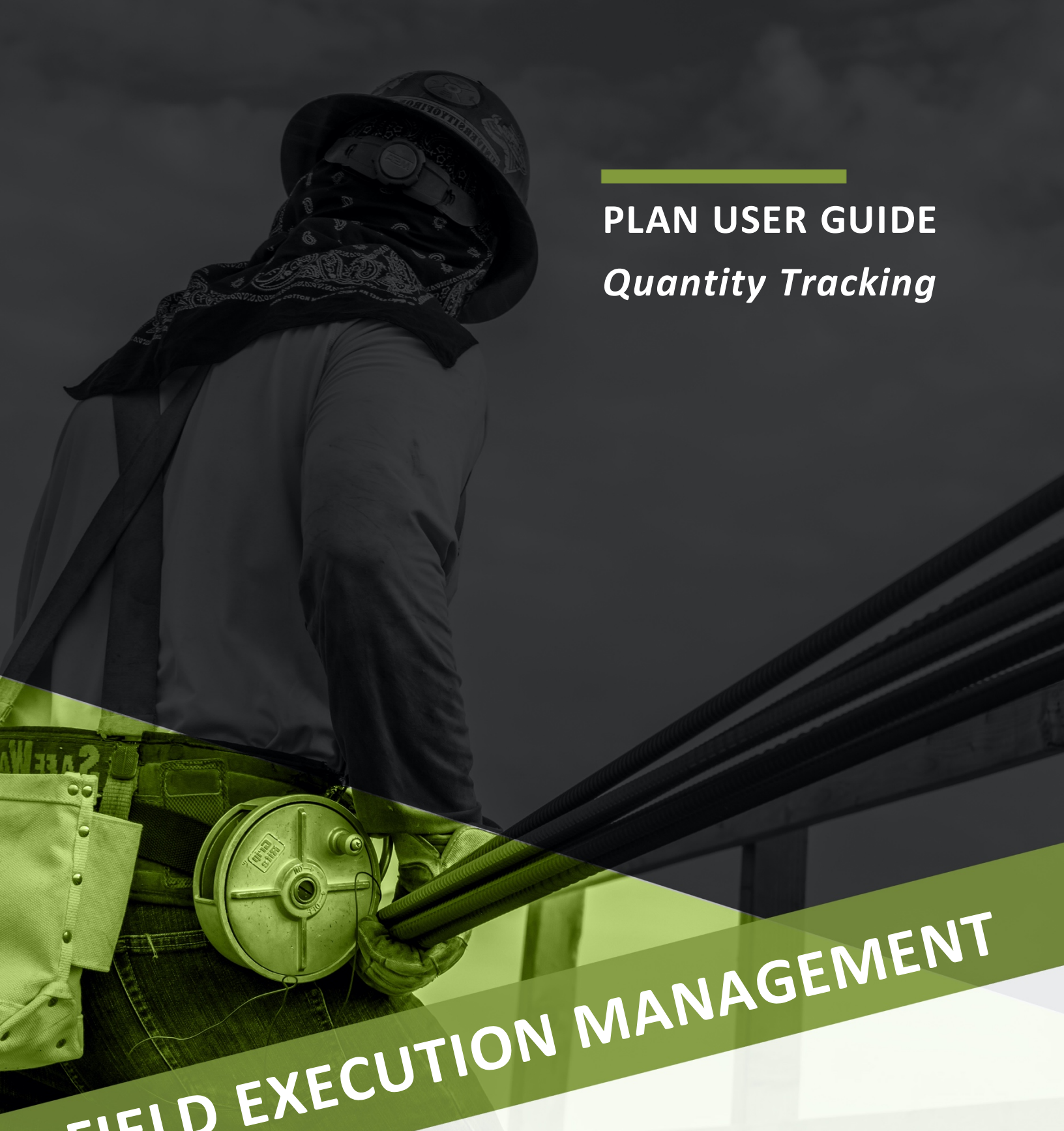

PLAN USER GUIDE

Quantity Tracking

FIELD EXECUTION MANAGEMENT

INEIGHT

Release 20.11
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LESSON 1 – QUANTITY TRACKING OVERVIEW

Lesson Duration: 45 minutes

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the two modules of Plan
- Explain the high-level work flow of Plan > Quantity tracking

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1.1.1 InEight Plan Work Flow 10
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1.1 PLAN QUANTITY TRACKING OVERVIEW

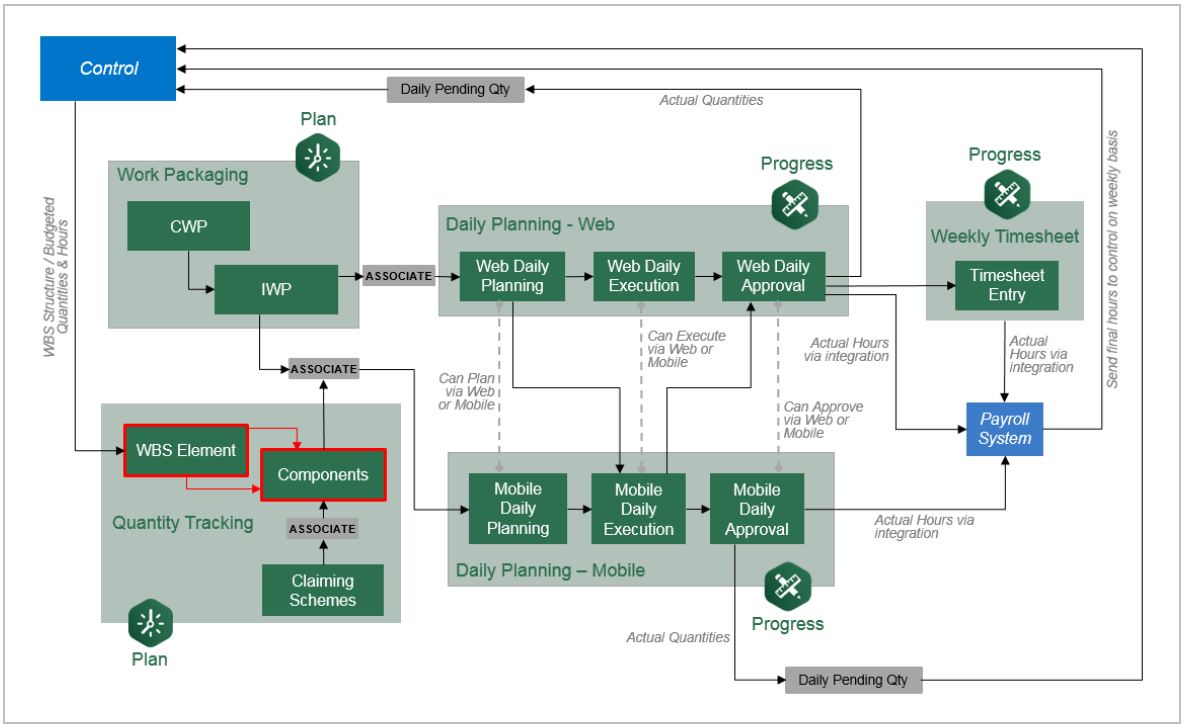
As one of the applications within the InEight portfolio of products, InEight Plan is a tool for engineers and superintendents to plan work and track quantities during the execution of their project.

Plan is organized into two modules:

Plan Modules	
Work Packaging	Creating and managing work packages.
Quantity Tracking	Creating and managing components and claiming schemes. Claiming completed quantities.

1.1.1 InEight Plan Work Flow

This course focuses on the Quantity Tracking module of InEight Plan.



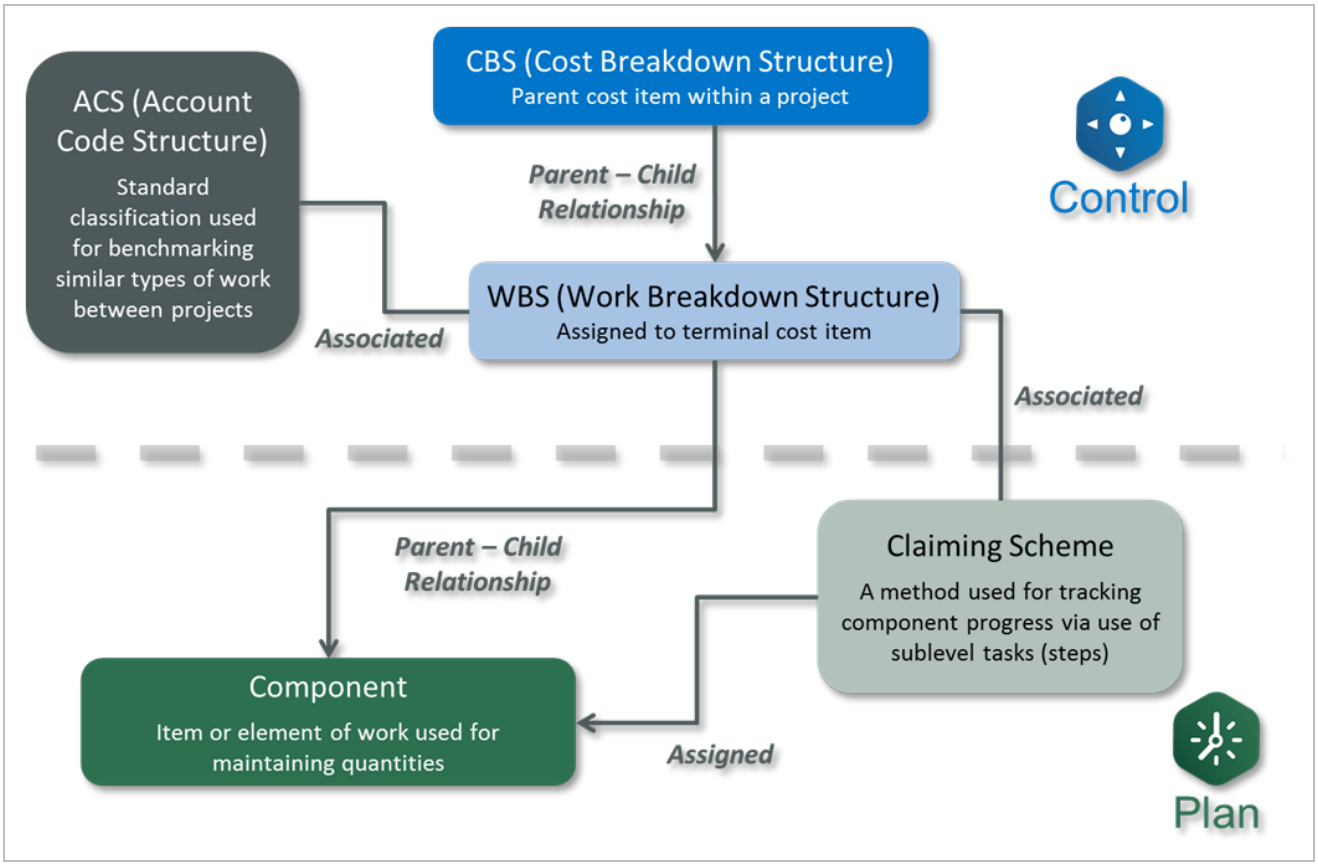
1.1.2 Quantity Tracking Terminology

Plan Quantity Tracking uses some key terminology to describe how the work is broken down for tracking.

The table below defines each of the key terms you should know.

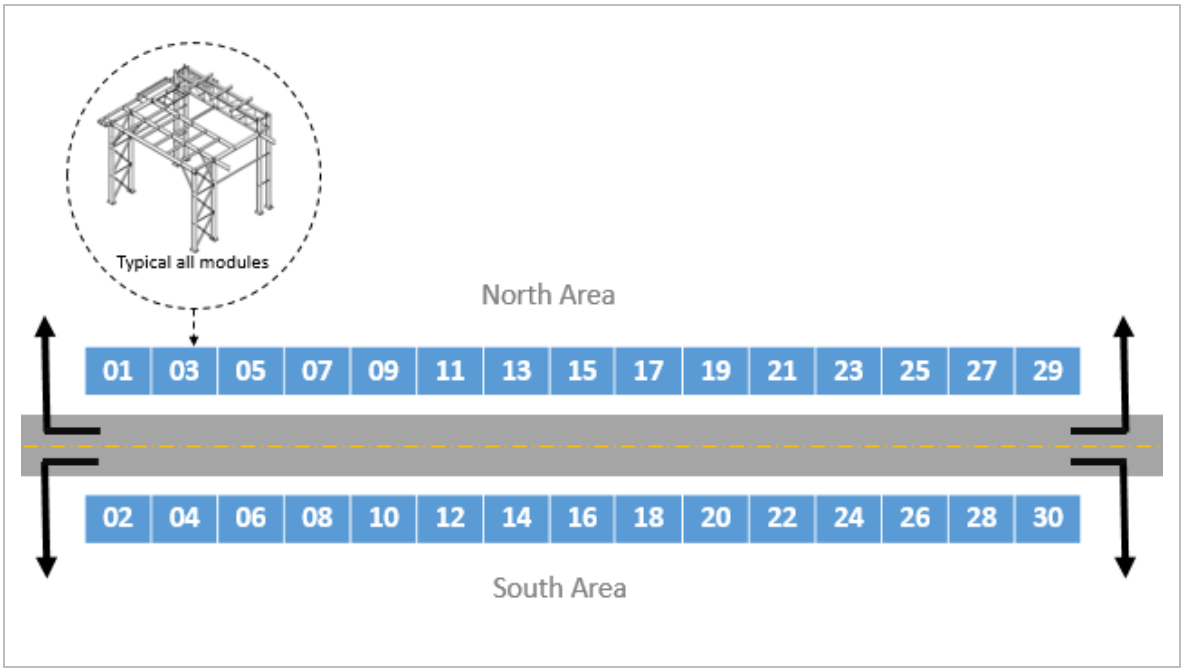
Term	Definition	Managed In..
CBS (Cost Breakdown Structure)	Hierarchy of budgeted work activities (cost items) in a project.	Control
WBS (Work Breakdown Structure)	Code assigned to terminal cost items for tracking purposes.	Control
ACS (Account Code Structure)	Standard Classification code used for benchmarking similar types of work between projects.	Control
Component	Item or element of work used for maintaining quantities.	Plan
Claiming Scheme	A method used for tracking component progress via use of sublevel tasks (steps).	Plan

The relationship between these terms is shown in the following diagram:



Scenario

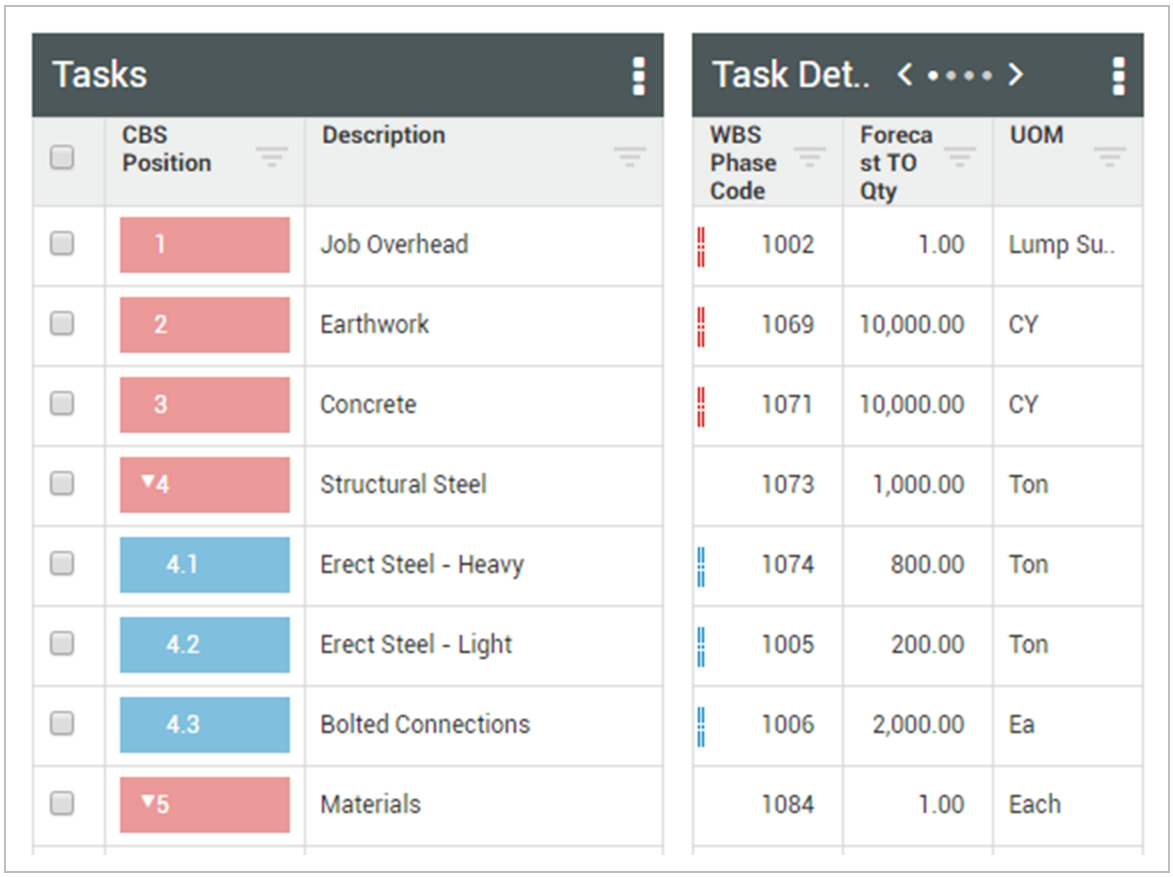
> You are a structural steel field engineer responsible for accurately tracking installation progress for a steel structure project. See image below. The structural steel cost item is measured in tons, but steel is installed by piecemark, and it needs to be tracked as such. There are multiple steps to structural steel installation that are all coded to the same cost code, and you need a way to track completion of the different steps as well. You also want to easily communicate to your foreman what he needs to accomplish each day to stay on schedule and on budget.



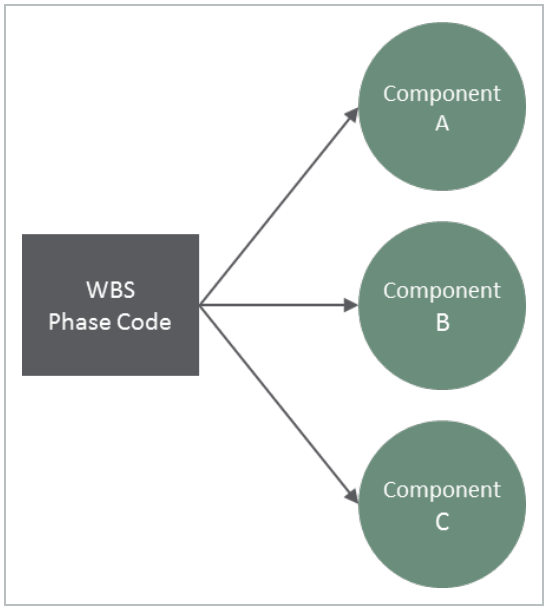
The image above depicts a layout for a steel structure project. The project consists of erecting 30 separate steel structures on opposite sides of a road. Each structure or module has been assigned a number 1-30.

1.1.3 Components

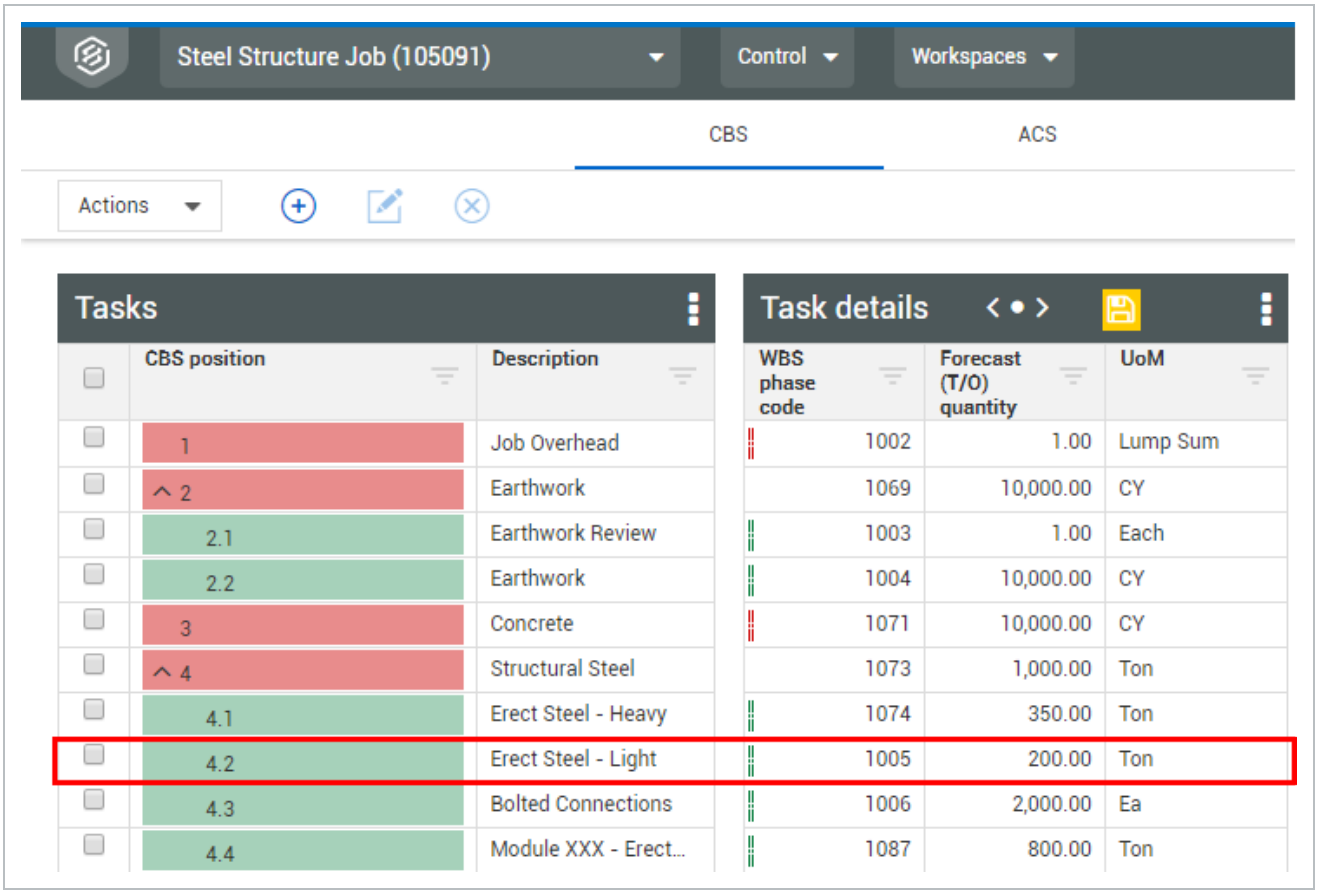
Within the InEight Control application, cost items are identified by a WBS Phase Code (commonly referred to as simply the WBS). A unique WBS is assigned to each cost item in the CBS, including superior and terminal items. The WBS codes can be set up to be automatically assigned or manually input.



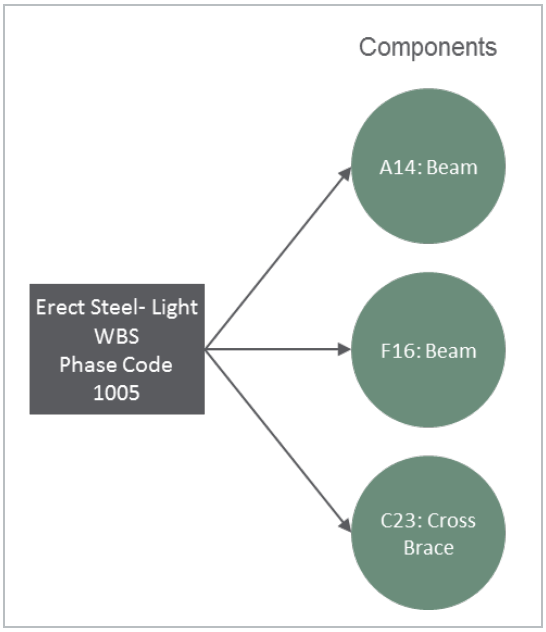
In InEight Plan, the Quantity Tracking module allows you to break down quantities into more manageable tasks to track and claim against. You accomplish this by breaking down your WBS Phase Code quantity into smaller pieces called components.



Referring to the scenario above, your project has an 'Erect Steel – Light' cost item with a WBS Phase Code of 1005, as seen in the CBS register of the Control application.



For tracking purposes, in the Quantity Tracking module of Plan, you can break down the 'Erect Steel – Light' WBS Phase Code into distinct components by structural steel piecemark:



Each component has a measured quantity:

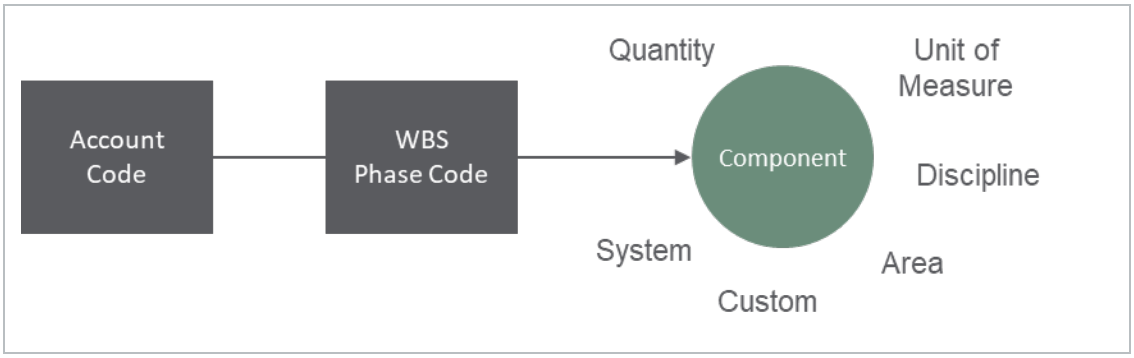
Component	Quantity
A14: Beam	0.44 Tons
F16: Beam	0.45 Tons
C23: Cross Brace	0.26 Tons

The sum of the quantities for each component adds up to the total quantity for the assigned WBS.

1.1.4 Component Attributes

Components can have a myriad of attributes assigned to them to help organize and store pertinent information that can be used for filtering and reporting. These include but are not limited to:

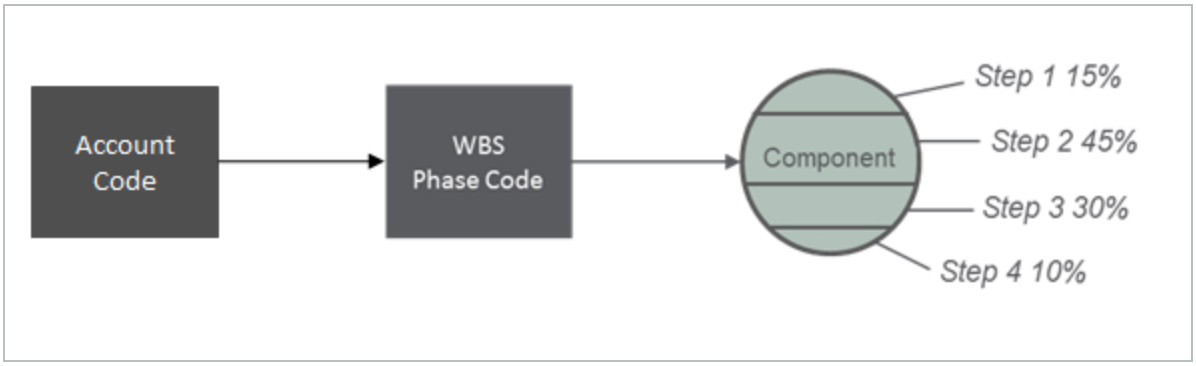
- Schedule ID
- Discipline
- Area
- System
- Customizable Attributes



NOTE In Lesson 4 – Component Management, you will learn how to create components either through import from an Excel template or by creating them manually.

1.1.5 Claiming Schemes

Claiming schemes break components down further, to a sequence of steps, so that foremen can track the individual steps as the installation of the component progresses. Each step has a weighted rule of credit, based on percentages, that will progress the overall component.



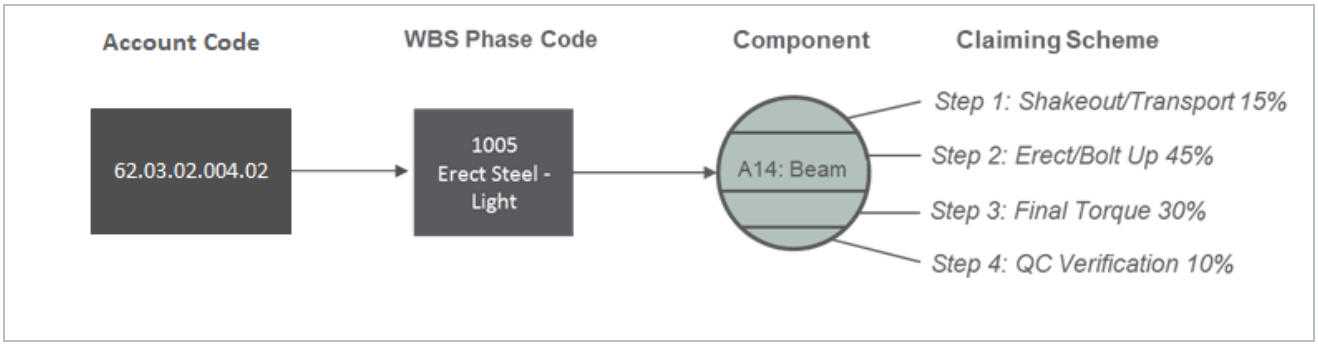
Claiming schemes can be assigned at either the component, WBS, or Account Code level. If a claiming scheme is assigned at the WBS level, then every component that is assigned to that WBS will automatically inherit the same claiming scheme.

NOTE The level at which claiming schemes will be assigned (Account Code, WBS, or component) will typically be dictated during project initiation in the project settings. See Lesson 3 – Claiming Schemes for more details on assigning claiming schemes.

For example, you may break down the 'A14: Beam' component into the following steps for tracking in the field:

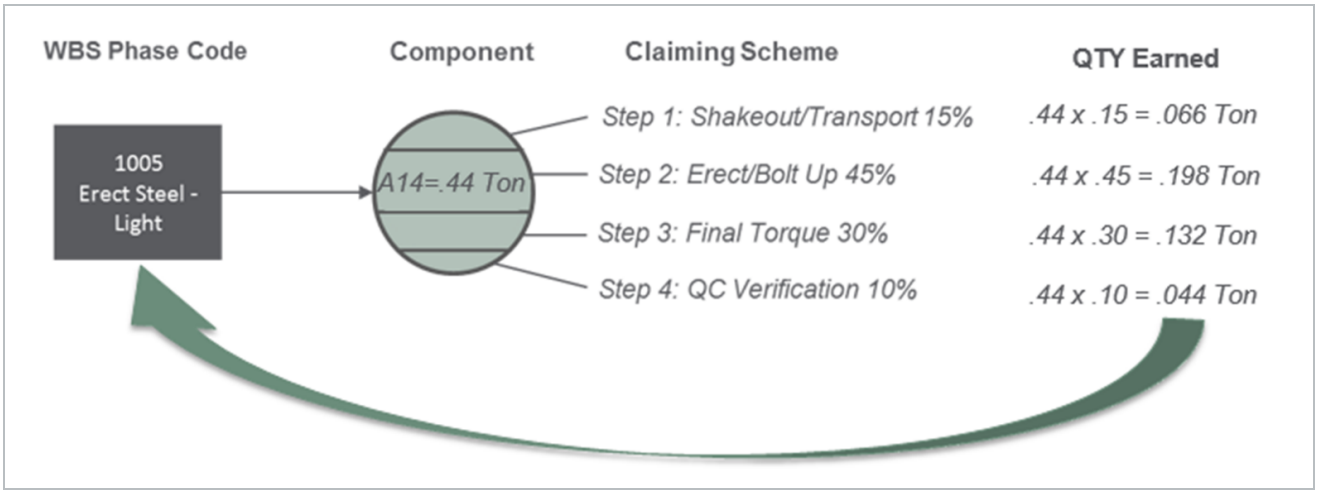
Claiming Scheme for 'A14: Beam' Component		
Step	Description	Percentage
Step 1	Shakeout/Transport	15%
Step 2	Erect/Bolt Up	45%
Step 3	Final Torque	30%
Step 4	QC Verification	10%

The diagram below shows how the claiming scheme relates to the component, WBS Phase Code, and Account Code.



In the field, the foreman can indicate when each step has been completed for a specific component. By indicating Step 1: Shakeout/ Transport is complete for 'A14: Beam', this will claim the component is 15% completed. After syncing this information to InEight Control, 15% of the quantity for A14: Beam will be added to the total quantity complete for that WBS code which will drive the earned value.

The diagram below shows the flow of quantity claiming through components and claiming schemes.



1.1.6 Quantities Sent to InEight Control

The quantities tracked at the component level will “roll up” to the assigned WBS Phase Code and be available for progress analysis and forecasting in the Control application. Learn more about syncing in the Control Knowledge Library.

In this example, the quantities claimed for steel components roll up to the ‘Erect Steel – Light’ WBS item, which then gets sent to Control upon request.

Lesson 1 Review

1. InEight Plan consists of which of the following two modules?
    a. Work packaging and Quantity tracking
    b. Work packaging and Daily planning
    c. Quantity tracking and Forecasting
    d. Quantity tracking and Work planning

---

2. In InEight Plan, you can break your quantities into more manageable groups by breaking down your WBS Phase Code quantity into smaller pieces called:
    a. Work plans
    b. Components
    c. Work packages
    d. Bid packages

---

3. _____ break components down into a sequence of steps for tracking progress as a component progresses.
    a. Cost items
    b. Work packages
    c. Disciplines
    d. Claiming schemes

---

4. Which represents the order for breaking down tasks and their quantities from larger pieces into smaller, more measurable pieces for tracking work?
    a. Component > WBS Phase Code > Claiming scheme
    b. WBS Phase Code > Component > Claiming scheme
    c. Claiming scheme > WBS Phase Code > Component
    d. WBS Phase Code > Claiming scheme > Component

Lesson 1 Summary

As a result of this lesson, you can:

- Describe the modules of Plan
- Explain the high-level work flow of Plan > Quantity tracking

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LESSON 2 – GENERAL NAVIGATION

Lesson Duration: 30 minutes

Lesson Objectives

After completing this lesson, you will be able to:

- Navigate the Plan > Quantity tracking page
- Manage columns
- Create viewsets
- Manage data blocks

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2.1.1 Standard Grid vs Data Block View 28
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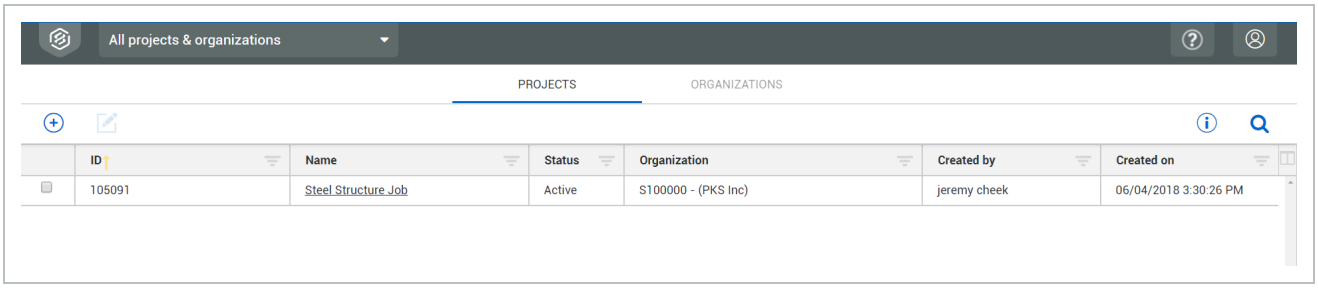
2.1 PAGE NAVIGATION

In this lesson, you will explore the layout and start to navigate around the application.

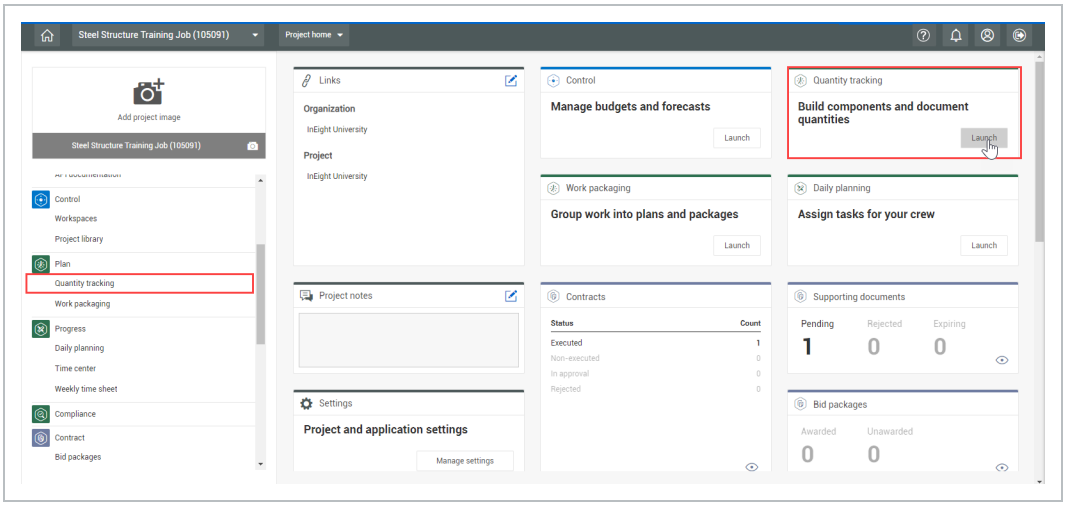
You access InEight Plan through your web browser. When you first log in, you will land on the **All projects & organizations page** within the **InEight Project Platform**. Here you can open any of your projects.



From the All projects & organizations page, selecting a project navigates you to the home page for that project. From your project home page, there are two different ways to access the **Quantity Tracking module** of Plan.

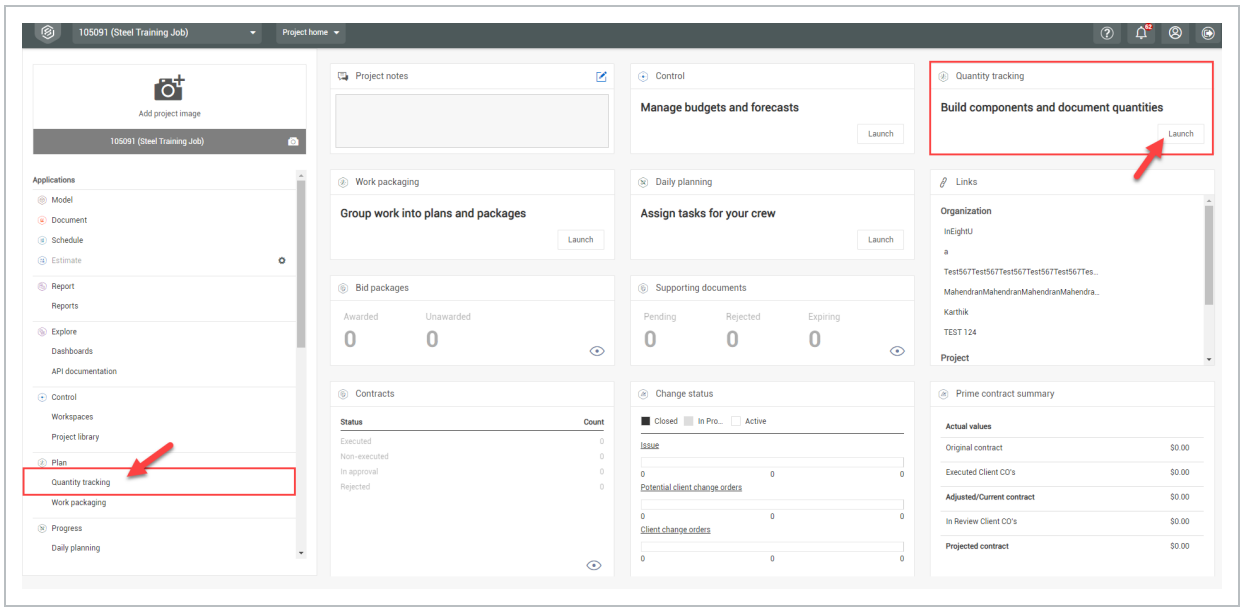
Navigate to the Quantity Tracking Module via the Project Home Page

1. From the All projects & organizations page, select your project.



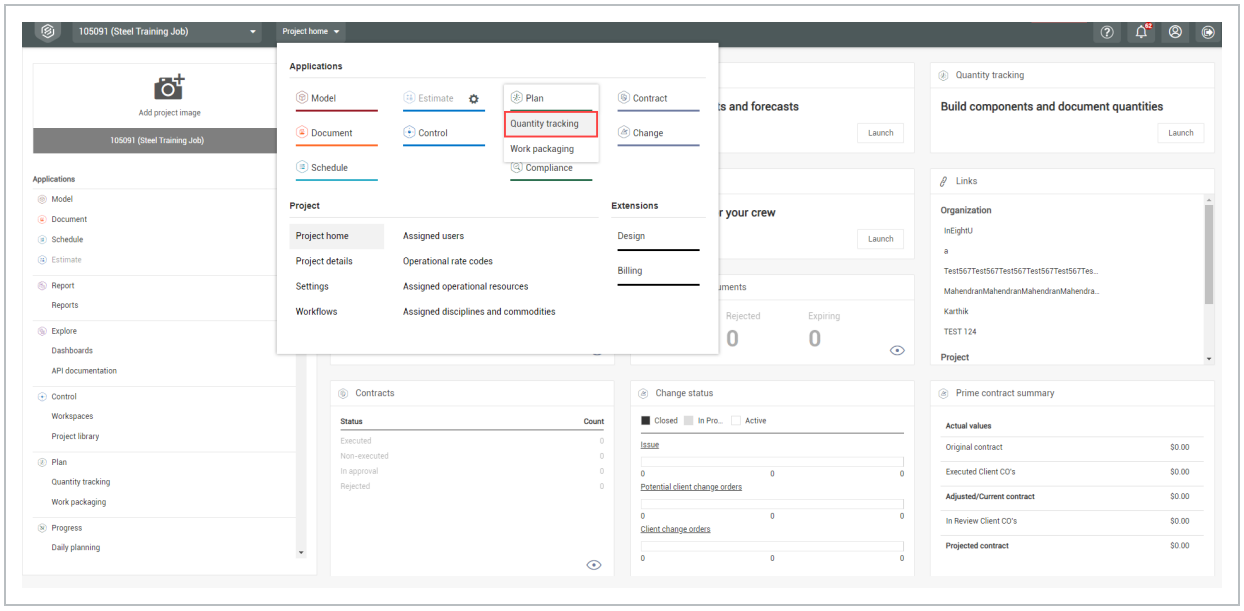
2. Select the Quantity Tracking module by clicking on the **Quantity tracking tile** on the right or

selecting **Quantity tracking** from the side bar menu on the left.



Navigate to the Quantity Tracking Module via the Navigation Bar

1. From the Projects page, select the **2nd level drop-down menu**, hover over **Plan** and select **Quantity tracking**.



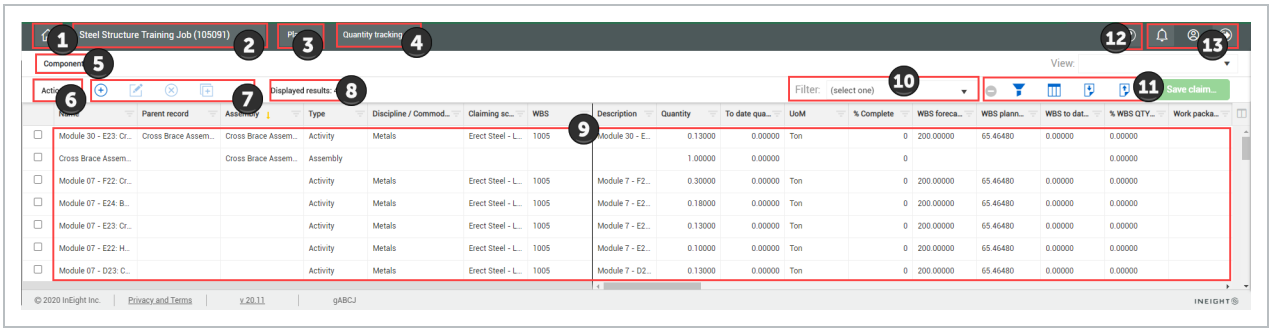
NOTE Use these same options to navigate to the Work Packaging Module in InEight Plan. For more information about Work Packaging, locate the InEight Work Packaging User Guide under the Resources Tab of Learn.InEight.com.

Overview – Quantity Tracking Home Page

	Title	Description
1	Home Button	Navigates to the project's home page.
2	First Level Menu	Shows the selected project and provides access to favorites, All projects and organizations, reports, master data libraries, and suite administration.
3	Second Level Menu	Displays the list of applications (Control, Plan, etc.), and navigates you to other project settings.
4	Third Level Menu	Navigates to individual modules inside each application (e.g., Contract > Bid packages, Plan > Quantity tracking). Options in this menu are dependent upon the application you are currently using.
5	Breadcrumbs	Shows what page you are currently on within the Quantity Tracking module and can be used to navigate back to the main components screen.

Overview – Quantity Tracking Home Page (continued)

	Title	Description
6	Actions Menu	Contains the available actions for the current register tab you are viewing.
7	Left Toolbar	Contains three commonly used buttons: **Add** adds cost items, **Edit** to edits cost items, and **Delete** to removes cost items from your project.
8	Component Count	Displays the number of components registered or filtered.
9	Components Register	Contains the list of all components for your project.
10	Filter	Allows you to apply a pre-defined filter.
11	Right Toolbar	Contains functions for the page you are on: clear all filters, filter, grid view, export, and import.
12	Help Menu	Contains walk throughs to guide you step by step through processes within the module.
13	Notifications and User Profile	Allows you to view notifications and your user profile, or log out.

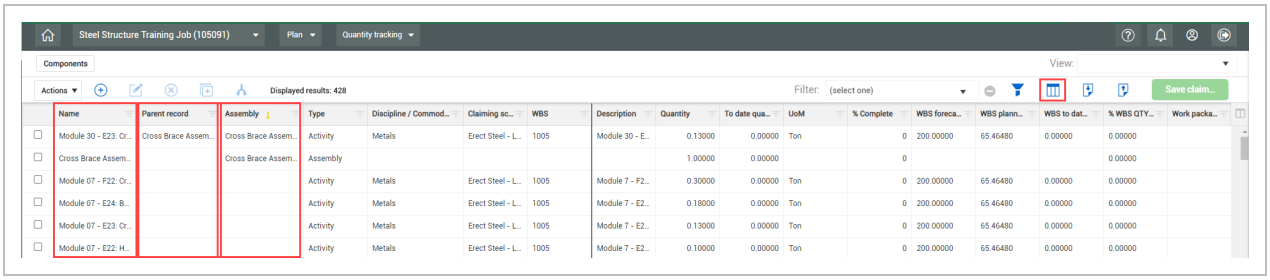


2.1.1 Standard Grid vs Data Block View

The **Components page** has two separate views: Standard Grid view and Data Block view. By default, the Components page will open in the Data Block view.

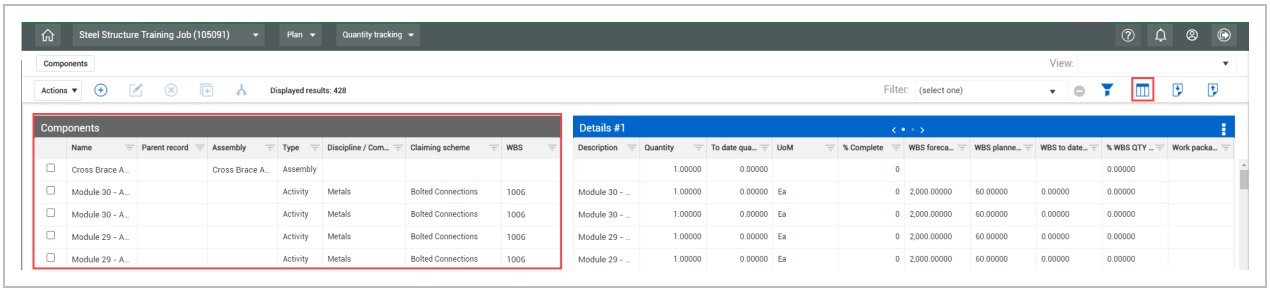
2.1.1.1 Standard Grid view

The Standard Grid view offers a traditional spreadsheet look with rows and columns.

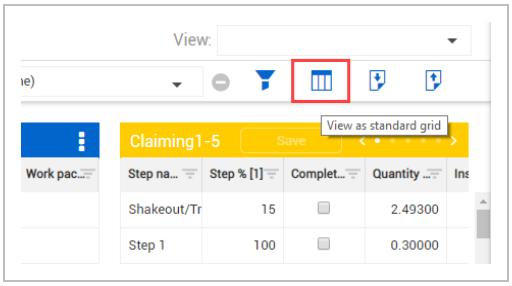


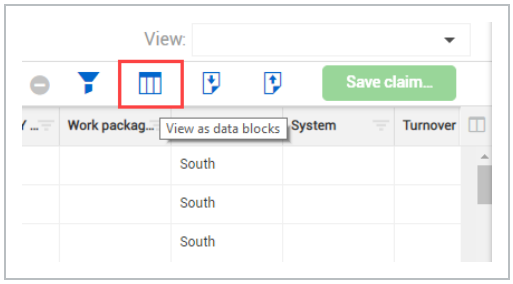
2.1.1.2 Data Block view

The Data Block view groups columns for a cleaner viewing experience. Data Blocks are covered in more detail in the Data Blocks topic.



Easily switch between the two views by clicking on the **View as button** on the right toolbar.





2.2 COLUMNS

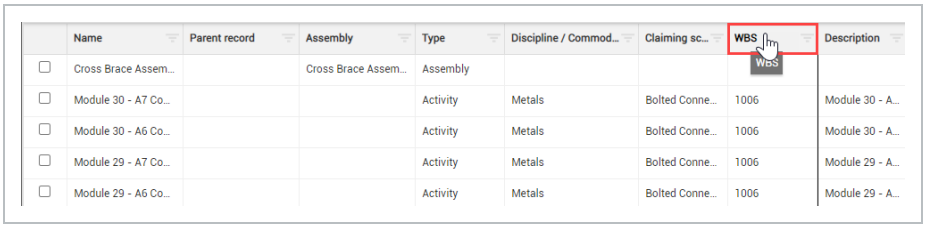
Customize columns according to your preferences. Changes you make to the placement of your columns will be retained the next time you access any page you have customized.

2.2.1 Move Columns

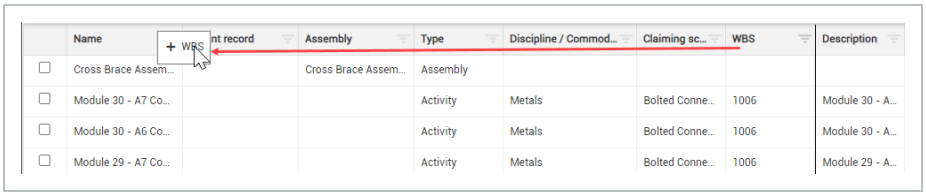
Drag and drop to move a column from one place to another to customize your view.

Move Columns

1. In the Standard Grid view of the Quantity Tracking module, click on and hold a column header.



2. Drag and drop the column in a new location.

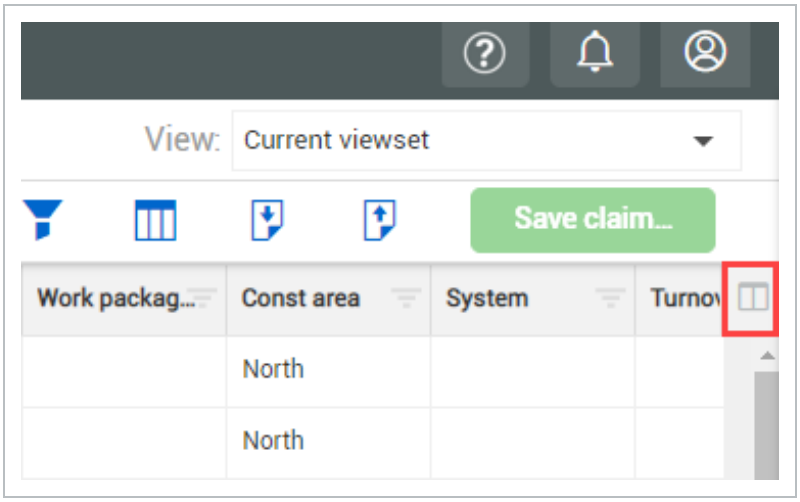


2.2.2 Add and Remove Columns

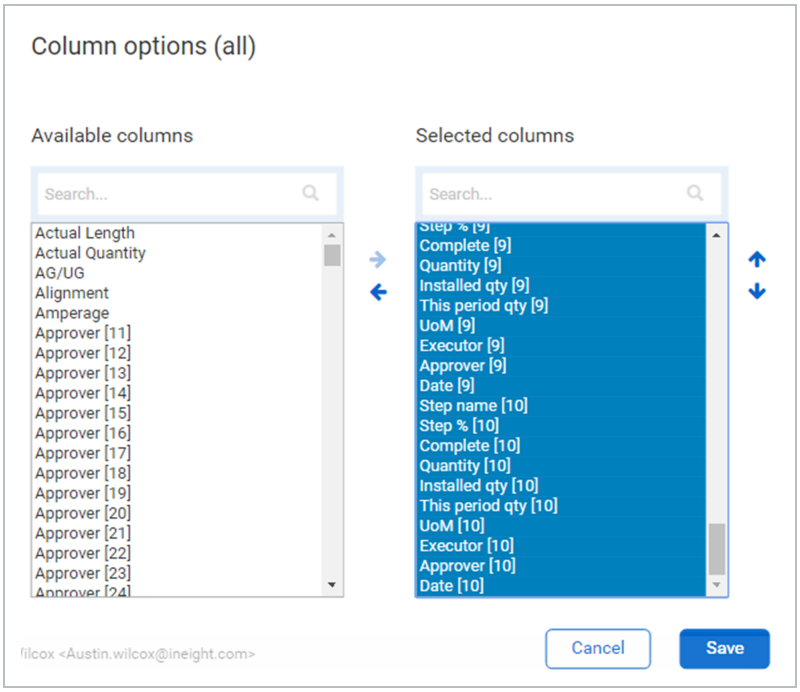
Add or remove columns to customize your view and work more efficiently when in the Standard Grid view.

Add Additional Columns

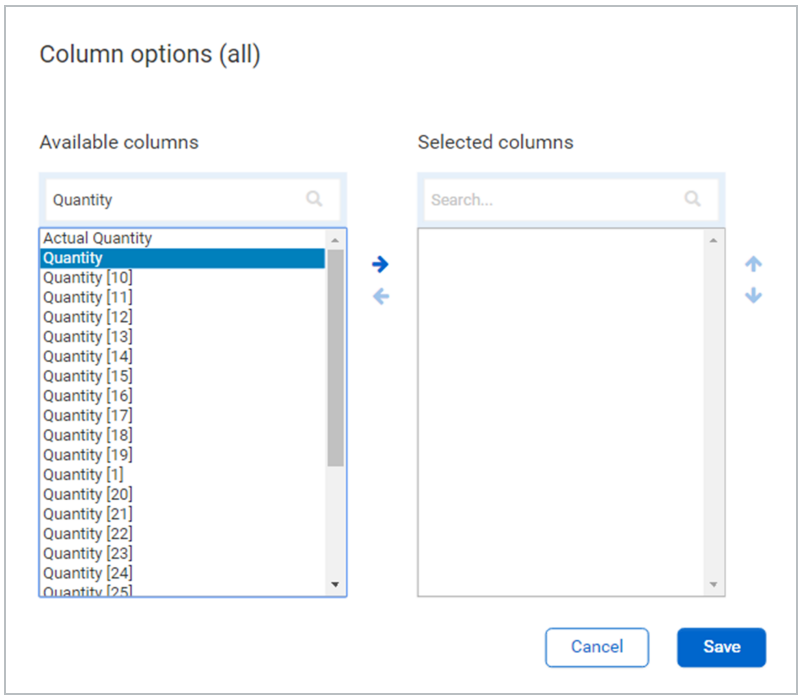
1. From the Standard Grid view, select the **Column Chooser icon** to open a pop-up window where you can search for and select columns.



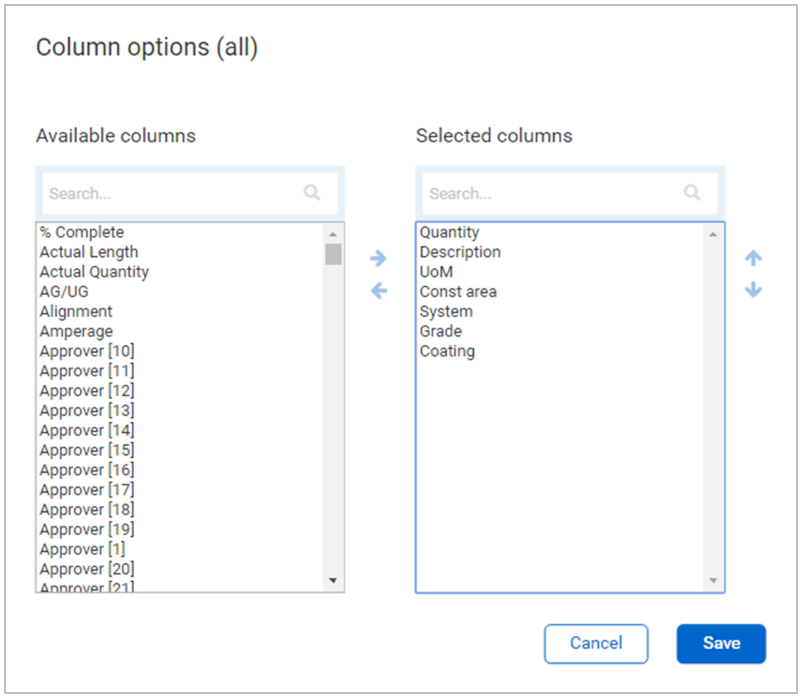
2. In the selected columns list on the right, highlight all columns. To do this, select the first item in the list, press and hold the Shift key, scroll down the list, and select the last item in the list. Then, select the **left pointing arrow**.



3. In the Available columns list on the left, type a column name in the search bar or use the scroll bar to find a column by name. Select a column from the **Available columns list**.



4. Select the **right facing arrow**.
5. Repeat steps three and four as needed for your project.



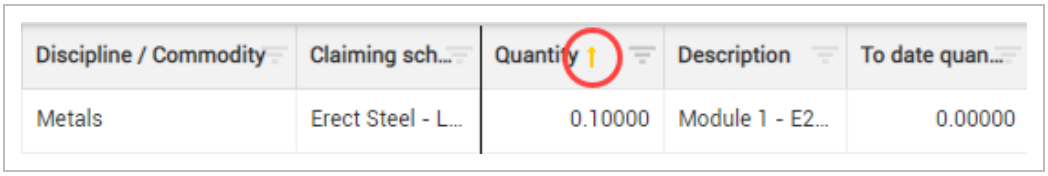
6. Click **Save.**

2.2.3 Sort Columns

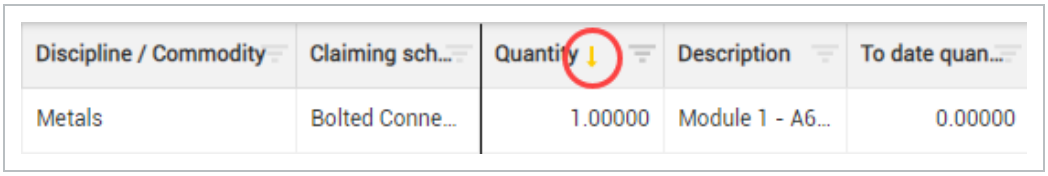
Sort in ascending or descending (both for alpha and numeric fields) order on any column by clicking one time on the column header.

Sort Columns

1. In the Standard Grid view of the Components page, click on any column header to sort the column in ascending order.



   - Notice the yellow up arrow designating you are sorting in ascending order
2. Click on a column header again (a second time) and the column will filter in descending order.



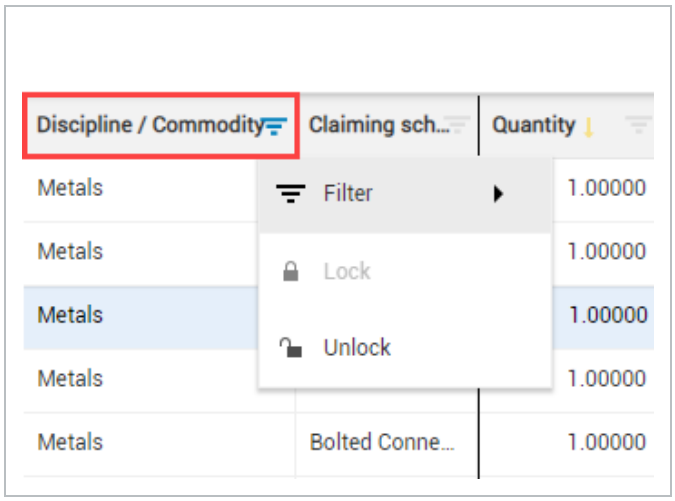
   - Notice the yellow arrow is now pointing down
3. Click the same column header a third time to remove the applied sorting feature.

2.2.4 Filter Columns

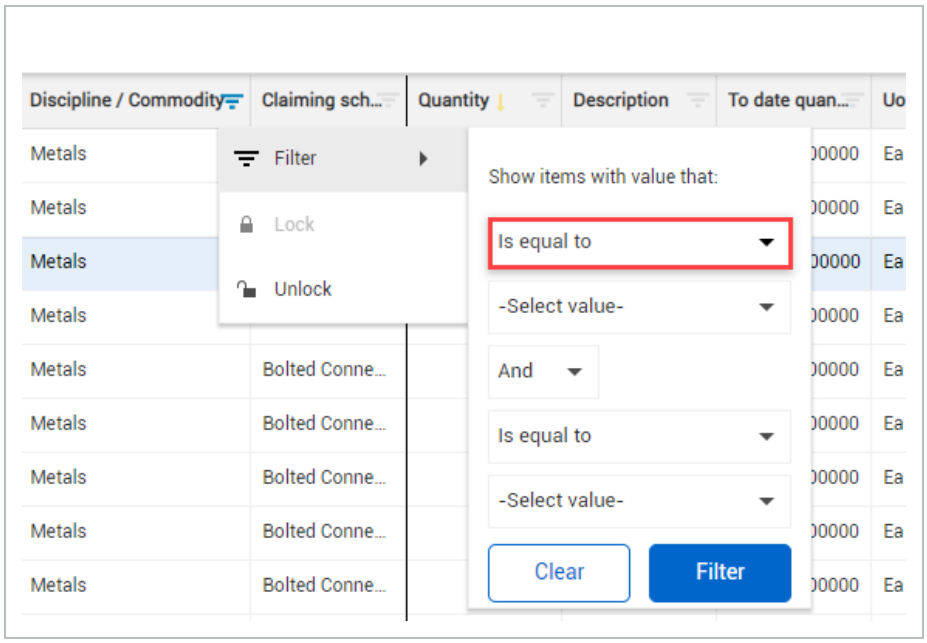
Filter columns as a way to see relevant information pertaining to your specific needs.

Filter Columns

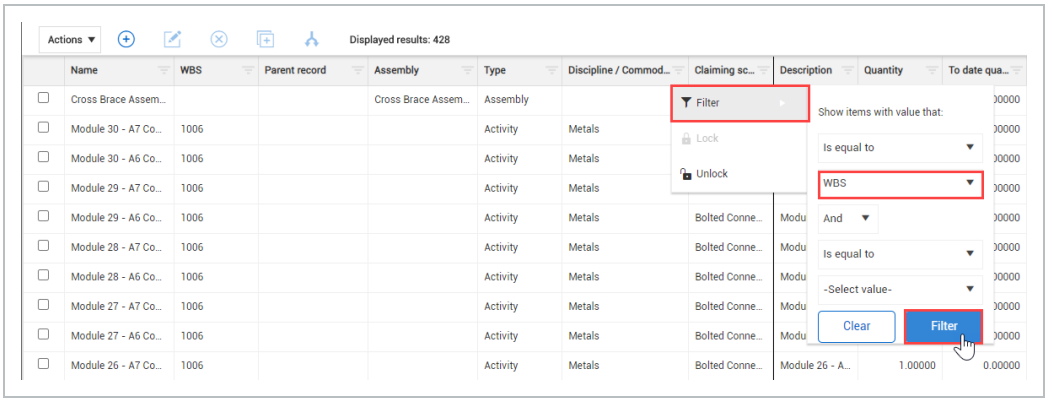
1. Click the **filter pyramid** of any column header.
2. From the drop-down list, select **Filter**.



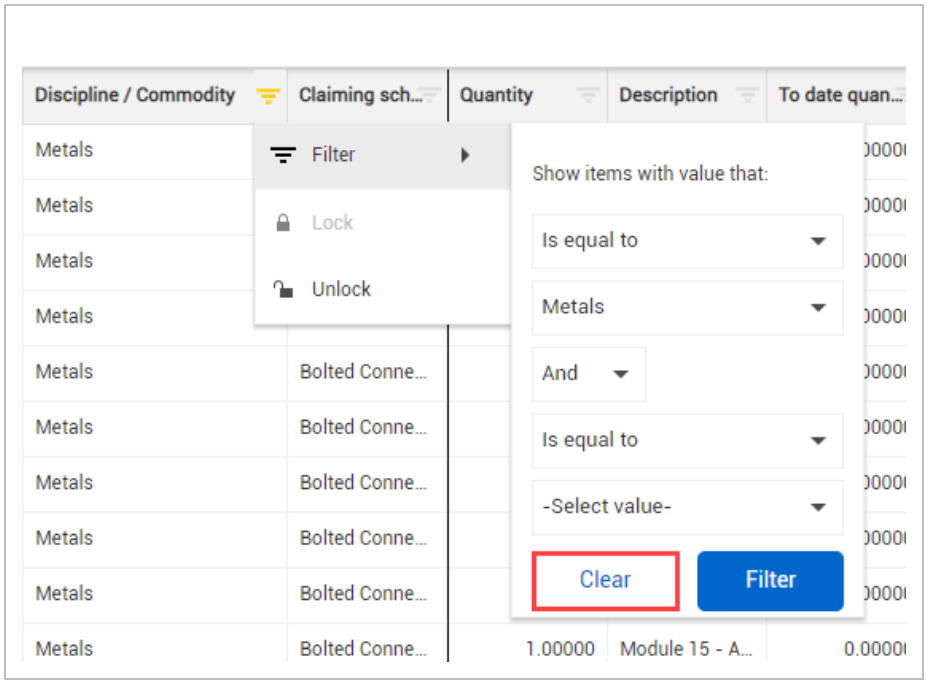
3. From the expanded drop-down, select an **operator**.



4. In the first value box select a value.
5. Click **Filter**.
    - The table now only shows items that have a discipline of the value you selected
    - Notice that the filter pyramid is now in yellow, indicating that this column is filtered



6. Select the **filter pyramid** again. Hover over **Filter**, then click **Clear** to remove your filter.



TIP Apply multiple rules to your filter. For example, setting a **Contains** or **Is equal to** filter for your column would allow you to bring in two distinct results at once.

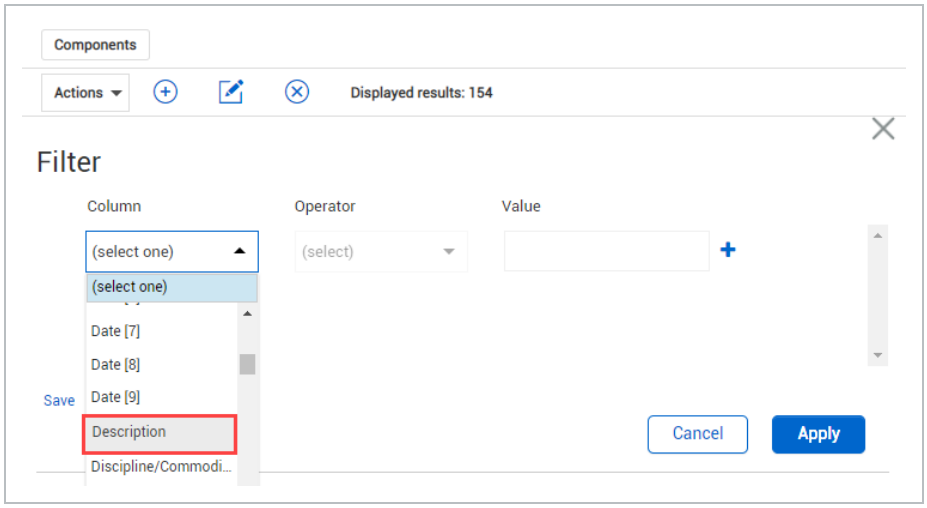
2.2.5 Saved Filters

Save a specific filter to save time later and share with your team.

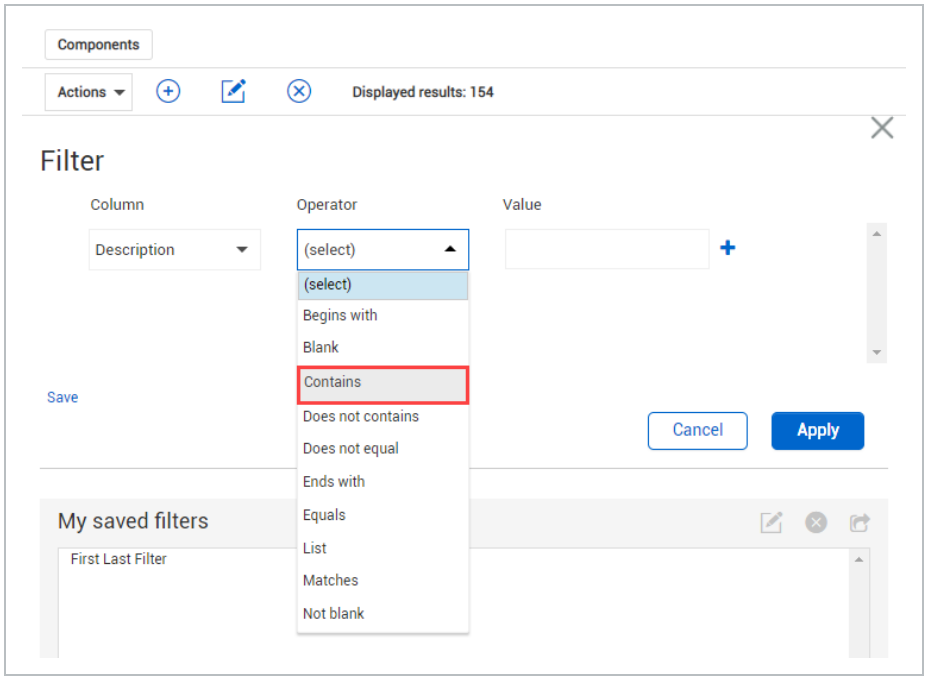
Create a Saved Filter

1. On the Components page, select the **Filter icon**.

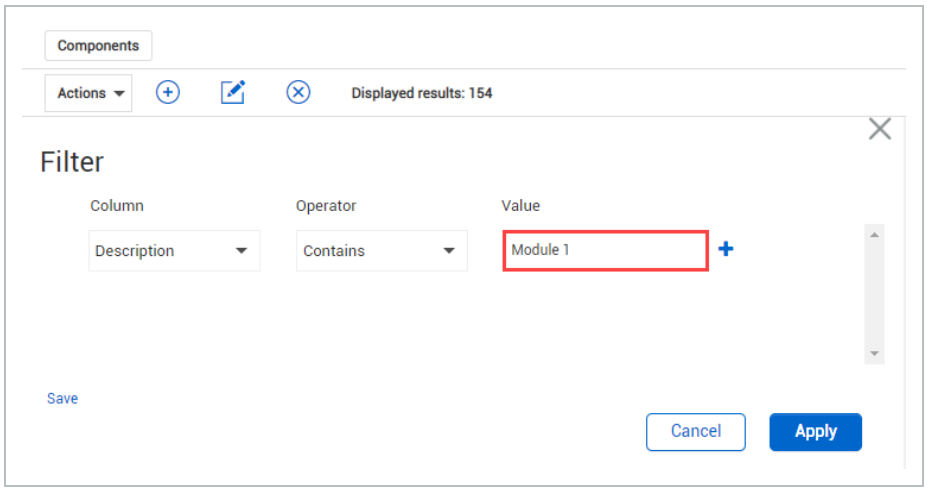
2. On the resulting left slide out panel, select a column from the drop-down list in the column field.



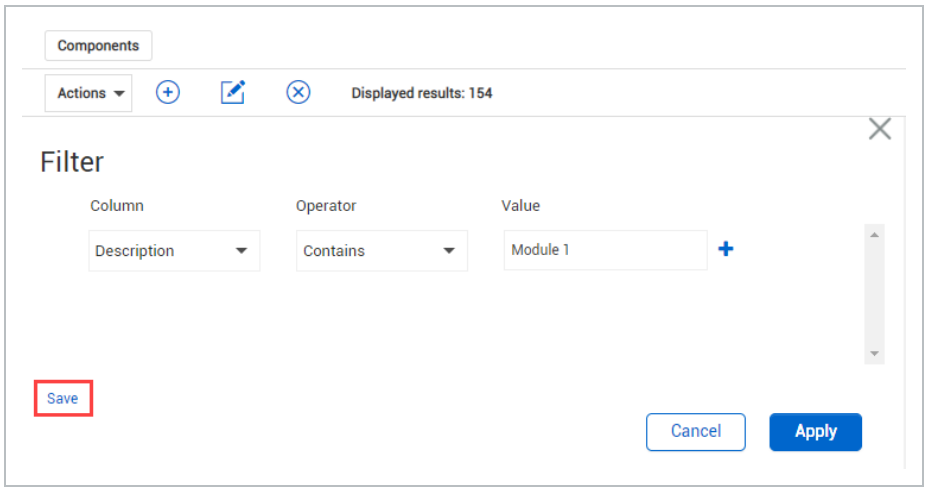
3. From the operator field, select an option from the drop-down list.



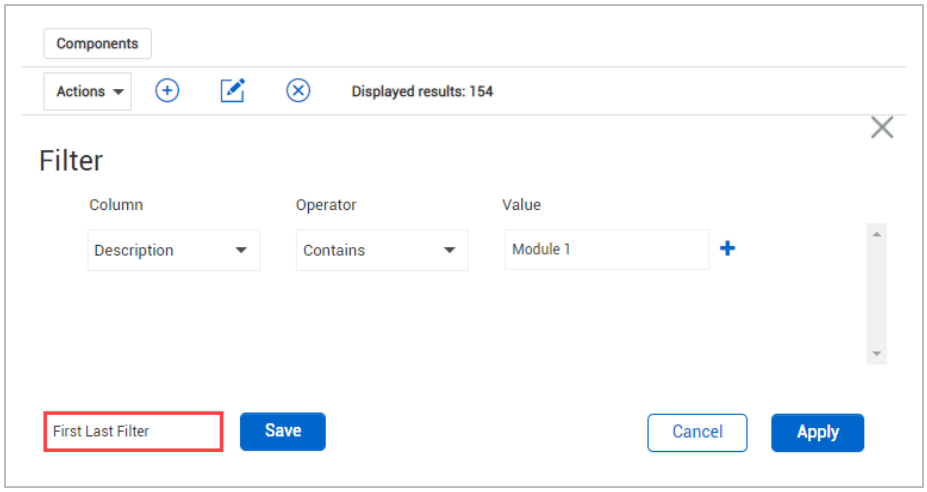
4. Enter a value in the Value field.



5. Click **Save** in the bottom left of the box.



6. Change the filter name.



7. Click **Save**. You now have a saved filter.
8. Click **Apply** to apply your filter.

NOTE You can also share pre-defined filters with your team.

Exercise 2.1 — Saved Filters

In this exercise, you will practice creating saved filters from the Components page.

1. Find a discipline that you most identify with by using the Discipline column sort function.

2. Select the Filter icon and select two (2) parameters you think would help you perform your job.

3. Save and apply the filter.

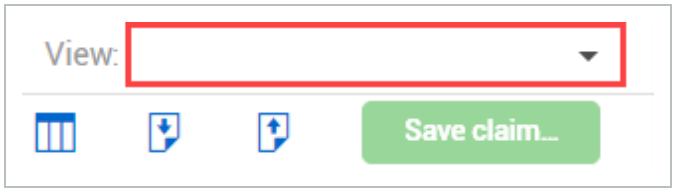
Congratulations, you have completed this exercise!

2.3 VIEWSETS

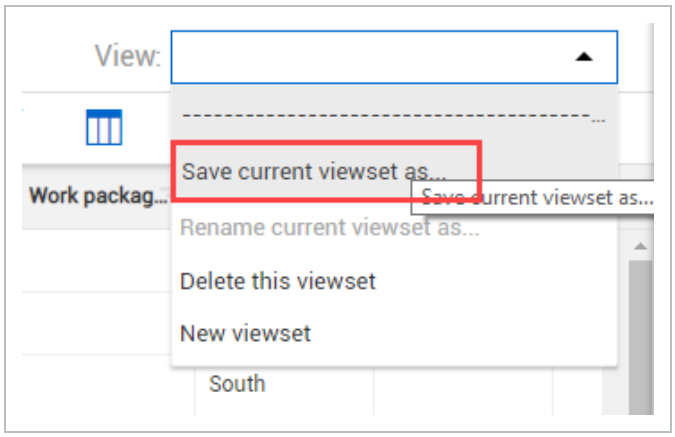
Once you have all columns organized, you can create a saved view of your page so that you can always revert back to it. This saved view is called a viewset.

Create a Viewset

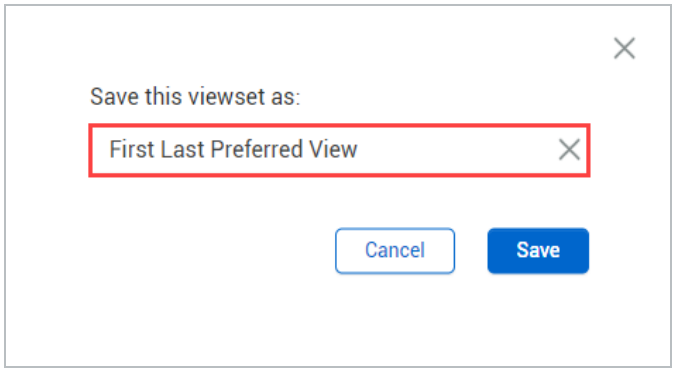
1. Select the **View** drop-down arrow to save your custom column set up.



2. Select **Save current viewset as** from the viewset drop-down list.



3. In the resulting window, type **[Your Name] Preferred View**.



4. Click **Save**. You now have a saved view.

> **NOTE** Each viewset is user specific. However, viewsets do not carry over from the Standard Grid view to the Data Block view. You have to create your viewsets for both the Standard Grid and Data Block views.

Exercise 2.2 — Create a Viewset

Now that you have learned some of the basics of navigating in InEight Plan, from the Components page, in the Standard Grid view, create a components viewset that you would use.

1. Bring in any columns you find useful or relevant.

2. Apply filters to your data if desired.

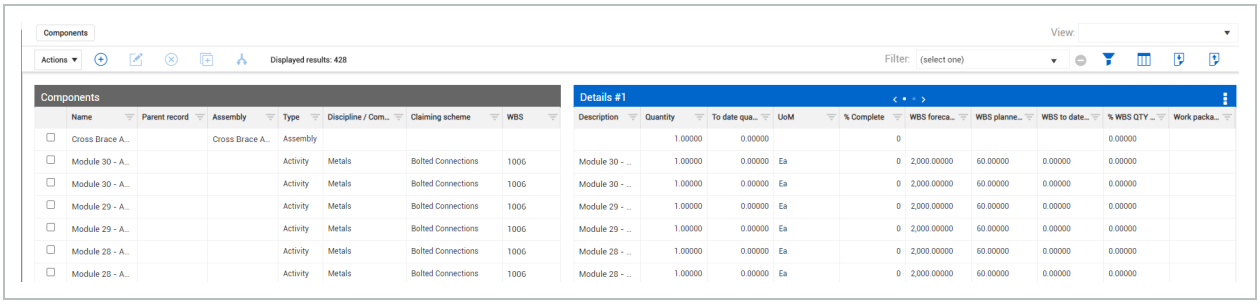
3. Save the viewset.

Congratulations, you have completed this exercise!

2.4 DATA BLOCKS

Each data block is a set of columns grouped together based on categories of information. Data blocks help you to organize and manage all of the columns on a page.

Data blocks are customizable, and can be viewed side by side or moved around in the register. The information in each data block is displayed in a grid like format, maintaining a spreadsheet look and feel.

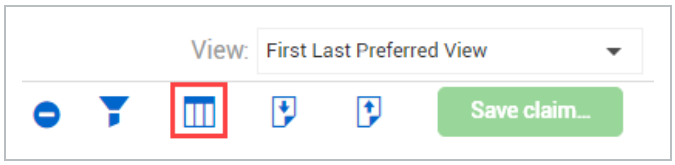


2.4.1 Add Data Blocks

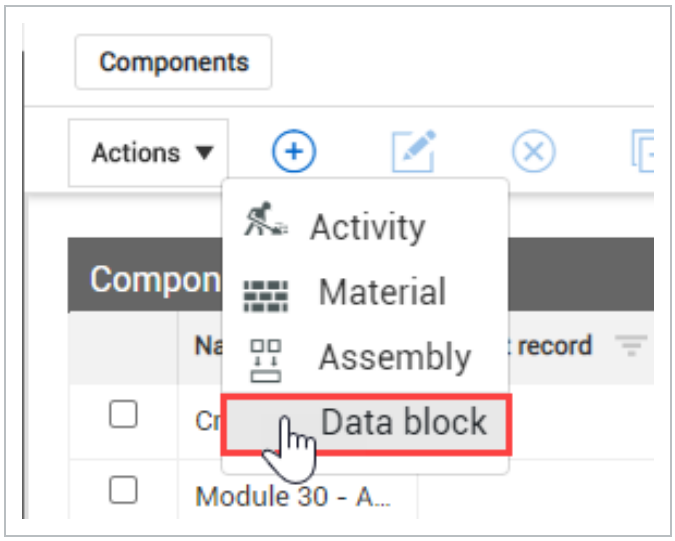
Some data block fields allow you to fill in key component information.

Add Data Blocks

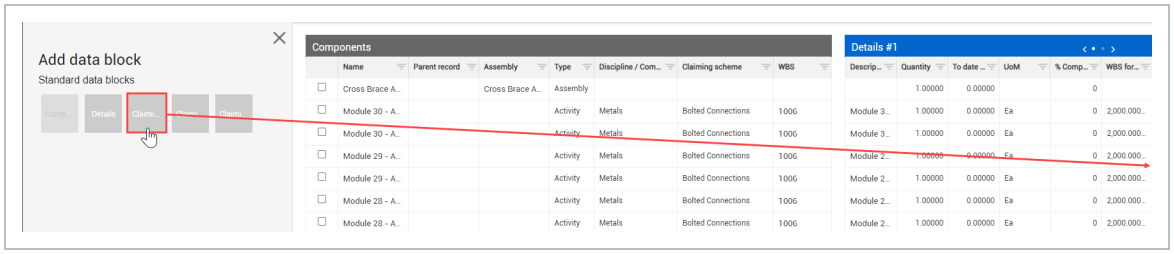
1. From the Components page grid view, select the **View as data blocks** icon.



2. On the left toolbar, select the **Add icon** and select **Data block**.



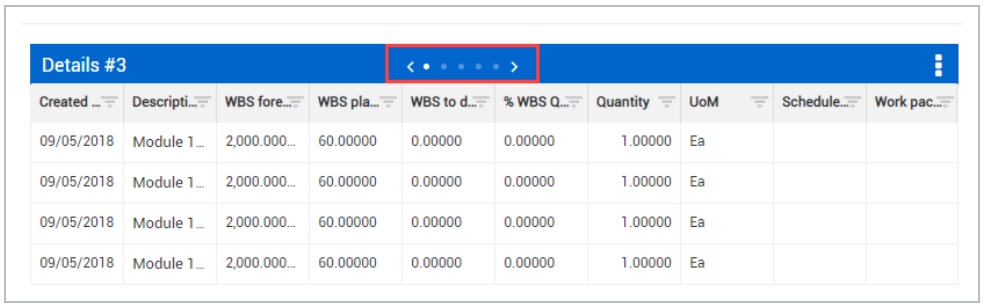
3. On the resulting left slide out panel, select a **data block icon** and drag it into the blank white portion of the page to your right. Then, scroll right to the end of your featured data blocks to see the added block.



NOTE Sort and filter columns whether they are a part of a tab or in a data block.

2.4.2 Navigate Data Blocks

Use the arrows at the top of the data block to view more columns associated with each data block that are not seen in the current view.



Each dot within the arrows signifies another grouping of columns (i.e., panel) to be seen.

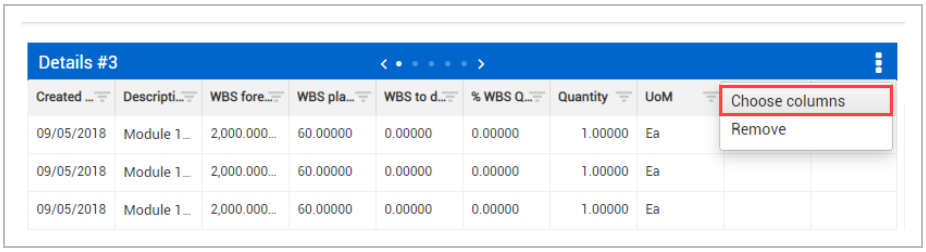
2.4.3 Context Menu

Customize the order of columns in each data block using the **Context Menu**.

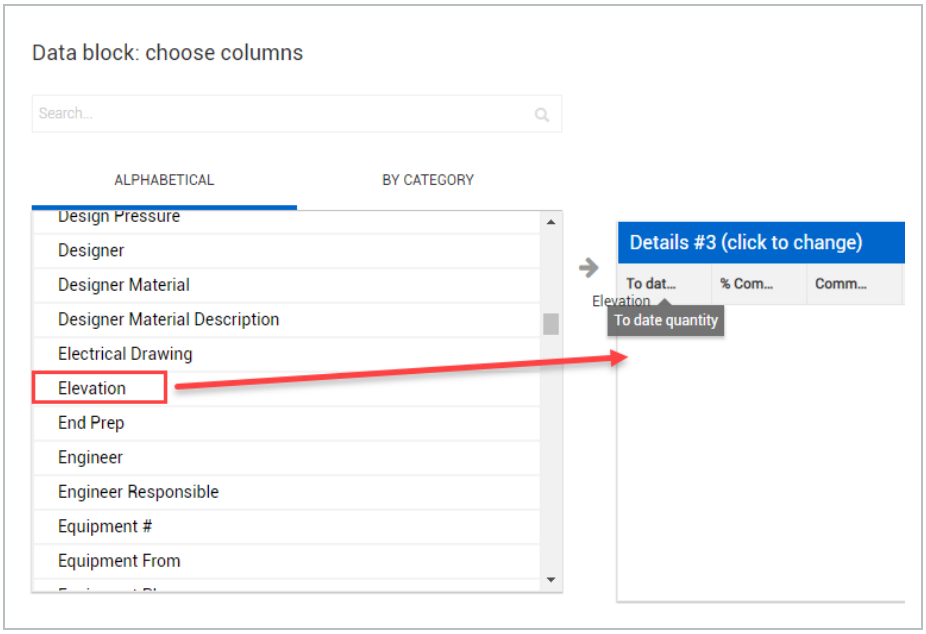
Utilize the Context Menu

1. Select the **Context Menu** of any data block.

2. Select **Choose columns**.



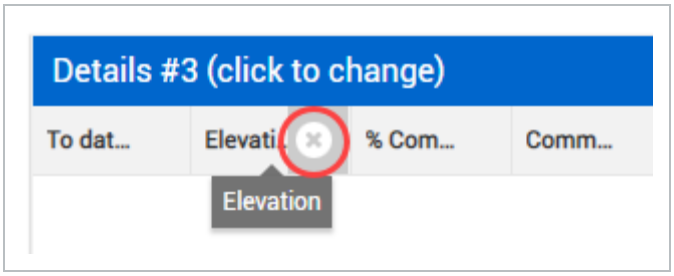
3. On the resulting slide out panel, drag and drop a column to the data block on the right.



- You can also drag columns from the Data Block: choose columns list into a data block to quickly add and remove columns to customize your view

4. Repeat step three as many times as needed.

> **TIP** On a data block column, you can remove the column by clicking on the column itself, then click on the **Remove icon**. Removed columns return to the Data Block: choose columns list on the left.



5. Click **Done.**

> **NOTE** There are pre-made data blocks that load upon opening a project in Plan's Quantity Tracking Module (in Data Block view). Each type of data block has its own unique default settings. Default settings include specific columns and total number of columns and panels.

Lesson 2 Review

1. Which option below indicates your open project?
    a. First level menu
    b. Third level menu
    c. Left toolbar
    d. Profile

---

2. On the Components page, you can add, edit, or delete components from the:
    a. Breadcrumbs
    b. Left toolbar
    c. Viewset menu
    d. Actions menu

---

3. What can you do to your columns to better align them with how you want to view a page?
    a. Move them
    b. Add/Remove them
    c. Sort/Filter them
    d. All of the above

---

4. Viewsets can be used from plan to plan, but do not carry over from the Standard Grid view to the Data Block view.
    a. True
    b. False

---

5. Which icon would you select to toggle between Standard Grid and Data Block view?
    a. 
    b. 
    c. 
    d.

Lesson 2 Summary

As a result of this lesson, you can:

- Navigate the Plan > Quantity tracking page
- Manage columns
- Create viewsets
- Manage data blocks

LESSON 3 – CLAIMING SCHEMES

Lesson Duration: 30 minutes

Lesson Objectives

After completing this lesson, you will be able to:

- Explain what a claiming scheme is
- Create a claiming scheme
- Manage claiming schemes

Lesson Topics

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3.1 WHAT IS A CLAIMING SCHEME?

A claiming scheme is a formula used to record partial progress of installed quantities. The installation sequence is broken down by steps or milestones and assigned a completion percentage based on the level of effort to complete each step. This allows you to progressively track progress as phases of construction are completed on a daily or weekly basis.

Scenario

> Imagine you are a field engineer responsible for tracking completion progress for the installation of structural steel for your assigned module. Work includes shaking out and transporting steel to the work area, erecting and bolting up steel members and final torqueing of bolts to the required specification. These steps happen over a period of time, and you need to report percent complete as work is performed. Predefined claiming schemes help you accomplish this without having to wait until the very end when all steps are complete.

Why would you not want to wait until all work steps are complete to claim an activity?

The answer: Delayed reporting of progress can hide issues and cause more impactful schedule and budget concerns if gone unnoticed. Short interval claiming via claiming schemes provides up-to-date reporting at all times.

3.1.1 What is the purpose?

Quantity tracking/claiming is the backbone for accurate cost reporting. Completed quantities drive your earned budget, overall percent complete, and forecasted cost at completion. It is imperative to have accurate completion percentages at short intervals (daily or weekly) to quickly recognize negative trends and react in a timely manner. Claiming schemes are designed to methodically claim portions of work that are completed within shorter intervals than the overall scope of work.

For example, referring to the scenario above:

You can predefine the percent complete of each step required to complete the structural steel installation, including final quality verification.

- *Step 1: Shake out / Transport*
- *Step 2: Erect / Bolt up*

- *Step 3: Final Torque*
- *Step 4: Quality Verification*

The percent complete assigned to each step should be based on the level of effort required to complete that step.

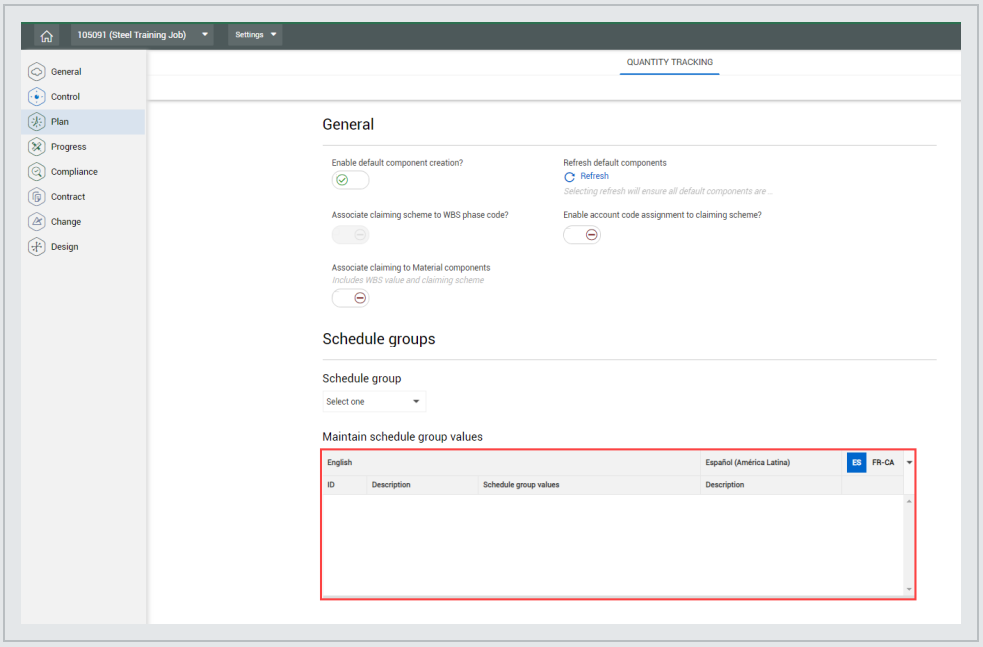
3.1.2 Setting up a Claiming Scheme

Claiming schemes are managed in the Quantity Tracking section of InEight Plan. They are created for both construction activities and commodities. Claiming schemes are organized by discipline and commodity type respectively. All disciplines and commodity types are preloaded with a default claiming scheme containing one step for 100%.

NOTE To add, edit, or delete disciplines and commodities, go to Master data libraries > **Disciplines and commodities**. On this page, you can only edit or delete one discipline or commodity at a time and only if the discipline or commodity is not in use.

You can edit and add claiming schemes under the discipline or commodity types. You can associate a schedule group and an activity ID format to the claiming scheme.

NOTE To manage schedule groups as an administrator, use the second level menu at the top of your screen to navigate to **Settings**. Then, select **Plan** from the menu on the left. Next, choose the **Quantity Tracking tab** and use the Maintain schedule group values table.



Once a claiming scheme is created, you can assign it to specific WBS phase code(s) or component(s) depending on the project set up.

> **TIP** When creating claiming schemes, aim for 3-5 steps. As a general rule, each step should be able to be completed for one component within one week.

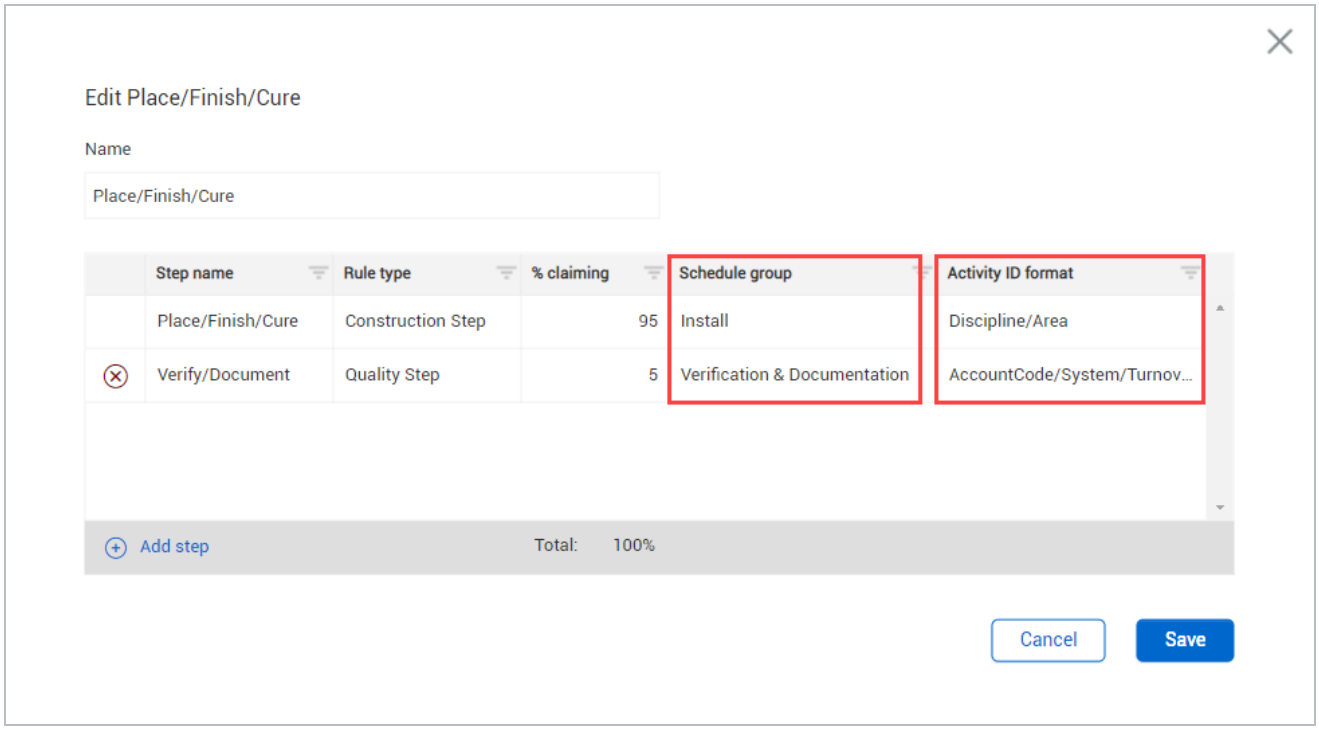
The following table displays an example of how a claiming scheme could be set up for structural steel installation.

Structural Steel Claiming Scheme		
Stage	Title	Percent Claimed
1	Shakeout / Transport Steel to Area	15%
2	Erect / Bolt Up	45%
3	Final Torque	30%
4	QC Verification	10%

> **NOTE** A Claiming Scheme must add up to 100%.

To associate schedule groups or activity IDs when creating or editing a claiming scheme, select the cells under the **Schedule group** or **Activity ID format** columns and select from the drop-down menus.

Here is an example of what the Structural Steel Claiming Scheme would look like in Plan:



By default, when you assign a claiming scheme to a component, the steps automatically inherit the same quantity and unit of measure as the component. However, depending on the component and situation, it may be necessary to change the unit of measure and quantity per step. This can be done and will be covered in greater detail in *Lesson 4 – Component Management*.

3.1.3 Claiming Scheme Solutions

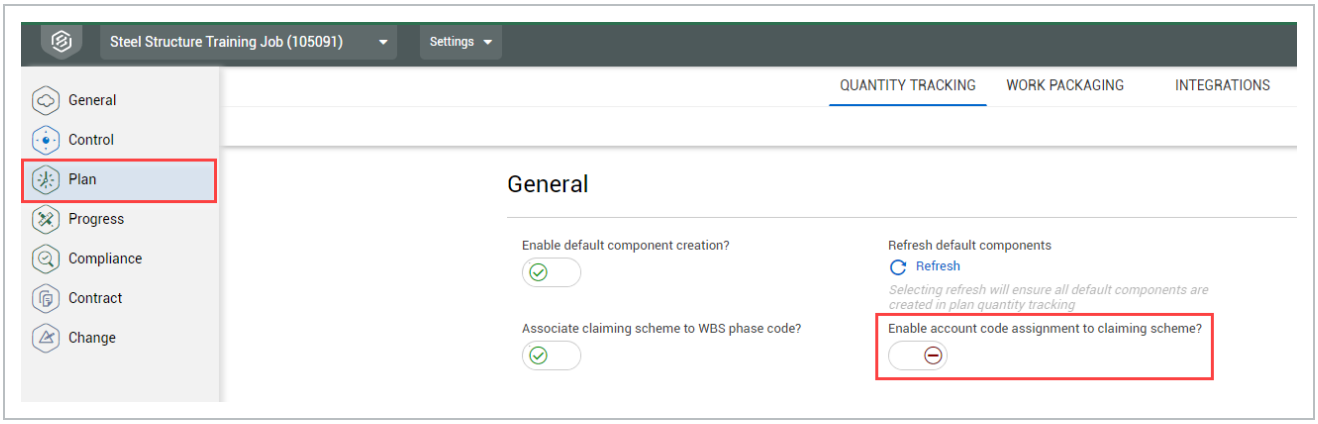
Claiming schemes:

- Allow you to track your claiming in one central location
- Reduce your need for individual side spreadsheets
- Allow for drill down transparency to see what specific work has been claimed as complete
- Keep claiming consistent with a clear breakout of quantities reserved for specific activities
- Communicate actual work steps to your foreman in the field when completing their plan

3.1.4 Account Code Assignment

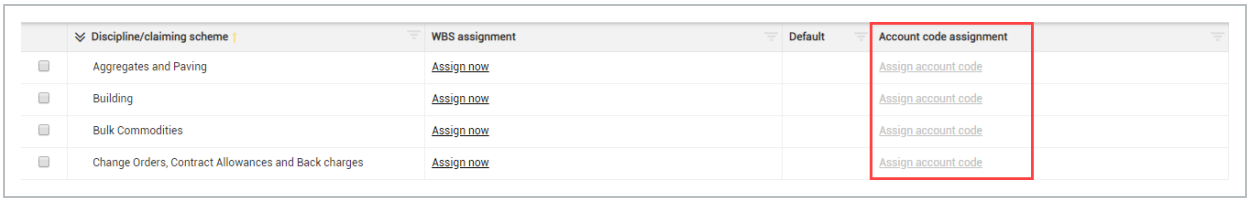
You can also assign account codes to claiming schemes. Account codes can be used to further categorize and standardize claiming schemes for integration with other applications. Below shows how claiming schemes are organized by discipline in Plan, with account codes assigned:

TIP Through the **Project Settings**, you can turn on or off the **Account Code Assignment**. If turned off, the Account Code Assignment column will be un-selectable.



With Account Code Assignment to Claiming Scheme **enabled**:

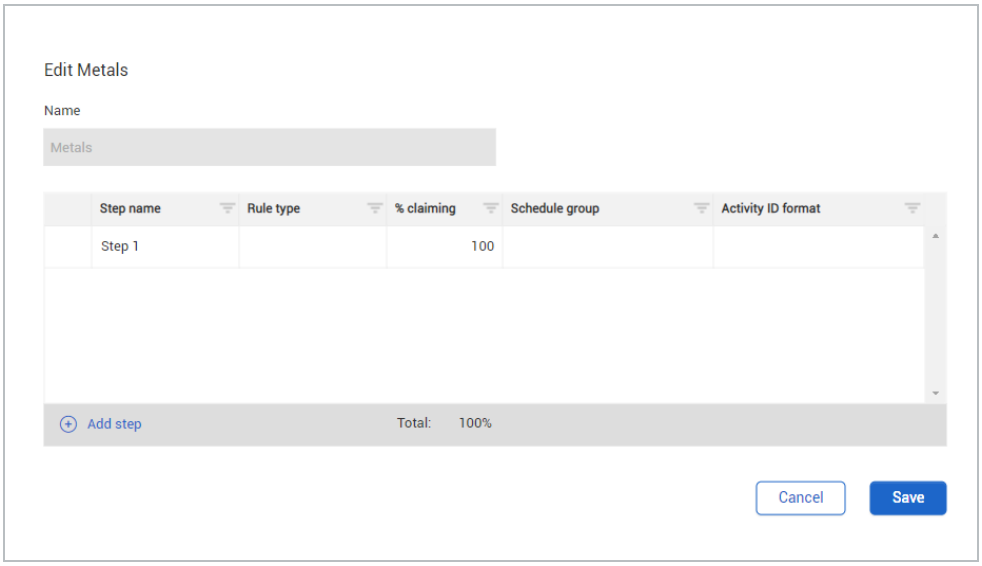
With Account Code Assignment to Claiming Scheme **disabled**:



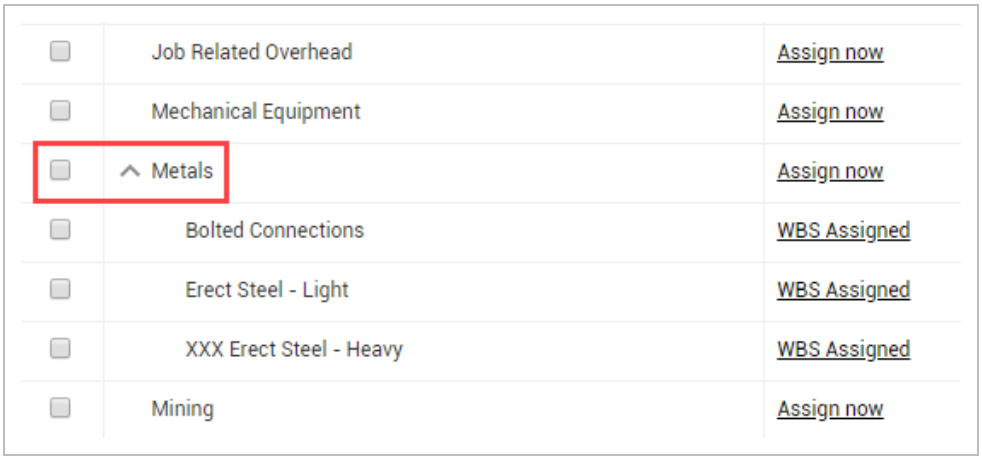
As you can see, the Assign Account Code column is un-selectable.

3.2 CLAIMING SCHEME CREATION

You will now create a claiming scheme in Plan for the erect steel code you created for your module during the InEight Control lesson. By default, the Plan application has a claiming scheme already created for each discipline. These default claiming schemes are all one step claiming schemes and can be modified as needed.



In most cases, you will need multiple claiming schemes for a single discipline. For example, in structural work you will need a different claiming scheme for bolted connections than you will need for erecting light steel. Plan allows for the creation of multiple claiming schemes under the discipline of Metals.

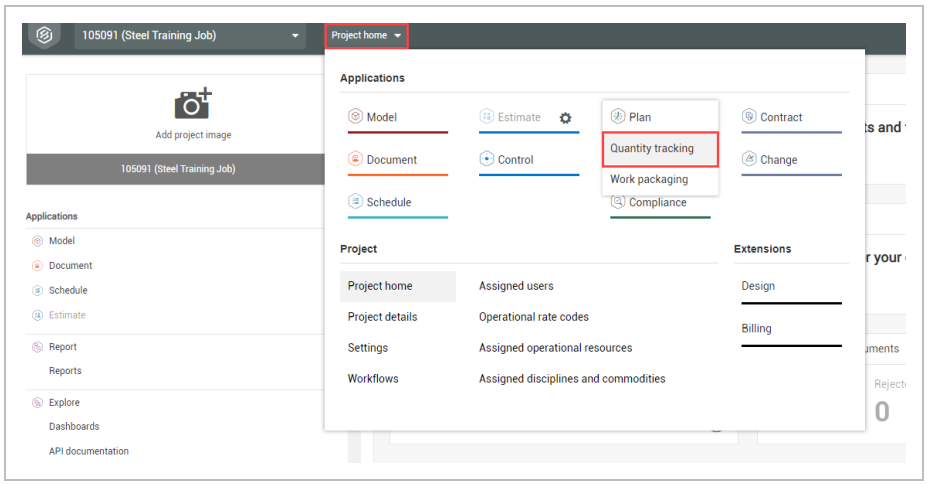


There is a parent-child relationship between the discipline claiming scheme and those added beneath it. Practice by creating a claiming scheme under the discipline that you created previously.

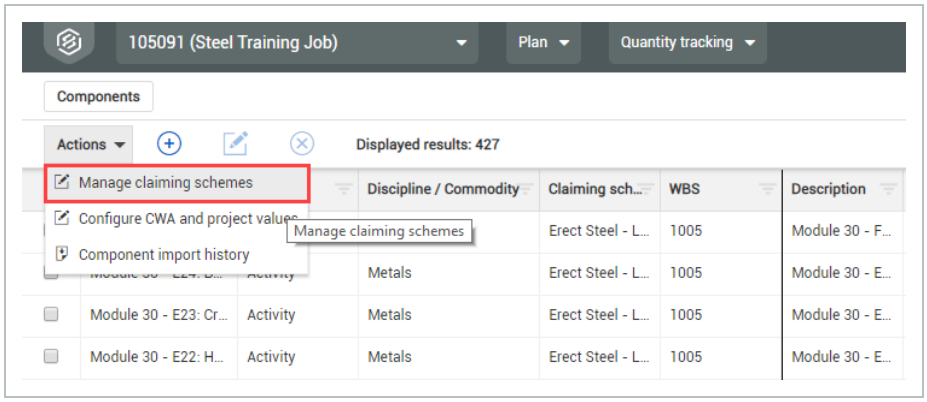
The following step by step walks you through how to create child-level claiming schemes.

Build a Claiming Scheme

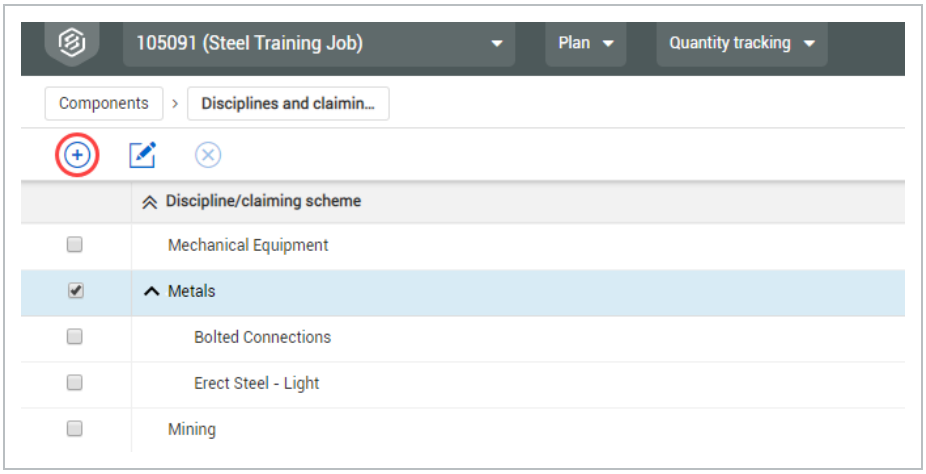
1. Open your project and go to the **Quantity Tracking page**.



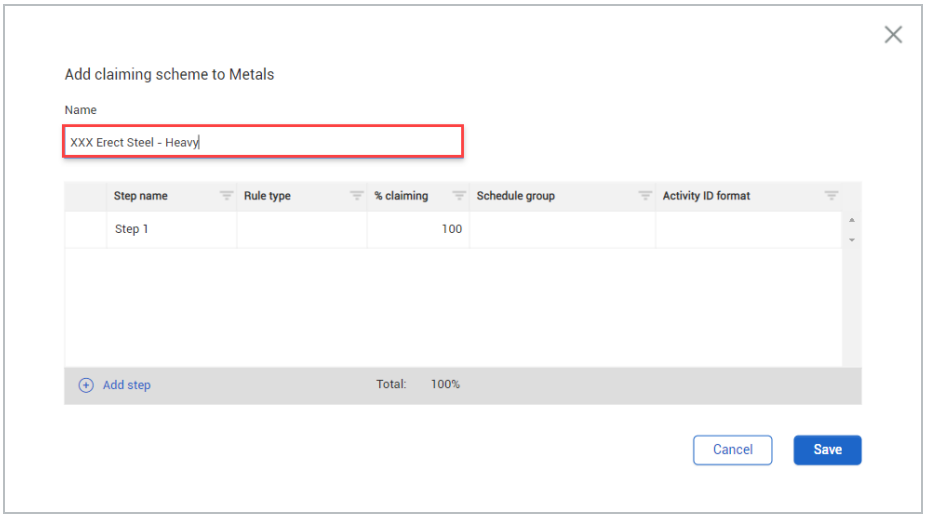
2. From the Actions drop-down menu, select **Manage claiming schemes**.



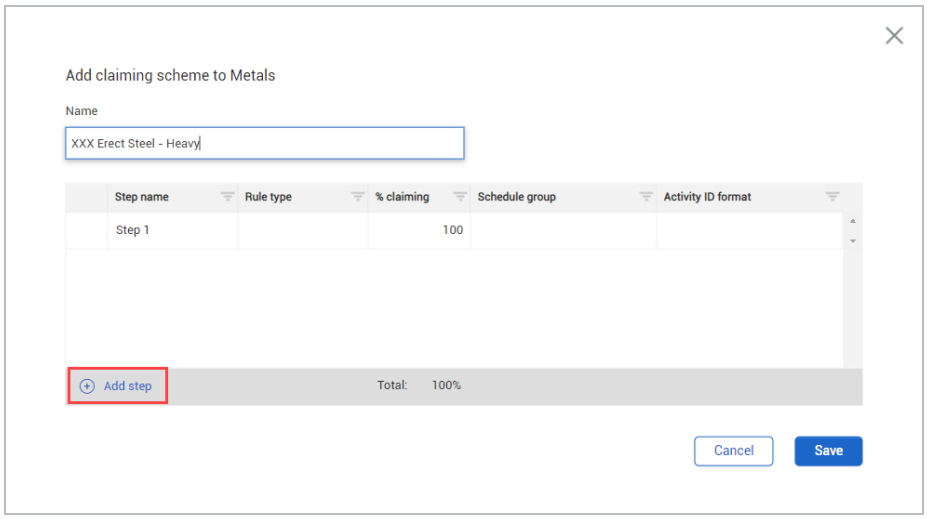
3. To place the claiming scheme in a discipline, click on the **check box** next that discipline in the Claiming Scheme list.
4. Click the **Add** icon on the left toolbar. You will now see a claiming scheme setup box.



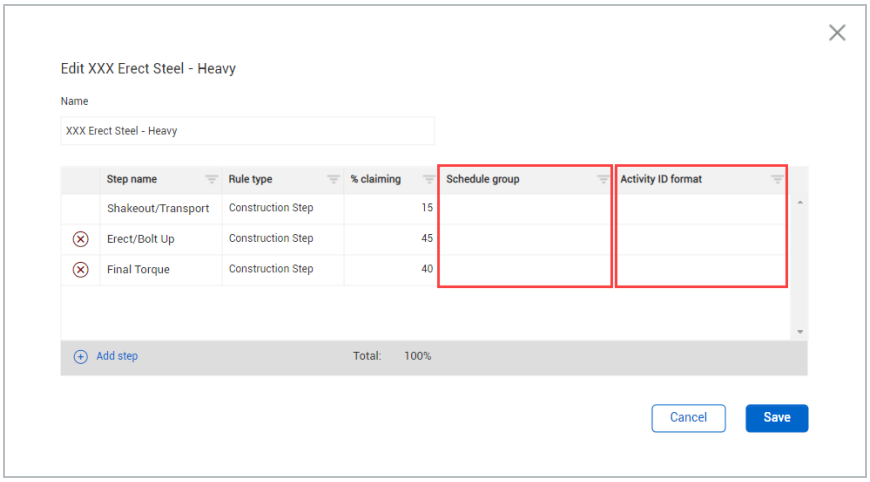
5. In the Name field, name your new claiming scheme.



6. To add steps to your claiming scheme, click **Add Steps** .



7. After creating those steps, rename them, add rule types and percentages.
    - To associate schedule groups or activity IDs when creating or editing a claiming scheme, select the cells under the **Schedule group** or **Activity ID format** columns and select from the drop-down menus



> **TIP** Copy claiming schemes from other projects to bring over the associated account codes, schedule groups, and activity ID formats.

8. Click **Save**.

3.2.1 Import and Export

You can import and export claiming schemes between projects by using the Import and Export icons in the top right of the page.

The following Step by Step shows you how to import claiming schemes from another project.

Import Claiming Schemes

1. In the top right of the Disciplines and claiming schemes page, click the **Import** icon.
    - The Select a project to import claiming schemes dialog box is shown
2. Select a project from the list.

    TIP You can search for a project using the Search bar in the top right.

    NOTE You can only import claiming schemes from one project at a time.
3. Click **Select**.

All of the project's claiming schemes are imported into your project.

There are two methods to export claiming schemes:

- Export all of the current project's claiming schemes to another project.
- Select specific claiming schemes and then export only those schemes.

The following Step by Step shows you how to export specific claiming schemes to another project.

Export Claiming Schemes

1. On the Disciplines and claiming schemes page, select the check boxes next to the claiming schemes you want to export.
2. Click the **Export** icon in the top right of the page.
    - The Claiming scheme project export dialog box is shown
3. Select a project from the list.

TIP You can search for a project using the Search bar in the top right.

NOTE You can only export claiming schemes to one project at a time.

4. Under Claiming schemes to send, choose **Selected claiming schemes**.

NOTE If you choose **All active claiming schemes**, your selections are ignored and all schemes are exported.

5. Click **Send**.

The selected claiming schemes are exported to the target project.

Exercise 3.1 — Claiming Scheme

Now that you have learned about claiming schemes and how to create them, you will complete an exercise to test your knowledge.

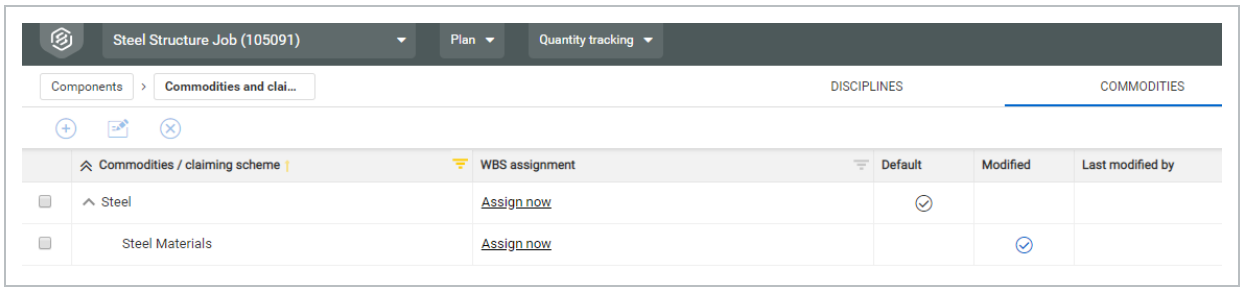
Claiming Schemes for commodities are created the exact same way.

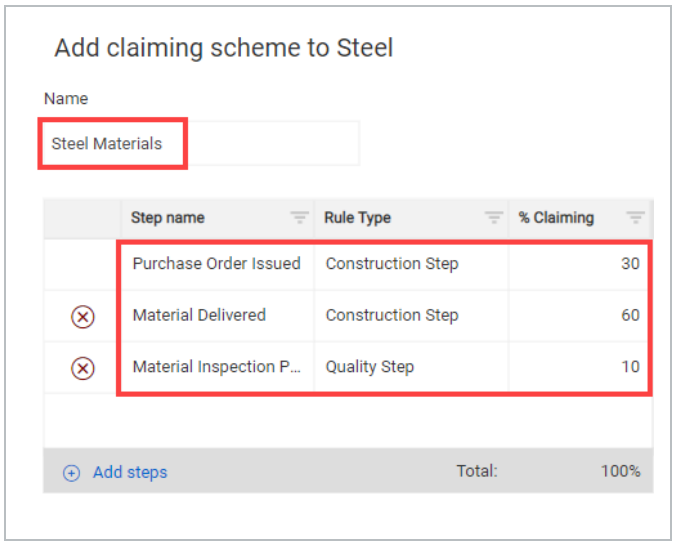
1. Create your own claiming scheme for any commodity by adding a child claiming scheme to that commodity.

2. Create at least 3-4 Steps.

3. Define a percentage for each step so the total percentage of all steps equals 100.

   Example:





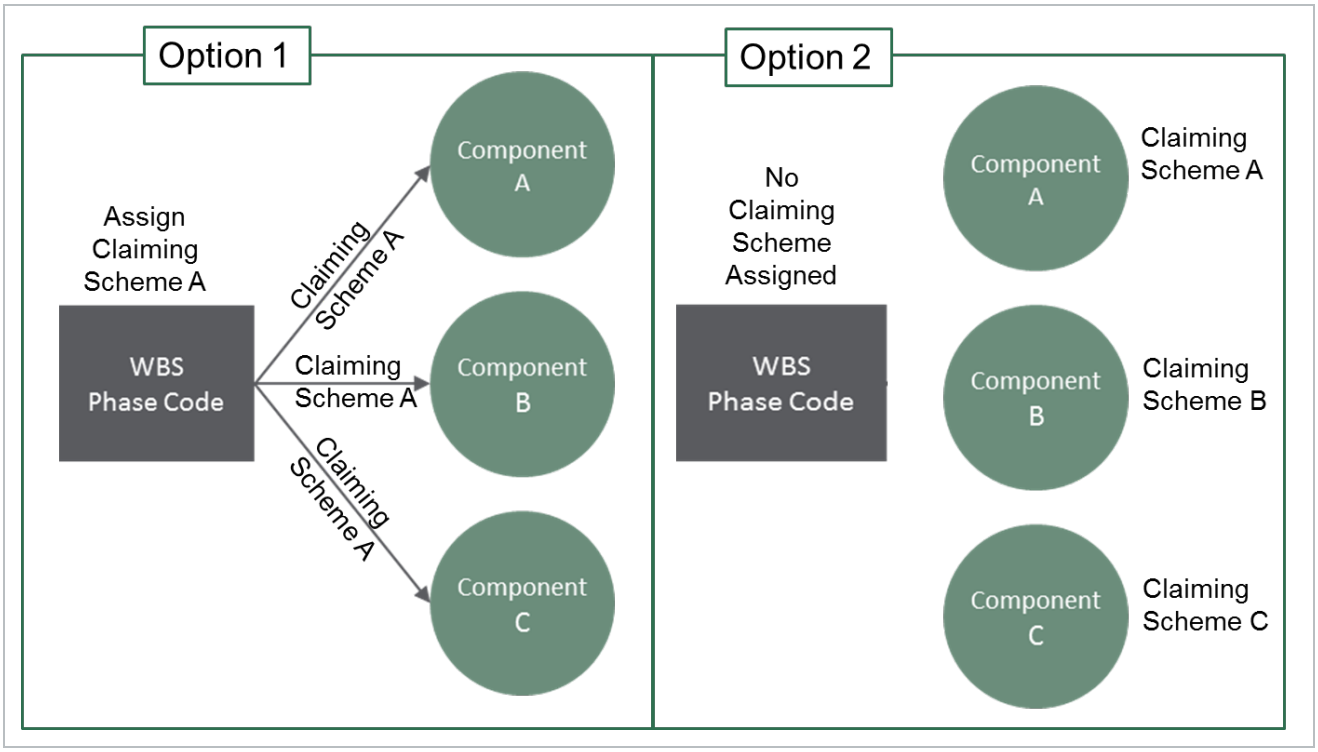
Congratulations, you have completed this exercise!

3.3 CLAIMING SCHEME MANAGEMENT

3.3.1 Assigning Claiming Schemes

Once you create a claiming scheme and it is ready to be used, the next step is to assign that claiming scheme. You can assign claiming schemes in two different ways:

- Option 1: Assign to WBS cost items
- Option 2: Assign to each component



To assign claiming schemes at the component level, you must assign them to each component individually. If you assign a claiming scheme at the WBS level, then every component assigned to that WBS will inherit the same claiming scheme.

NOTE To change at the level at which your claiming schemes are assigned, navigate to the **Project Settings**.

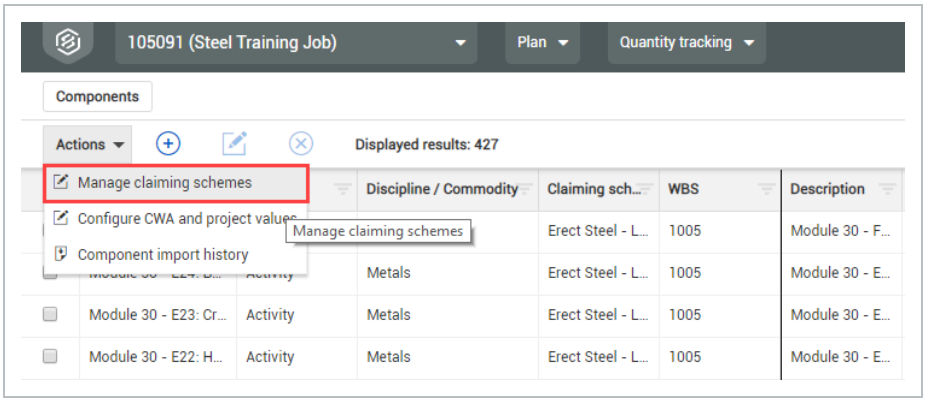
TIP When choosing to assign claiming schemes at a WBS level you must have a claiming scheme assigned to a WBS before you can add components with that WBS. If you choose to assign claiming schemes at a component level, you will not be able to assign any to a WBS.

The following step by step walks you through how to assign a WBS item to a claiming scheme.

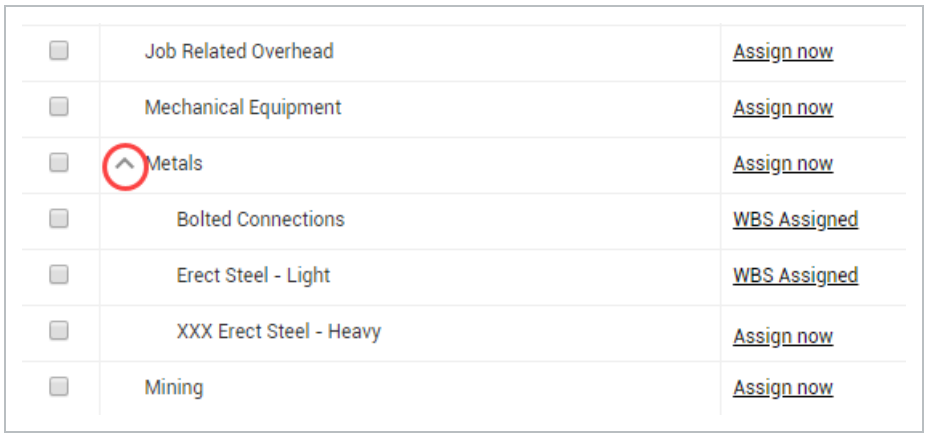
Assign a WBS to a Claiming Scheme

NOTE In order to be able to assign a WBS to a claiming scheme, the Allow As-Built setting for that WBS line item in Control should either be “All” or “Quantities." This makes that WBS available for Plan.

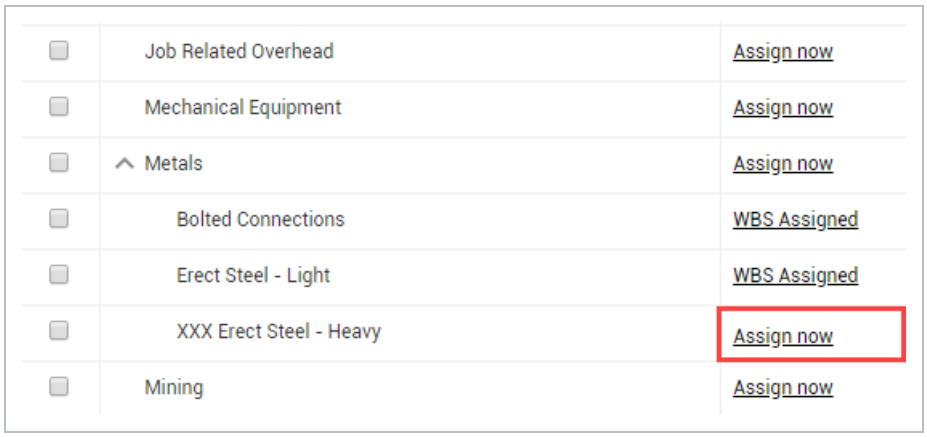
1. From the Quantity Tracking page, select the **Actions menu** and choose **Manage claiming schemes** from the drop-down list.



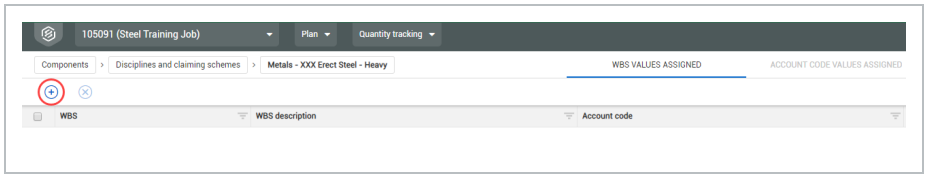
2. Click on the **arrow** next to a discipline to expand its list of child-level claiming schemes.



3. In the WBS assignment column, click on **Assign now** for the claiming scheme you created in section 3.2.



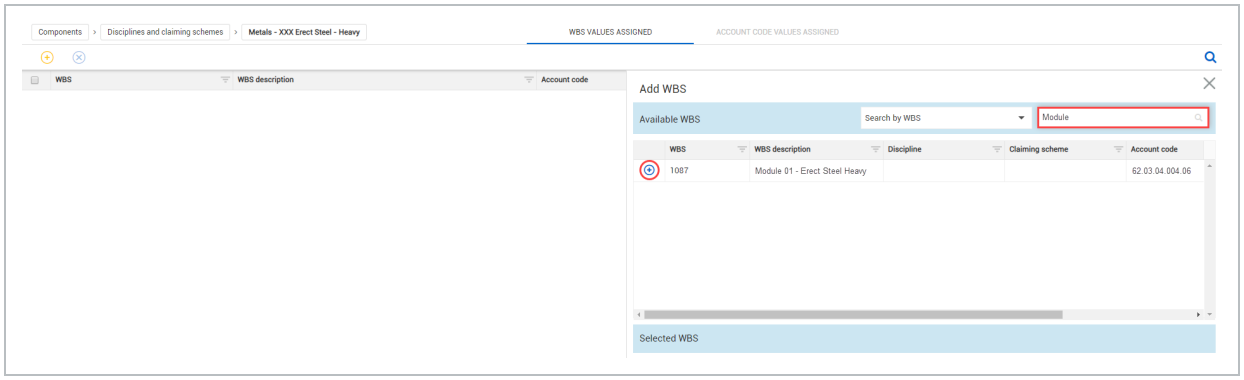
4. Click on the **Add** icon on the left toolbar.



5. On the resulting slide out panel on the right, search for the WBS you created while learning InEight Control.

> **TIP** If you can't find your WBS use **WBS 1004** to follow along with the Steel Training Job scenario.

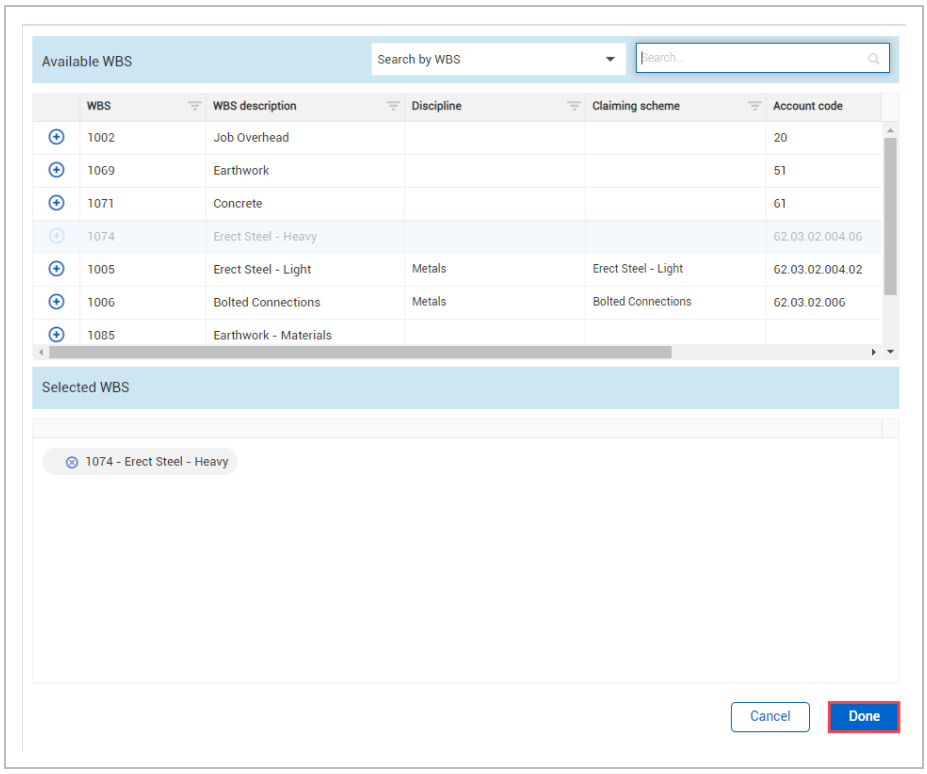
6. When the WBS appears, click on the **Add** icon on the left.



> **TIP** A WBS can only be assigned to one claiming scheme. However, multiple WBS items can be assigned to a single claiming scheme. Make sure to select the Module # of the computer you are using.

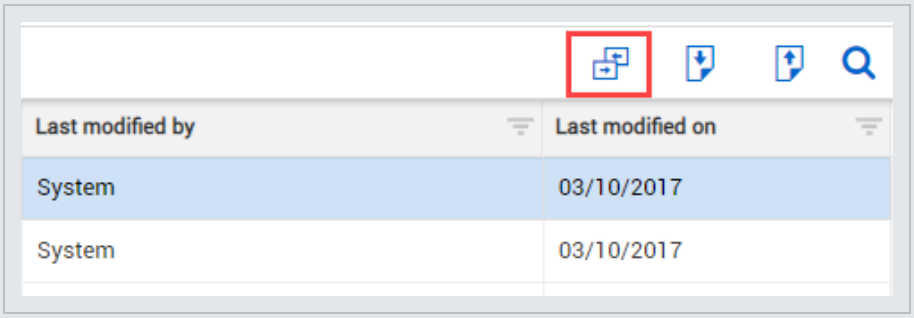
- You should see your WBS has moved to the **Selected WBS field** below

7. Click **Done** on the bottom right of the screen.



NOTE Follow the same process for assigning an Account Code to a claiming scheme.

After you have assigned an account code to a claiming scheme, select the **check box** next to the claiming scheme. Then, select the **Map Account Code to WBS** icon in the top right of the Disciplines and Commodities tab to automatically map WBS to the associated account code. There, you can select multiple claiming schemes to map all of them at the same time.



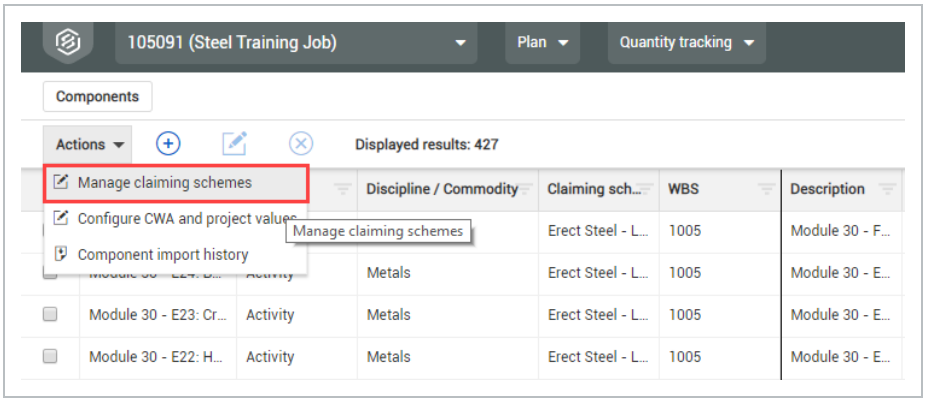
3.3.2 Edit Claiming Schemes

In this step by step you will add a quality verification step to the claiming scheme you created previously.

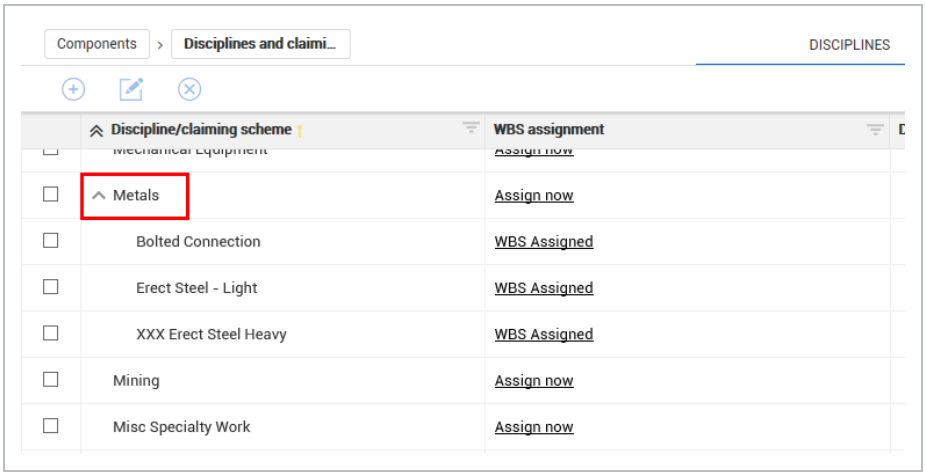
The following step by step walks you through how to edit a claiming scheme.

Edit a Claiming Scheme

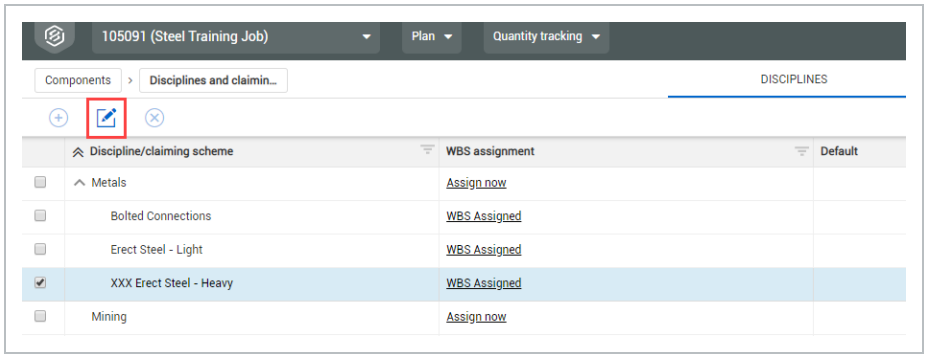
1. From the Quantity Tracking page, select the **Action menu** and choose **Manage claiming schemes** from the drop-down menu.



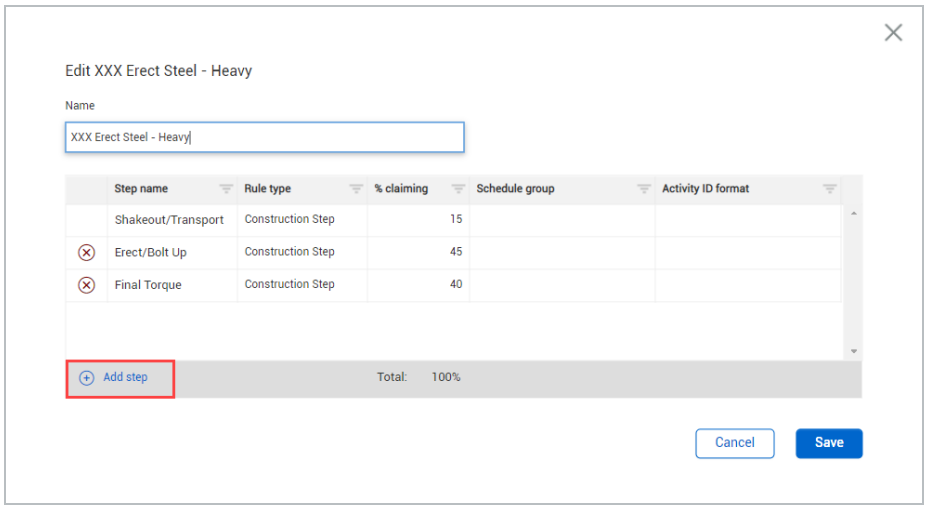
2. Click on the **arrow** next to a discipline to expand its list of child-level claiming schemes.



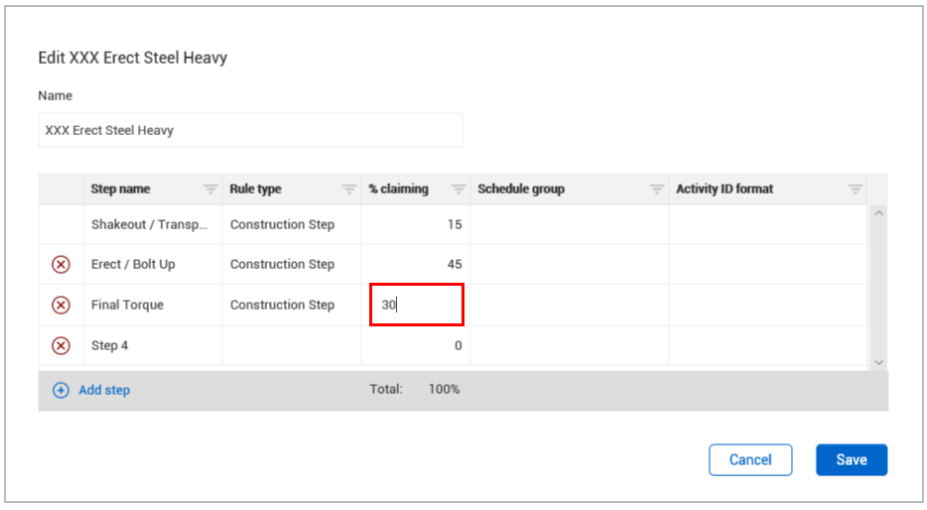
3. Click in the **check box** to the left of the claiming scheme you created.
4. Click on the **Edit** icon on the left toolbar.



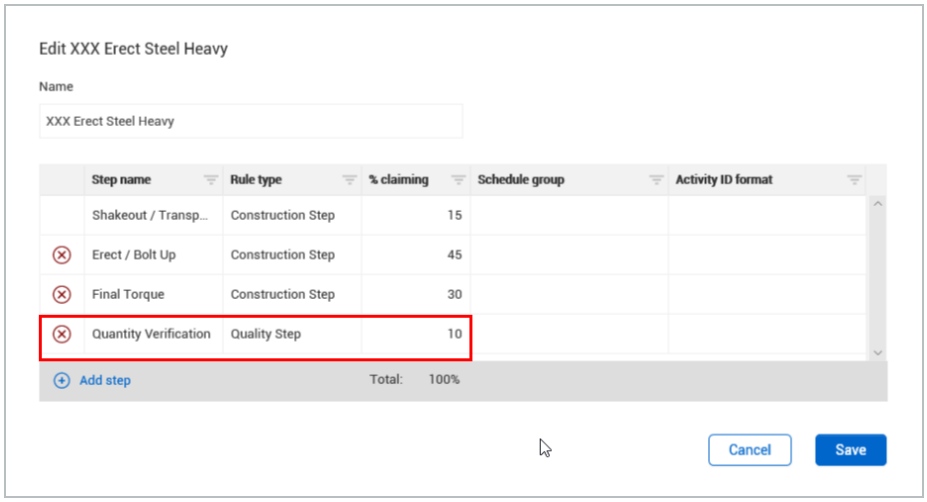
5. Click **Add steps**.



6. Lower the percentage for one of your existing steps.



7. Add a fourth step. Name it, assign it a rule type, and give it a percentage so that all steps add up to 100%.



TIP You cannot save a claiming scheme if your steps' percentages do not add up to 100%.

NOTE You cannot edit any claiming scheme that has quantity claimed against it. Also, if claiming has begun on a child scheme, then the parent scheme automatically becomes un-editable. To edit a claiming scheme that has claiming against it, you must un-claim all quantities, edit the claiming scheme, and then re-claim the quantities.

8. Click **Save**.

Lesson 3 Review

1. The purpose of a claiming scheme is to break a component down into steps so that you can do which one of the following?
    a. Progressively track progress of quantities installed as phases of construction are completed.
    b. Schedule components in multiple phases.
    c. Measure the quality of the component installation in multiple phases.
    d. Monitor safety during the installation of the component.

---

2. On the page for creating claiming schemes, claiming schemes are organized under:
    a. Areas
    b. Work Types
    c. Disciplines
    d. Components

---

3. A claiming scheme must add up to:
    a. 85%
    b. 90%
    c. 95%
    d. 100%

---

4. How do you break out the steps of your claiming scheme?
    a. EA
    b. LF
    c. Percentages
    d. Decimals

---

5. You can edit a claiming scheme that has quantity claimed against it.

---

a. True

b. False

---

6. A WBS can only be assigned to _____ claiming scheme(s).

   a. no

   b. one

   c. two

   d. three

Lesson 3 Summary

As a result of this lesson, you can:

- Explain what a claiming scheme is
- Create a claiming scheme
- Manage claiming schemes

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LESSON 4 – COMPONENT MANAGEMENT

Lesson Duration: 60 minutes

Lesson Objectives

After completing this lesson, you will be able to:

- Create components in Plan from scratch
- Create components in Plan using an import template

Lesson Topics

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4.2 Component Creation from Scratch 74
4.2.1 Why Create Components? 74
4.2.2 Types of Components 75
4.2.3 Methods of Creating Components 76
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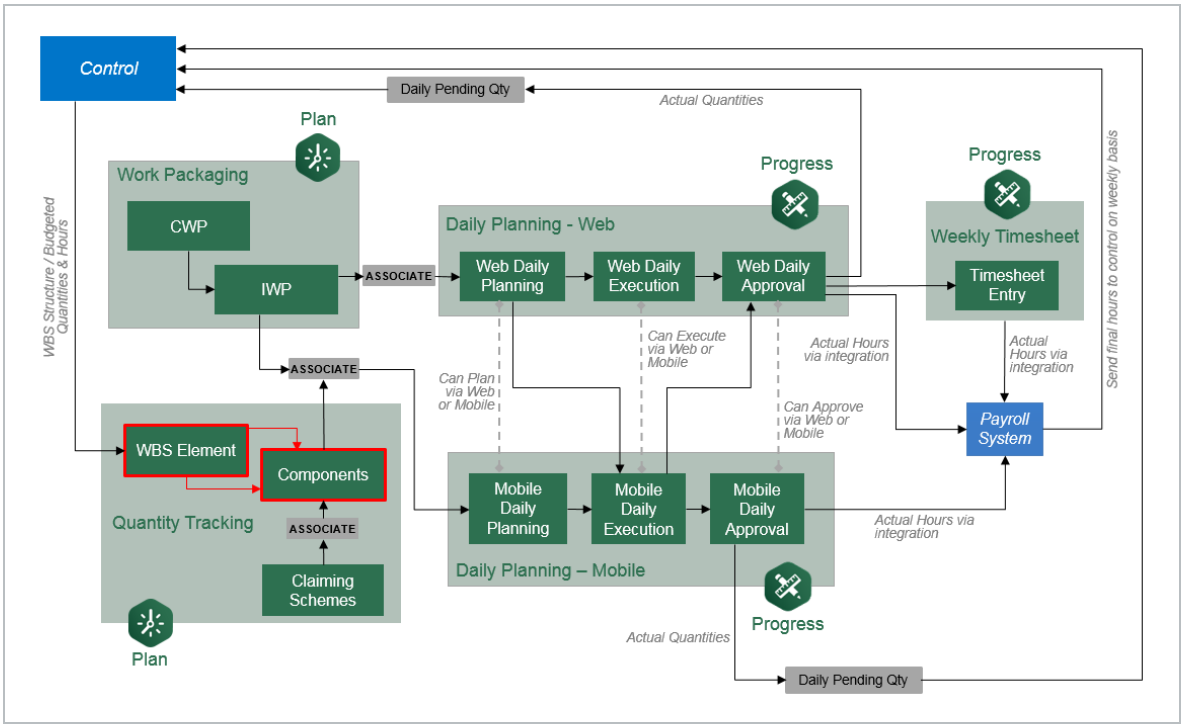
4.1 INEIGHT PLAN WORKFLOW - COMPONENT MANAGEMENT



4.2 COMPONENT CREATION FROM SCRATCH

In this topic, you will create a new component from scratch in InEight Plan.

4.2.1 Why Create Components?

In InEight Control, a direct cost item (WBS phase codes) has a quantity that is the sum of many components with smaller quantities which are created in InEight Plan. For example, a structural steel cost item measured in tons is made up of many pieces of steel, each with a specific weight (in tons). When claiming work complete, you could calculate the weight of each piece of steel installed and claim that much at the WBS level.

- *If you did this, how would you know what work is complete and what specific work is remaining?*
- *What have you already claimed and what have you not?*

- *What if a Foreman doesn't have the time to weigh each piece of steel before installing, or what if he weighs incorrectly?*

This is why you create components. Components allow you to break down the WBS quantity into smaller, more manageable sub items for claiming. When you claim components, you can easily see what specific items have been completed and what is remaining. You do not have to guess at what has already been claimed to date. Foremen do not need to do any calculating in the field; they simply report the components they completed. Components already have an assigned quantity based on takeoff calculations.

- *Can you think of how components would help claiming of other disciplines like Pipe, Electrical, or Concrete?*
- *How are these disciplines measured vs how is the work performed?*

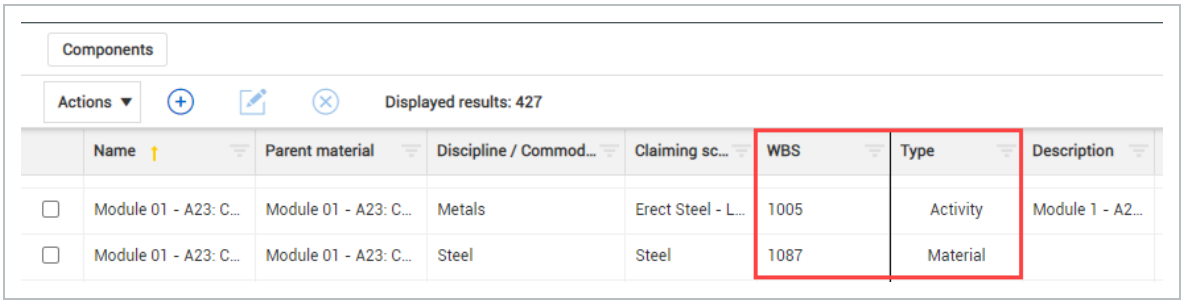
Components aim to bridge that gap.

4.2.2 Types of Components

There are three types of components in the Plan – Quantity Tracking module:

- Activity
- Material
- Assembly

This allows you to claim procurement activities and construction activities separately. To do this, material cost and labor cost must be broken out in separate WBS codes. If that is the case, you can add the same steel components as activity components and material components as pictured below:



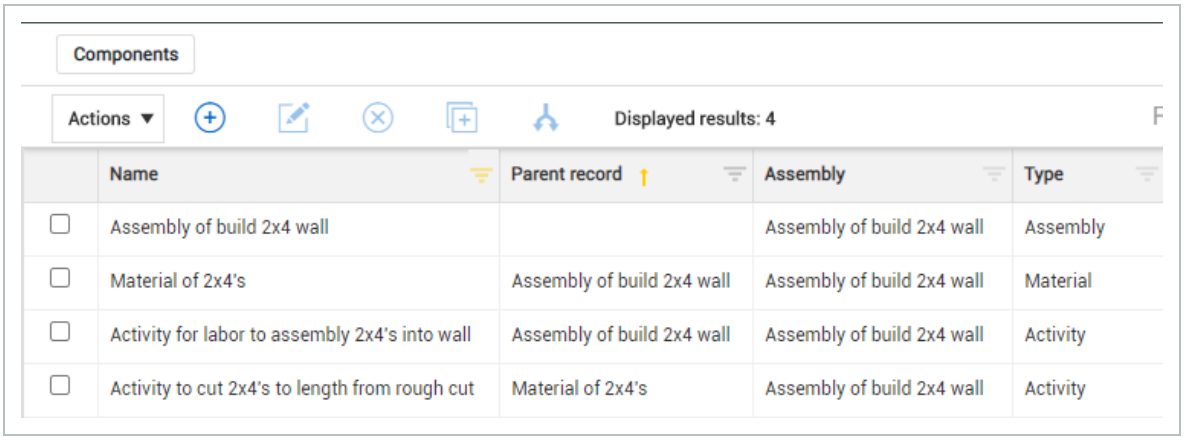
When you create components for both the material and activity, you can then earn hours based on a unit rate for the activity, and earn dollars based on material unit cost for the material and assign them to two separate WBS codes.

You can combine activity and material components into assembly components. An assembly allows claiming to roll up into one parent record.

For example, if you are building a wall using 2x4s, you might have the following components:

- Material of 2x4s
- Activity of cutting 2x4s to lengths from rough cut
- Activity of labor to assemble 2x4s into wall

If you create a new assembly component to build a 2x4 wall, you can set the parent record of the material and labor activities to be the assembly. If you set the parent record of the cutting activity to be the material, the cutting activity also becomes part of the assembly. Using assembly components and parent records lets you create hierarchies of components so that claiming rolls up into one record. The new Assembly column shows which assembly each component belongs to.



4.2.3 Methods of Creating Components

There are four methods for creating components:

Component Creation	
From Scratch	Create each component manually using the new component slide out panel.
Import Template	Import multiple components into InEight Plan simultaneously.
Copy	Create one new component from an existing component.
Split	Create multiple new components from an existing component.

4.2.4 Component Attributes

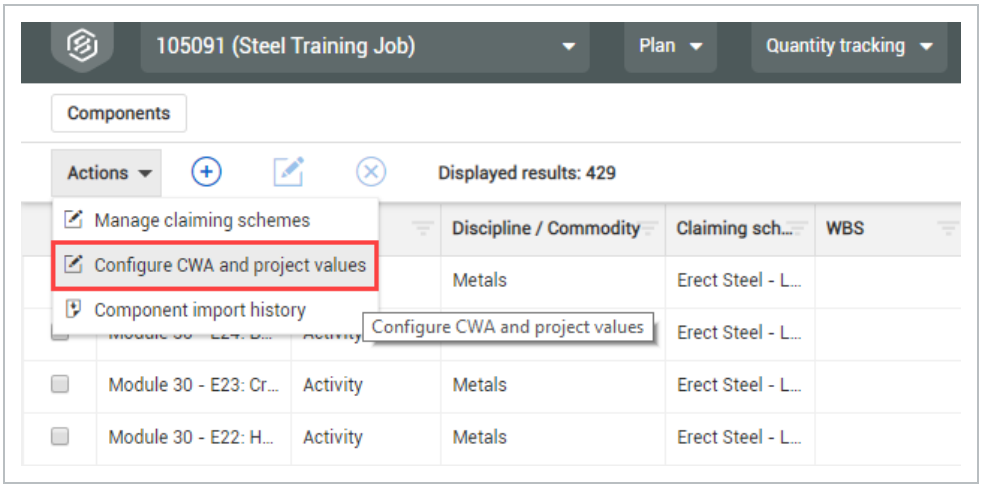
When creating components, a number of fields called attributes are available to be filled out. It is not necessary to fill out every single field, but the more information input, the better. Attributes help make tracking components easier. In many cases, depending on the size of the job, you may have hundreds of thousands of components. In such a case, it can be difficult at times to distinguish the differences between components if only a few attributes are filled out.

4.2.4.1 Validated Fields

You will rely heavily on certain component attributes for reporting purposes. For these attributes, it is important that data integrity is maintained.

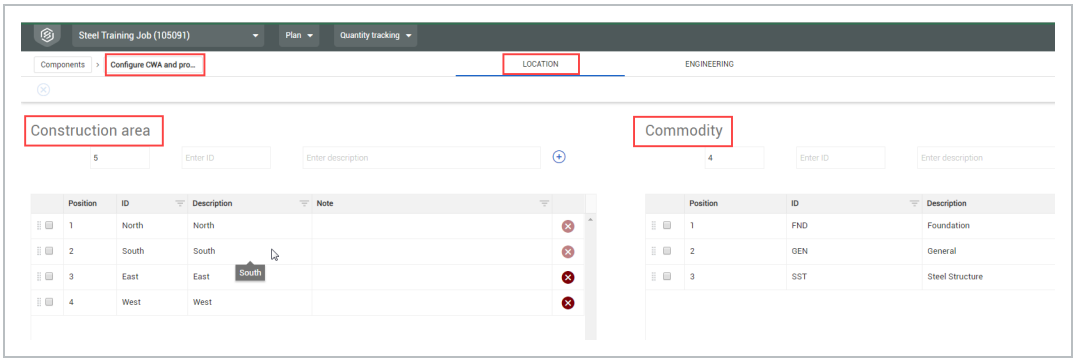
For example, the area and system fields are commonly used for reporting. For these fields, it is important that the area and system entered are always spelled and formatted exactly the same way every time. Imagine a scenario where the data entered for the area field is spelled and formatted five different ways by five different users. In this case, when a report is run for areas, the report will only identify the data that is spelled and formatted one of the five ways. All data for the other four will be left out and your report will be missing crucial information.

To solve this problem, validated fields are used. Validated fields are simply a pre-defined list of values that populate into a drop-down menu. Instead of making these fields free text fields, a drop-down list is utilized. This drop-down list is maintained in the Configure CWA and project values page. You access the Configure CWA and project values page from the Actions menu on the Components page in Quantity tracking.



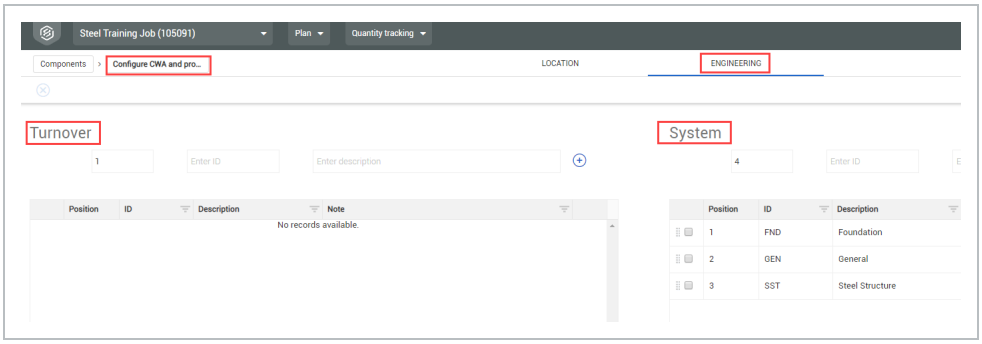
4.2.4.2 Location

In the Location section of the Configure CWA and Project Values page, you can add a construction areas and commodities as data validated tag values to assign to components. Construction area can be North, South etc. Examples of commodities can be rebar, steel etc. These can then be used to map your components for reporting.



4.2.4.3 Engineering

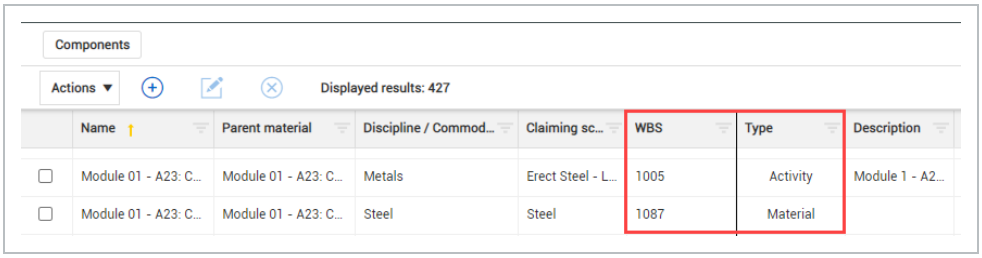
In the Engineering section of the Configure CWA and Project Values page, you can associate turnover packages and systems of work such as fire, water, sprinkler system etc. to a component. You can further define subsystems for a component.



Depending on your permissions, you might not be able to edit these component attributes. This list will typically be maintained by an administrator. If you need the drop-down list for a validated field updated, contact your system administrator.

4.2.4.4 Using Component Attributes

Back on the Quantity tracking Components page, you can add the component attribute columns to your view. Clicking into a field under one of the component attribute columns will provide the drop-down values for the attribute as defined previously on the Configure CWA and Project values page.

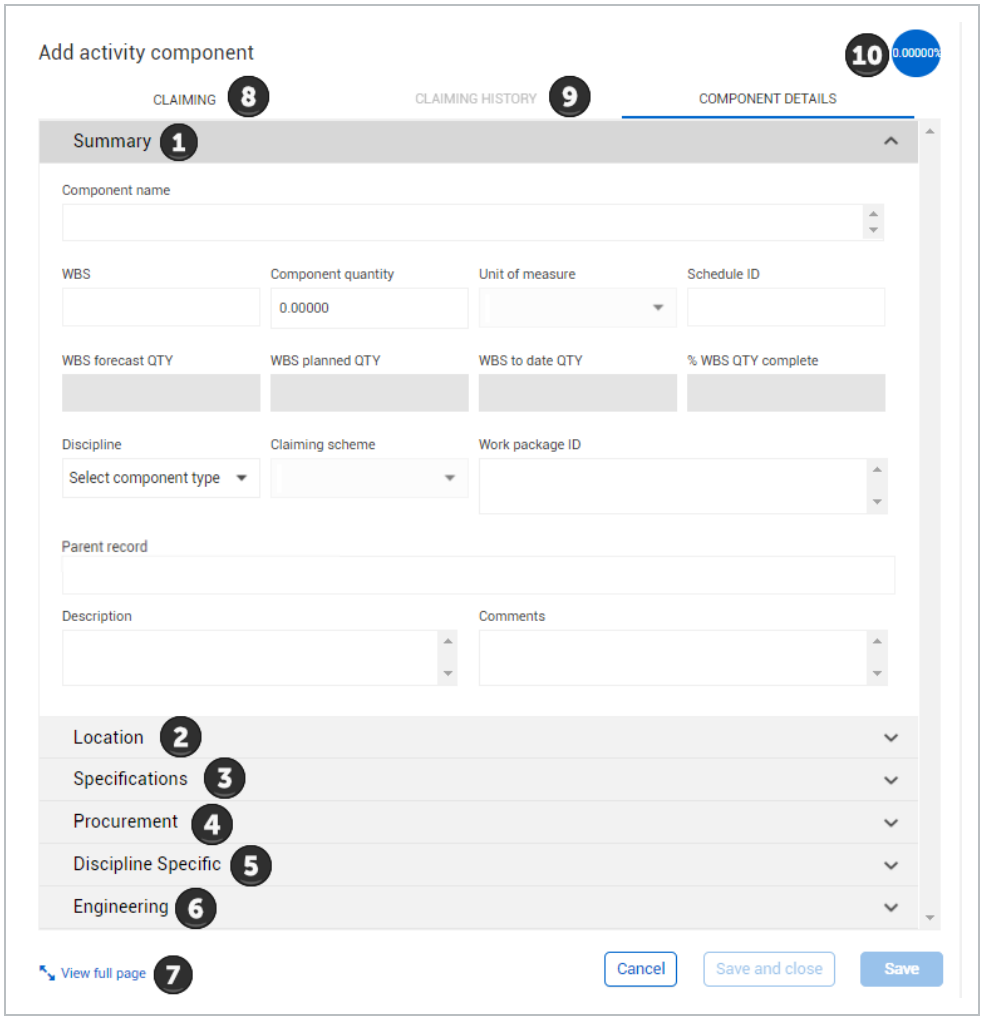


Overview – New Component Slide Out Panel

	Title	Description
1	Summary Menu	Contains general high-level component information such as: Name, WBS, Quantity, Unit of Measure, Discipline, etc.
2	Location Menu	Contains exact location information of the component such as: Building, Elevation, Construction area, System, etc.
3	Specifications Menu	Contains information regarding exact specification for the component such as: Size, Weight, Thickness, Material code, etc.
4	Procurement Menu	Contains information regarding the procurement of the component such as: Supplier, PO #, Shop/Field, etc.
5	Discipline Specific Menu	Contains information that is specific to the discipline selected in the summary menu. Will be different for every discipline.
6	Engineering	Contains information regarding the engineering of the component such as: Turnover, Test Package, Owner Code, etc.
7	Claiming Scheme Menu	Displays the claiming scheme selected in the summary menu.
8	Claiming History	Shows log of what has been claimed to date for this component and by whom.

Overview – New Component Slide Out Panel (continued)

	Title	Description
9	View Full Page Link	Pops the slide out panel into a separate window and expands all menus. Allows for scrolling through the menus instead of opening accordions individually.
10	% Complete Field	Displays overall percent complete of the component.

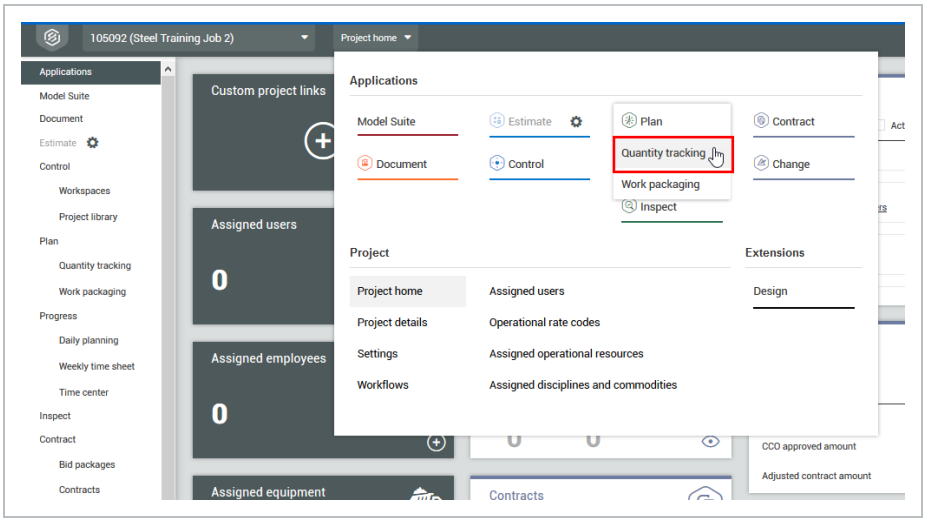


4.2.5 Component Creation

The following step by step walks you through how to create a component from scratch.

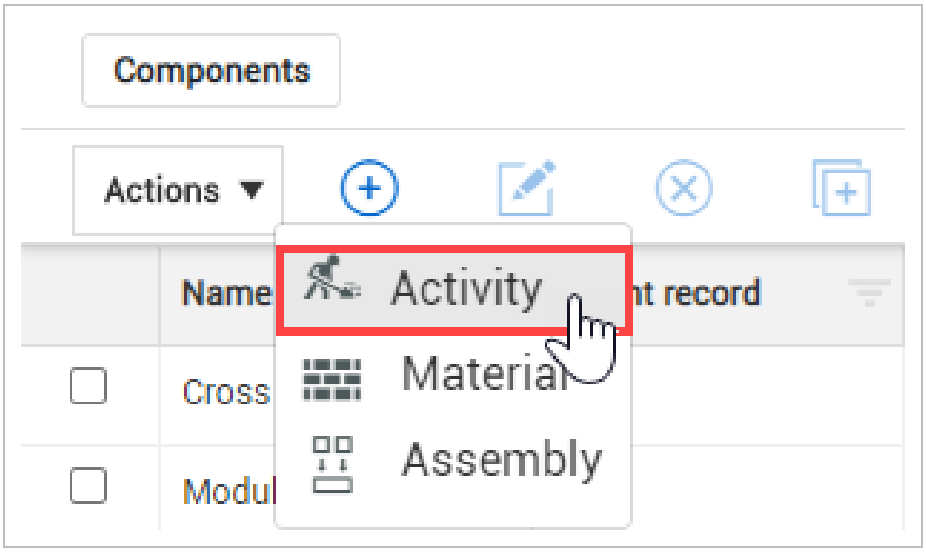
Create a Component from Scratch

1. From an open project, go to the **Quantity Tracking** module.



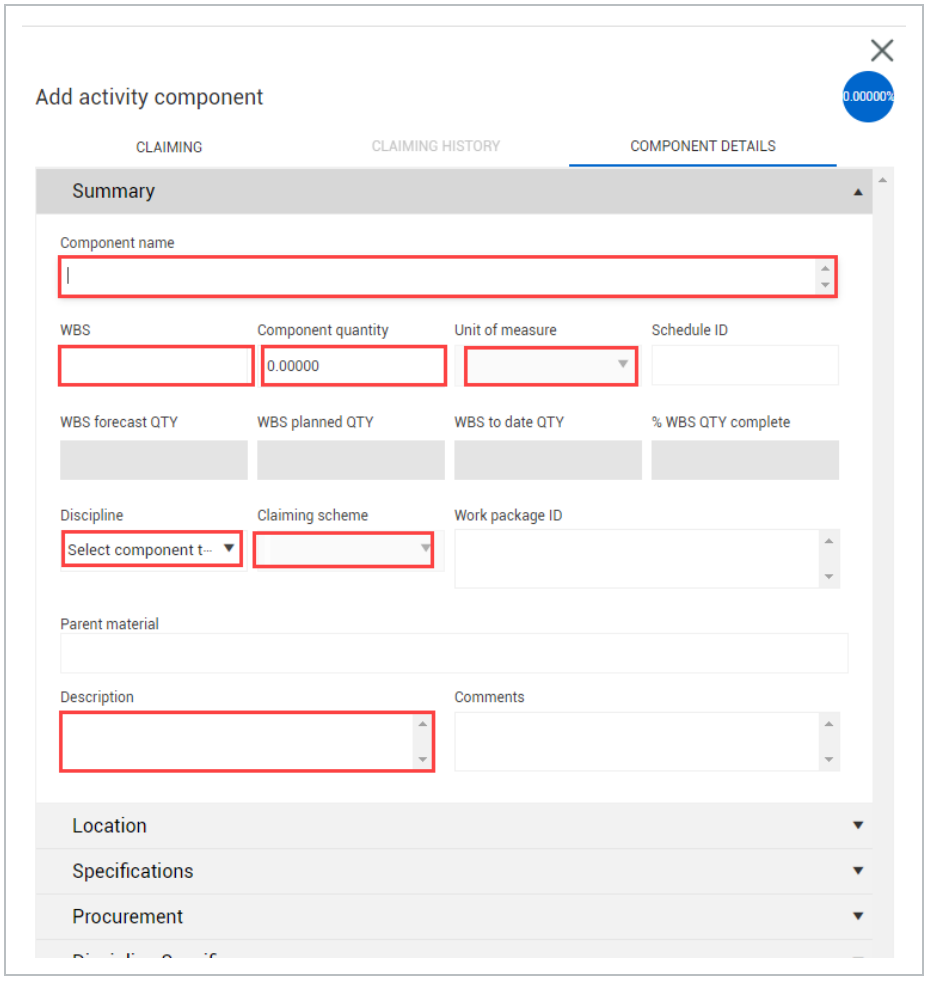
2. To create a component, select the **Add** icon on the left toolbar.

3. Select **Activity**.



- This opens the new activity component slide out-panel. By default, the summary accordion menu should be expanded

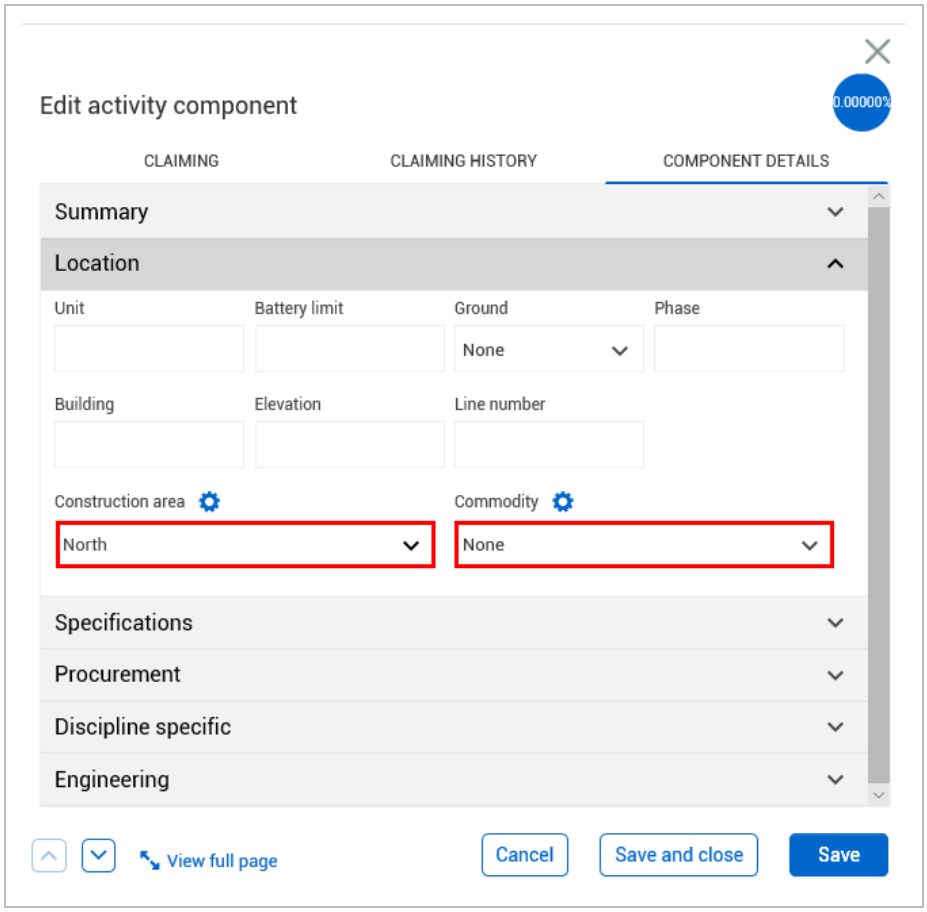
4. In the Summary menu, enter your component details.



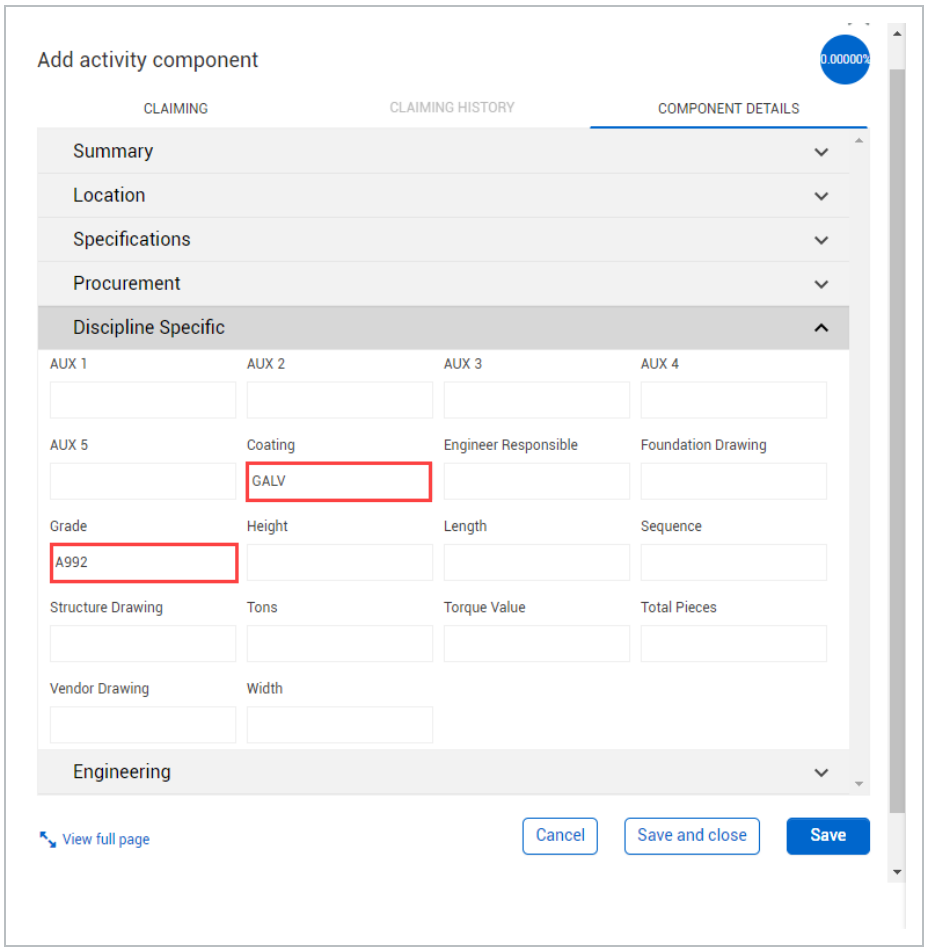
TIP Depending on what project setting you have set up, when you assign your WBS, the Unit of Measure, Discipline, and Discipline/Claiming Scheme fields might be automatically populated and locked for editing.
You can associate material components and assembly components to activity components by adding materials or assemblies to the Parent record field. To associate materials, check that you have the setting Associate Claiming to Material Components turned on in your Project Settings > **Plan Quantity Tracking**.

5. Open the Location menu by clicking on the **Location** title header.

6. In the Location menu, enter the location and commodity information.



7. Open the **Discipline specific** menu and enter your grade and coating information.



8. After you have completed filling out your information, click **Save**.

The following Step by Step walks you through how to create a component by copying an existing component.

Copy an Existing Component

1. Select a component.

   NOTE The Copy function only works when you select a single component.

2. Click the **Copy** icon in the upper-left of the page.

   The Copy component dialog box opens

3. Enter a name for the new component.

   The default name adds -copy to the end of the original component's name

4. Click **Copy**.

The following Step by Step walks you through how to create multiple components by splitting an existing component.

Split an Existing Component

1. Select a component.

   NOTE The Split function only works when you select a single component.

2. Click the **Split** icon in the upper-left of the page.

   The Split component dialog box opens

3. Click the **Add** icon next to Split components to increase the number of new components to split the original into.

   NOTE To remove a split component, click the **Remove** icon next to the component.

4. Enter names for the split components.

   The default names add -n to the end of the original component's name, where n is an increasing number starting at 1

5. Change the Quantity for each of the split components.
6. Click **Split**.

4.3 COMPONENT CREATION FROM IMPORT

In this topic, you will learn how to upload multiple components at once via the Import Template.

Scenario

> Imagine you are the structural steel field engineer responsible for tracking all steel erection for your module. You receive a bill of materials from your steel fabricator that matches the erection drawings. The bill of materials has all the information you need to input for components -

> piecemarks, weight, grade, coating, etc. You need to add all the piecemarks as components, so you can track them as they are installed.

4.3.1 Import Template

As is the case with this scenario, you will often receive lists of components from an outside source.

Can you think of other examples?

- *Electrical Cable or Termination Schedules*
- *Pipe Spool Fabricator Bill of Materials*
- *Mechanical Equipment List*
- *Take off sheets from the estimators*

In these situations, it saves time to import multiple items at once. This can be done using the export and import feature within Plan.

What is the Import Template?

The Import Template is a Microsoft Excel spreadsheet used to upload multiple components into Plan at once. The import template is generated first by setting up your view to show the columns of information you wish to import. Then you export the import template to Excel. You can export with or without data (by choosing Data Export), as well as, Excel equations. This means you can export just the column headers or all the information in the cells below as well. Once exported, you can fill in your information in the spreadsheet, save it, and import it. You have the option to import only new items or overwrite information on existing items (based on unique component IDs).

Upon import, Plan will check the file for any errors. Errors may include:

- Validated fields that don’t exist
- WBS codes that are not available
- Non-unique component IDs

A report is generated to help you find and correct any errors before continuing the import.

The following step by step walks you through how to export the Import Template, populate it, and upload it back into Plan.

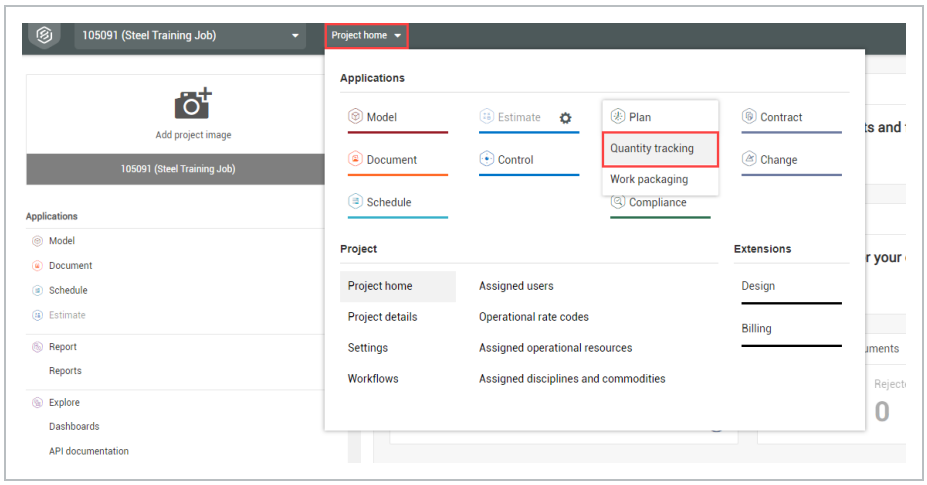
NOTE Component IDs must be unique within the same type of component (activity, material, or assembly). You cannot have two components of the same type with the exact same ID, but you can have an activity component with the same ID as a material component.

If you wish to duplicate an existing component (perhaps, the component created manually in the previous section), you must either delete it, or rename either the existing or imported component.

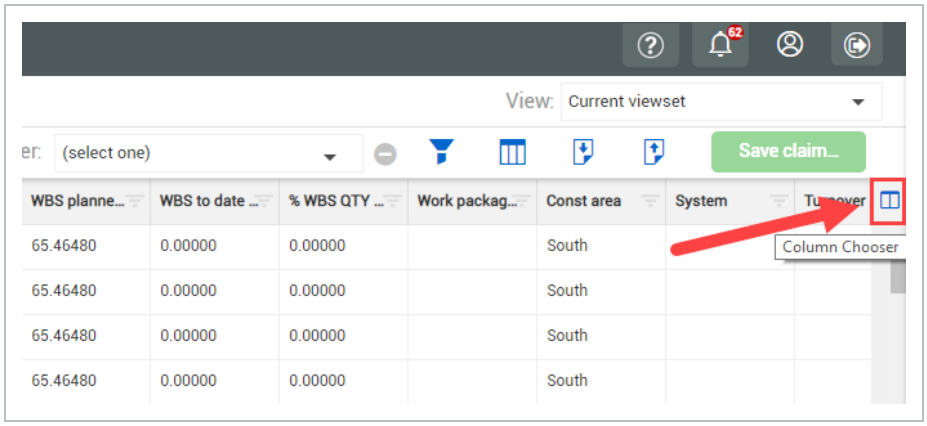
The same scenario follows for the creation of components through an Excel import.

Create Components from Excel Import

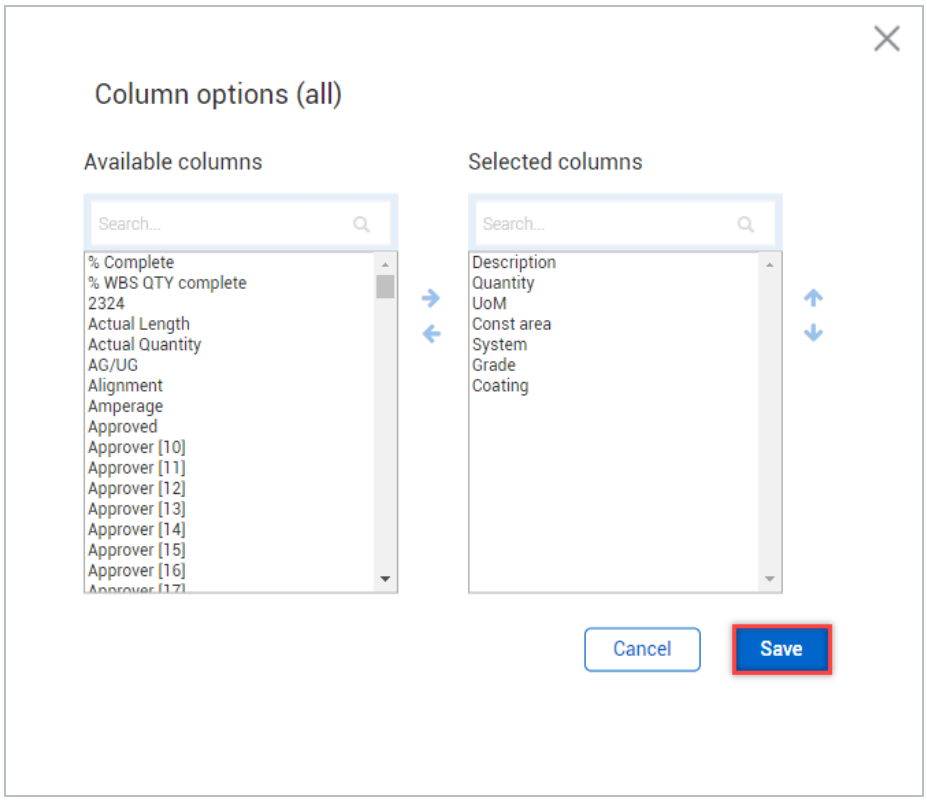
1. From an open project, navigate to the **Quantity Tracking** module.



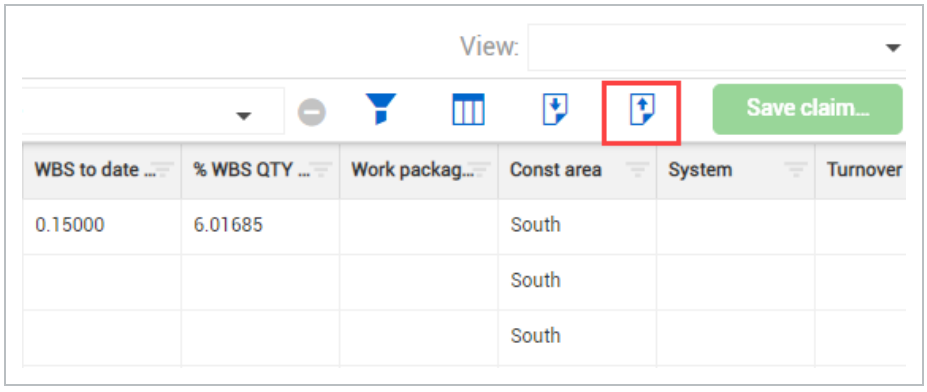
2. In Standard View, select the **Column Chooser** on the far right of the column header row.



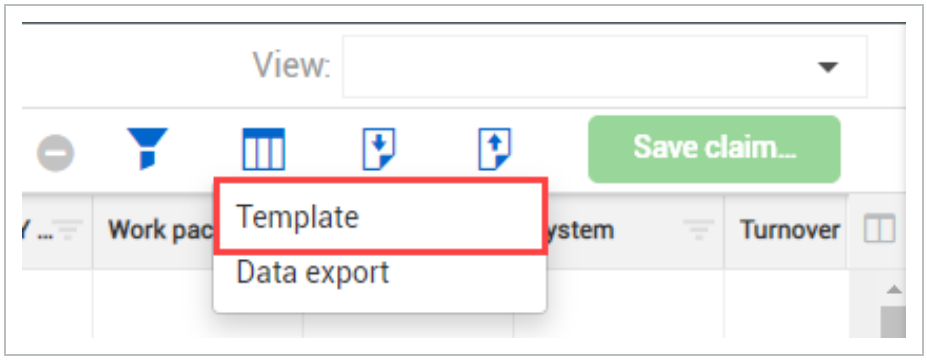
3. From the Column Chooser dialog box, select your desired columns from the **Available columns list** and use the right facing arrow to move them into the **Selected columns list**. Save your columns.



4. Click on the **Export** button on the right toolbar.

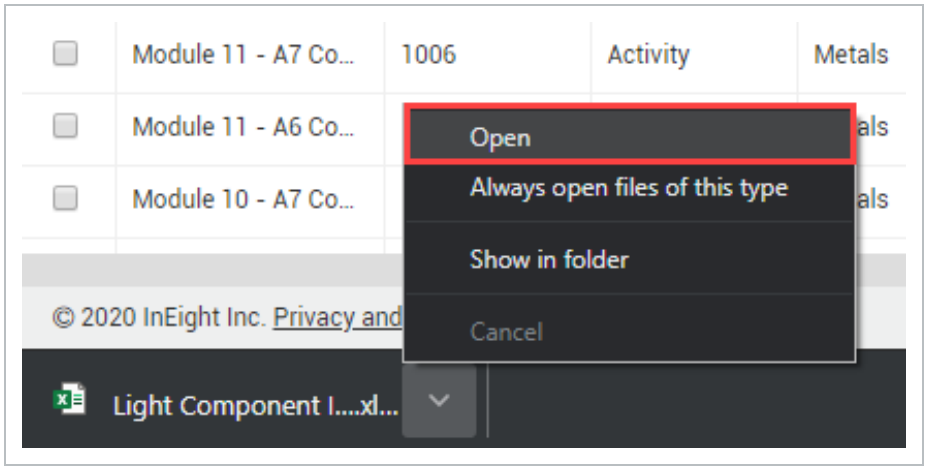


5. Select **Template**.

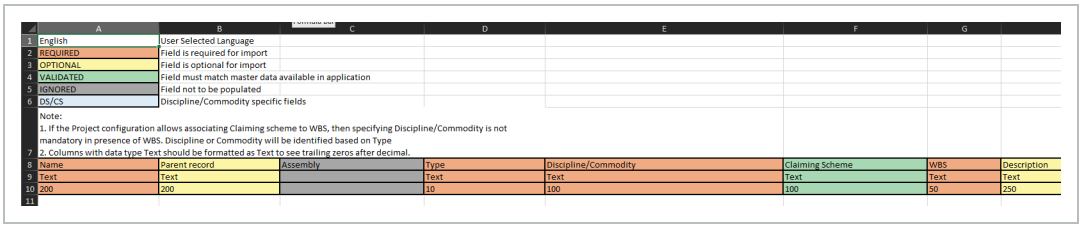


- A Microsoft Excel spreadsheet automatically opens or is shown at the bottom of your screen to download

6. Click on the drop-down arrow for the file and select **Open**.

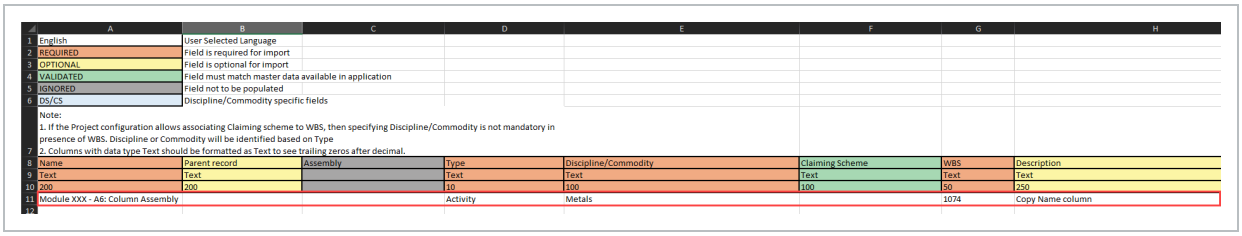


- The resulting spread sheet is now your Import Template and should only contain the columns that were displayed in Plan at the time of exporting



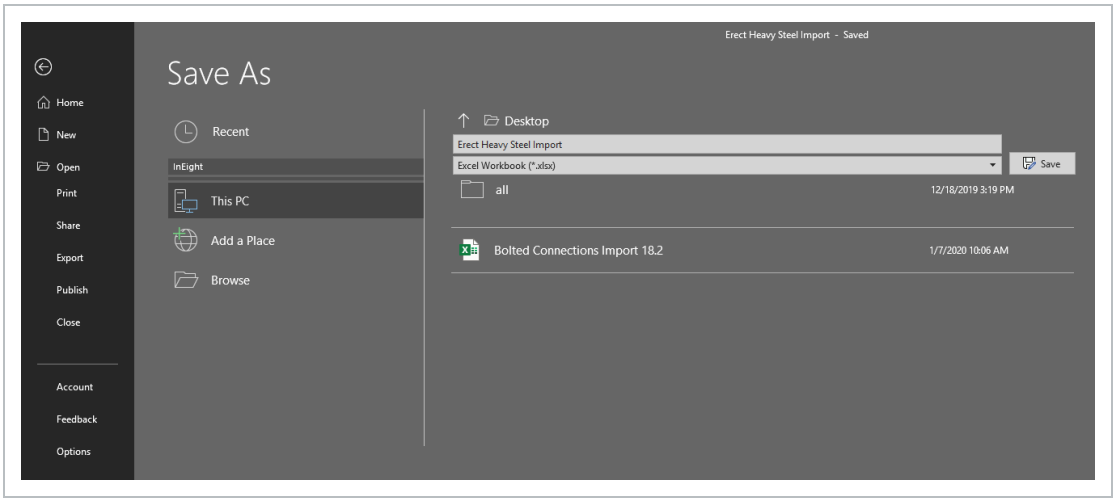
	A	B	C	D	E	F	G	
1	English	User Selected Language						
2	REQUIRED	Field is required for import						
3	OPTIONAL	Field is optional for import						
4	VALIDATED	Field must match master data available in application						
5	IGNORED	Field not to be populated						
6	DS/CS	Discipline/Commodity specific fields						
	Note: 1. If the Project configuration allows associating Claiming scheme to WBS, then specifying Discipline/Commodity is not mandatory in presence of WBS. Discipline or Commodity will be identified based on Type 2. Columns with data type Text should be formatted as Text to see trailing zeros after decimal.							
8	Name	Parent record	Assembly	Type	Discipline/Commodity	Claiming Scheme	WBS	Description
9	Text	Text		Text	Text	Text	Text	Text
10	200	200		10	100	100	50	250
11								

7. In the Name column, enter your component name.
8. Enter the component Name data.

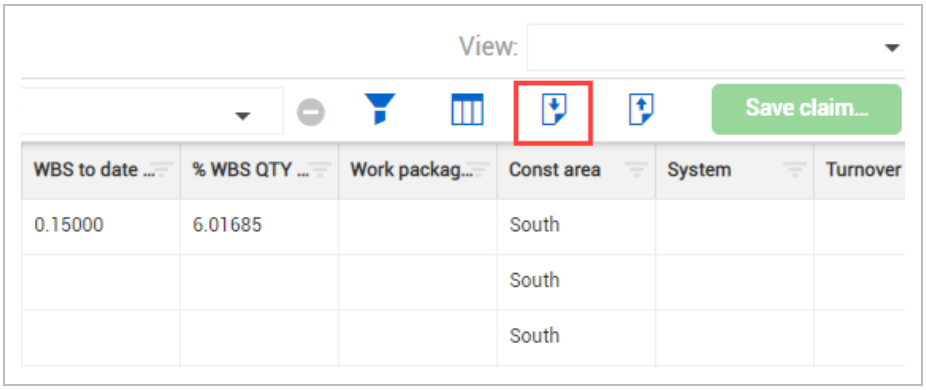


	A	B	C	D	E	F	G	H
1	English	User Selected Language						
2	REQUIRED	Field is required for import						
3	OPTIONAL	Field is optional for import						
4	VALIDATED	Field must match master data available in application						
5	IGNORED	Field not to be populated						
6	DS/CS	Discipline/Commodity specific fields						
7	Note: 1. If the Project configuration allows associating Claiming scheme to WBS, then specifying Discipline/Commodity is not mandatory in presence of WBS. Discipline or Commodity will be identified based on Type 2. Columns with data type Text should be formatted as Text to see trailing zeros after decimal.							
8	Name	Parent record	Assembly	Type	Discipline/Commodity	Claiming Scheme	WBS	Description
9	Text	Text		Text	Text	Text	Text	Text
10	200	200		10	100	100	50	250
11	Module XXX - A6: Column Assembly			Activity	Metals		1074	Copy Name column
12								

9. **Save** the file to your desktop so you can find it.

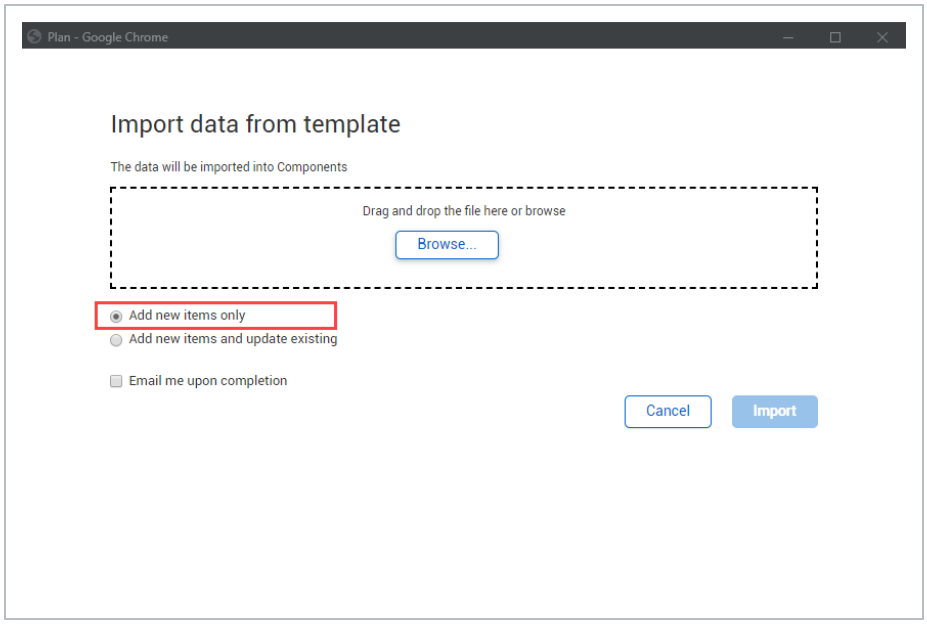


10. Return to Plan and click the **Import** button on the right toolbar.



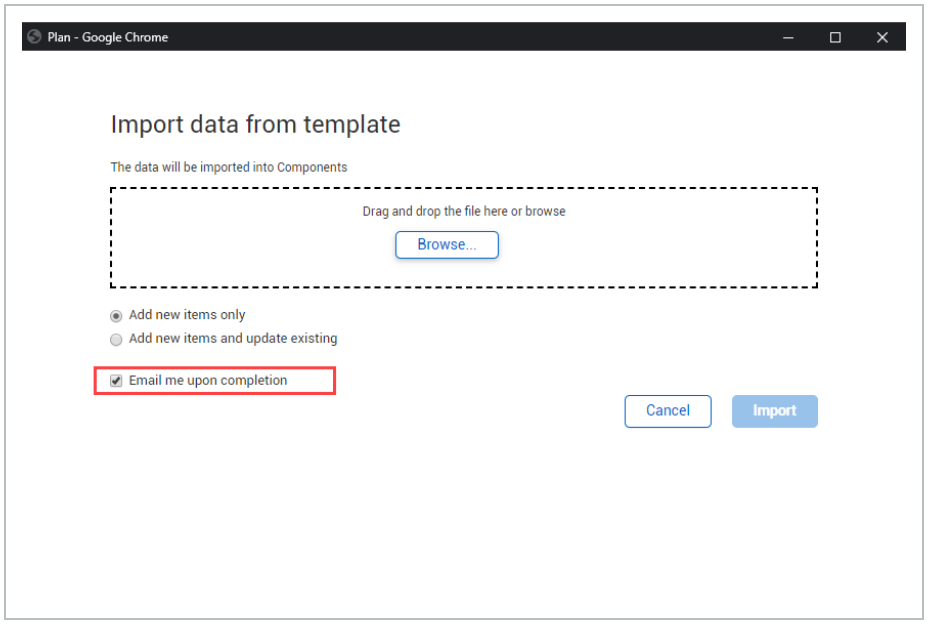
- An Import data dialog box is shown

11. Select **Browse**.
12. From the resulting Open window, locate and select your file then select **Open**.
13. Select **Add new items only**.



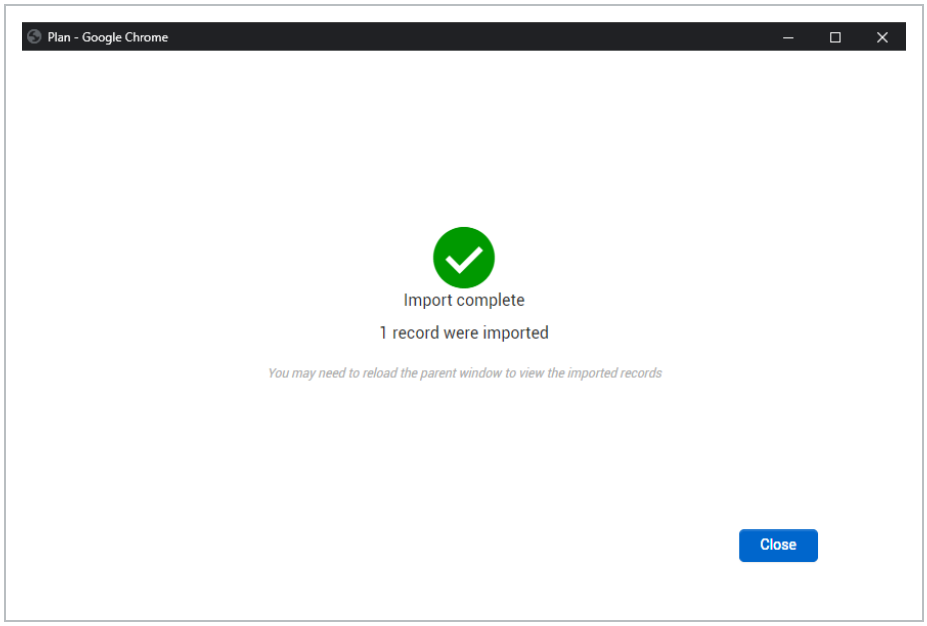
TIP By selecting Add new items only, the system will flag an error if you've accidentally created a component with the same ID as a previously created component. If you select Add new items and update existing, then instead of flagging an error for a component ID that already exists, the system will overwrite the data for that component.

14. Click the **check box** for Email me upon completion.



- This alerts you to the completion of the upload

15. Click **Import**.
    - A progress bar opens in a new window
16. Select **Close** from the window, verifying that the import is complete.



- If any errors occur, you can review them from this window. You may need to make changes in the Excel file and reimport

> **TIP** If you have an error, check that the name of your component is not the same as an existing component.

Scenario Recap

> Now you can see how easy it is to upload multiple components. Picture a project with thousands of components from multiple sources that can be combined on an import template and easily loaded in quickly.

Exercise 4.1 — Create Components

Now that you have learned how to upload components from a template and create components from scratch, create 5 components on your own using either method. Use **Type - Material** to create material components and assign them to **WBS 1087.**

1. Create some sample components that you might actually use on one of your projects.

2. Don’t forget that Component ID’s must be unique within the same component type.

Congratulations, you have completed this exercise!

Lesson 4 Review

1. What do you create in Plan to track quantities?
    a. Cost Codes
    b. Values
    c. Attributes
    d. Components

---

2. If you need to upload multiple components at once, which method is preferred?
    a. From scratch
    b. Copying existing components
    c. Import template
    d. None of the above

---

3. A component ID within the same component type must be _____.
    a. At least 6 characters long
    b. Unique
    c. Contain both letters and numbers
    d. All of the above

Lesson 4 Summary

As a result of this lesson, you can:

- Create components in Plan from scratch
- Create components in Plan using an import template

LESSON 5 – QUANTITY CLAIMING

Lesson Duration: 45 minutes

Lesson Objectives

After completing this lesson, you will be able to:

- Claim quantities in Plan
- Edit claimed quantities

Lesson Topics

5.1 InEight Plan Workflow – Quantity Claiming 96
5.2 Quantity Claiming 96
5.2.1 Process for claiming quantities 96
5.2.2 Why claim at a component level? 97
5.2.3 Claiming in the Standard Grid View 97
5.2.4 Claiming in the Data Blocks View 99
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5.3.2 Quantity Editing 103
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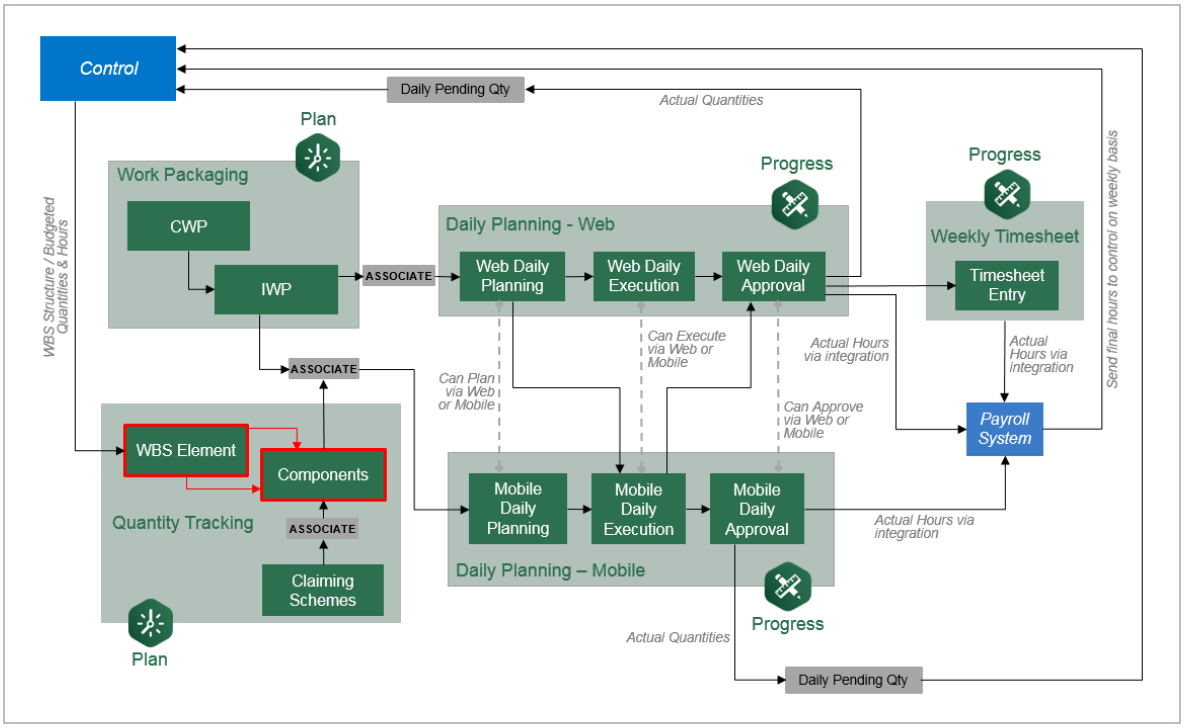
Lesson 5 Review 107
Lesson 5 Summary 108

5.1 INEIGHT PLAN WORKFLOW - QUANTITY CLAIMING



5.2 QUANTITY CLAIMING

This topic covers how to claim component quantities in the InEight Plan application.

5.2.1 Process for claiming quantities

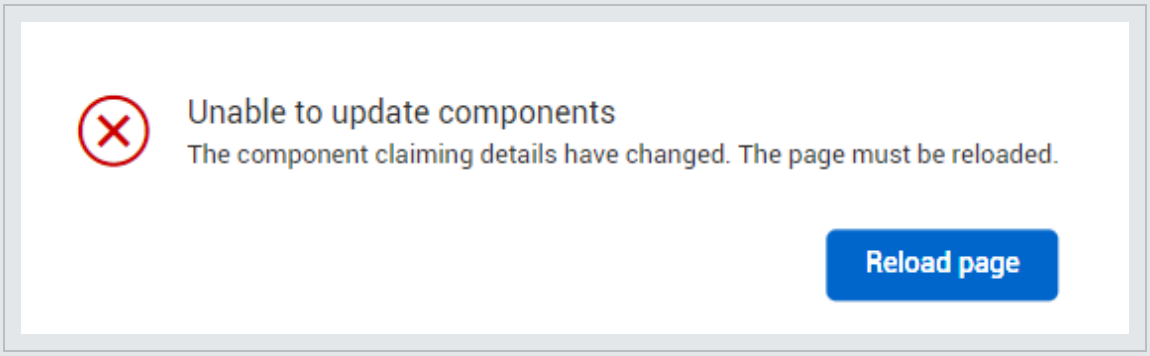
Quantities can be claimed in Control, Plan or Progress. There are reasons to claim in each of the different modules, but this lesson will focus on claiming in Plan. Since labor and material are expensed in the field, quantity for activities and materials can be claimed during the daily planning process of InEight Progress. This allows foremen to select (not calculate) the work they completed during the shift while filling out the time sheet at the end of the day, and it is reviewed by field engineers or superintendents before final quantities are approved. Sometimes, claiming in this fashion isn't accurate and what was originally claimed needs to be revised. To manage claiming quantities without having to create daily plans, it is important to understand how to use the Quantity Tracking module of Plan.

5.2.2 Why claim at a component level?

Claiming directly in the Quantity Tracking module of Plan is different than claiming in the Control module. In Quantity tracking, claims are made at the component level. This is more specific than claiming in Control at the WBS level. For example, suppose a WBS cost item has a quantity of 200 tons of steel. If 20 tons are erected so far, how would you know which specific pieces make up that 20 tons? How could you audit this claiming?

Direct labor and material codes should be claimed at the component level in the interest of transparency. Completed component quantities roll up into the WBS completed quantity. To enable quantities to be claimed in Plan, the cost item must have the Hide in Plan/Progress box unchecked within InEight Control and at least one component for that cost item must exist in Plan.

NOTE If two users concurrently are trying to claim quantities for the same component, the following error message will prompt them to refresh the page.

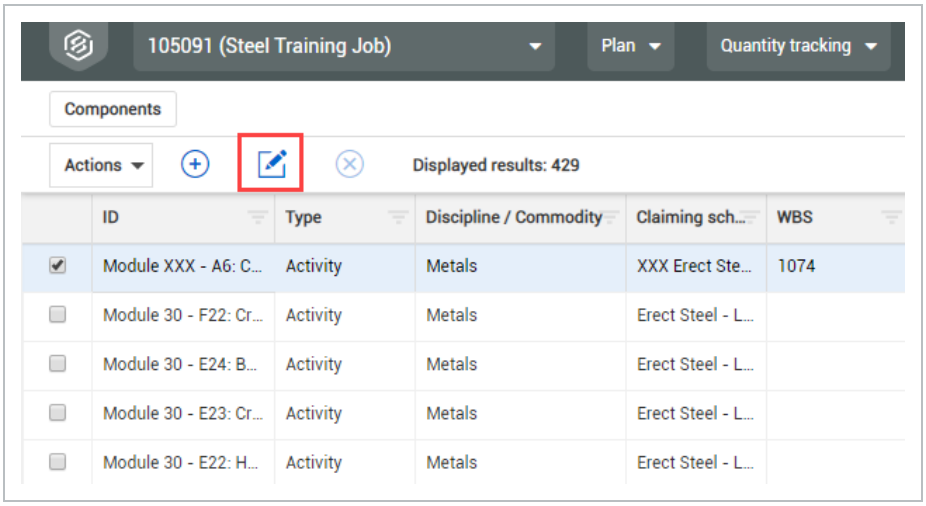


5.2.3 Claiming in the Standard Grid View

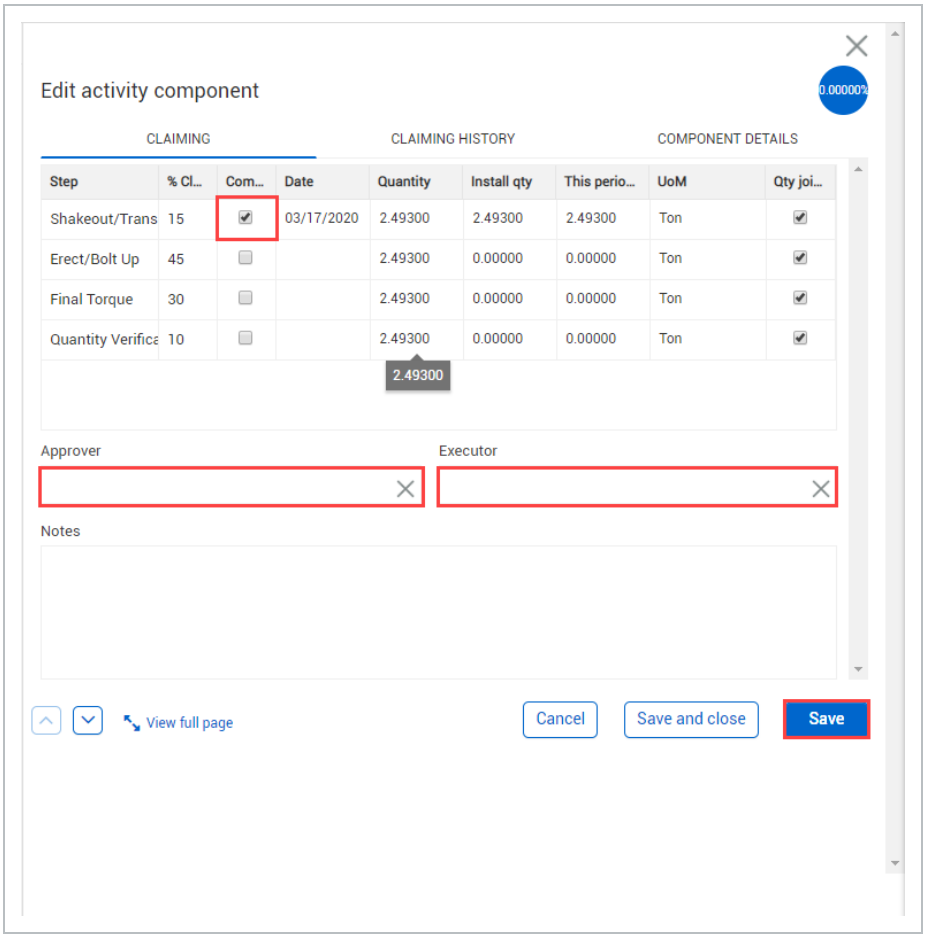
In the following Step by Step you will claim quantities in the Standard Grid view via the Edit component slide out panel.

Quantity Claiming (Standard Grid View)

1. Navigate to the **Quantity Tracking page** and select the **View As button** to see your workspace in Standard Grid view.
2. Find and select the **check box** to the left of the component you previously created.
3. Click on the **Edit** icon to open the component editor slide out panel.



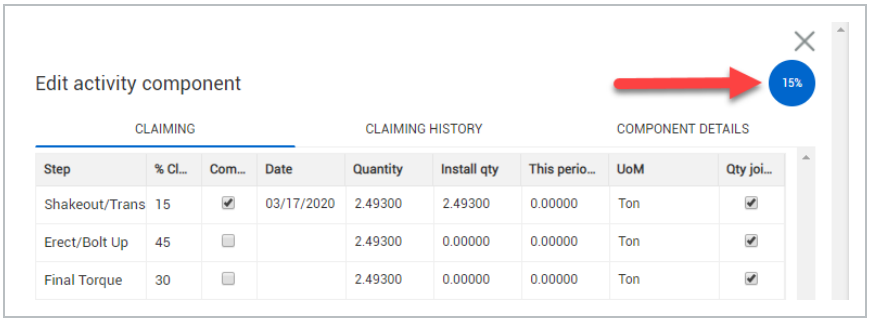
4. On the Claiming tab, check the box in the **Complete** column for step one.
5. Enter an Executor and Approver.



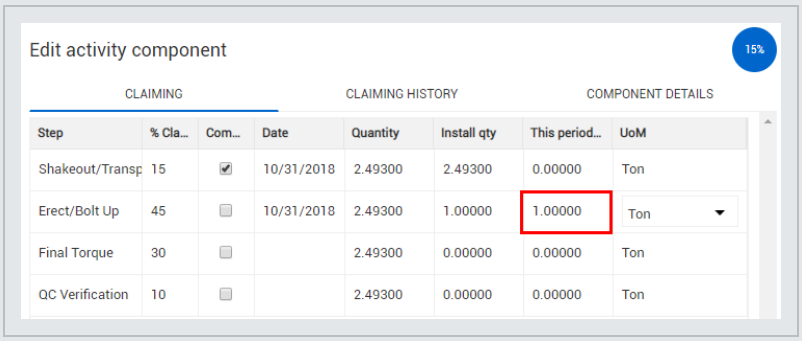
6. At the bottom of the slide out panel, click **Save**.

NOTE Select **Save** to have claimed quantities be added/deducted from your percent complete or to show up in your claiming history report.

- Notice that the percentage indicator in your component view has changed



TIP You can also claim a portion of the quantity for a single step by inputting the quantity in the **This Period** cell.



NOTE To claim in the Plan Quantity Tracking module, the component WBS must have **Allow-As-Built** set to **All** or **Quantities** in InEight Control. See your Control Manager to verify this setting if unable to claim the component.

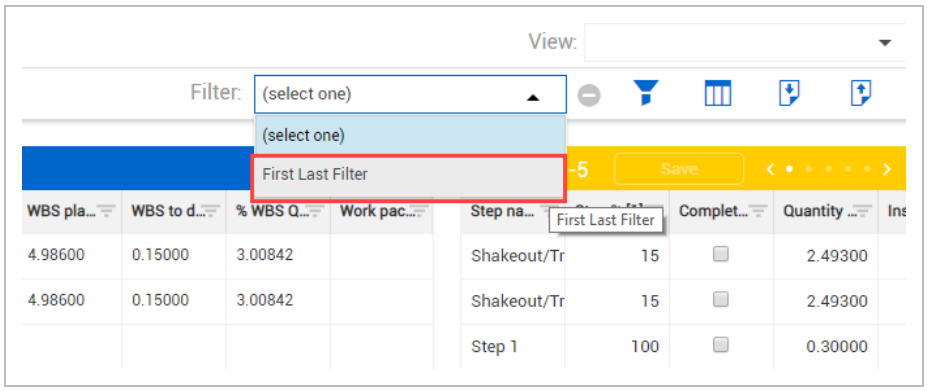
The same scenario follows for claiming in data blocks.

5.2.4 Claiming in the Data Blocks View

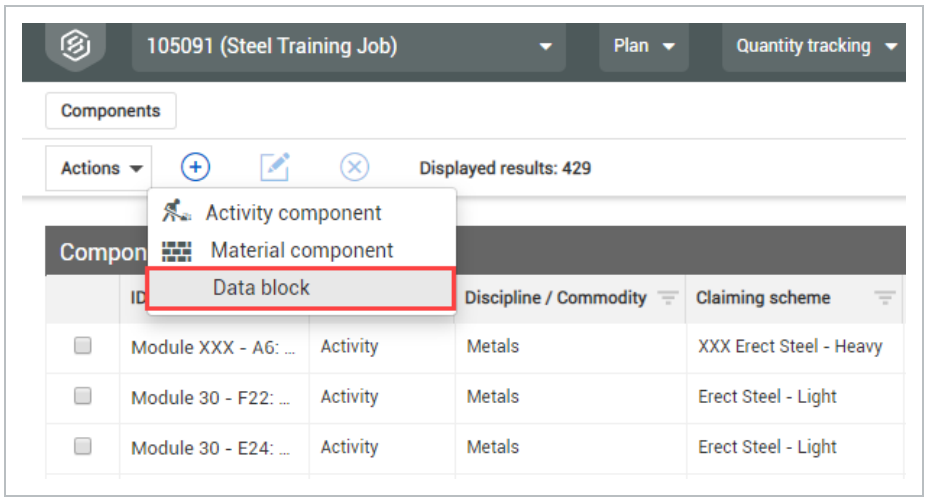
In the following Step by Step you will claim quantities in the Data Blocks view.

Quantity Claiming (Data Blocks View)

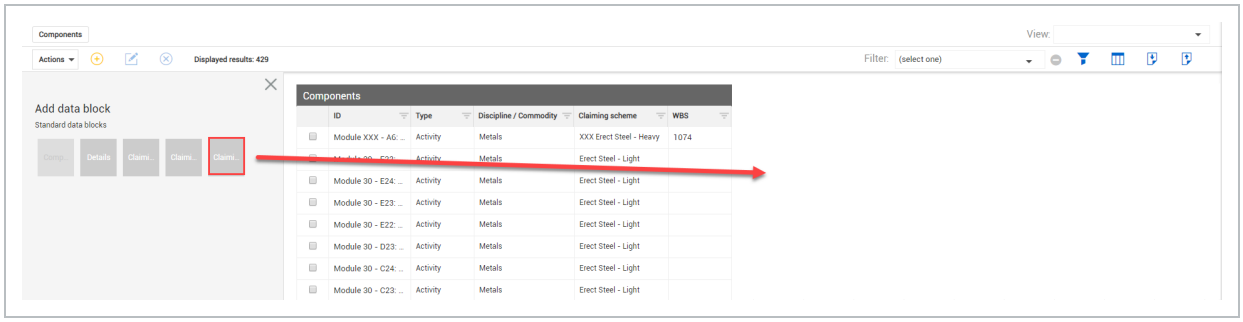
1. Navigate to the **Quantity Tracking page** and select **View As button** to see your workspace in Data Blocks view.
2. Turn on the **[your name] filter** that you created in Quantity Tracking *Lesson 2 – General Navigation* using the filter drop-down menu on the right toolbar.



3. Click the **Add** icon on the left toolbar and select **Data Block** from the drop-down menu.

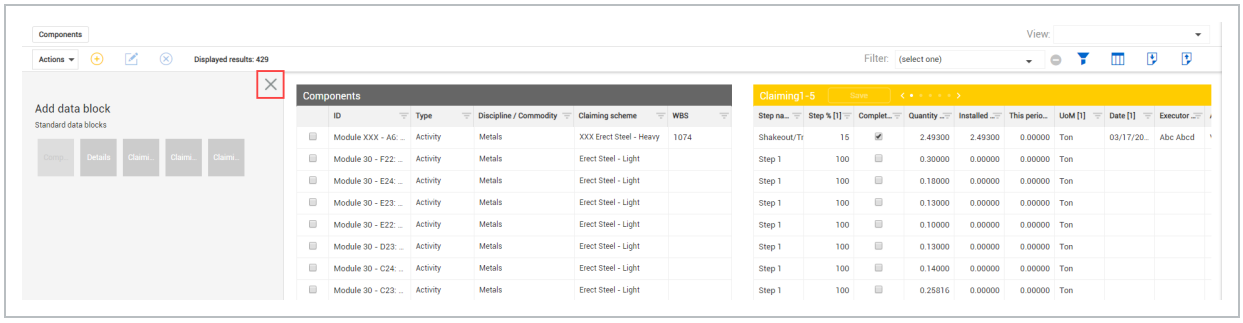


4. Select a **Data Block** icon and drag it to the white space to the right of your page.

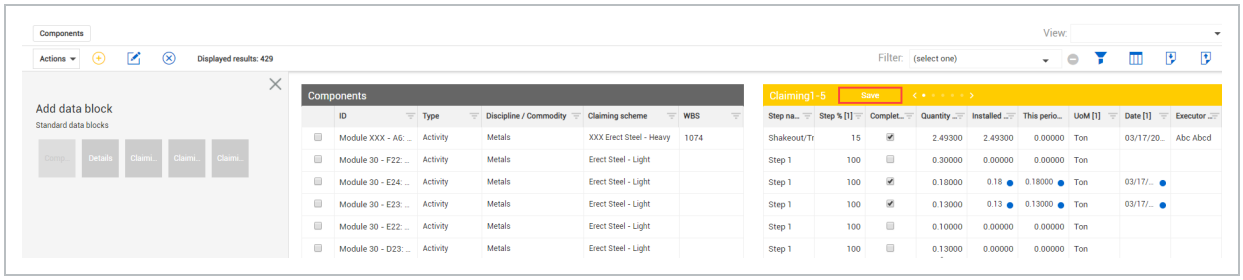


NOTE You can rearrange the order of the data blocks once they are added.

5. Close the Add data block menu by clicking on the **X** in the upper right corner.



6. Select the **check box** in the Complete [1] column for three of the components in your module.
7. Click the **Save** button in the data block header.



You have now claimed multiple items as complete by using the Data Block view. You can use the Standard Grid view and bring in columns for each claiming step to claim in that view also. Some setup is required for this option.

5.3 EDIT CLAIMED QUANTITIES

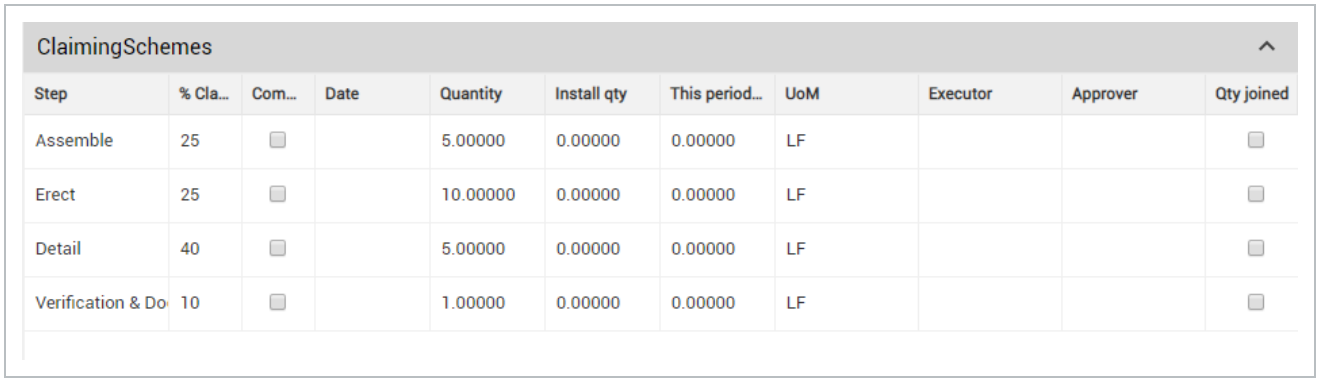
This topic covers how to edit the claimed quantity of a component in the InEight Plan application.

It is possible that you may need to update the quantity that has been claimed for a component. You might find the need to:

- Claim more quantity for a step in a specific component
- Back out quantity that was reported incorrectly

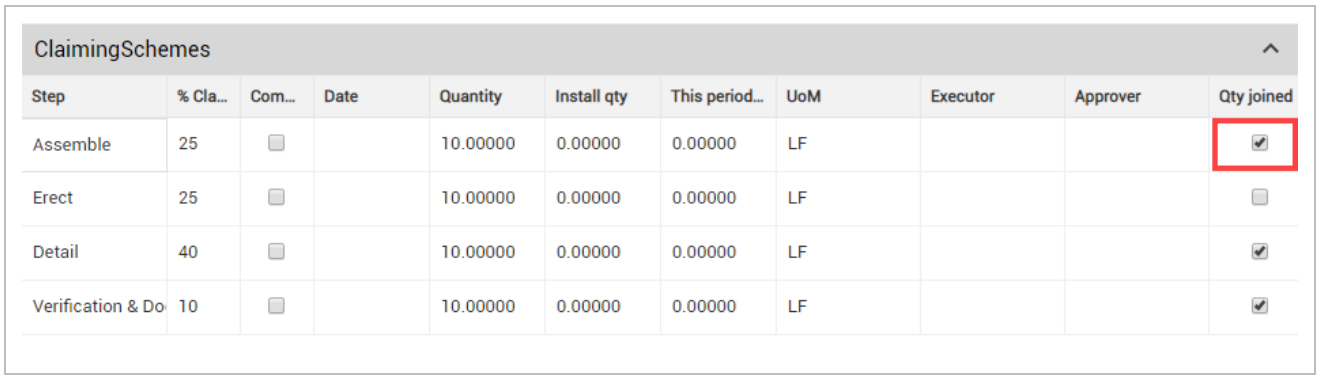
5.3.1 Quantity Joined

In Quantity Tracking, when the quantity joined box is unchecked for a step in the claiming scheme, the step quantity and the component quantity are no longer connected. Any updates made to the component quantity will not be reflected for that step. You can re-join step quantities with the component quantity.



Step	% Cla...	Com...	Date	Quantity	Install qty	This period...	UoM	Executor	Approver	Qty joined
Assemble	25	☐		5.00000	0.00000	0.00000	LF			☐
Erect	25	☐		10.00000	0.00000	0.00000	LF			☐
Detail	40	☐		5.00000	0.00000	0.00000	LF			☐
Verification & Do	10	☐		1.00000	0.00000	0.00000	LF			☐

You can re-join step quantities with the component quantity. By checking the re-join box, the step quantity is linked again to the component quantity, so when the component quantity is changed, the step quantity will automatically change along with it.



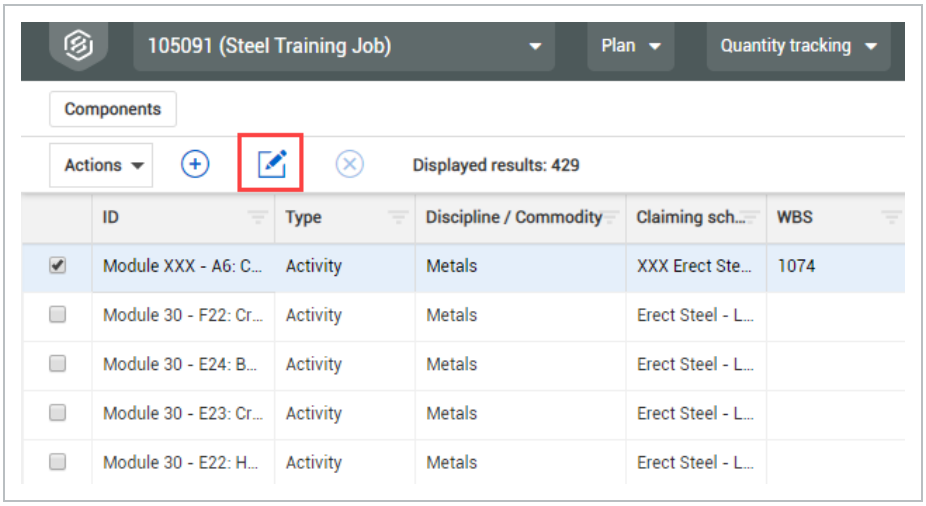
Step	% Cla...	Com...	Date	Quantity	Install qty	This period...	UoM	Executor	Approver	Qty joined
Assemble	25	☐		10.00000	0.00000	0.00000	LF			☑
Erect	25	☐		10.00000	0.00000	0.00000	LF			☐
Detail	40	☐		10.00000	0.00000	0.00000	LF			☑
Verification & Do	10	☐		10.00000	0.00000	0.00000	LF			☑

5.3.2 Quantity Editing

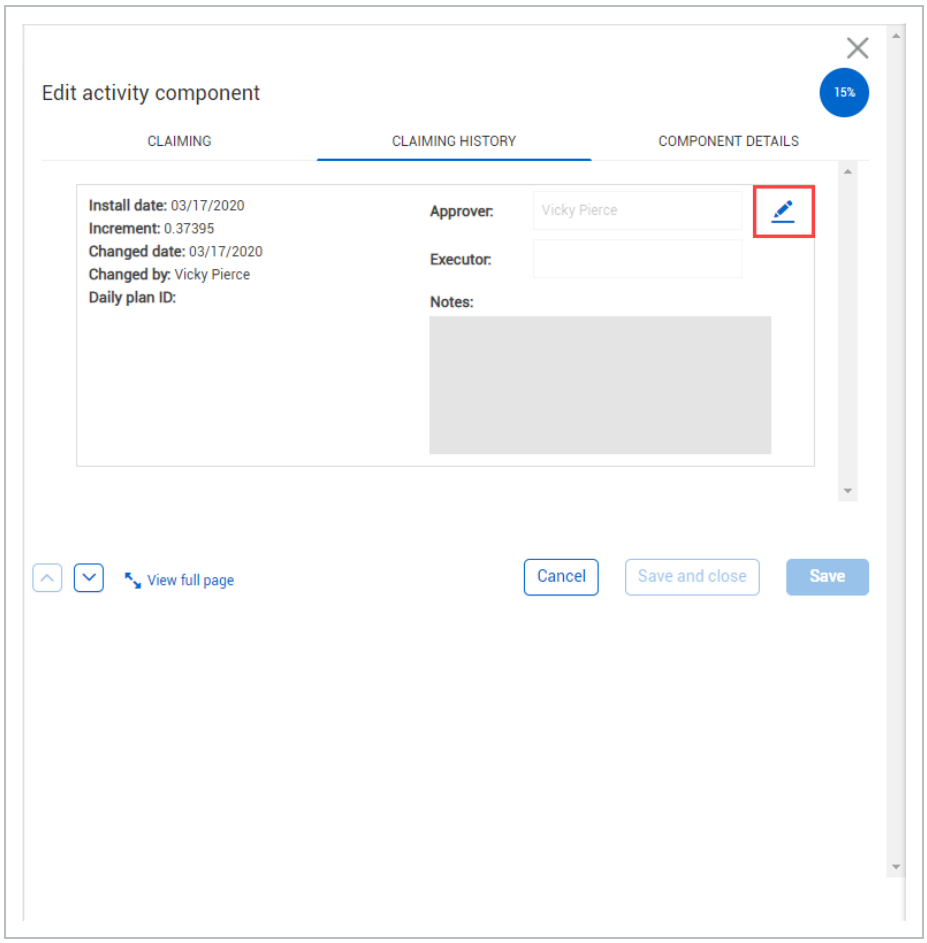
Using InEight Plan, you can easily add or subtract quantity from components. The following Step by Step will detail this process.

Edit Claimed Quantity

1. Navigate to the **Quantity Tracking page** and make sure you are in the Standard Grid view.
2. Find and select the **check box** to the left of one of the components you created.
3. Click the **Edit icon** to open the Edit component slide out panel.



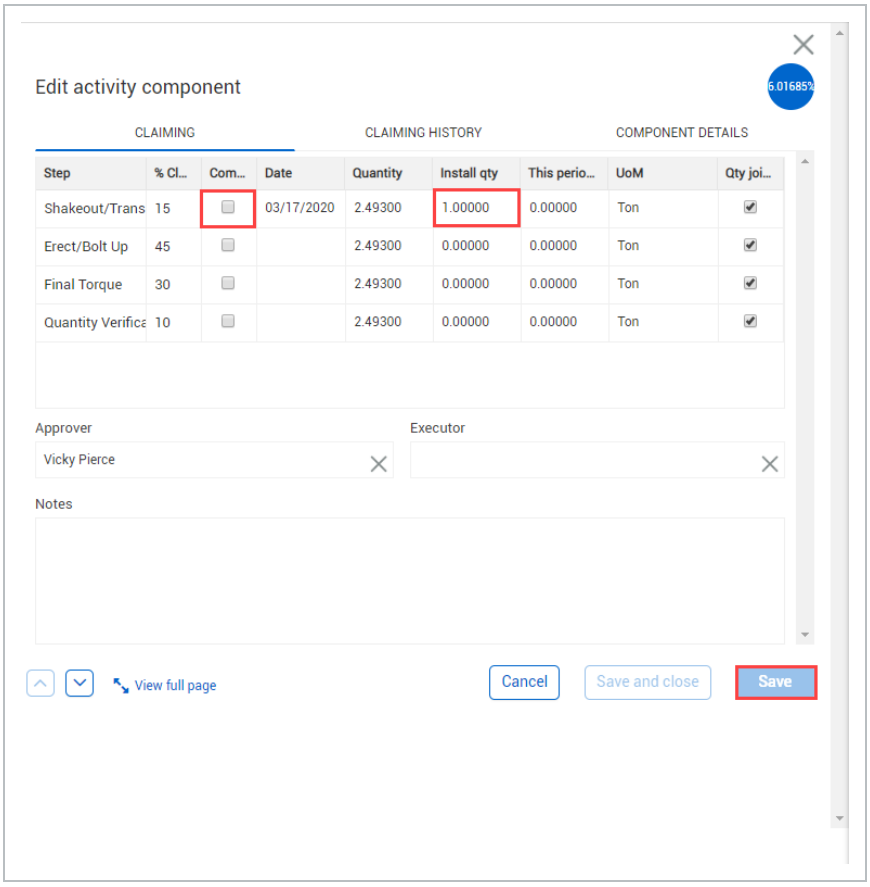
4. On the Edit activity component slide out panel, click on the **Claiming History tab**.
5. Click on the **Edit icon** for your latest entry.



- You can only change the Approver and Executor, and add notes
- You cannot change the quantity and date information on the left
- This preserves an audit trail to document accurately the claiming of this component

6. Click on the **Claiming tab**.
7. Uncheck the **Complete** box for one of your steps.
8. Enter a number in the Installed quantity field of that step.

- Note that the This Period quantity automatically recalculates



9. Click **Save**.
10. Click on the **Claiming History tab**.
    - You can now see your new entry with its negative quantity adjustment along with the original entry made

Exercise 5.1 — Quantity Claiming

Now that you have learned how to claim and edit quantities in InEight Plan, practice claiming quantities on your own.

1. Using the components you created in Exercise 4.1, claim quantities for each of them.
    - Claim at least one of the components from the Edit component slide out panel (accessed from the Standard Grid view of the Quantity tracking page)
    - Claim at least one of the components from the Data Blocks view

---

2. After completing step 1, change the installed quantities back to 0.

Congratulations, you have completed this exercise!

Lesson 5 Review

1. Why is it recommended to claim quantities at a component level, instead of at a higher WBS code level?
    a. Improved scheduling information
    b. Because Accounting needs the information
    c. Improved accuracy for inspections
    d. Improved tracking visibility because it is more specific

---

2. What individual(s) can you assign to a component when you are claiming quantities? (Select all that apply)
    a. Project Manager
    b. Field engineer
    c. Executor
    d. Approver
    e. Superintendent

---

3. When you claim actuals on components, the quantity complete rolls _____ to the WBS quantity complete, but allows you to drill _____ and see what specific items make up that quantity.
    a. up, down
    b. down, up
    c. left, right
    d. right, left

---

4. When editing claimed quantities on the Edit activity component slide out panel, which of the following columns can you edit? (Select all that apply)
    a. % Claim
    b. Complete
    c. Install qty

---

d. Step

e. This period qty

---

5. You can only add quantities, not deduct any.

   a. True

   b. False

Lesson 5 Summary

Upon completion of this lesson, you can:

- Claim quantities in Plan
- Edit claimed quantities