

PLAN USER GUIDE
Quantity Tracking

FIELD EXECUTION MANAGEMENT

INEIGHT 

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LESSON 1 – QUANTITY TRACKING OVERVIEW

Lesson Duration: 45 minutes

Lesson Objectives

After completing this lesson, you will be able to:

- Summarize the purpose of InEight software
- Describe the two modules of Plan
- Explain the high-level work flow of Plan > Quantity tracking

Lesson Topics

1.1 InEight Cloud Platform Overview	11
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1.1 INEIGHT CLOUD PLATFORM OVERVIEW

1.1.1 Project Management and Lifecycle

Most projects that you are working on will follow a typical lifecycle. It is broken down into different roles and the people involved. We will break those roles and people down into four locations:

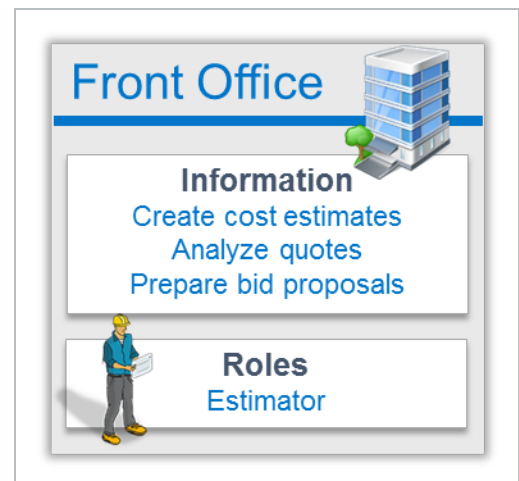
- Front office
- Field office
- Jobsite
- Back office

1.1.1.1 Front Office

What are the essential functions of the front office? What roles are involved?

The front office focuses on getting work and typically houses estimators who, during the *bidding phase* of the project, start out by estimating its value. This is done by calculating cost estimates, analyzing quotes, and capturing all the data necessary to submit a bid to the client.

Once complete, they prepare the bid proposal, submit it to the client, and find out if they are the preferred contractor to do the work. If they have the winning bid, they can start the *planning phase* and preparing to build the project.



1.1.1.2 Field Office

What work roles are typically found in the field office? What are their primary tasks?

Budgeting and Forecasting

During the *execution phase* of a project, the field office manages the budget and forecasting for the project. The

Field office relays this information to the other field personnel, so they understand what the budgets for the work are, how they should build the job, who the suppliers of materials are, and if there are any subcontractors, etc.

Contract Procurement

Project engineers and managers procure contracts for materials and with subcontractors.

Work Planning and Quantity Tracking

The field office is where the field engineers and superintendents responsible for the work prepare work plans for the foremen and their crews, breaking down the work into manageable pieces. They then create quantity-tracking plans, formulate inspections and create daily plans to send to the foremen on the jobsite.

Change Management

As issues arise, project engineers record and submit issues, get them approved through the client, and execute change orders.

Inspections Management

Inspections, as well as actual time and quantities from the jobsite, come back to the field office where they are review and approval before going to the back office.

1.1.1.3 Jobsite

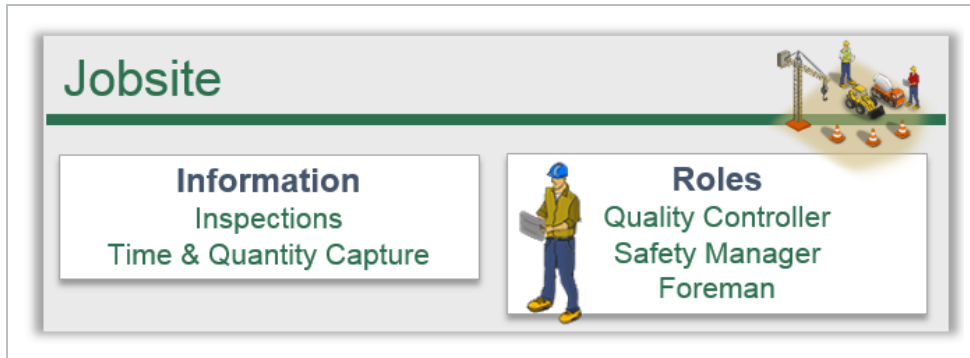
What types of employees work at the jobsite? What type of information do they capture as they build the work? Where does that information need to go and why?

The jobsite is where you find the quality controller, safety manager and foreman. It is where the work is completed. The safety managers, superintendents and foremen are involved in safety inspections,



while the quality controller and field engineers perform inspections before and after the work is complete. The foreman also captures the time of each of the craft workers and the quantity completed each day, based on the plan provided from the superintendent and field engineer.

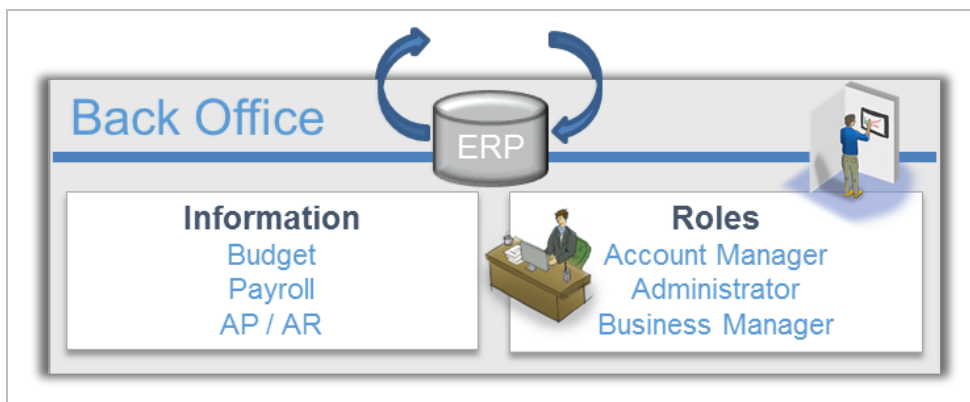
All this information is relayed back to the field office where it can be verified and approved.



1.1.1.4 Back Office

What functions take place in the back office, related to the project? Why is the back office a critical element of managing the project?

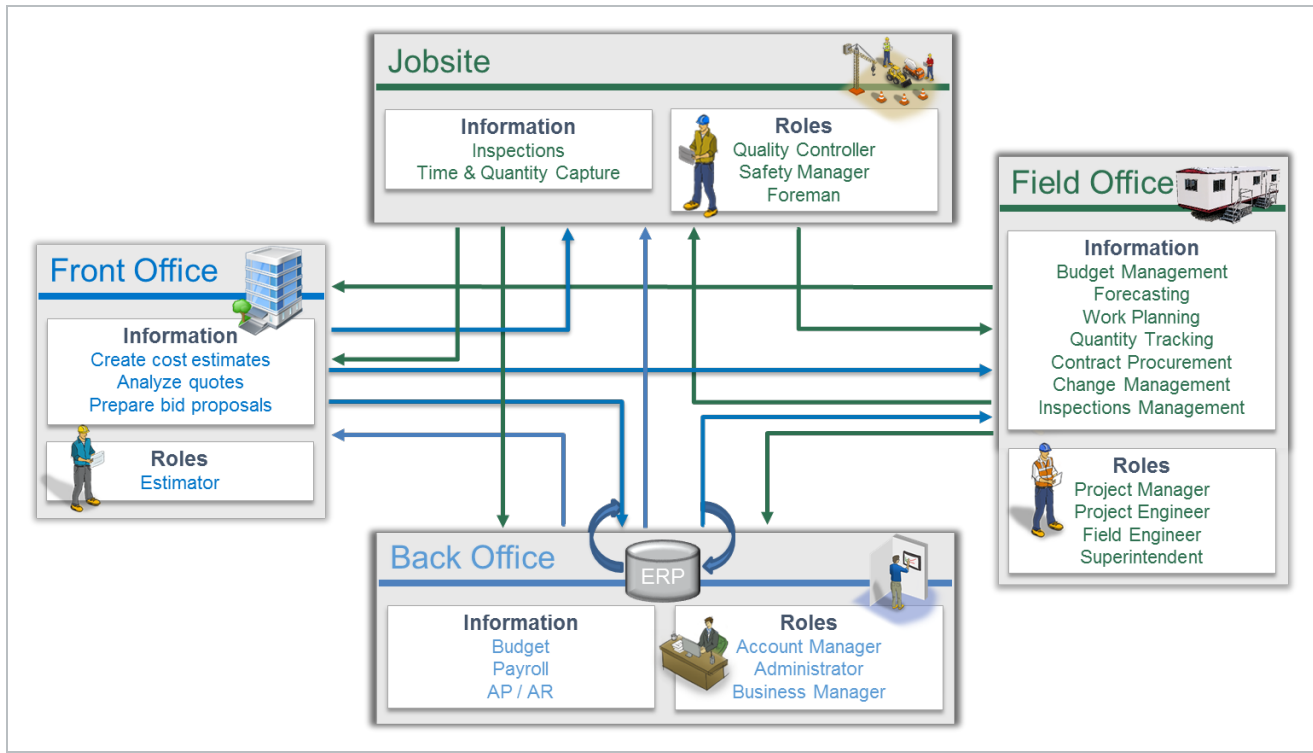
The back office is where the account managers and administration staff keep track of budgets, make sure the payroll is correct and completed in a timely manner, keep track of all the accounts payable and receivable, and take care of revenue. After a contract is created, the business manager verifies purchase orders are generated. All the “actual” data, whether it be time or dollars then is communicated back to all the other areas of the job.



1.1.1.5 Problems with Existing Systems

Often issues arise when it comes to communication between all the different areas of a project. Information must flow quickly and accurately between the different areas, but often it is lost,

miscommunicated, or slowly received. In some cases, information must be re-entered in a new system and is duplicated. This can cause all sorts of issues when it comes to managing a project.



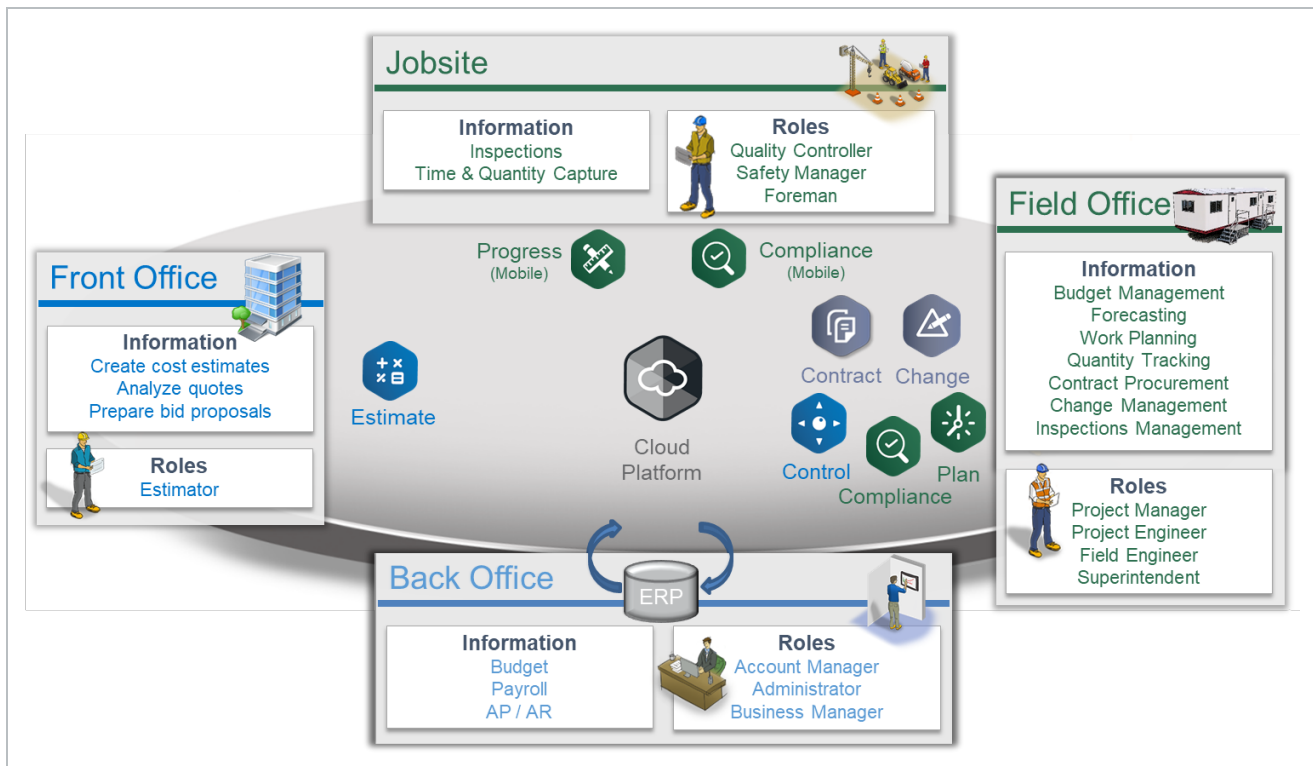
Employing too many systems to transmit information on a project can result in duplication, which is not efficient. Here are a few examples of such inefficiencies:

- Inspections that are completed on paper must be manually input or scanned into a computer system.
- Hand-written time cards that are misplaced or get wet must be reproduced and then entered into a computer system so that the crew can be paid.
- Quantities established in the daily plan do not coincide with the quantity claiming system.

What issues can you think of that you have experienced on your projects?

1.1.2 What is InEight Cloud Platform?

The InEight cloud platform was designed and is continually updated to address these issues. The cloud platform of software applications designed to help companies visualize, estimate, manage, control, and connect all aspects of capital and maintenance projects. The cloud platform is built so all the different applications can communicate with each other. It is also designed to communicate with multiple different **ERP systems** such as SAP or Oracle to share key information with the back office.



1.1.3 How Does InEight cloud platform Integrate in to a Project?

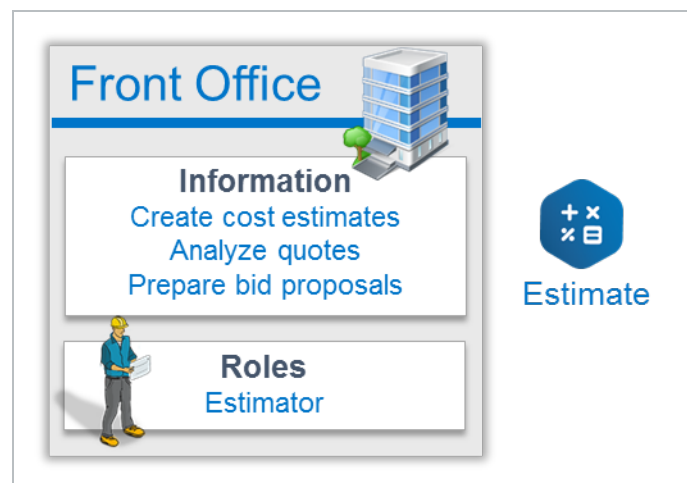
Scenario: Step 1

Skyline Construction Company decides to bid on a project to build a concrete foundation.

Upon submittal, the client informs them that they are the preferred contractor for the work. They now need to take the project from the estimate to the project execution phase.

Using the **InEight Estimate** application, the estimating team in the front office builds the cost estimate and submits the bid proposal, including awarded quotes and all bid documents.

Once awarded the contract, the project team then transfers all the information from the estimate to **InEight Control** where the project can be managed. This includes the cost item estimates, awarded quotes, bid and proposal documents, and the estimate



budget structure. During this transition, the project management team can modify the estimate easily to conform to how the project will be built and tracked.

Scenario: Step 2

The field engineers and superintendents in the field office are ready to begin planning the work. They break the work plans down into work packages that contain the specific quantities, materials, labor, equipment, and budgets associated with each portion of work.

The project manager and engineers procure contracts for material and subcontracted work.

Then, inspections are created for quality of the work to ensure it meets the specifications as well as safety.

The field engineers in the field office can now go into **InEight Plan** to break down the work into work areas, work plans within those areas, and then work packages where the work is broken down into components. There, all the components are assigned a WBS code from **InEight Control** as well as other important information and claiming schemes.

Project Engineers use **InEight Contract** to create bid packages and submit them to vendors and subs and solicit contracts.

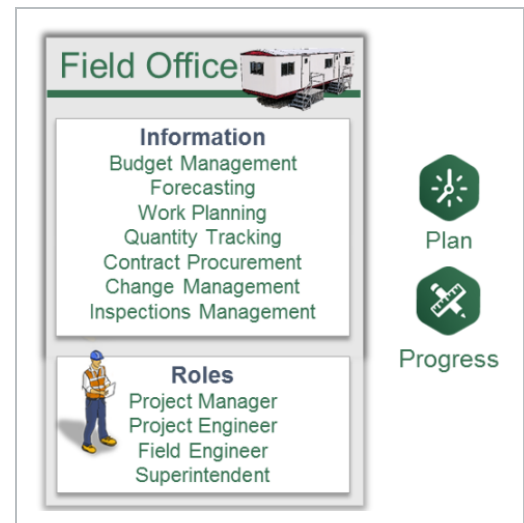
Engineers also utilize **InEight Compliance** to create the forms necessary for both the quality and safety inspections. They can then send these to **InEight Compliance Mobile** for the responsible person to complete them in the field.



Scenario: Step 3

Joe, the concrete superintendent, now has all the work planned for a concrete foundation and is ready to communicate all the details to his foreman Jill, so construction can begin tomorrow.

The superintendent can go into **InEight Plan** and create a daily plan for his crew to erect the formwork needed for the foundation. He brings in all the quantities, budgets and claiming schemes from the work package his field engineer created and breaks it down into what Jill's crew needs to complete tomorrow. He adds production goals for the day and safety notes related to the formwork installation. He communicates this to his foreman by syncing it to her, where the foreman can open the **InEight Progress** app on her iPad.



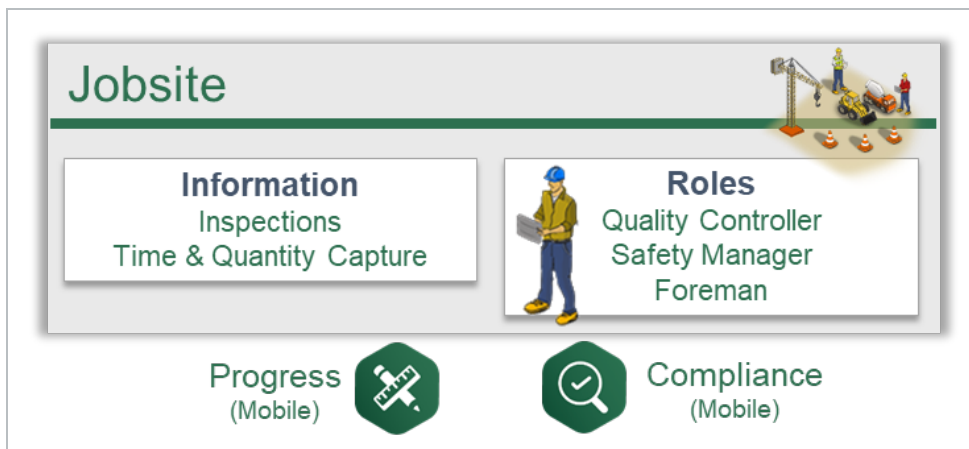
Scenario: Step 4

In the morning, Jill reviews the plan for the day and determines if any changes are necessary due to one of the crewmembers calling in sick.

John, the quality controller on the project reviews the quality inspections that he needs to perform that day and creates a plan with Jill to schedule the proper times.

The foreman reviews the plan in the **InEight Progress** app on her iPad and adjusts as necessary to the plan (e.g., sick crewmember, unforeseen issues).

The quality controller speaks with the foreman and determines when they can complete the inspection for the day. The quality controller uses the **InEight Compliance** app on his iPad to perform the inspection.

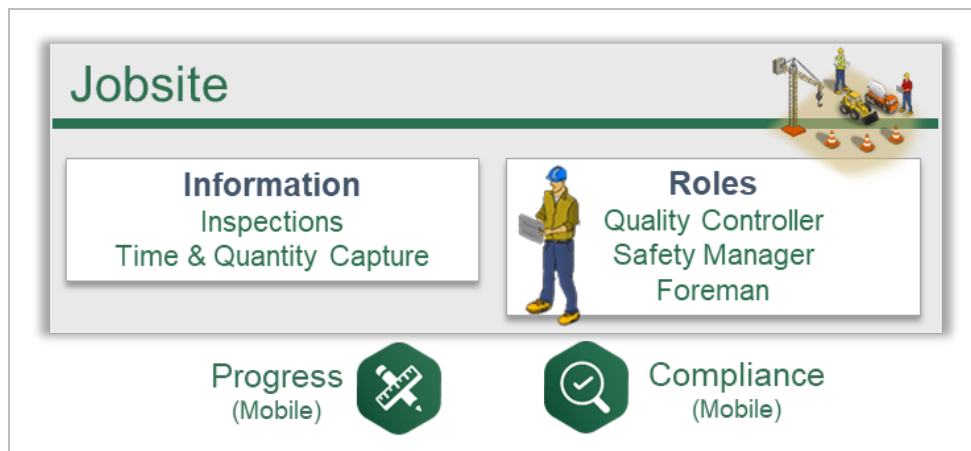


Scenario: Step 5

Throughout the day, Jill has kept track of the quantities completed on the formwork but had to adjust the plan to send her crew to build a quick access ramp for an earthworks crew. This was not in the plan and she needs to account for it before signing out the crew.

In the **InEight Progress** app, the foreman can keep a log of notes on the day's progress and any unforeseen construction needs that come up. She can quickly add extra tasks to accommodate adjustments to the plan, review each crewmembers' hours, and sign them out at the end of the shift. She enters in the quantities completed and can see her crew's productivity for the day. She will be able to communicate this to the crew in the morning.

Once complete, she approves the daily plan and synchronizes it, so it can be reviewed by the superintendent in the field office.



Scenario: Step 6

Joe and his field engineer have received the quantities, hours, and inspections completed during the day and now want to review and approve them.

Upon review, they discover there was an issue with the foundation specifications that may result in a change order. They log this issue to communicate with the client.

The superintendent can open **InEight Plan** and review the hours for each crewmember, any new tasks created, and the quantities completed for each of the tasks. He is also able to review the daily costs and see how the crew performed in both man-hours and cost. He can approve the plan and can make any necessary changes to the plan tomorrow based on the productivity information he received.

The field engineer is can also verify the inspections were completed in the **InEight Compliance** application.

One of the project engineers records the concrete foundation issue in **InEight Contract** and will track it, converting it into a change order if necessary.

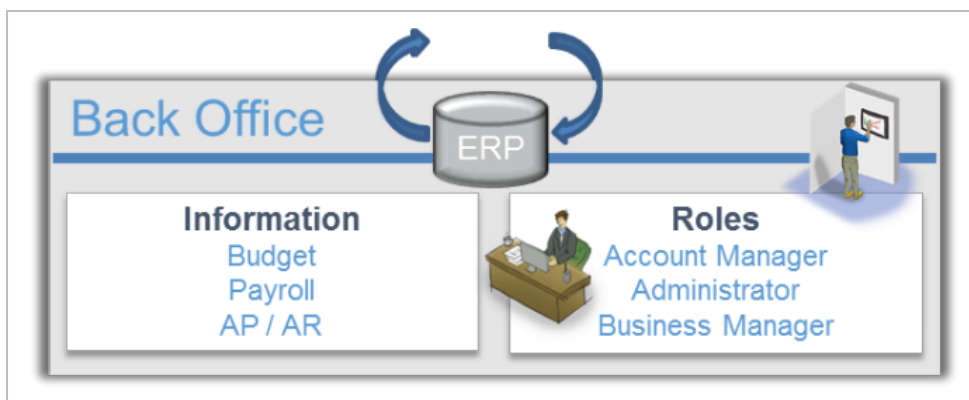


Scenario: Step 7

The account manager in the back office will now verify all the time for each crewmember and ensure they are paid correctly according to the union guidelines.

This information is then communicated to the front office, so the project manager can analyze the job costs and update forecasting.

Within the **ERP system**, the account manager and administrators review all the time that has come in, adjust where necessary, and submit the payroll to ensure everyone is paid accurately and on time. They then synchronize this information into the **ERP system**, where it can be sent to **InEight Control** so project management in the front office can review the information.



Scenario: Step 8

At the end of the month, the project management in the front office views all the actual quantity and cost information, compares it to the budget, and projects the final cost of each operation. Forecasts are then finalized for the project.

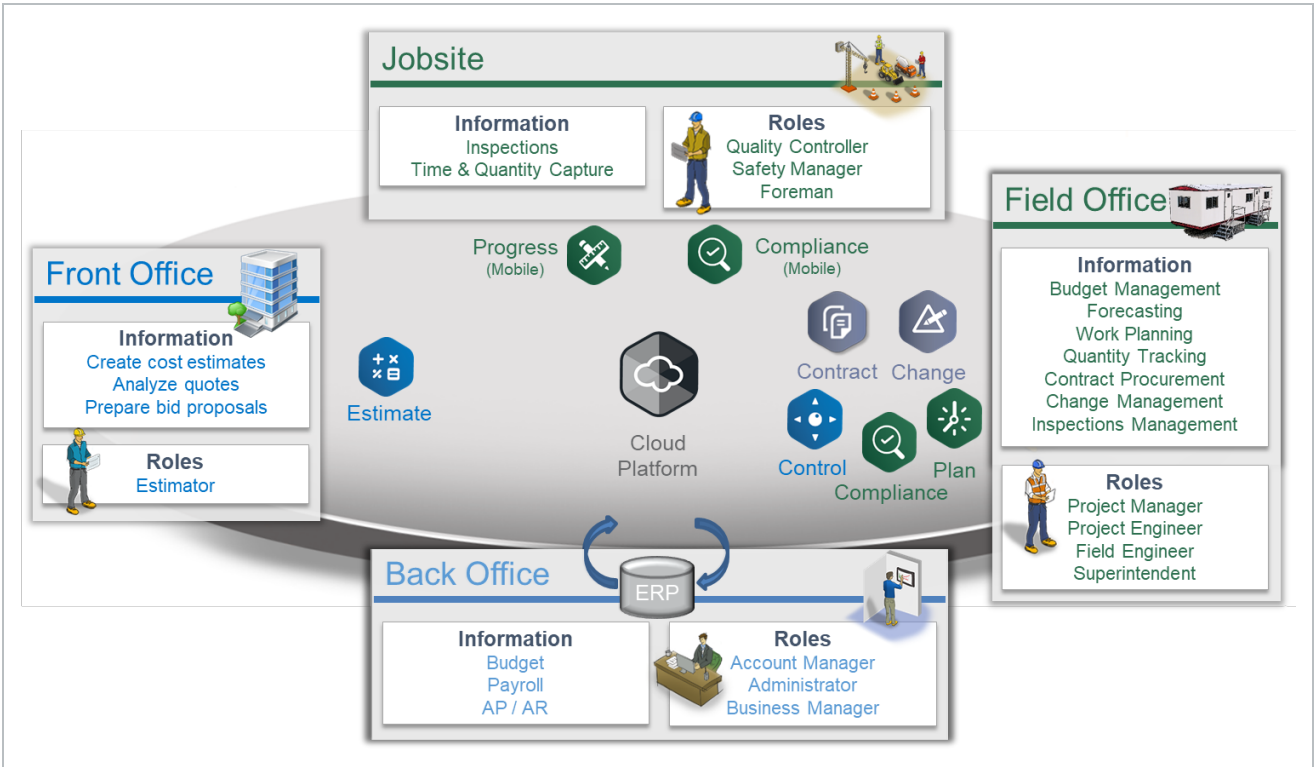
In **InEight Control**, project engineers and managers can view all the actual quantities and costs from the jobsite and analyze the information to determine if they are going to meet their budgets. If, after review, they see that a few operations are spending more time and money due to weather delays, they can decide to update the forecasts for those operations accordingly.

They also look at the total quantities for the month to determine how much of the scope can be billed to the client.



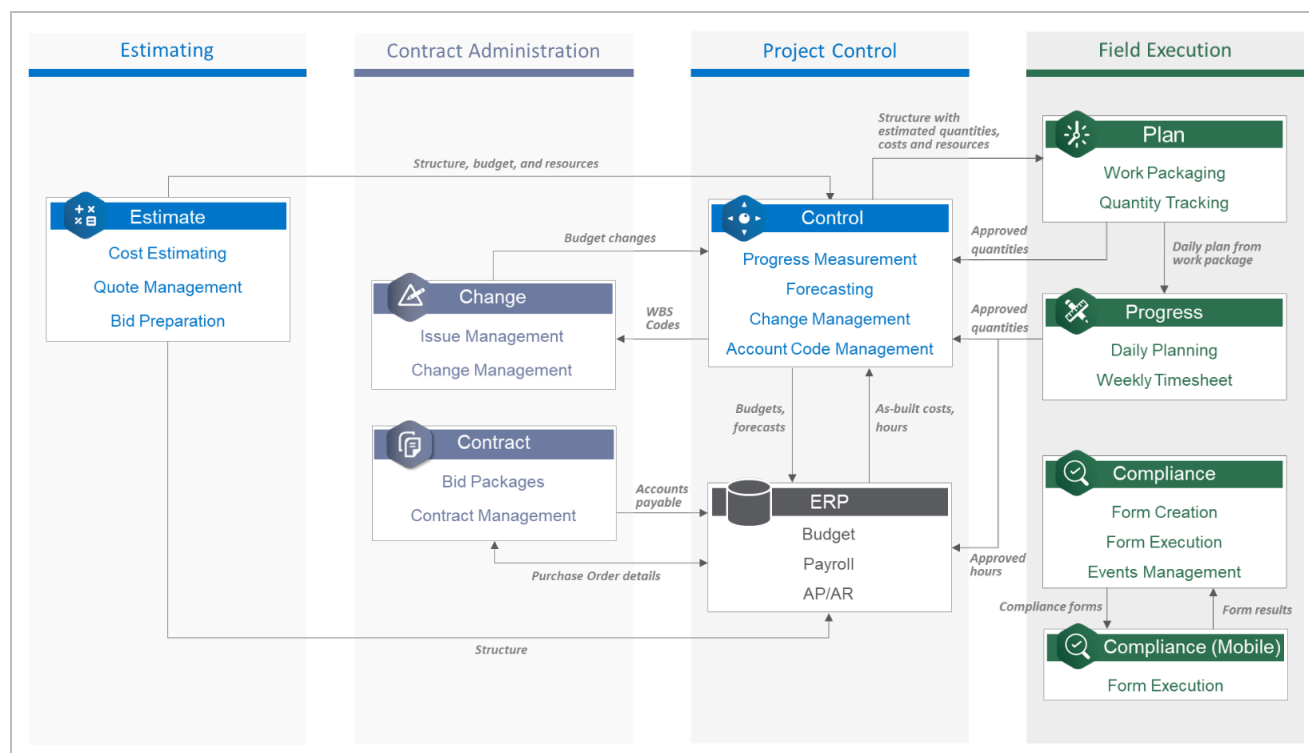
1.1.4 Summary

No matter what location you are in or what role you have, the information created for your project is communicated to all the InEight cloud platform applications and shared through the Cloud Platform. The **InEight Cloud Platform** is also able connect and communicate to your **ERP system** and other 3rd party applications to utilize the same information, eliminating the need to re-enter data. All this information can then be archived for future reference, and selected information can easily be turned over to the client.



1.1.5 InEight cloud platform Workflow

The following workflow diagram illustrates in greater detail what information travels between the InEight cloud platform applications and the **ERP system** and direction in which it flows.



1.2 PLAN QUANTITY TRACKING OVERVIEW

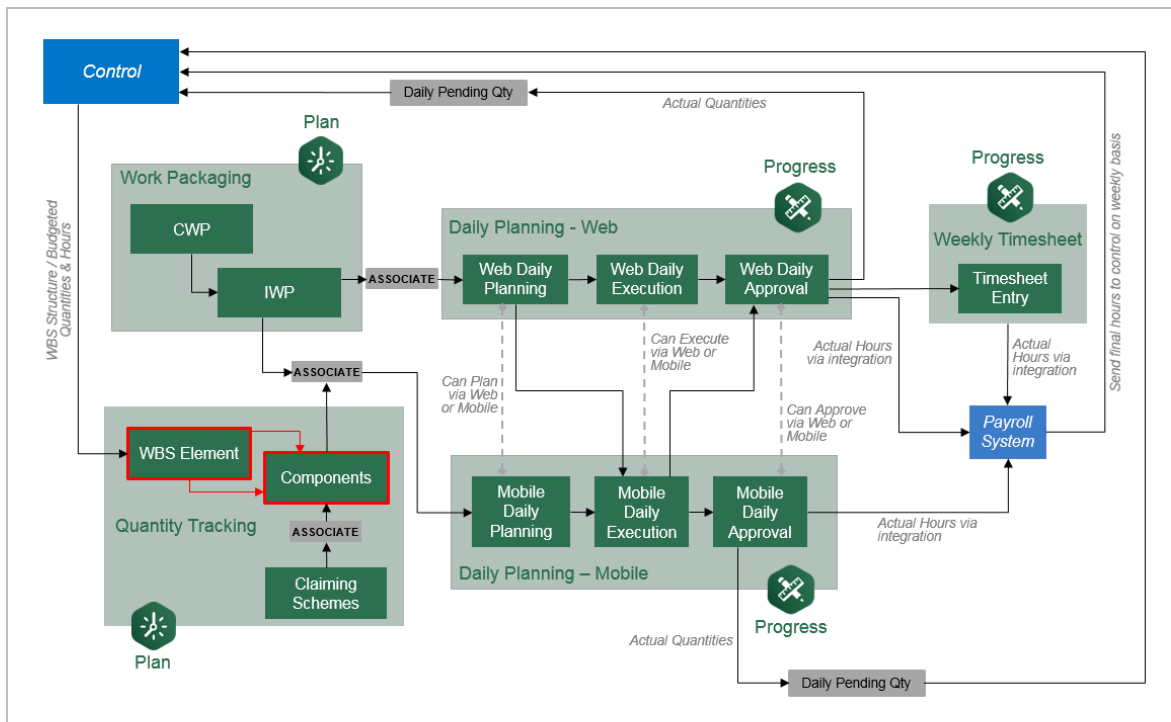
As one of the applications within the InEight portfolio of products, Plan is a tool for engineers and superintendents to plan their work and track quantities during the construction of their project.

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.

1.2.1 InEight Plan Work Flow

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



1.2.2 Quantity Tracking Terminology

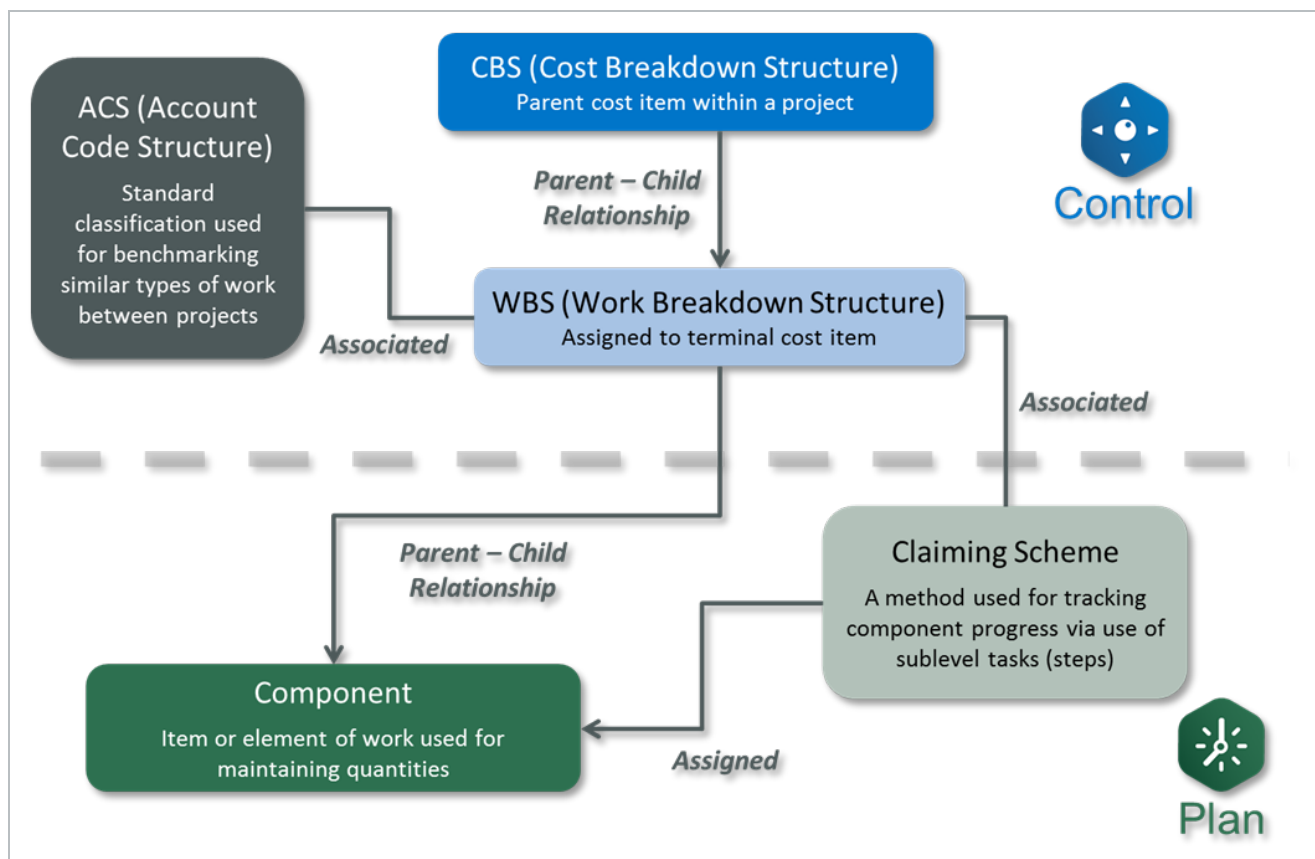
Plan Quantity Tracking uses some key terminology to describe how the work is broken down for tracking.

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

Term	Definition	Managed In..
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

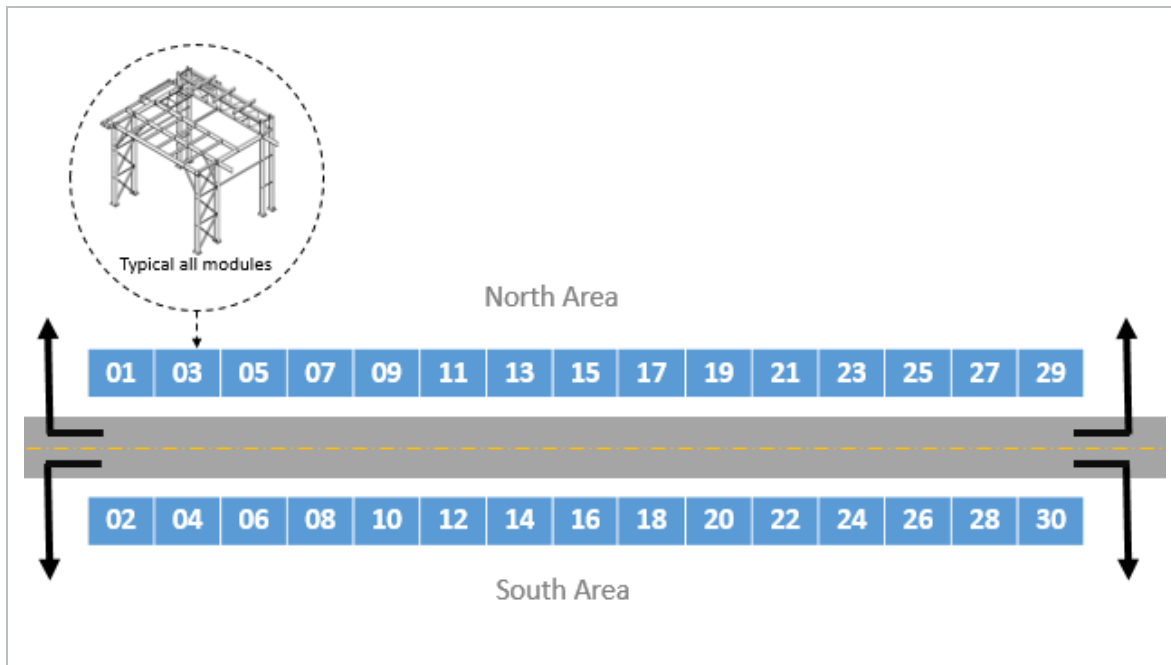
The relationship between these terms is shown in the following diagram:



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.



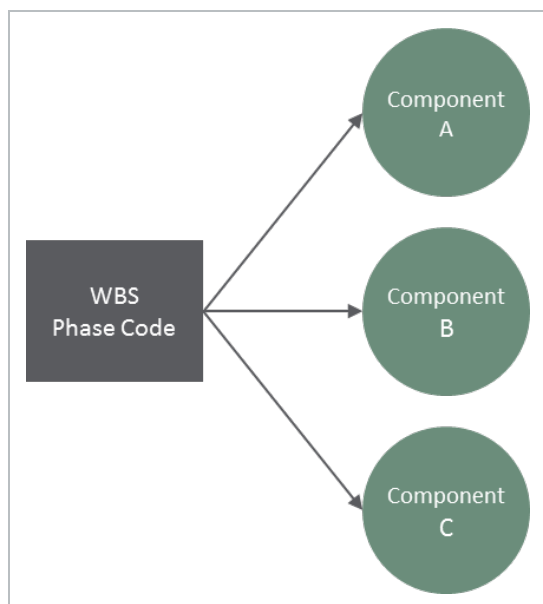
The image above depicts a layout for a steel structure project. The project consists of erecting 30 separate steel structures on opposite sides of a road. Each structure or module has been assigned a number 1-30.

1.2.3 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 code is assigned to the cost item upon creation and never changes.

Tasks			Task Det.. < >		
☐	CBS Position	Description	WBS Phase Code	Forecast TO Qty	UOM
☐	1	Job Overhead	1002	1.00	Lump Su..
☐	2	Earthwork	1069	10,000.00	CY
☐	3	Concrete	1071	10,000.00	CY
☐	▼4	Structural Steel	1073	1,000.00	Ton
☐	4.1	Erect Steel - Heavy	1074	800.00	Ton
☐	4.2	Erect Steel - Light	1005	200.00	Ton
☐	4.3	Bolted Connections	1006	2,000.00	Ea
☐	▼5	Materials	1084	1.00	Each

In InEight Plan, the Quantity Tracking module allows you to break down quantities into more manageable groups that you can 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.

Steel Structure Job (105091)

Control

Workspaces

CBS

ACS

Actions

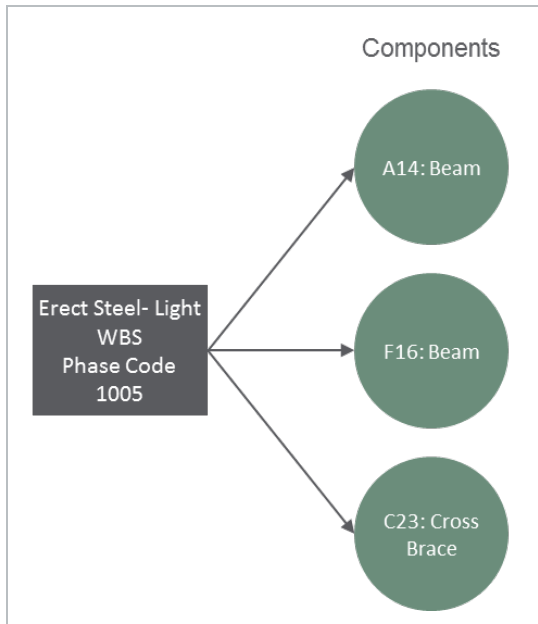
Tasks

	CBS position	Description
☐	1	Job Overhead
☐	^ 2	Earthwork
☐	2.1	Earthwork Review
☐	2.2	Earthwork
☐	3	Concrete
☐	^ 4	Structural Steel
☐	4.1	Erect Steel - Heavy
☐	4.2	Erect Steel - Light
☐	4.3	Bolted Connections
☐	4.4	Module XXX - Erect...

Task details

WBS phase code	Forecast (T/O) quantity	UoM
1002	1.00	Lump Sum
1069	10,000.00	CY
1003	1.00	Each
1004	10,000.00	CY
1071	10,000.00	CY
1073	1,000.00	Ton
1074	350.00	Ton
1005	200.00	Ton
1006	2,000.00	Ea
1087	800.00	Ton

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:

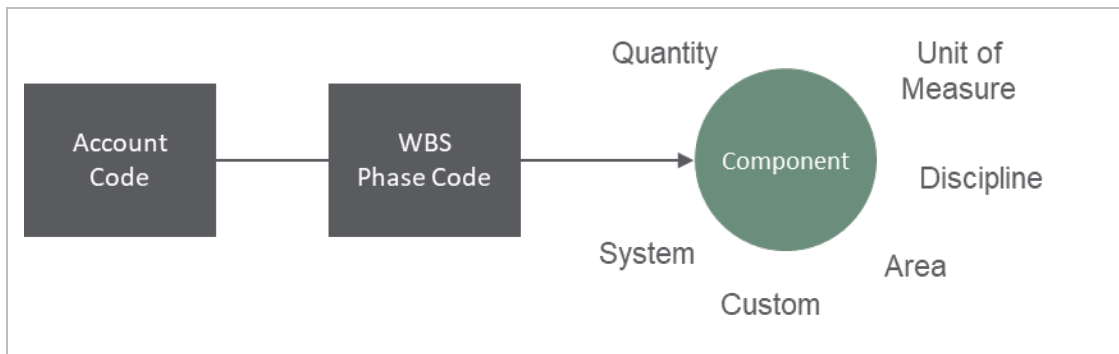
Component	Quantity
A14: Beam	0.44 Tons
F16: Beam	0.45 Tons
C23: Cross Brace	0.26 Tons

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

1.2.4 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:

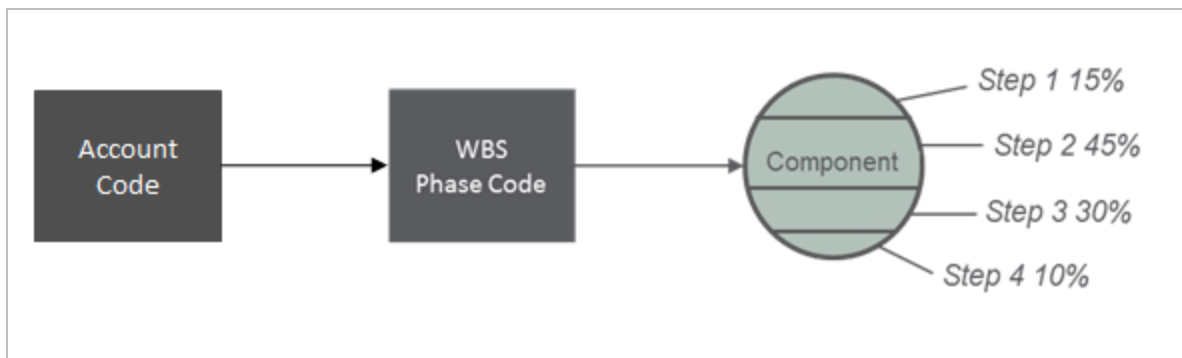
- Quantity
- Unit of Measure
- Discipline
- Area
- System
- Customizable Attributes

**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.

1.2.5 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

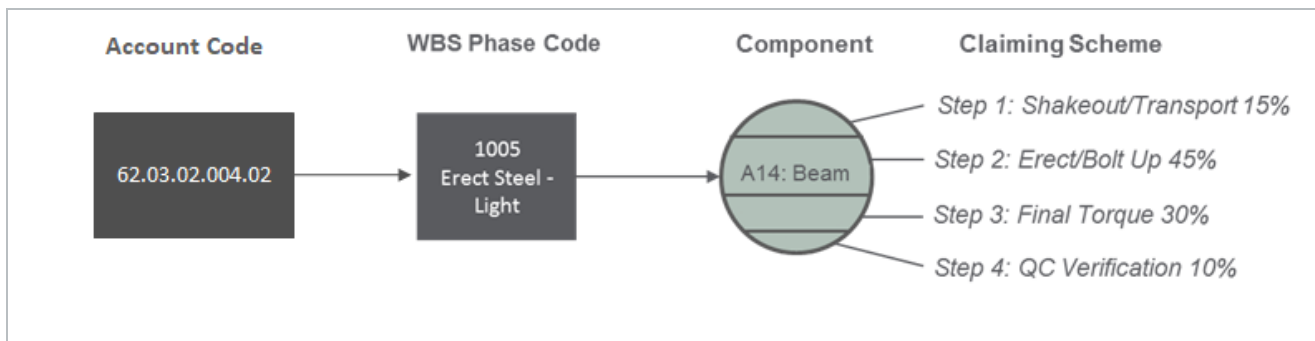
The level at which claiming schemes will be assigned (Account Code, WBS, or component) will typically be dictated during project initiation in the project settings. See Lesson 3 – Claiming Schemes for more details on assigning claiming schemes.

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

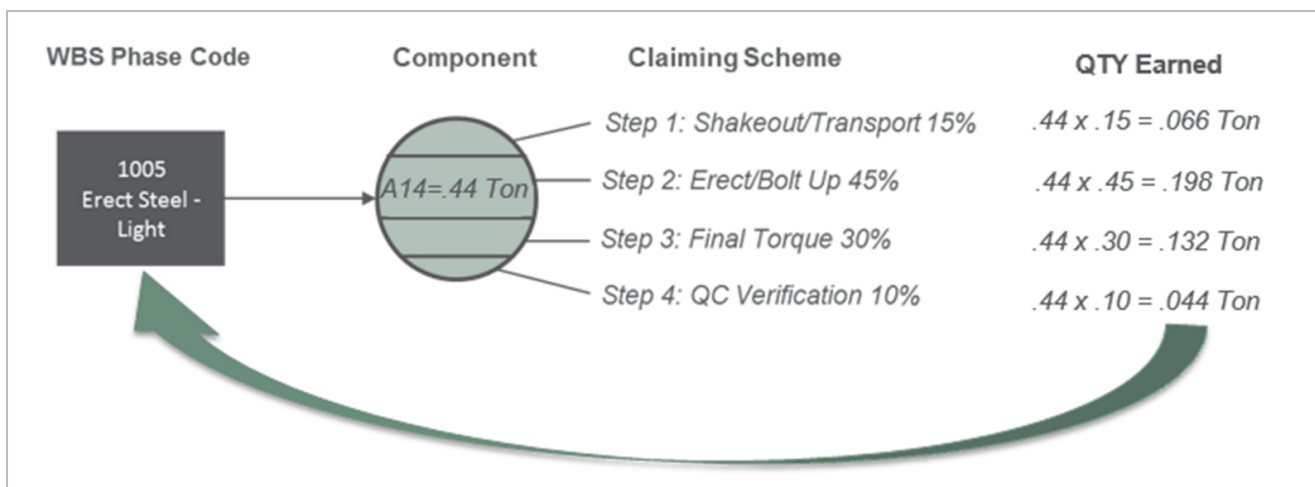
Step	Description	Percentage
Step 1	Shakeout/Transport	15%
Step 2	Erect/Bolt Up	45%
Step 3	Final Torque	30%
Step 4	QC Verification	10%

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 as a whole is 15% complete. After syncing this information to InEight Control, 15% of the quantity for A14: Beam will be added to the earned value for that WBS code.

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



1.2.6 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.

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:

- Summarize the purpose of InEight software
- 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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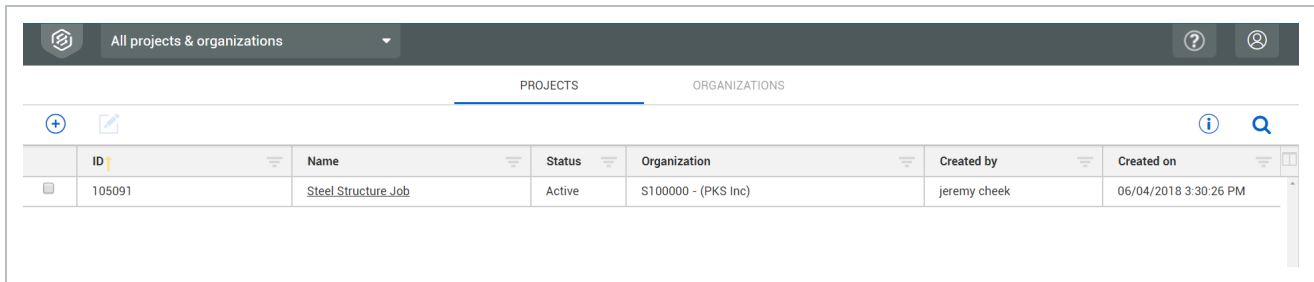
2.1 PAGE NAVIGATION

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

Scenario

You are an engineer recently assigned to a Steel Structure project. You are taking over the role from another field engineer who recently moved to another position on a different project. You are responsible for tracking all installed quantities for the project. You are informed that you will use the InEight Plan application to track and manage your quantities, however, you have never used the Plan application. You would like to take some time to familiarize yourself with the application and also check to see what components have already been created.

You access InEight Plan through your web browser. When you first log in, you will be taken to the **All projects & organizations** page within the InEight project platform. Here you can select any project you are associated with.



All projects & organizations						
PROJECTS				ORGANIZATIONS		
ID	Name	Status	Organization	Created by	Created on	
105091	Steel Structure Job	Active	S100000 - (PKS Inc)	jeremy cheek	06/04/2018 3:30:26 PM	

Selecting a project takes you to the Project home landing page for that project. From the home page, there are two different ways to access the Plan Work Packaging module. The following Step by Step shows you both ways.

2.1 Step by Step 1 — Navigate to the Quantity Tracking Page via Project Home Page

1. From the All projects & organizations page, select the project name **Steel Structure Training Job**.

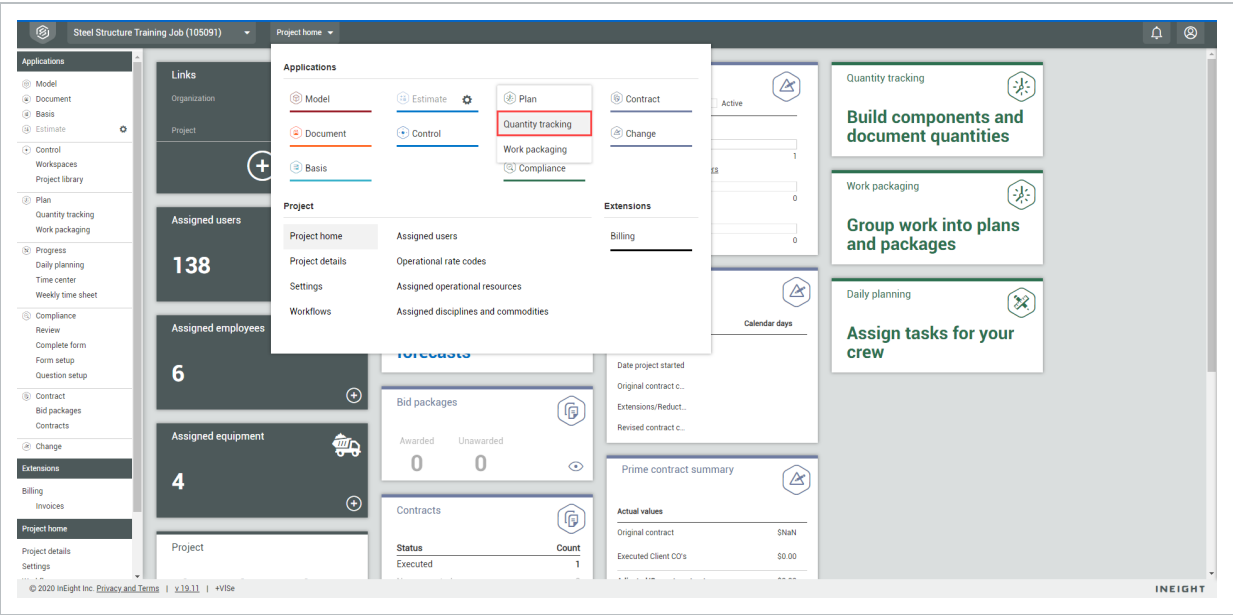
S100000 - (PKS Inc) Assigned projects					
	ID	Name	Status	Created by	Created on
☐	105091	Steel Structure Job	Active	jeremy cheek	06/04/2018 3:30:26 PM
☐	105092	Steel Structure Job (Do not use)	Active	jeremy cheek	06/05/2018 3:40:42 PM
☐	105093	Steel Structure Job 3	New	jeremy cheek	06/05/2018 3:41:27 PM
☐	105094	Steel Structure Job 4 (Use for Samples)	Active	jeremy cheek	06/20/2018 11:33:06 AM

- This opens the project's home page
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.

- This opens the Quantity tracking page

2.1 Step by Step 2 — Navigate to the Quantity Tracking Home Page via Navigation Bar

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



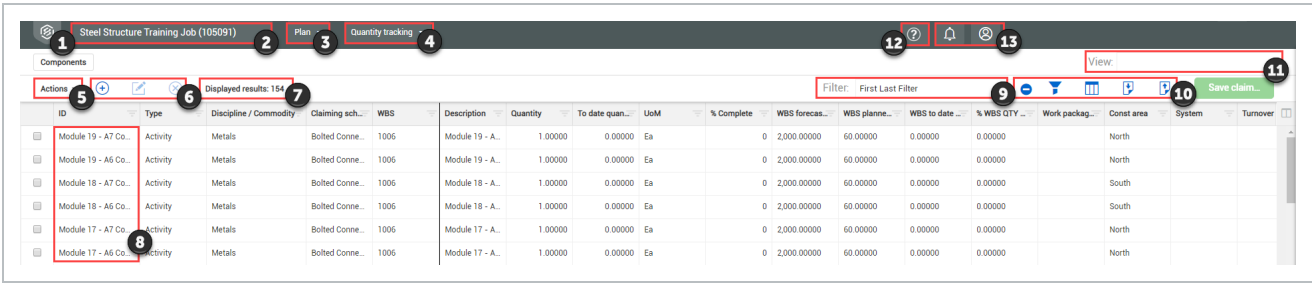
NOTE This is how you will navigate to the Work Packaging module as well. You will go over Work Planning in the InEight Plan – Work Packaging course.

Overview – Quantity Tracking Home Page

Title		Description
1	Home Button	Navigates you 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	Select what application you want to use (Control, Plan, etc.), as well as other project settings.
4	Third Level Menu	Navigate to separate individual modules inside each application (e.g., Contract > Bid packages, Plan > Quantity tracking). Options in this menu change based on what application you are currently using.
5	Actions Menu	Select available actions for the current register tab you are viewing.
6	Left Toolbar	Contains 3 main buttons used most commonly throughout the InEight software applications. In this case, add is used to add cost items, Edit to edit cost items,

Overview – Quantity Tracking Home Page (continued)

Title		Description
and delete to remove a cost item from the project.		
7	Component Count	Displays the number of components registered or filtered.
8	Components Register	Contains list of all components for the project.
9	Filter	Allows you to apply a pre-defined filter.
10	Right Toolbar	Contains functions for the page you are on: clear all filters, filter, grid view, export, and import.
11	Viewset Menu	Display different preset views or create your own viewsets.
12	Help Menu	Contains Walkthrus to walk you step by step through processes within the module.
13	Notifications and User Profile	View notifications, user profile and 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, when first opened, the Components page will open in the Data Block view. Selecting the Standard Grid view button will change the layout to a traditional spreadsheet look with rows and columns.

Steel Structure Training Job (105091)
Plan
Quantity tracking

Components
View:

Actions
+
-
x
Displayed results: 154
-
+
-
+
Save claim...

ID	Type	Discipline / Commodity	Claiming sch...	WBS	WBS to date ...	% WBS QTY ...	Work packag...	Const area	System	Turno
Module 19 - A7 Co...	Activity	Metals	Bolted Conne...	1006	0.00000	0.00000		North		
Module 19 - A6 Co...	Activity	Metals	Bolted Conne...	1006	0.00000	0.00000		North		
Module 18 - A7 Co...	Activity	Metals	Bolted Conne...	1006	0.00000	0.00000		South		
Module 18 - A6 Co...	Activity	Metals	Bolted Conne...	1006	0.00000	0.00000		South		
Module 17 - A7 Co...	Activity	Metals	Bolted Conne...	1006	0.00000	0.00000		North		

The Data Block view allows for the grouping of columns for a cleaner viewing experience. Data Blocks are covered in more detail in topic 2.4 of this lesson.

Steel Structure Training Job (105091)

Plan

Quantity tracking

Components

Actions

Displayed results: 154

Filter: First Last Filter

Components

ID	Type	Discipline / Commodity	Claiming scheme	WBS
Module 19 - A7 C...	Activity	Metals	Bolted Connections	1006
Module 19 - A6 C...	Activity	Metals	Bolted Connections	1006
Module 18 - A7 C...	Activity	Metals	Bolted Connections	1006
Module 18 - A6 C...	Activity	Metals	Bolted Connections	1006
Module 17 - A7 C...	Activity	Metals	Bolted Connections	1006

Details #1

Description	Quantity	WBS to d...	% WBS Q...	Work pac...
Module 1...	1.00000	0.00000	0.00000	
Module 1...	1.00000	0.00000	0.00000	
Module 1...	1.00000	0.00000	0.00000	
Module 1...	1.00000	0.00000	0.00000	
Module 1...	1.00000	0.00000	0.00000	

Claiming 1-5

Step na...	Step % [1]	Comple...	Quantity
Stuff Bolts	40		1.00000
Stuff Bolts	40		1.00000
Stuff Bolts	40		1.00000
Stuff Bolts	40		1.00000
Stuff Bolts	40		1.00000

You can easily switch between the two views by clicking on the **View as Standard Grid** button on the right toolbar.

2.2 COLUMNS

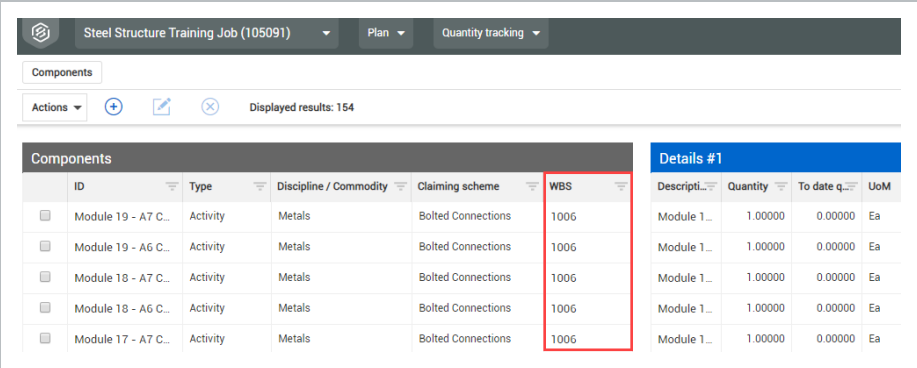
Within the InEight software, you can customize columns according to your preferences. Changes made to the placement of your columns will be retained the next time you access any page you have customized.

2.2.1 Move Columns

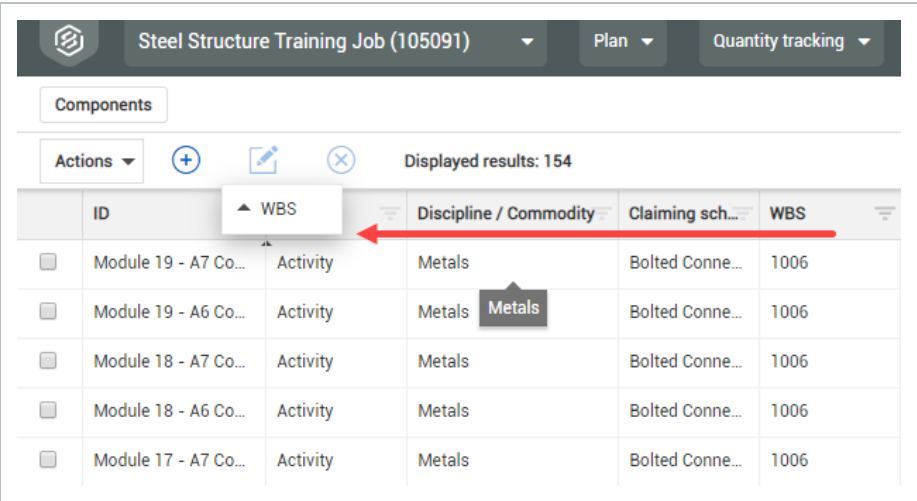
You can move a column from one place to another to customize your view using drag and drop.

2.2 Step by Step 1 — Move Columns

- 1. In the Standard Grid view of the Quantity Tracking module, click on the **WBS** column header.



- 2. Drag the column to the left, dropping it to the right of the ID Column.
 - Two black arrows appear to guide you to the location the column will be dropped

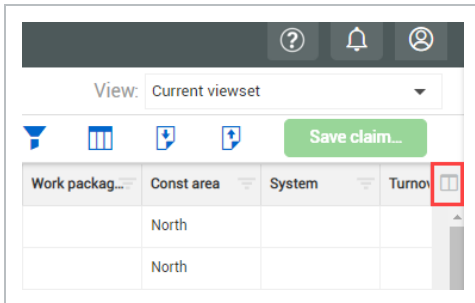


2.2.2 Add and Remove Columns

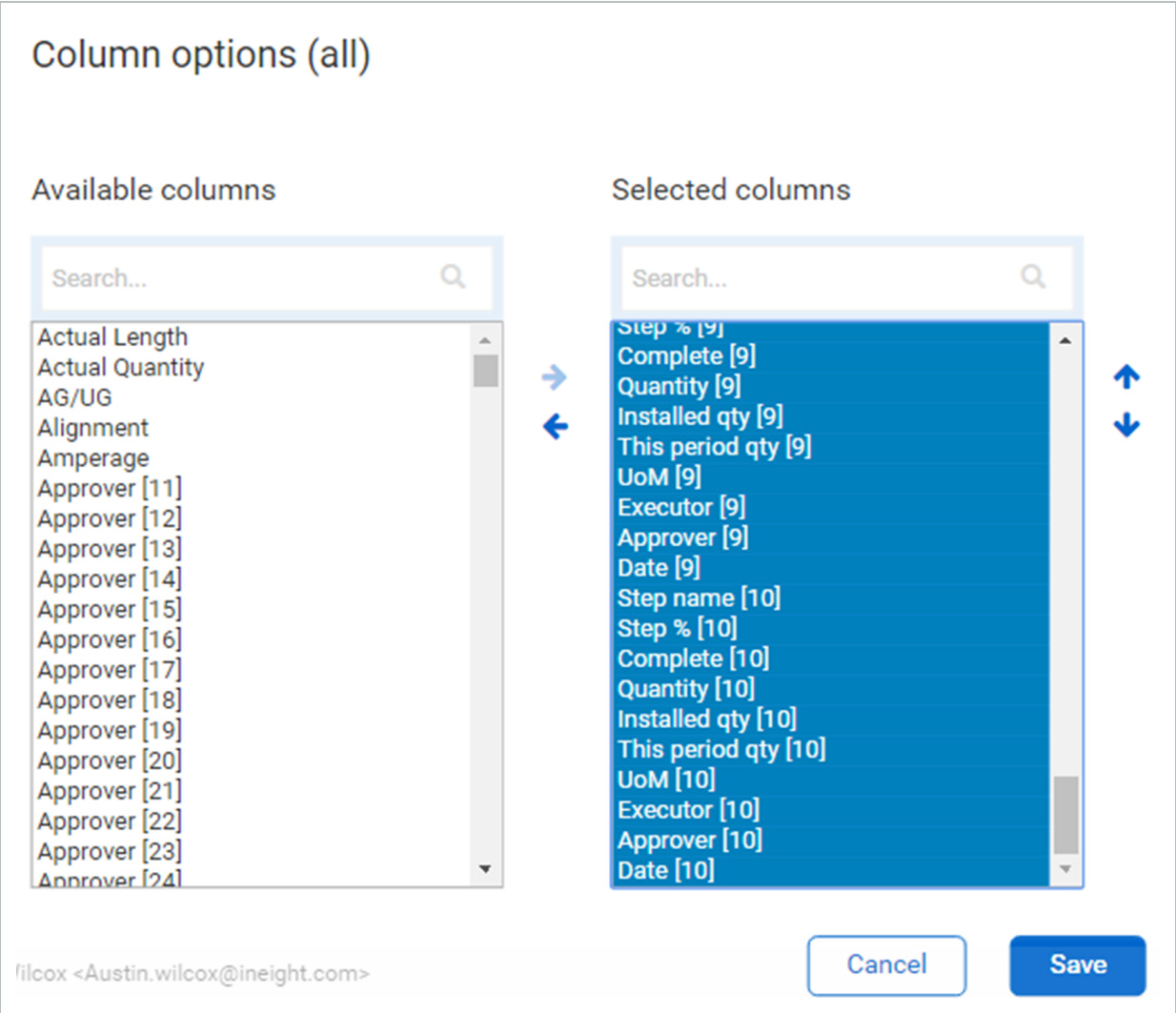
You can add or remove columns to customize your view and work more efficiently when in the Standard Grid view.

2.2 Step by Step 2 — Add Additional Columns

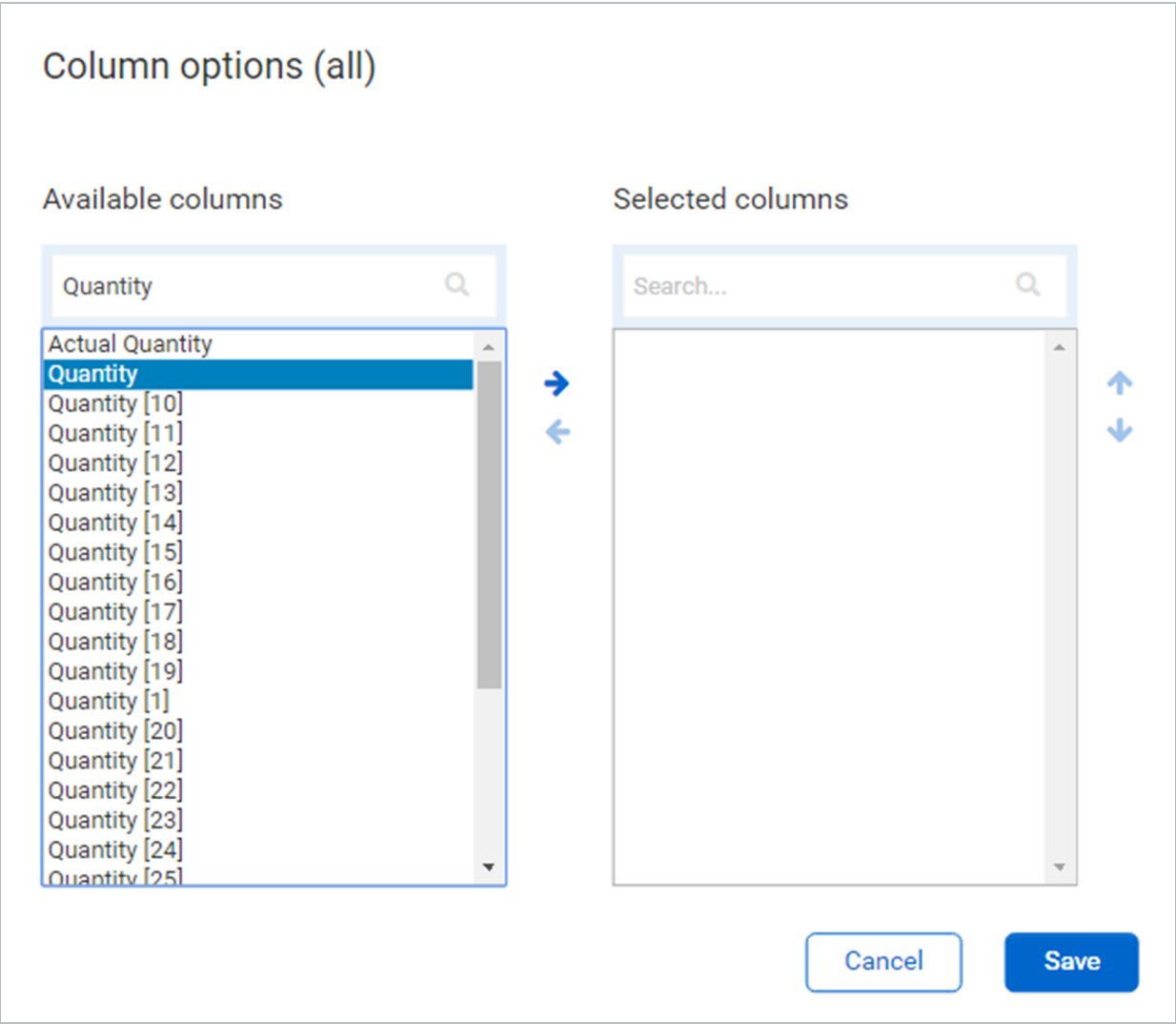
1. From the Standard Grid view, select the **Column Chooser** icon



- This opens up a pop-up window where you can search for and select columns
2. In the selected columns list on the right, highlight all columns by selecting the first item in the list and then holding the Shift key and selecting the last item in the list, then select the **left pointing arrow**.



- 3. In the Available columns list on the left, type **Quantity** in the search bar, then select the **Quantity** option from the filtered list.



- 4. Select the **right facing arrow**.
- 5. Repeat step 3 for the following values: **Description, UoM, Const Area, System, Grade** and **Coating**.

Column options (all)

Available columns

Search...

% Complete

Actual Length

Actual Quantity

AG/UG

Alignment

Amperage

Approver [10]

Approver [11]

Approver [12]

Approver [13]

Approver [14]

Approver [15]

Approver [16]

Approver [17]

Approver [18]

Approver [19]

Approver [1]

Approver [20]

Approver [21]

Selected columns

Search...

Quantity

Description

UoM

Const area

System

Grade

Coating

→

←

↑

↓

Cancel

Save

6. Select **Save**.

2.2.3 Sort Columns

You can sort in ascending or descending (both for alpha and numeric fields) on any column by clicking once on the column header.

2.2 Step by Step 3 — Sort Columns

- 1. In the Standard Grid view of the Components page, click on the **Quantity** column to sort the column in ascending order.
 - Notice the yellow up arrow designating you are sorting in ascending order

Discipline / Commodity	Claiming sch...	Quantity	Description	To date quan...
Metals	Erect Steel - L...	0.10000	Module 1 - E2...	0.00000

- 2. Click the **Quantity** column again and the column filters in descending order.
 - Notice the yellow arrow is now pointing down

Discipline / Commodity	Claiming sch...	Quantity	Description	To date quan...
Metals	Bolted Conne...	1.00000	Module 1 - A6...	0.00000

- 3. Click the **Quantity** column a third time to remove the applied sorting feature.

2.2.4 Filter Columns

You can filter columns as a way to see relevant information pertaining to your specific needs.

2.2 Step by Step 4 — Filter Columns

- 1. Click the **filter pyramid** in the Discipline/Commodity column.

WBS	Type	Discipline / Commodity	Claiming..
-----	------	------------------------	------------

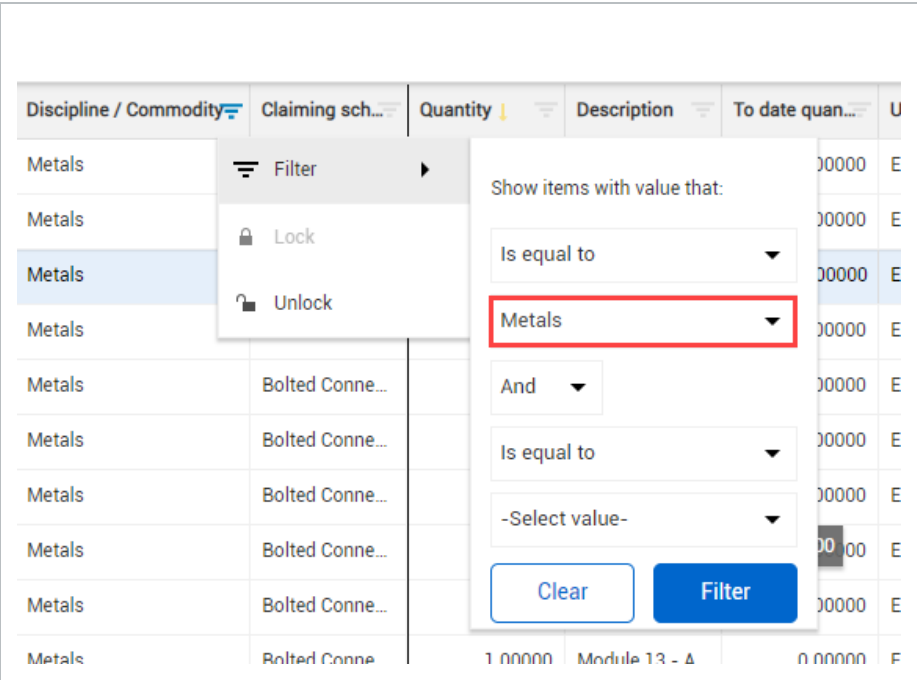
- 2. In the drop-down list, select **Filter**.

Discipline / Commodity	Claiming sch...	Quantity
Metals		1.00000
Metals		1.00000
Metals		1.00000
Metals		1.00000
Metals	Bolted Conne...	1.00000

3. In the expanded drop-down, select **Is Equal to**.

Discipline / Commodity	Claiming sch...	Quantity	Description	To date quan...	Uo
Metals		00000			Ea
Metals		00000			Ea
Metals		00000			Ea
Metals		00000			Ea
Metals	Bolted Conne...	00000			Ea
Metals	Bolted Conne...	00000			Ea
Metals	Bolted Conne...	00000			Ea
Metals	Bolted Conne...	00000			Ea
Metals	Bolted Conne...	00000			Ea
Metals	Bolted Conne...	00000			Ea

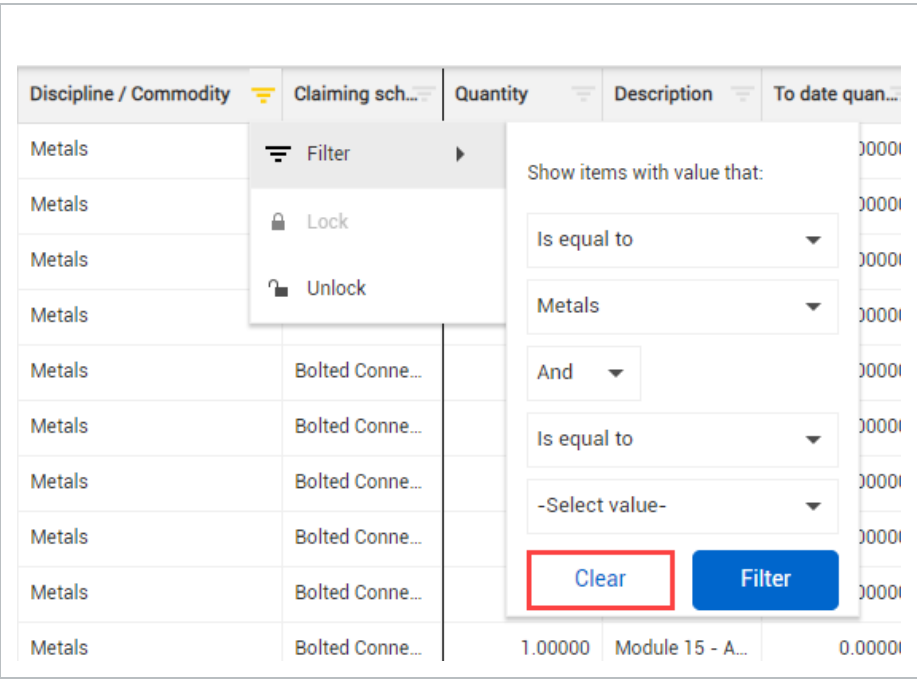
4. In the first value box select **Metals**.



5. Click **Filter**.
- The table now only shows items that have a discipline of Metals
 - Notice that the Filter Pyramid is now in yellow, indicating that this column is filtered
6. Select the yellow pyramid.

WBS	Type	Discipline / Commodity	Claiming sch...	Quantity	Description
1006	Activity	Metals	Bolted Conne...	1.00000	Module 19 - A...

7. Hover over **Filter**, then click **Clear** to clear your filter.



TIP

You can 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

You can save a specific filter so that it can be used anytime you want. You can also share your filters with the team so that they can use your filters as well.

2.2 Step by Step 5 — Create a Saved Filter

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



- 2. On the resulting left slide out panel, select **Description** in the column field.

Components

Actions + [edit] [close] Displayed results: 154

Filter

Column (select one) (select one) Date [7] Date [8] Date [9] **Description** Discipline/Commodi...

Operator (select)

Value +

Save

Cancel Apply

3. For Operator, select **Contains**.

Components

Actions + [edit] [close] Displayed results: 154

Filter

Column Description

Operator (select) (select) Begins with Blank **Contains** Does not contains Does not equal Ends with Equals List Matches Not blank

Value +

Save

Cancel Apply

My saved filters

First Last Filter

4. For Value, type **Module [your user ID]**.

The screenshot shows a 'Filter' dialog box within a larger application window. At the top, there's a 'Components' tab and an 'Actions' dropdown menu. Below this, a status bar indicates 'Displayed results: 154'. The main area is titled 'Filter' and contains three fields: 'Column' (set to 'Description'), 'Operator' (set to 'Contains'), and 'Value' (set to 'Module 1'). The 'Value' field is highlighted with a red rectangle. To the right of the 'Value' field is a blue '+' button. At the bottom left is a 'Save' button, and at the bottom right are 'Cancel' and 'Apply' buttons.

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

This screenshot is identical to the previous one, showing the 'Filter' dialog box with 'Module 1' in the 'Value' field. However, in this image, the 'Save' button at the bottom left is highlighted with a red rectangle, indicating the next step in the process.

6. Change the Filter name to **[Your Name] Filter**.

Components

Actions + × Displayed results: 154

Filter

Column

Operator

Value

Description ▼Contains ▼Module 1 +

First Last Filter

Save

Cancel

Apply

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

TIP

You can share pre-defined filters with the different members of 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.

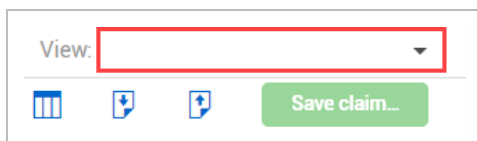
Congratulations, you have completed this exercise!

2.3 VIEWSETS

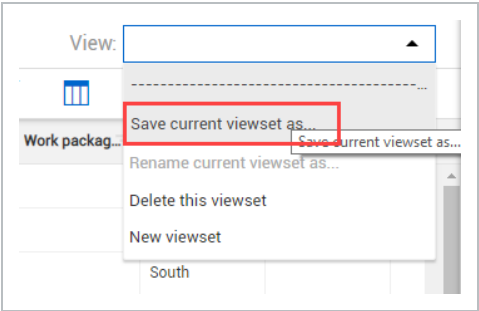
Once you have all columns organized, you can create a saved view of your page so that you can always revert back to it. This saved view is called a viewset.

2.3 Step by Step 1 — Create a Viewset

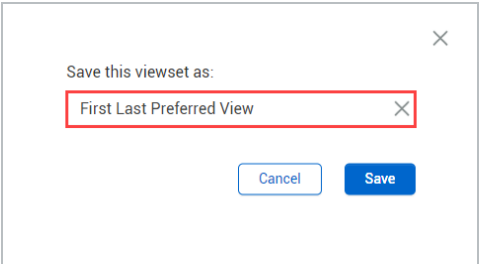
1. Select the **View** drop-down arrow to save the column setup you created in Step by Step 2.2.2.



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 and can be used from plan to plan. 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 and moved around in the register. The information in each data block is displayed in a grid like format, maintaining a spreadsheet look and feel.

Steel Structure Job (105091)

Plan

Quantity tracking

Components

View: Details Only

Actions

Filter: Custom Filter

Components

	ID	Type	Discipline / Commodity	Claiming scheme	WBS
	Module XXX- A9: Co...	Activity	Metals	Erect Steel - Light	1005
	Module XXX- A8: Co...	Activity	Metals	Erect Steel - Light	1005
	Module XXX- A7: Co...	Activity	Metals	Erect Steel - Light	1005
	Module 30 - F22: Cro...	Activity	Metals	Erect Steel - Light	1005
	Module 30 - E24: Bea...	Activity	Metals	Erect Steel - Light	1005
	Module 30 - E23: Cro...	Activity	Metals	Erect Steel - Light	1005

Details #1

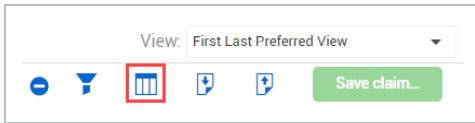
Descript...	Quantity	To date q...	UoM	% Compl...	WBS fore...	WBS plan...	WBS to d...	% WBS Q...	Work pack...
Module 0...	2.49300	0.00000	Ton	0	200.00000	75.58080	0.75915	1.00442	
Module X...	2.48700	0.37305	Ton	15	200.00000	75.58080	0.75915	1.00442	
Module 0...	2.49300	0.00000	Ton	0	200.00000	75.58080	0.75915	1.00442	
Module 3...	0.30000	0.00000	Ton	0	200.00000	75.58080	0.75915	1.00442	
Module 3...	0.18000	0.00000	Ton	0	200.00000	75.58080	0.75915	1.00442	
Module 3...	0.13000	0.00000	Ton	0	200.00000	75.58080	0.75915	1.00442	

2.4.1 Add Data Blocks

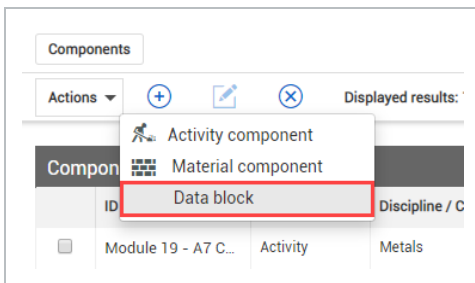
Some data block fields allow you to fill in key component information.

2.4 Step by Step 1 — Add Data Blocks

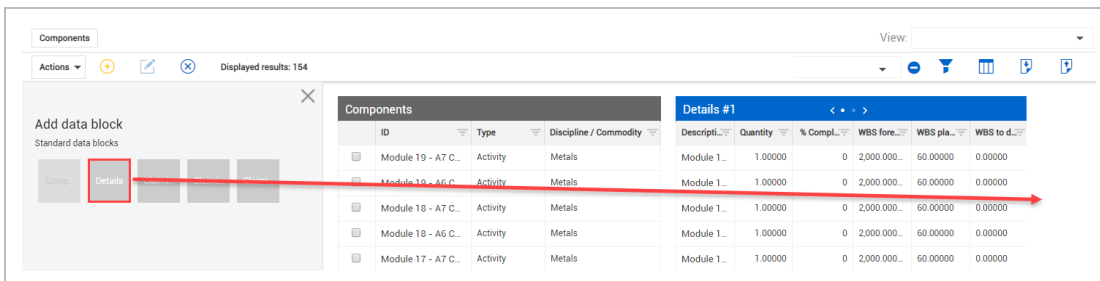
1. From the Components page grid view, select **View as data blocks**.



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



3. On the resulting left slide out panel, select **Details** 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 Details block.



NOTE

You can Sort and Filter columns whether they are a part of a tab or in a data block.

2.4.2 Navigate Data Blocks

You can utilize the arrows to view more columns associated with each data block that are not seen in the current view.

Details #3									
Created ...	Descripti...	WBS fore...	WBS pla...	WBS to d...	% WBS Q...	Quantity	UoM	Schedule...	Work pac...
09/05/2018	Module 1...	2,000.000...	60.00000	0.00000	0.00000	1.00000	Ea		
09/05/2018	Module 1...	2,000.000...	60.00000	0.00000	0.00000	1.00000	Ea		
09/05/2018	Module 1...	2,000.000...	60.00000	0.00000	0.00000	1.00000	Ea		
09/05/2018	Module 1...	2,000.000...	60.00000	0.00000	0.00000	1.00000	Ea		

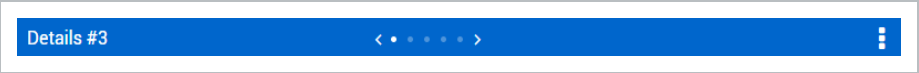
Each dot within the arrows signifies another grouping of columns (i.e., panel) to be seen.

2.4.3 Context Menu

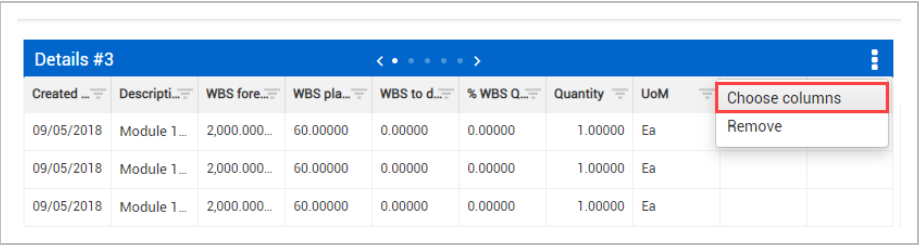
The **Context Menu** allows you to customize the order of columns in each data block. There are also additional columns you can add or remove from some data blocks.

2.4 Step by Step 2 — Utilize the Context Menu

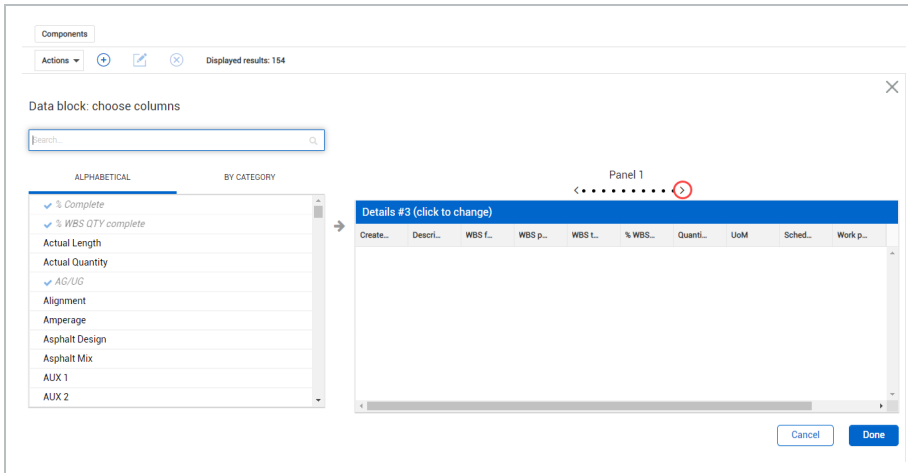
- 1. Select the **Context Menu** of the Details data block.



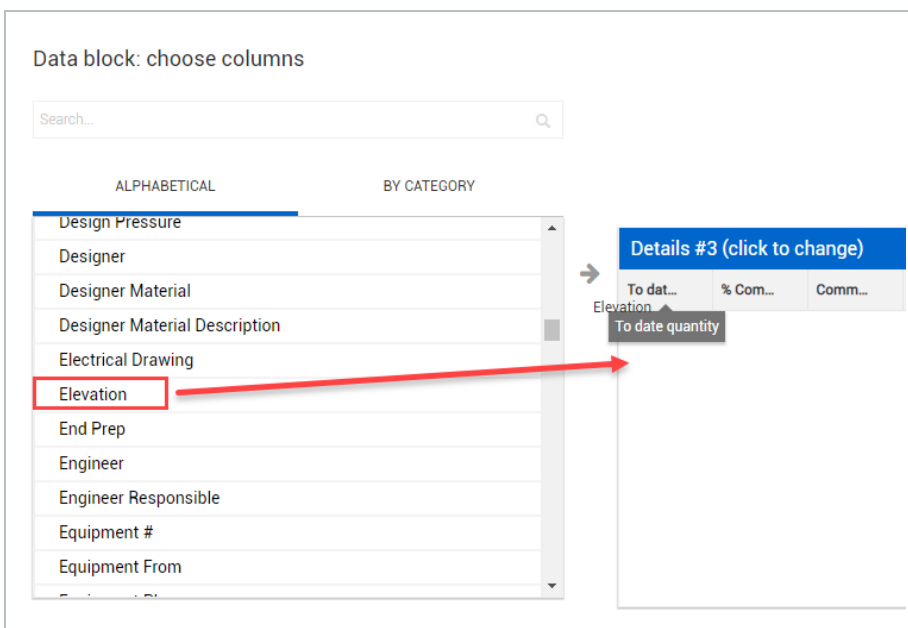
- 2. Select **Choose columns**.



- 3. On the resulting slide out panel, click the right arrow to navigate to **Panel 2** of the data block.



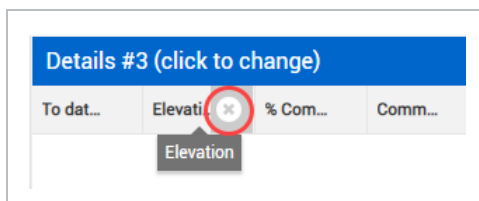
4. Click and drag the **Elevation** column to the far left.



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

5. Arrow back to **Panel 1**.

6. On the Schedule ID column, click on the **Remove icon** to remove it from the data block.



- You now have a new layout for the data block

7. Click **Done**.

TIP

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. What shows you the project you are on?
 - 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 columns to make them more aligned 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 do you select to switch to the Standard Grid 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

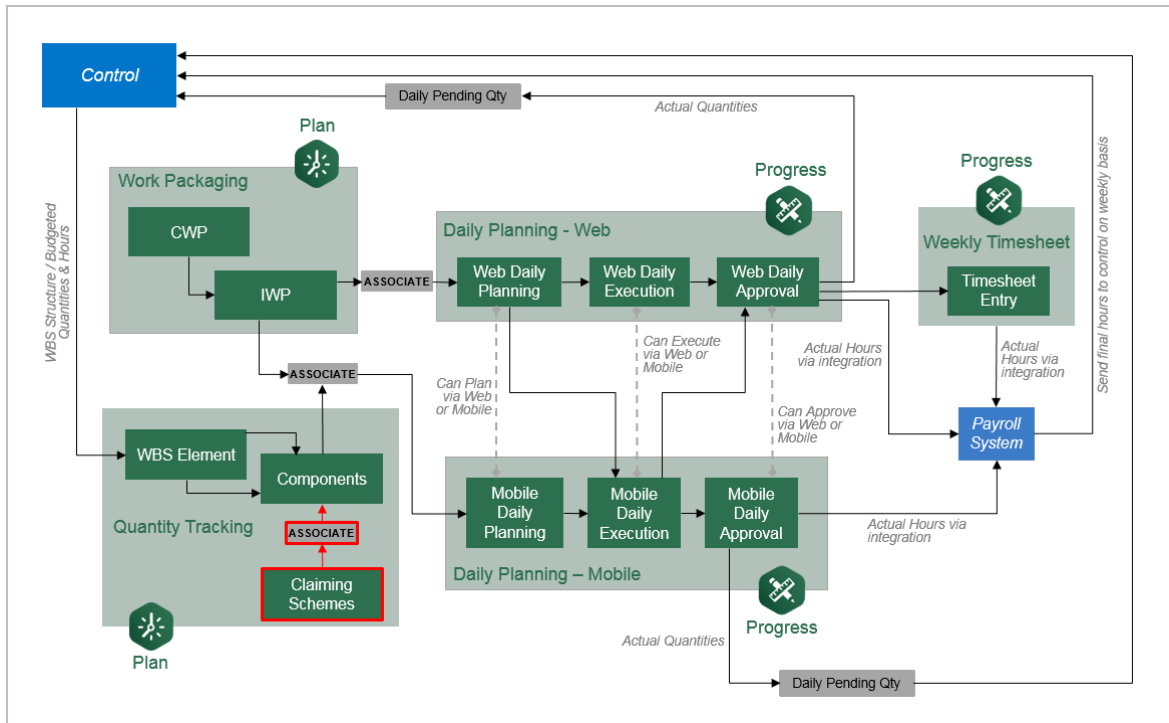
After completing this lesson, you will be able to:

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

Lesson Topics

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3.1 INEIGHT PLAN WORKFLOW - CLAIMING SCHEMES



3.2 WHAT IS A CLAIMING SCHEME?

A claiming scheme is a formula used to generate partial quantities of a component. 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.

3.2.1 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.

3.2.2 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%. 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. To manage schedule groups as an administrator, go to Settings for Plan, under 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, you should aim for 3-5 steps. As a general rule, each step should be able to be completed 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:

×

Edit Place/Finish/Cure

Name

Place/Finish/Cure

Step name	Rule type	% claiming	Schedule group	Activity ID format
Place/Finish/Cure	Construction Step	95	Install	Discipline/Area
⊗ Verify/Document	Quality Step	5	Verification & Documentation	AccountCode/System/Turnov...

⊕ Add step

Total: 100%

Cancel

Save

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*.

3.2.3 Claiming Scheme Solutions

Claiming schemes:

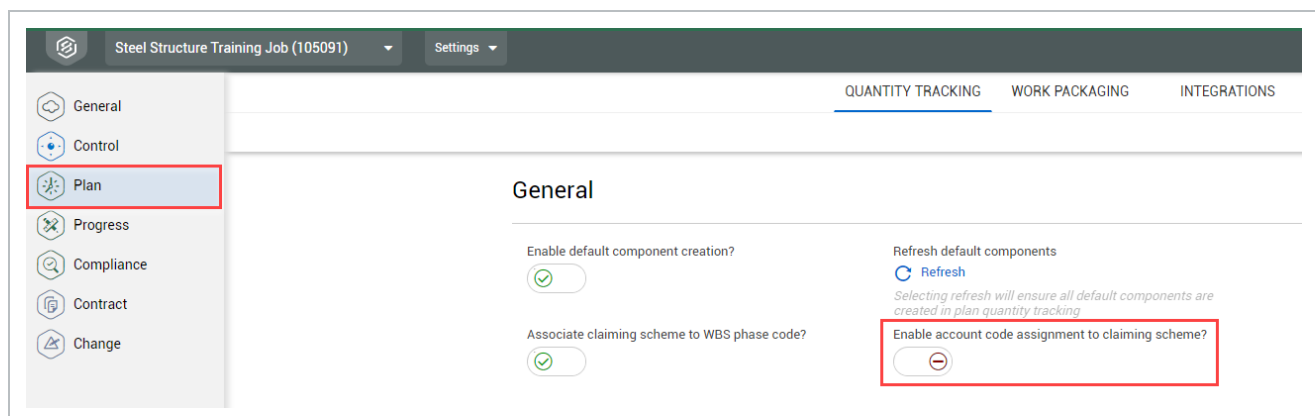
- Allow you to track your claiming in one central location
- Reduce your need for individual side spreadsheets
- Allow for drill down transparency to see what specific work has been claimed as complete
- Keep claiming consistent with a clear breakout of quantities reserved for specific activities
- Communicate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

3.2.4 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**:

Discipline/claiming scheme	WBS assignment	Default	Account code assignment
Aggregates and Paving	WBS Assigned	✓	Account codes assigned
Agg. and Paving - Gen. Claiming 95/5	WBS Assigned		Account codes assigned
Building	Assign now	✓	Assign account code
Building - Gen. Claiming 95/5	Assign now	✓	Account codes assigned

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

Discipline/claiming scheme	WBS assignment	Default	Account code assignment
Aggregates and Paving	Assign now		Assign account code
Agg. and Paving - Gen. Claiming 95/5	Assign now		Assign account code
Building	Assign now		Assign account code
Building - Gen. Claiming 95/5	Assign now		Assign account code

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

3.3 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.

Edit Metals

Name

Metals

Step name	Rule type	% claiming	Schedule group	Activity ID format
Step 1		100		

+ Add step

Total: 100%

Cancel

Save

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.

☐	Job Related Overhead	Assign now
☐	Mechanical Equipment	Assign now
☐	Metals	Assign now
☐	Bolted Connections	WBS Assigned
☐	Erect Steel - Light	WBS Assigned
☐	XXX Erect Steel - Heavy	WBS Assigned
☐	Mining	Assign now

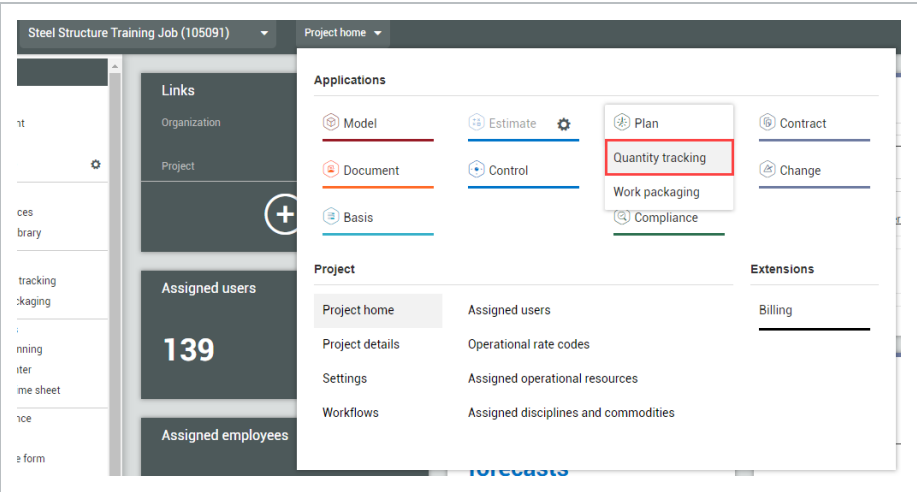
There is a parent-child relationship between the discipline claiming scheme and those added beneath it.

You will practice by creating a claiming scheme under the Metals discipline for the ‘Module [User ID #] – Erect Steel Heavy’ WBS that you created previously.

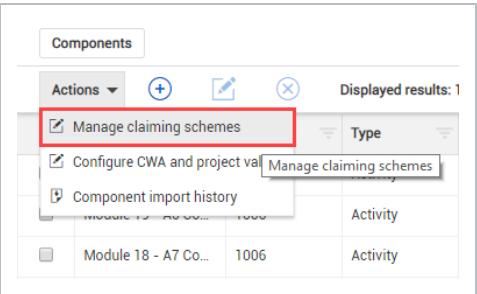
The following step by step walks you through how to create child-level claiming schemes.

3.3 Step by Step 1 — Build a Claiming Scheme

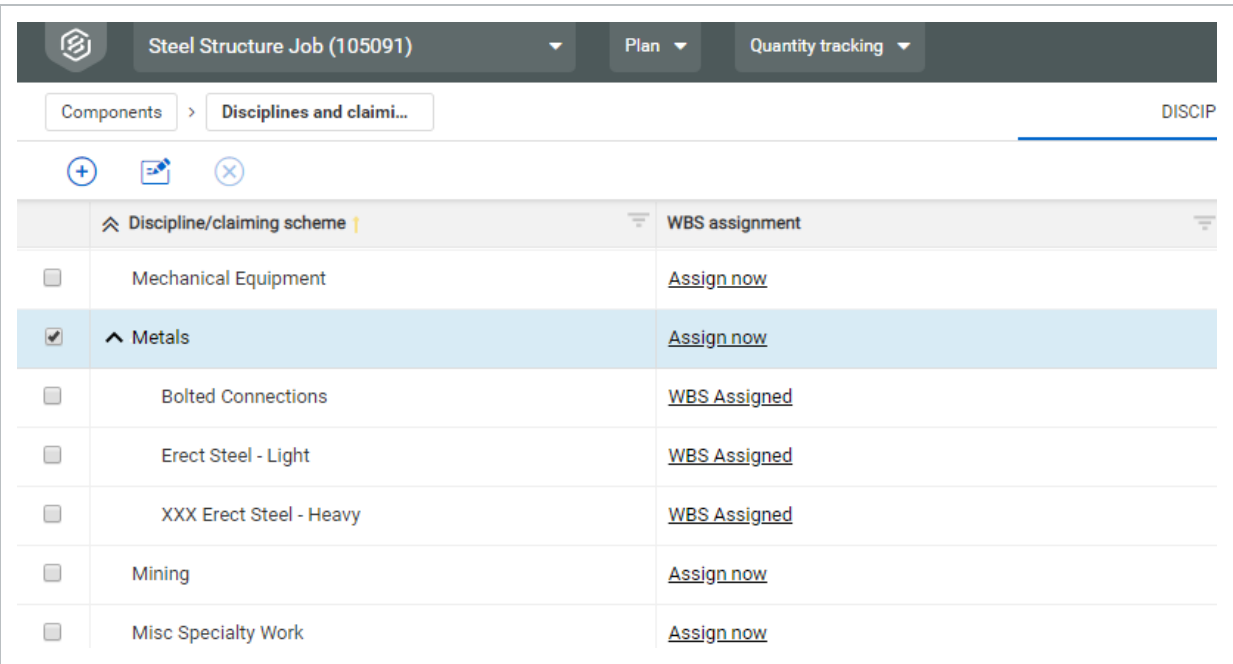
1. Navigate to the **Quantity Tracking** page for the **Steel Structure Training Job**.



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



3. To place the claiming scheme in the Metals discipline, click on the check box next to **Metals** in the Claiming Scheme list.



Click the **Add** button on the left toolbar.

Steel Structure Job (105091)PlanQuantity tracking

Components > Disciplines and claimi...DISCIP

	Discipline/claiming scheme ↑	WBS assignment
☐	Mechanical Equipment	Assign now
☒	Metals	Assign now
☐	Bolted Connections	WBS Assigned
☐	Erect Steel - Light	WBS Assigned
☐	XXX Erect Steel - Heavy	WBS Assigned
☐	Mining	Assign now
☐	Misc Specialty Work	Assign now

- You will now see a claiming scheme setup box

4. In the Name field, name the new claiming scheme **[Your Initials] Erect Steel- Heavy**.

Add claiming scheme to Metals

Name

XXX Erect Steel - Heavy

Step name	Rule type	% claiming	Schedule group	Activity ID format
Step 1		100		

Add step

Total: 100%

Cancel

Save

5. To add steps to your claiming scheme click **Add Steps** two times.

×

Add claiming scheme to Metals

Name

XXX Erect Steel - Heavy

Step name	Rule type	% claiming	Schedule group	Activity ID format
Step 1		100		

+

 Add step

Total: 100%

Cancel

Save

6. Update the three Step names, Rule types and Percentages to the following:

Step Name	Rule type	% Claiming
Shakeout / Transport	Construction Step	15%
Erect / Bolt Up	Construction Step	45%
Final Torque	Construction Step	40%

- 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

×

Add claiming scheme to Metals

Name

XXX Erect Steel - Heavy

Step name	Rule type	% claiming	Schedule group	Activity ID format
Shakeout/ Transport	Construction Step	15		
⊗ Erect/ Bolt Up		45		
⊗ Final Torque		40		

+

 Add step

Total: 100%

Cancel

Save

TIP

You can copy claiming schemes from other projects, and this will bring over the associated account codes, schedule groups, and activity ID formats.

7. Click the **Save** button.

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:

Steel Structure Job (105091)		Plan	Quantity tracking
Components > Commodities and clai...		DISCIPLINES	COMMODITIES
Commodities / claiming scheme		WBS assignment	Default
Steel		Assign now	✓
Steel Materials		Assign now	✓

Add claiming scheme to Steel

Name

Steel Materials

	Step name	Rule Type	% Claiming
	Purchase Order Issued	Construction Step	30
✕	Material Delivered	Construction Step	60
✕	Material Inspection P...	Quality Step	10
Add steps			Total: 100%

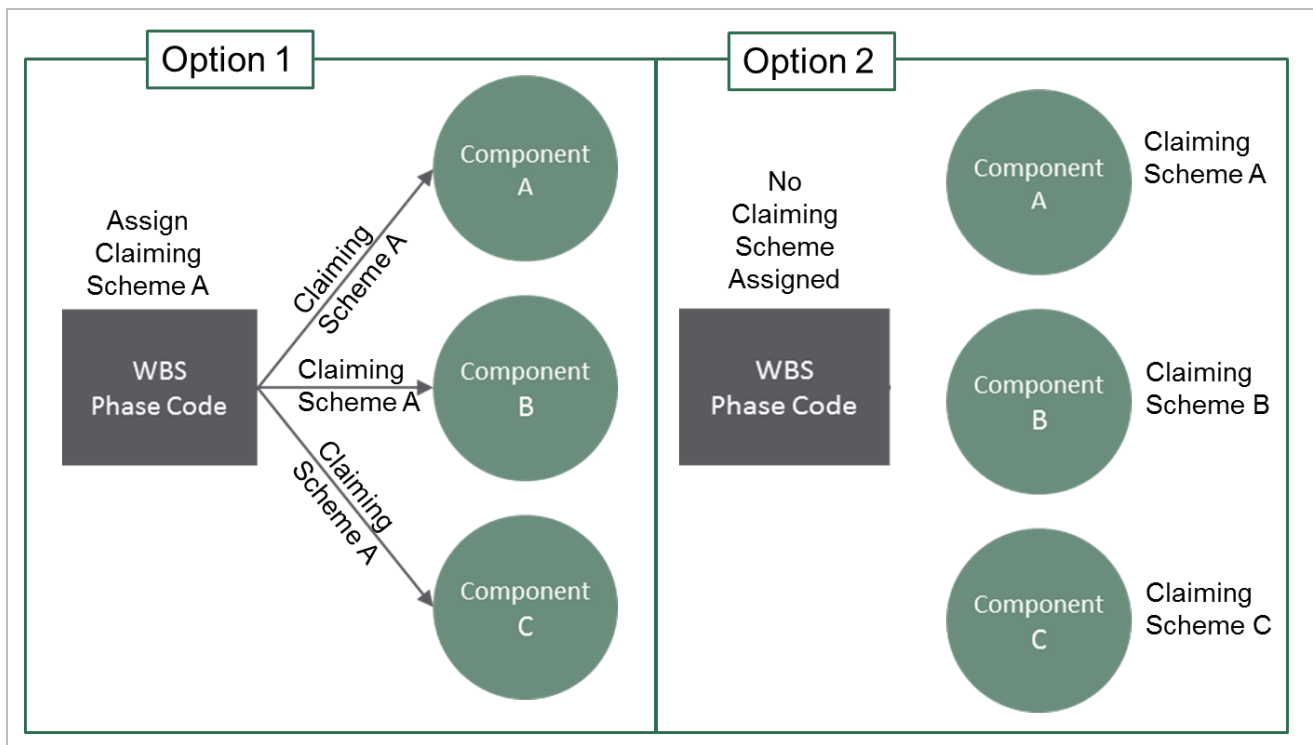
Congratulations, you have completed this exercise!

3.4 CLAIMING SCHEME MANAGEMENT

3.4.1 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 that is created underneath that WBS will inherit the same claiming scheme.

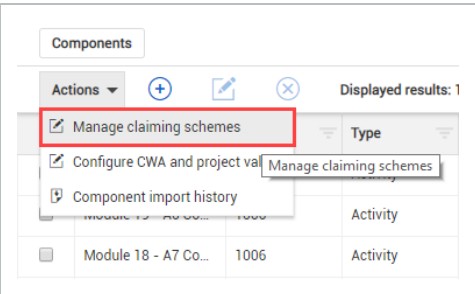
NOTE

What level claiming schemes are assigned at is controlled in the project settings. 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.

3.4 Step by Step 1 — Assign a WBS to a Claiming Scheme

- 1. From the Quantity Tracking page navigate to the **Manage claiming schemes** page.



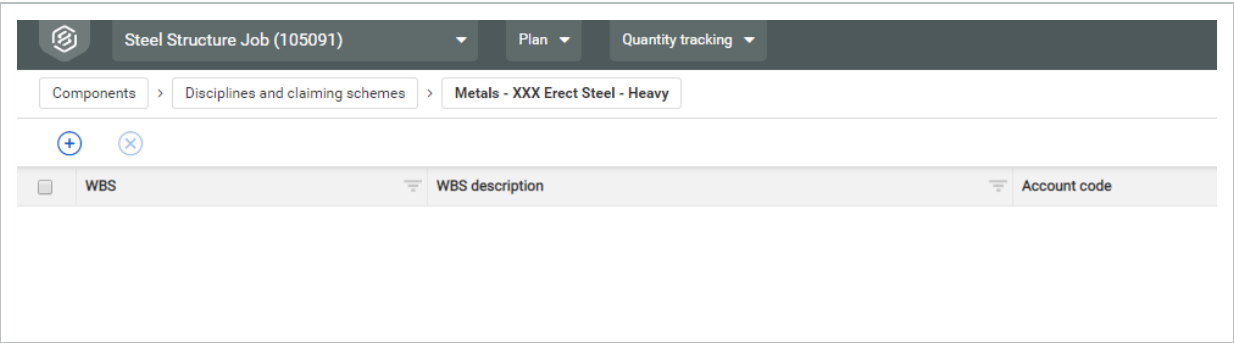
- 2. Click on the **arrow** next to the Metals discipline to expand the list of children.

☐	Job Related Overhead	Assign now
☐	Mechanical Equipment	Assign now
☐	 Metals	Assign now
☐	Bolted Connections	WBS Assigned
☐	Erect Steel - Light	WBS Assigned
☐	XXX Erect Steel - Heavy	Assign now
☐	Mining	Assign now

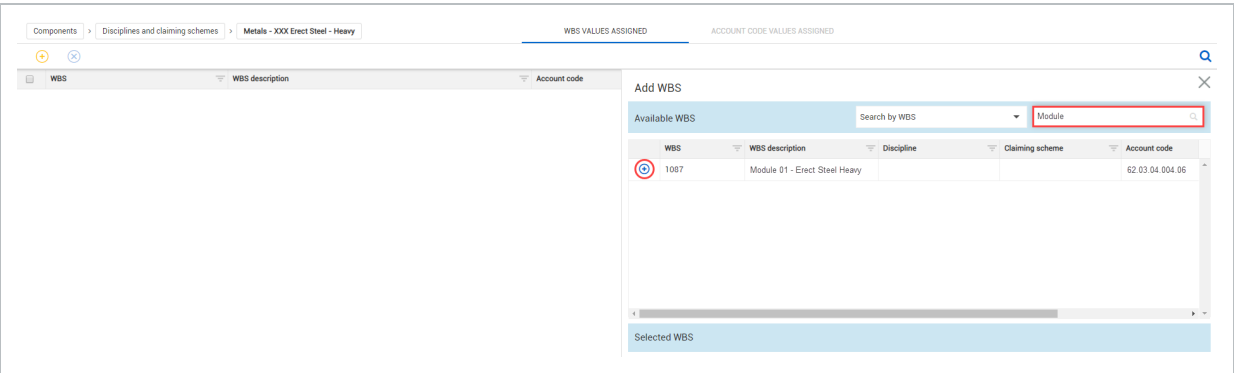
- 3. In the WBS assignment column, click on **Assign now** for the claiming scheme you created in section 3.2 [your initials] Erect Steel - Heavy.

☐	Job Related Overhead	Assign now
☐	Mechanical Equipment	Assign now
☐	^ Metals	Assign now
☐	Bolted Connections	WBS Assigned
☐	Erect Steel - Light	WBS Assigned
☐	XXX Erect Steel - Heavy	Assign now
☐	Mining	Assign now

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



5. On the resulting slide out panel on the right, search for the WBS you created during the Control lesson: **Module [User ID #] - Erect Steel Heavy**. (If you can't find your WBS use **WBS 1004**.)
6. When the WBS appears, click on the **Add** button 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 that WBS now move down to the Selected WBS field below

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

Selected WBS

✕ 1092 - Module 1 - Erect Steel Heavy

Cancel

Done

NOTE

Follow the same process for assigning Account Code to a claiming scheme. After you have assigned an account code to a claiming scheme, you can select the checkbox next to the claiming scheme and 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. You can select multiple claiming schemes to map all of them at the same time.

Last modified by	Last modified on
System	03/10/2017
System	03/10/2017

3.4.2 Edit Claiming Schemes

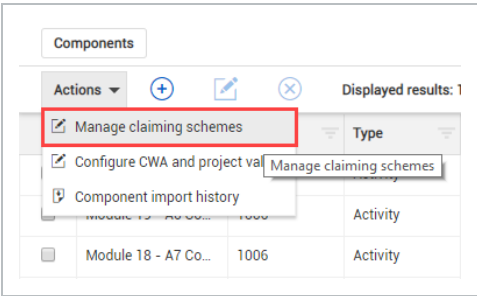
In many cases, it may be necessary to edit a claiming scheme. For example, you may occasionally forget a step at the time of creation. In Plan, editing claiming schemes is a simple process.

In this step by step you will add a quality verification step to the claiming scheme you created previously for [Initials] Erect Steel – Heavy.

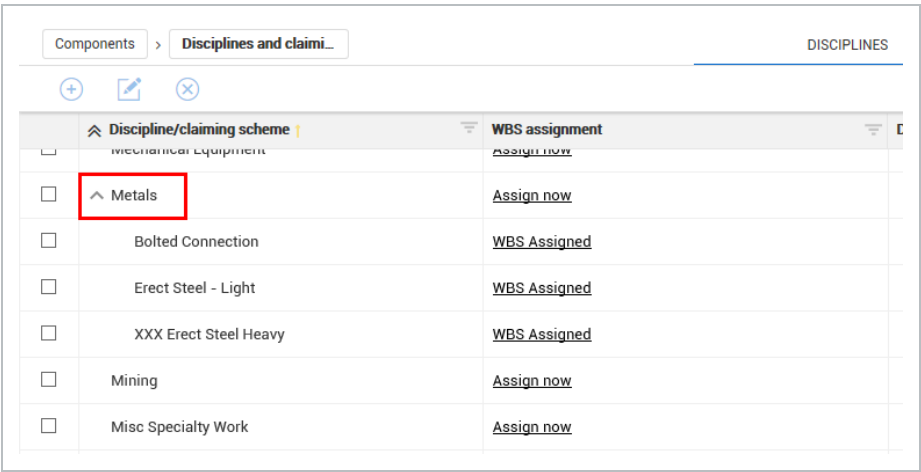
The following step by step walks you through how to edit a claiming scheme.

3.4 Step by Step 2 — Edit a Claiming Scheme

- 1. From the Quantity Tracking page navigate to the **Manage claiming schemes** page.



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



- 3. Click in the **check box** to the left of the claiming scheme you created in section 3.2, [your initials] Erect Steel - Heavy.

Steel Structure Job (105091)PlanQuantity tracking

Components > Disciplines and claimi...DISCIPLINES

	Discipline/claiming scheme	WBS assignment	Defau
☐	Metals	Assign now	
☐	Bolted Connections	WBS Assigned	
☐	Erect Steel - Light	WBS Assigned	
☒	XXX Erect Steel - Heavy	WBS Assigned	
☐	Mining	Assign now	

4. Click on the **Edit** button on the left toolbar.

Components > Disciplines and claimin...

	Discipline/claiming scheme	WBS assignment
☒	Metals	Assign now
☐	Bolted Connections	WBS Assigned
☐	Erect Steel - Light	WBS Assigned
☐	XXX Erect Steel - Heavy	WBS Assigned
☐	Mining	Assign now

5. Click on the **Add steps** button.

Edit XXX Erect Steel Heavy

Name

XXX Erect Steel Heavy

	Step name	Rule type	% claiming	Schedule group	Activity ID format
	Shakeout / Transp...	Construction Step	15		
⊗	Erect / Bolt Up	Construction Step	45		
⊗	Final Torque	Construction Step	40		

+ Add step

Total: 100%

Cancel

Save

6. Change the percentage for the 'Final Torque' step to **30%**.

Edit XXX Erect Steel Heavy

Name

XXX Erect Steel Heavy

	Step name	Rule type	% claiming	Schedule group	Activity ID format
	Shakeout / Transp...	Construction Step	15		
⊗	Erect / Bolt Up	Construction Step	45		
⊗	Final Torque	Construction Step	30		
⊗	Step 4		0		

+ Add step

Total: 100%

Cancel

Save

7. Add a fourth step and change the Step 4 name to **Quality Verification**, Rule type to **Quality Step** and enter **10%** for the % Claiming. All steps must sum to 100%.

Edit XXX Erect Steel Heavy

Name

XXX Erect Steel Heavy

	Step name	Rule type	% claiming	Schedule group	Activity ID format
	Shakeout / Transp...	Construction Step	15		
⊗	Erect / Bolt Up	Construction Step	45		
⊗	Final Torque	Construction Step	30		
⊗	Quantity Verification	Quality Step	10		

+

Add step

Total: 100%

Cancel

Save

8. Click the **Save** button.

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.

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

LESSON 4 – COMPONENT MANAGEMENT

Lesson Duration: 60 minutes

Lesson Objectives

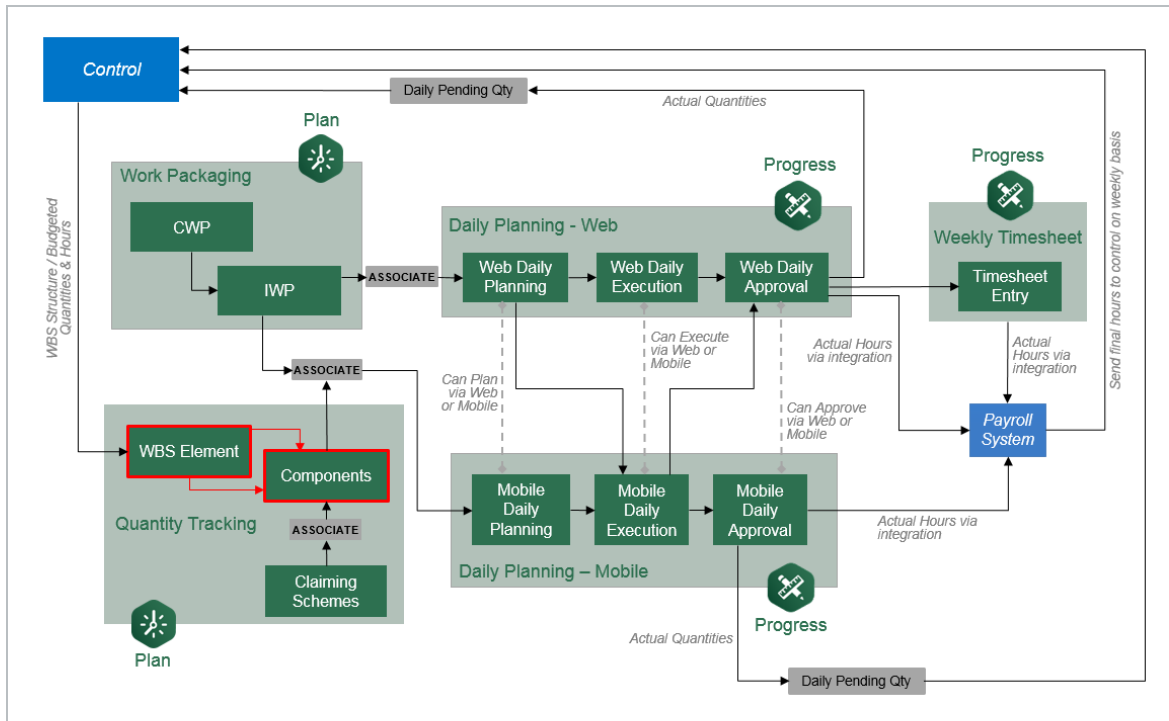
After completing this lesson, you will be able to:

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

Lesson Topics

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4.1 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 two types of components in the Plan – Quantity Tracking module:

- Activity Components
- Material Components

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:

Components									
View: Current viewset									
Actions	+	+	+	Filter: (select one)	+	+	+	+	Save claim...
ID	Type	Discipline / Commodity	Claiming scheme	WBS	WBS forecas...	Quantity	UoM		
Module 1 - A23: Cross Brace Assembly	Material	Steel	Steel	1087	800.00000	0.15000	Ton		
Module 1 - A23: Cross Brace Assembly	Activity	Metals	Erect Steel - Light	1005	200.00000	0.15000	Ton		

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.

4.2.3 Methods of Creating Components

There are two 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.

4.2.4 Component Attributes

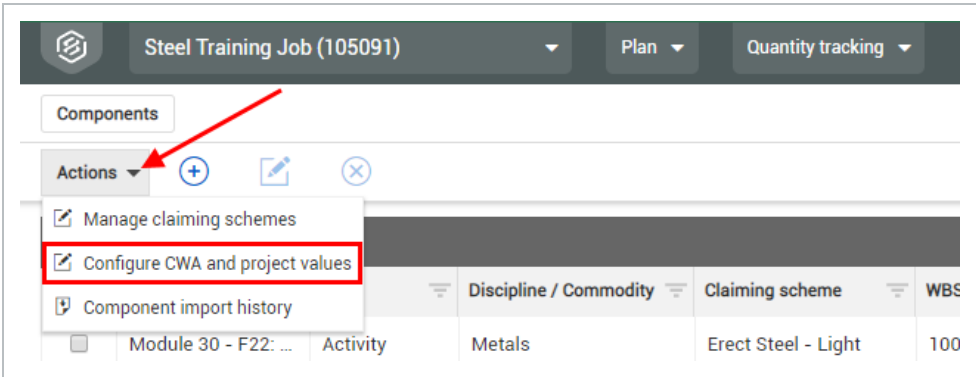
When creating components, a number of fields called attributes are available to be filled out. It is not necessary to fill out every single field, but the more information input, the better. Attributes help make tracking components easier. In many cases, depending on the size of the job, you may have 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 within Plan > 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.

The screenshot shows the 'LOCATION' tab in the 'Configure CWA and Project Values' page. The page is divided into two main sections: 'Construction area' and 'Commodity'. Each section has a table with columns for Position, ID, Description, and Note. The 'Construction area' table has 4 rows with values: 1 North, 2 South, 3 East, 4 West. The 'Commodity' table has 3 rows with values: 1 FND (Foundation), 2 GEN (General), 3 SST (Steel Structure).

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.

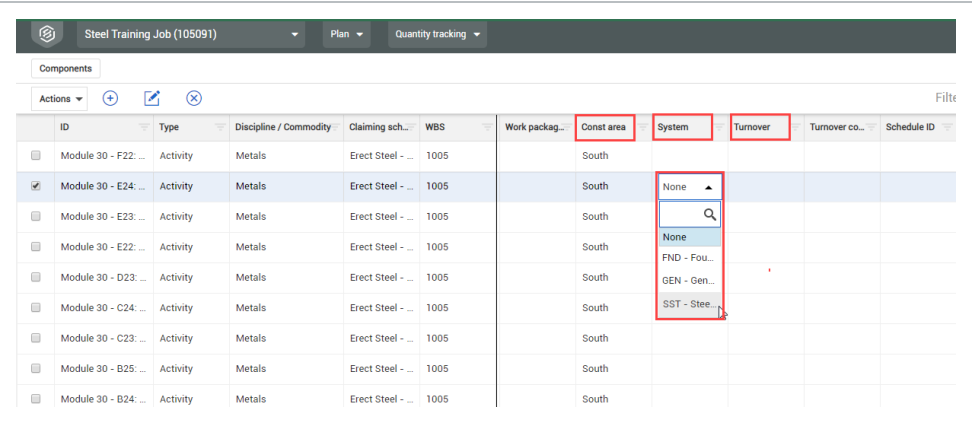
The screenshot shows the 'ENGINEERING' tab in the 'Configure CWA and Project Values' page. The page is divided into two main sections: 'Turnover' and 'System'. Each section has a table with columns for Position, ID, Description, and Note. The 'Turnover' table is empty with the message 'No records available'. The 'System' table has 3 rows with values: 1 FND (Foundation), 2 GEN (General), 3 SST (Steel Structure).

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 information such as: Component ID, 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.

Add activity component 10 0.00000%

CLAIMING 7 CLAIMING HISTORY 8 COMPONENT DETAILS

Summary 1

Component ID

WBS Component quantity Unit of measure Schedule ID

WBS forecast QTY WBS planned QTY WBS to date QTY % WBS QTY complete

Discipline Claiming scheme Work package ID

Description Comments

Location 2

Specifications 3

Procurement 4

Discipline specific 5

Engineering 6

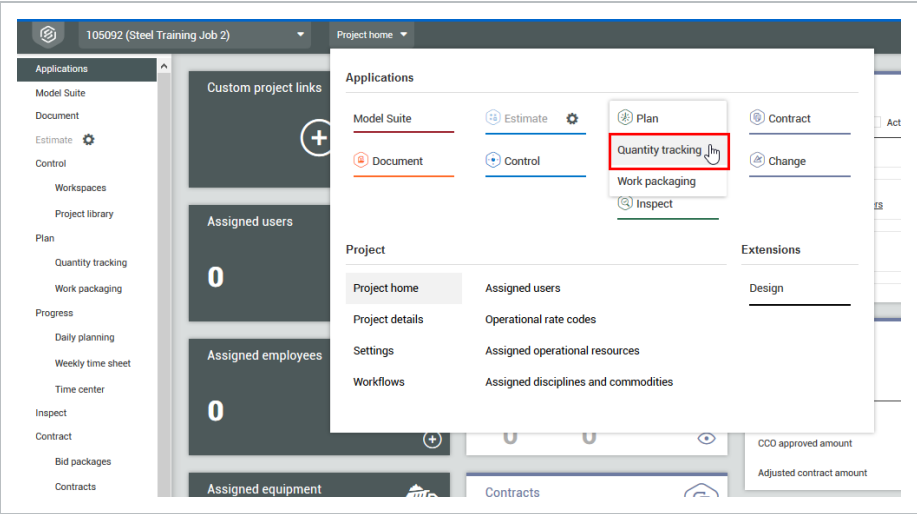
[View full page 9](#) Cancel Save and close Save

4.2.5 Component Creation

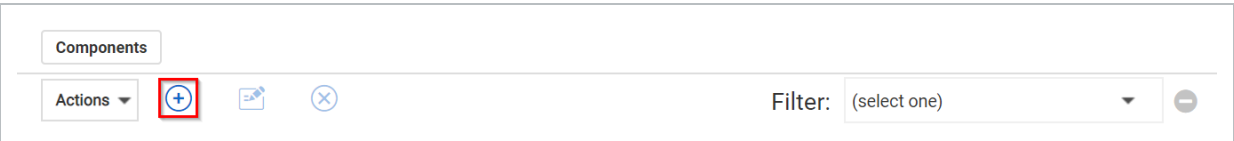
The following step by step walks you through how to create a component from scratch.

4.2 Step by Step 1 — Create a Component from Scratch

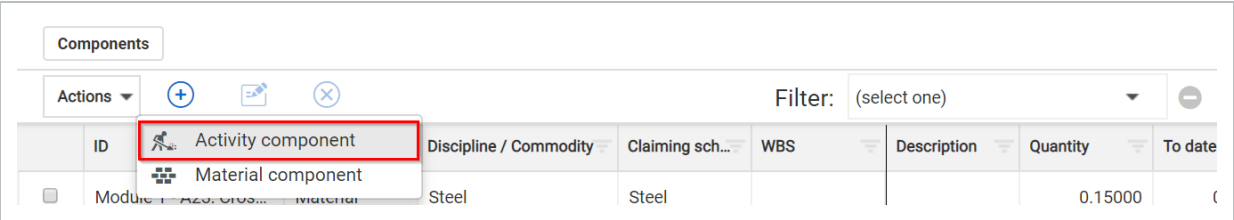
- 1. Navigate to the **Quantity Tracking** page.



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



- 3. Select **Activity Component**.



- This opens the new activity component slide out panel. By default, the summary accordion menu should be expanded
4. In the Summary menu, enter the following:
- Component ID – **Module [your user ID] – A6: Column Assembly**
 - WBS – **The WBS # you created for ‘Module [your user id] – Erect Steel Heavy’**
 - Discipline – **Metals**
 - Component Quantity – **2.493**
 - Unit of Measure – **Ton**

The screenshot shows a 'Summary' form with the following fields and values:

WBS	Component quantity	Unit of measure	Schedule ID
1087	2.49300	Ton	

WBS forecast QTY	WBS planned QTY	WBS to date QTY	% WBS QTY complete

Discipline	Claiming scheme	Work package ID
Metals	Erect Steel - H	

Description	Comments
Module XXX - A6: Column Assembly	

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 may be auto populated and locked for editing.

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

Add activity component

0.00000%

CLAIMINGCLAIMING HISTORYCOMPONENT DETAILS

Summary

Component ID

WBS

Component quantity

Unit of measure

Schedule ID

WBS forecast QTY

WBS planned QTY

WBS to date QTY

% WBS QTY complete

Discipline

Claiming scheme

Work package ID

Description

Comments

Location

Specifications

Procurement

Discipline specific

Engineering

View full page

Cancel

Save and close

Save

6. In the Location menu, enter the following:

- Construction area: If User ID is odd, select **North**. If User ID is even, select **South**.

0.00000%

Edit activity component

CLAIMING CLAIMING HISTORY COMPONENT DETAILS

Summary

Location

Unit Battery limit Ground Phase

Building Elevation Line number

Construction area ⚙️ Commodity ⚙️

North None

Specifications

Procurement

Discipline specific

Engineering

View full page Cancel Save and close Save

7. Open the **Discipline specific** menu and enter the following:

- Grade: A992
- Coating: GALV

×

0.00000%

Add activity component

CLAIMING

CLAIMING HISTORY

COMPONENT DETAILS

Summary

Location

Specifications

Procurement

Discipline specific

Tons

Length

Vendor Drawing

Width

AUX 5

Height

AUX 3

Engineer Responsible

AUX 2

AUX 1

Grade

Sequence

AUX 4

Total Pieces

Coating

Structure Drawing

Torque Value

Foundation Drawing

Engineering

View full page

Cancel

Save and close

Save

8. Once you have completed filling out your information, click the **Save** button.
- You may have to scroll to reach the bottom of the slide out panel

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 an 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:

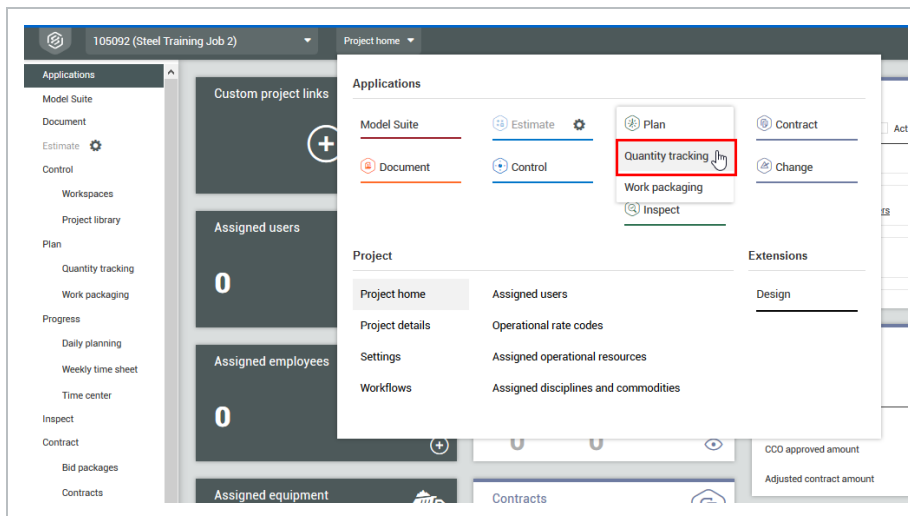
- Validated fields that don't exist
- WBS codes that are not available
- Non-unique component IDs

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

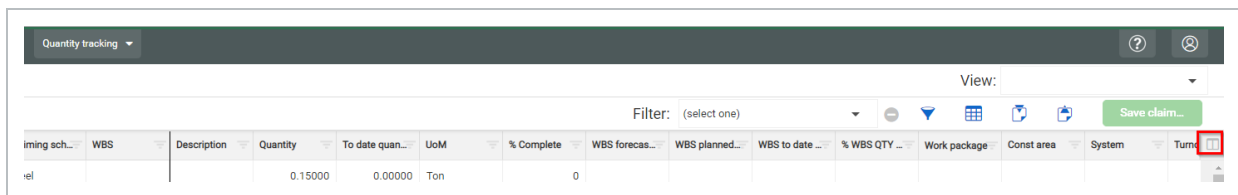
The following step by step walks you through how to export the Import Template, populate it, and upload it back into Plan.

4.3 Step by Step 1 — Create Components from Excel Import

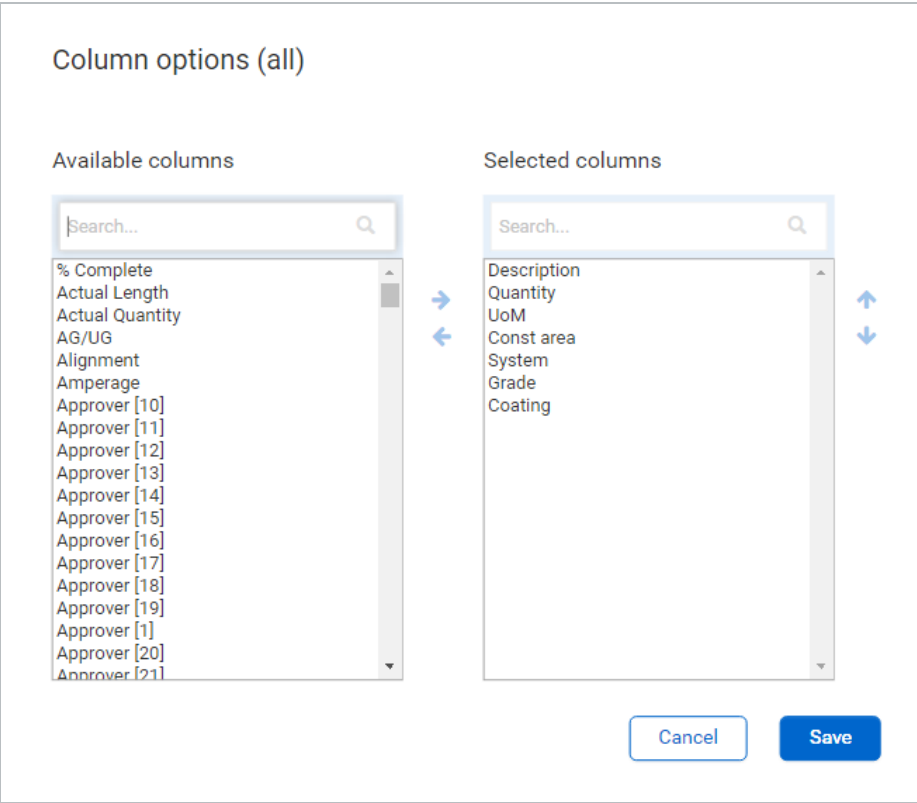
1. Navigate to the **Quantity Tracking** page.



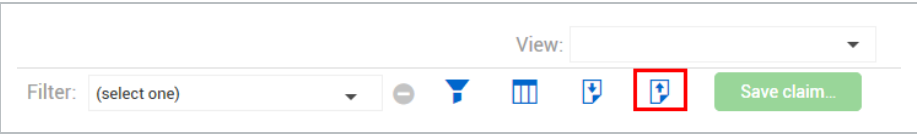
- From the grid view of the Quantity tracking page, select the **Column Chooser** on the far right of the column header row.



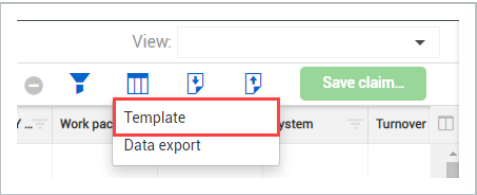
- From the Column Chooser pop up select the following fields and click **Save**:
 - **Description**
 - **Quantity**
 - **UOM**
 - **Const Area**
 - **System**
 - **Grade**
 - **Coating**



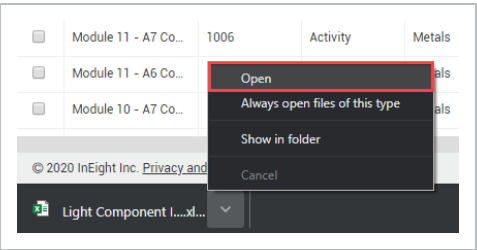
4. Click on the **Export** button on the right toolbar.



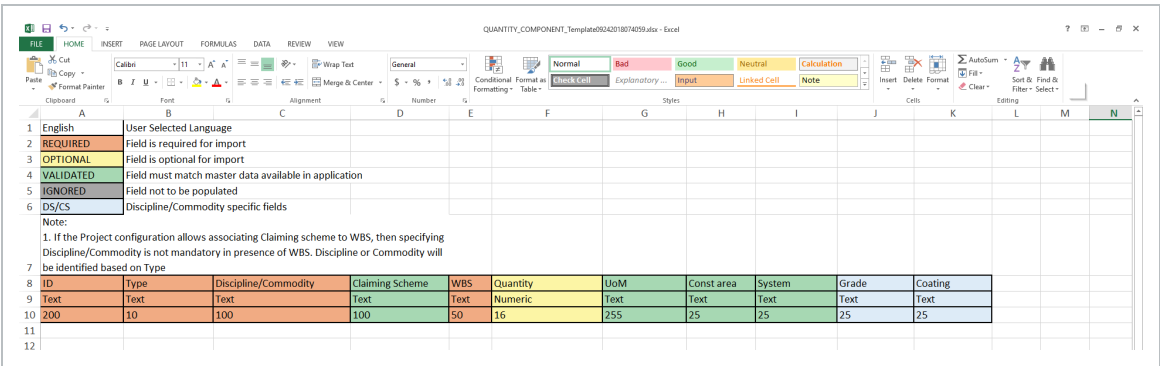
5. Select **Template**.



- An Excel spreadsheet should automatically open or appear at the bottom of your screen to download
6. Click on the drop-down arrow for the file and select **Open**.

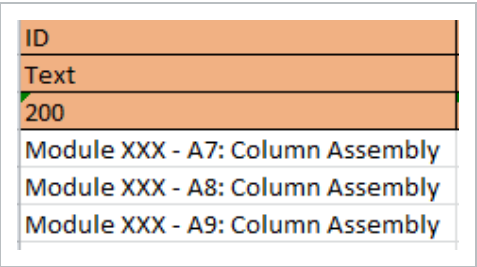


- The resulting spread sheet is now your Import Template and should only contain the columns that were displayed in Plan at the time of exporting.



7. In the ID Column, enter the following:

- **Module [your user ID #] - A7: Column Assembly**
- **Module [your user ID #] - A8: Column Assembly**
- **Module [your user ID #] - A9: Column Assembly**



TIP

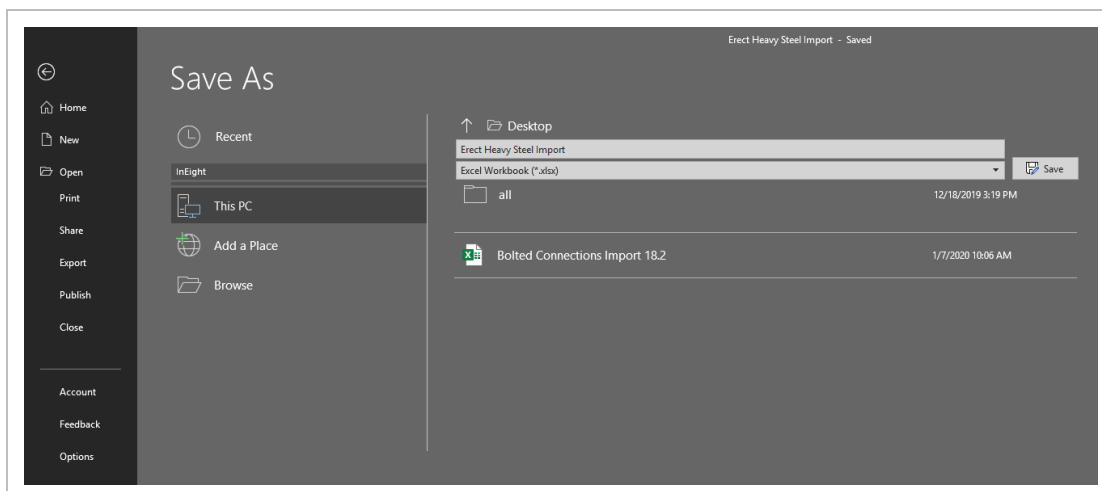
Component ID's must be unique within the same type of component (activity or material). You cannot have 2 components of the same type with the exact same ID, but you can have an activity component with the same ID as a material component.

8. Enter the following for all component ID's:

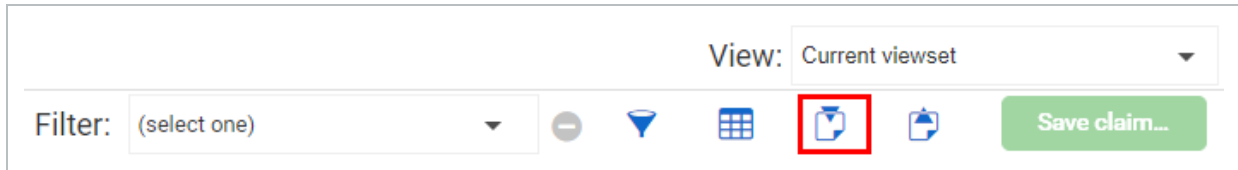
- Type: **Activity**
- Discipline: **Metals**
- Description: **Copy ID column**
- WBS: **WBS you created in control for 'Module [your user ID] – Erect Steel Heavy' or 1004**
- Quantity: **2.487**
- Unit of Measure: **Ton**
- Const Area: **North** for **odd** user ID's, **South** for **even** user ID's
- System: **SST**
- Grade: **A992**
- Coating: **GALV**

English	User Selected Language										
REQUIRED	Field is required for import										
OPTIONAL	Field is optional for import										
VALIDATED	Field must match master data available in application										
IGNORED	Field not to be populated										
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											
ID	Type	Discipline/Commodity	Claiming Scheme	WBS	Description	Quantity	UoM	Const area	System	Grade	Coating
Text	Text	Text	Text	Text	Text	Numeric	Text	Text	Text	Text	Text
200	10	100	100	50	200	16	255	25	25	25	25
Module XXX - A7: Column Assembly		Activity	Metals	1087	Module XXX - A7: Column Assembly	2.487	Ton	North	SST	A992	GALV
Module XXX - A8: Column Assembly		Activity	Metals	1087	Module XXX - A8: Column Assembly	2.487	Ton	North	SST	A992	GALV
Module XXX - A9: Column Assembly		Activity	Metals	1087	Module XXX - A9: Column Assembly	2.487	Ton	North	SST	A992	GALV

9. Save the file to your desktop so you can find it. Save as '**Erect Steel Heavy Import**'.xls or .csv file.

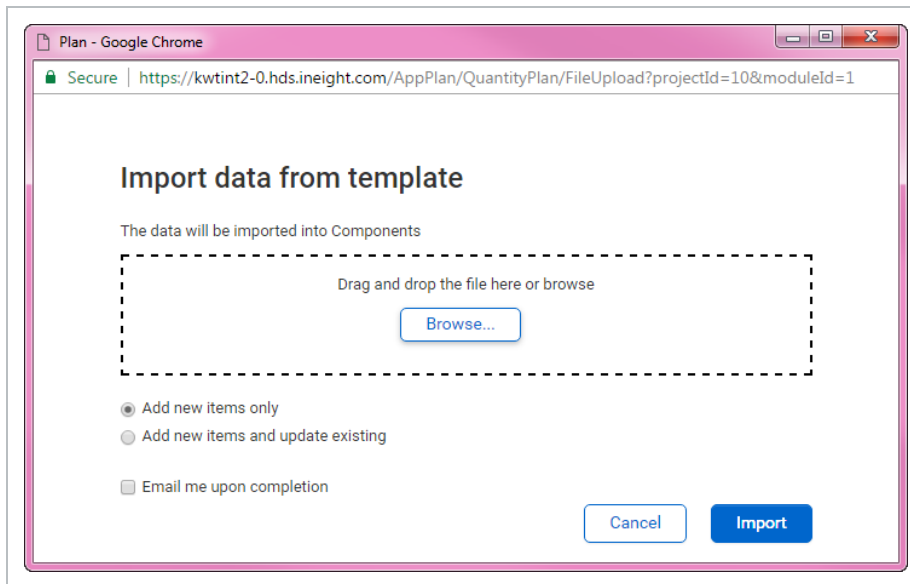


10. Return to Plan and click the **Import** button on the right toolbar.



- An Import data pop-up window appears

11. Select the **Browse** button.



12. From the resulting Open window, locate and select the **Erect Steel Heavy Import** file then select **Open**.

13. Select **Add new items only**.

Import data from template - Erect Steel Heavy Import.xlsx

The data will be imported into Components

Drag and drop the file here or browse

Browse...

☒ Add new items only

☐ Add new items and update existing

☐ Email me upon completion

Cancel Import

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.

Import data from template - Erect Steel Heavy Import.xlsx

The data will be imported into Components

Drag and drop the file here or browse

Browse...

☒ Add new items only

☐ Add new items and update existing

☒ Email me upon completion

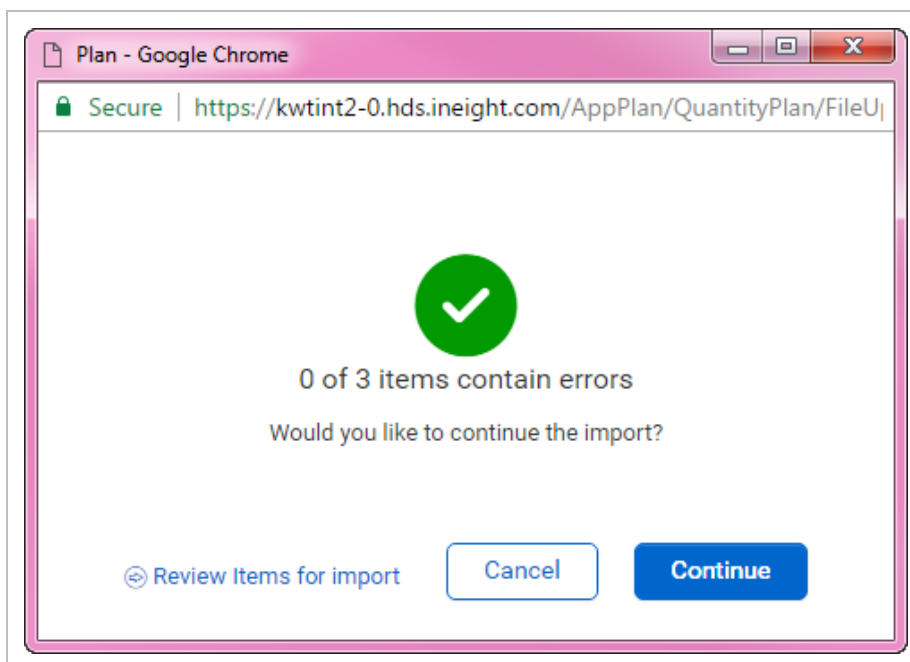
Cancel Import

- This will alert you to the completion of the upload

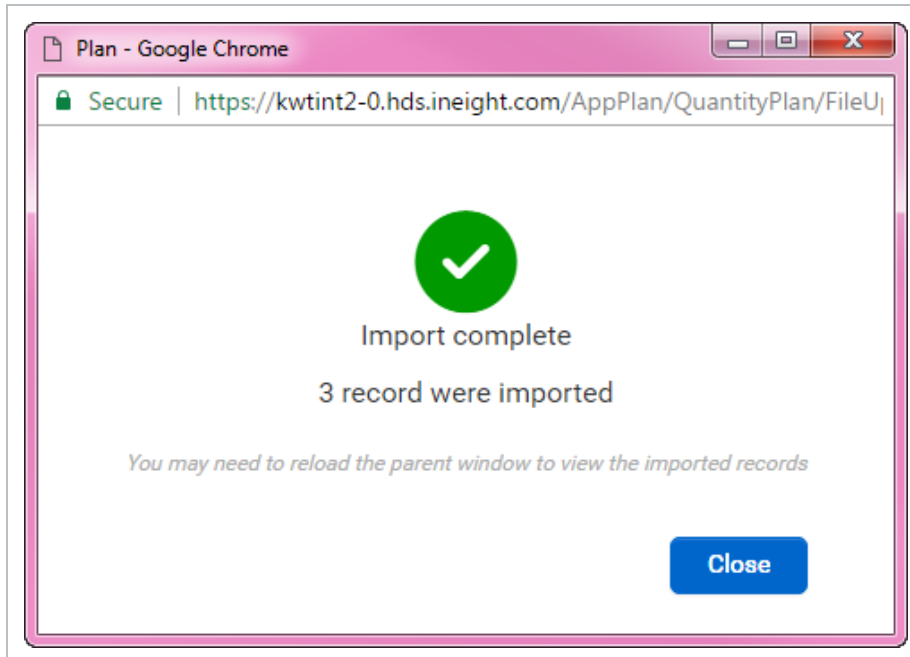
15. Click the **Import** button.

- Another window appears, indicating whether any errors occurred

16. Select **Continue** if no errors occurred.



17. Select **Close** from the window, verifying that the import is complete.



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

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LESSON 5 – QUANTITY CLAIMING

Lesson Duration: 45 minutes

Lesson Objectives

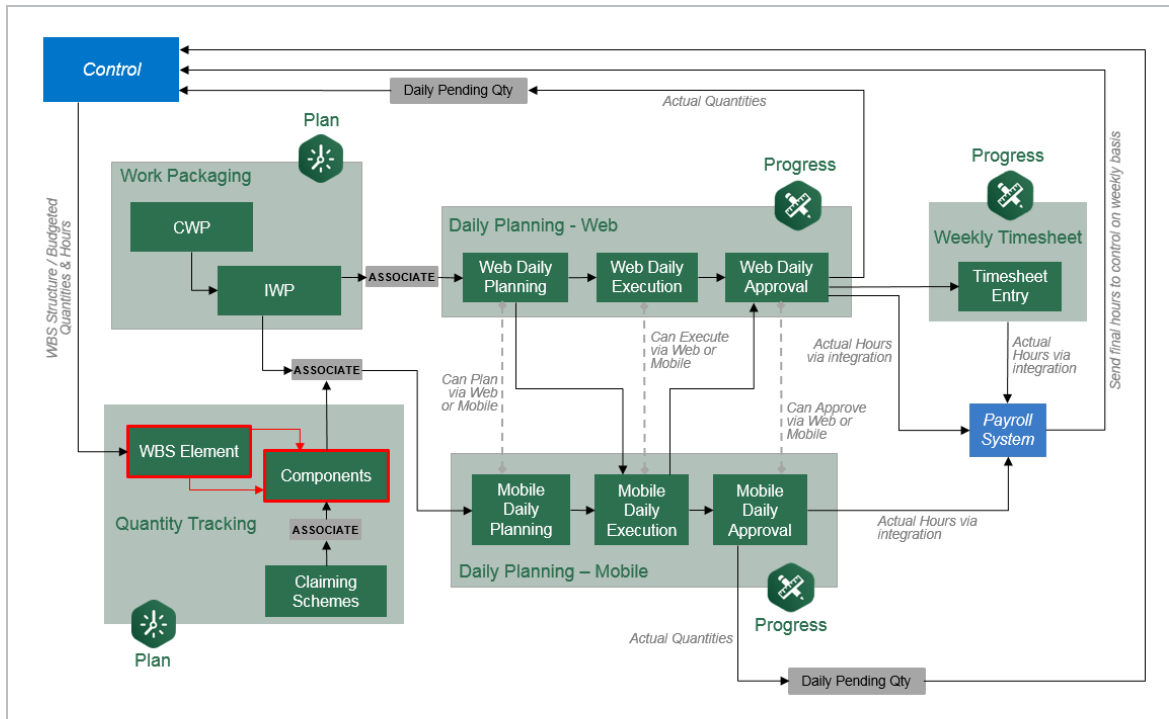
After completing this lesson, you will be able to:

- Claim quantities in Plan
- Edit claimed quantities

Lesson Topics

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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 Plan or 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. In Quantity Tracking, it is possible to analyze the quantities completed for the subordinate cost items.

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.



Unable to update components

The component claiming details have changed. The page must be reloaded.

[Reload page](#)

5.2.3 Claiming in the Standard Grid View

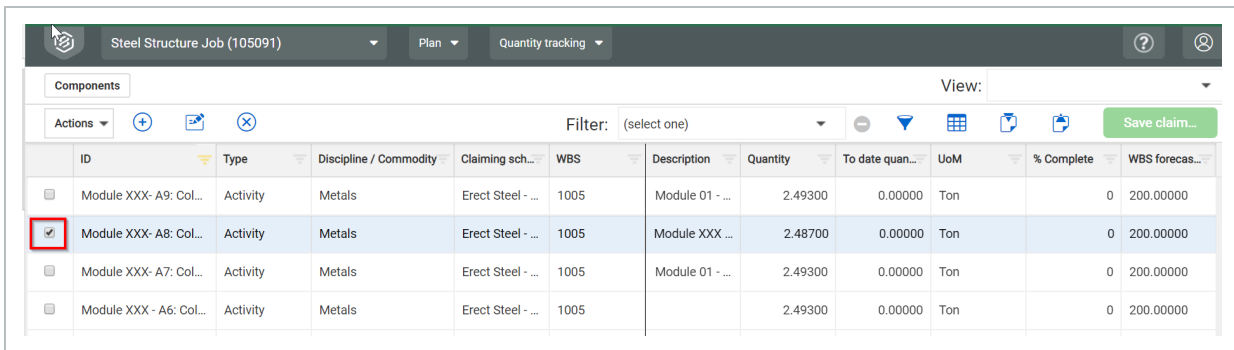
Scenario

Imagine you are the field engineer responsible for tracking the installation of structural steel for your module. You have been informed from the warehouse crew that one column you requested (column A8) has been shaken out in the laydown yard and transported to your work area. This is the first step in your claiming scheme for heavy structural steel and you need to claim it complete.

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

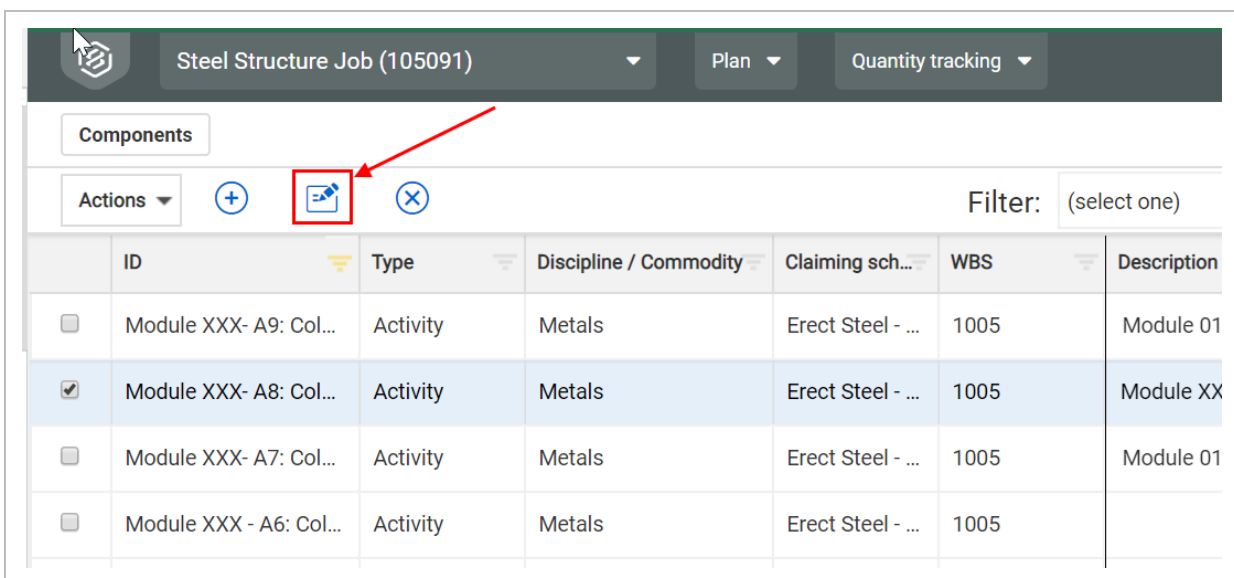
5.2 Step by Step 1 — Quantity Claiming (Standard Grid View)

1. Navigate to the **Quantity Tracking** page (make sure you are in the Standard Grid view).
2. Find and select the **check box** to the left of the component **Module [your user ID] – A8: Column Assembly** you created in *Lesson 4 – Component Management*.



ID	Type	Discipline / Commodity	Claiming sch...	WBS	Description	Quantity	To date quan...	UoM	% Complete	WBS forecas...
Module XXX- A9: Col...	Activity	Metals	Erect Steel - ...	1005	Module 01 - ...	2.49300	0.00000	Ton	0	200.00000
☒ Module XXX- A8: Col...	Activity	Metals	Erect Steel - ...	1005	Module XXX ...	2.48700	0.00000	Ton	0	200.00000
Module XXX- A7: Col...	Activity	Metals	Erect Steel - ...	1005	Module 01 - ...	2.49300	0.00000	Ton	0	200.00000
Module XXX - A6: Col...	Activity	Metals	Erect Steel - ...	1005		2.49300	0.00000	Ton	0	200.00000

3. Click the **Edit** button to open the component editor slide out panel.



ID	Type	Discipline / Commodity	Claiming sch...	WBS	Description
Module XXX- A9: Col...	Activity	Metals	Erect Steel - ...	1005	Module 01
☒ Module XXX- A8: Col...	Activity	Metals	Erect Steel - ...	1005	Module XX
Module XXX- A7: Col...	Activity	Metals	Erect Steel - ...	1005	Module 01
Module XXX - A6: Col...	Activity	Metals	Erect Steel - ...	1005	

4. On the Claiming tab, check the box in the **Complete** column for step 1 'Shakeout / Transport'.
 - You will notice that once you check the box, the 'Install qty,' 'This period qty,' and 'Date' fields automatically populate

Edit activity component

CLAIMING

CLAIMING HISTORY

COMPONENT DETAILS

Step	% Cla...	Com...	Date	Quantity	Install qty	This period...	UoM
Shakeout/Transp	15	☒	10/31/2018	2.49300	2.49300	2.49300	Ton
Erect/Bolt Up	45	☐		2.49300	0.00000	0.00000	Ton
Final Torque	30	☐		2.49300	0.00000	0.00000	Ton
QC Verification	10	☐		2.49300	0.00000	0.00000	Ton

5. Enter an Executor and Approver.

Edit activity component

CLAIMING

CLAIMING HISTORY

COMPONENT DETAILS

Step	% Cla...	Com...	Date	Quantity	Install qty	This period...	UoM
Shakeout/Transp	15	☒	10/31/2018	2.49300	2.49300	2.49300	Ton
Erect/Bolt Up	45	☐		2.49300	0.00000	0.00000	Ton
Final Torque	30	☐		2.49300	0.00000	0.00000	Ton
QC Verification	10	☐		2.49300	0.00000	0.00000	Ton

Approver

Executor

Notes

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

NOTE

You must 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

Edit activity component

CLAIMING

CLAIMING HISTORY

COMPONENT DETAILS

Step	% Cla	Com	Date	Quantity	Install qty	This period	UoM
------	-------	-----	------	----------	-------------	-------------	-----

TIP

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

Edit activity component 15%

CLAIMING			CLAIMING HISTORY		COMPONENT DETAILS		
Step	% Cla...	Com...	Date	Quantity	Install qty	This period...	UoM
Shakeout/Transp	15	☒	10/31/2018	2.49300	2.49300	0.00000	Ton
Erect/Bolt Up	45	☐	10/31/2018	2.49300	1.00000	1.00000	Ton
Final Torque	30	☐		2.49300	0.00000	0.00000	Ton
QC Verification	10	☐		2.49300	0.00000	0.00000	Ton

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. (Note: The same scenario follows for claiming in data blocks.)

5.2.4 Claiming in the Data Blocks View

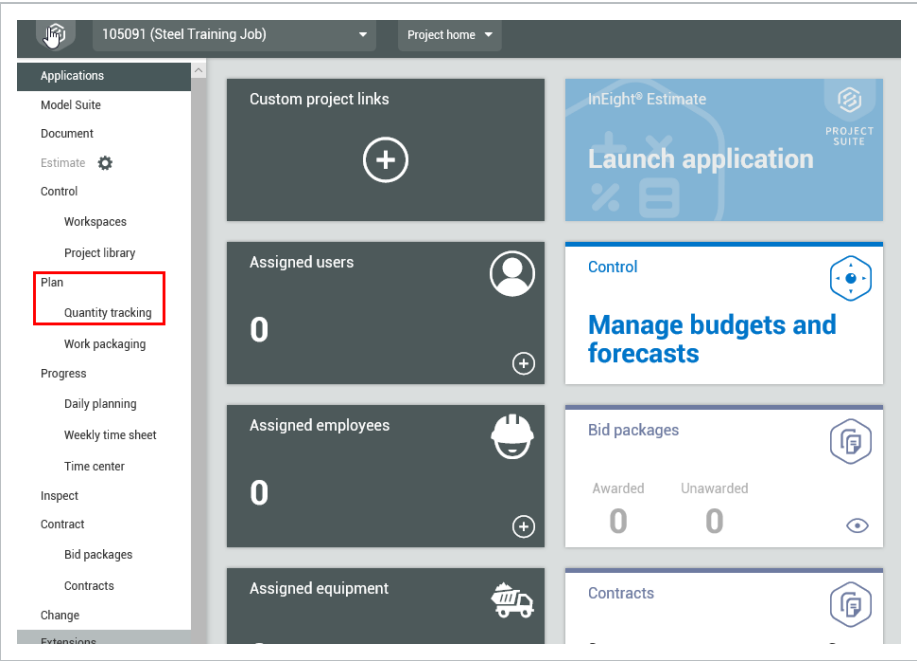
Scenario

Imagine the warehouse crew gave you a list of all the steel they had transported to your work area. Instead of having to go through and open each component, you can use the data block view to claim multiple items faster.

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

5.2 Step by Step 2 — Quantity Claiming (Data Blocks View)

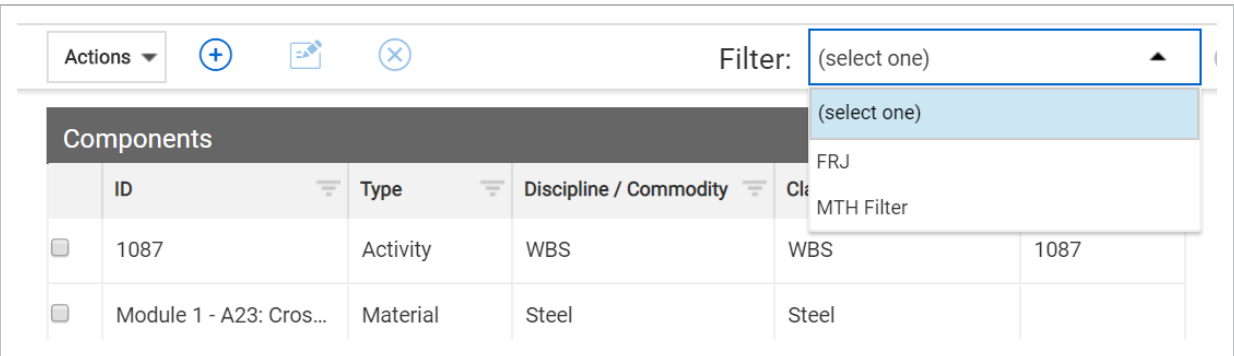
1. Navigate to the **Quantity Tracking** page and make sure you are in the Data Blocks view.



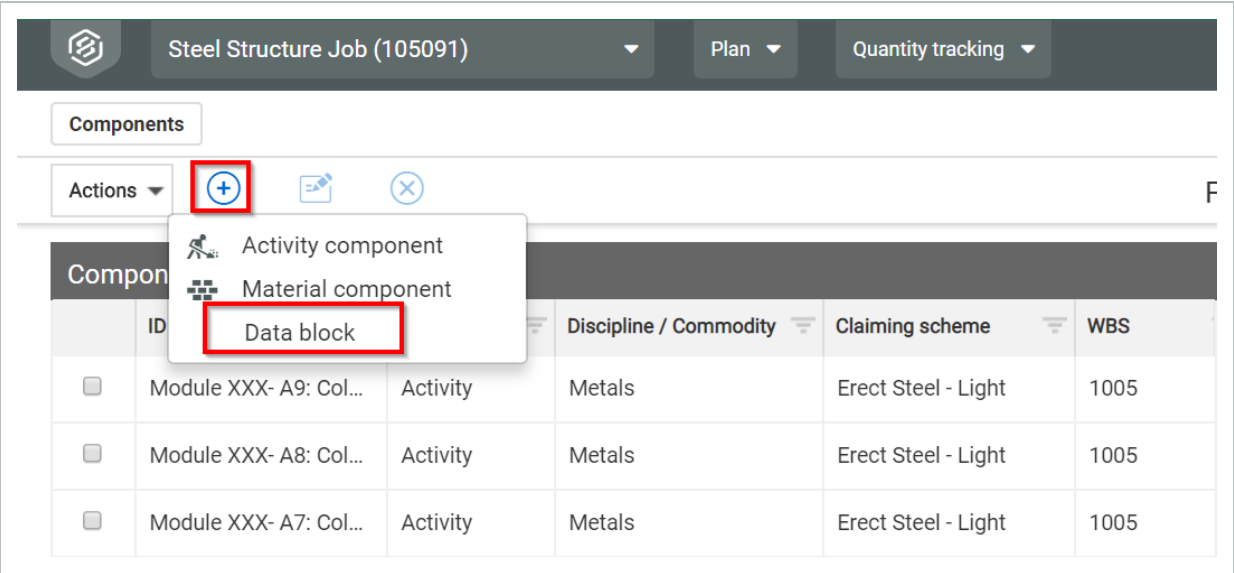
The screenshot shows the 'Quantity tracking' view for 'Steel Structure Job (105091)'. The table lists components with the following data:

ID	Type	Discipline / Commodity	Claiming sch...	WBS	Description	Quantity	To date quan...	UoM	% complete	WBS forecas...
Module 1 - A23: Cros...	Material	Steel	Steel			0.15000	0.00000	Ton	0	
Module 1 - A23: Cros...	Activity	Metals	Erect Steel - ...	1005		0.15000	0.00000	Ton	0	200.00000
Module XXX- A9: Col...	Activity	Metals	Erect Steel - ...	1005	Module 01 - ...	2.49300	0.00000	Ton	0	200.00000
Module XXX- A8: Col...	Activity	Metals	Erect Steel - ...	1005	Module XXX ...	2.48700	0.37305	Ton	15	200.00000

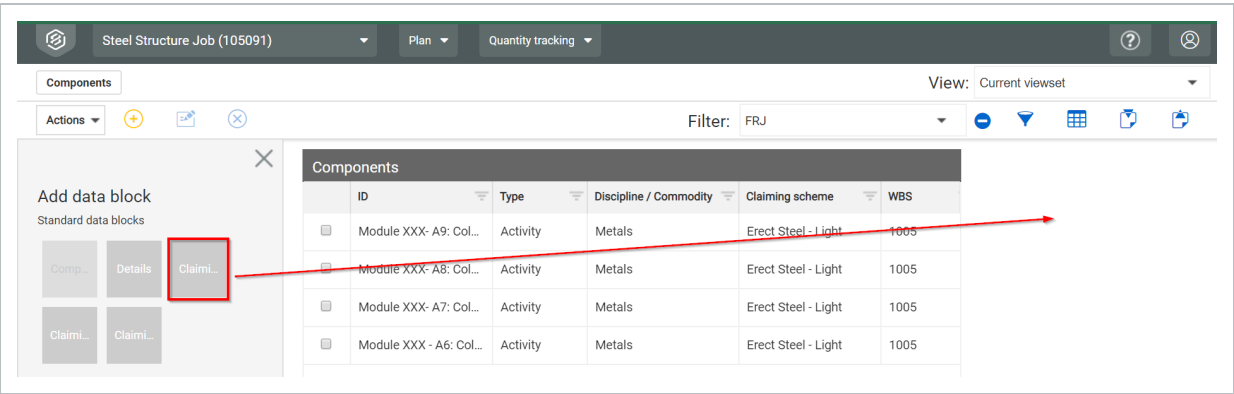
2. Turn on the **[your name]** filter that you created in Quantity Tracking *Lesson 2 – General Navigation* using the filter drop-down menu on the right toolbar.



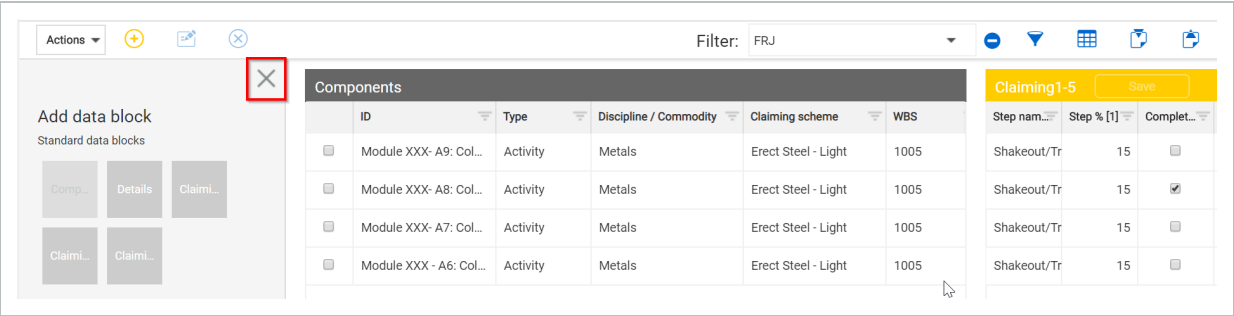
3. Click the **Add** button on the left toolbar and select **Data Block**.



4. Select the **Claiming 1-5** data block and drag it to the white space to the right of the components data block.



- Note that 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.

Actions

Filter: FRJ

Components						Claiming1-5					
ID	Type	Discipline / Commodity	Claiming scheme	WBS	Step nam...	Step % [1]	Comple...	Quantity [...]	Installed ...	This peri...	UoM [1
Module XXX- A9: Col...	Activity	Metals	Erect Steel - Light	1005	Shakeout/Tr	15	☐	2.49300	0.00000	0.00000	Ton
Module XXX- A8: Col...	Activity	Metals	Erect Steel - Light	1005	Shakeout/Tr	15	☒	2.49300	2.49300	0.00000	Ton
Module XXX- A7: Col...	Activity	Metals	Erect Steel - Light	1005	Shakeout/Tr	15	☒	2.49300	0.00000	0.00000	Ton
Module XXX- A6: Col...	Activity	Metals	Erect Steel - Light	1005	Shakeout/Tr	15	☒	2.49300	0.00000	0.00000	Ton

7. Click the **Save** button in the data block header.

Actions

Filter: FRJ

Components						Claiming1-5					
ID	Type	Discipline / Commodity	Claiming scheme	WBS	Step nam...	Step % [1]	Comple...	Quantity [...]	Installed ...	This peri...	UoM [1
☒ Module XXX- A9: Col...	Activity	Metals	Erect Steel - Light	1005	Shakeout/Tr	15	☒	2.49300	0.00000	0.00000	Ton
☐ Module XXX- A8: Col...	Activity	Metals	Erect Steel - Light	1005	Shakeout/Tr	15	☒	2.49300	2.49300	0.00000	Ton
☐ Module XXX- A7: Col...	Activity	Metals	Erect Steel - Light	1005	Shakeout/Tr	15	☒	2.49300	0.00000	0.00000	Ton
☐ Module XXX- A6: Col...	Activity	Metals	Erect Steel - Light	1005	Shakeout/Tr	15	☒	2.49300	0.00000	0.00000	Ton

Scenario Recap

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.

ClaimingSchemes ^										
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.

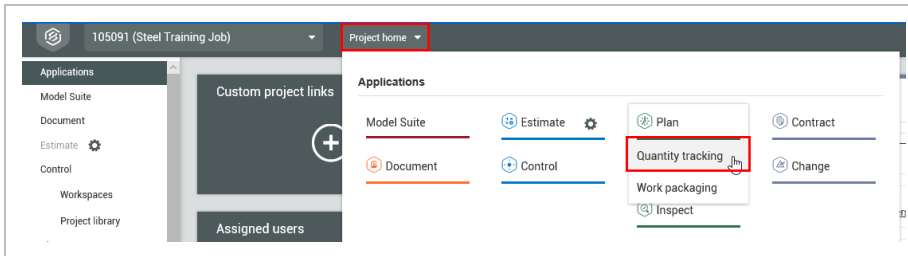
ClaimingSchemes ^										
Step	% Cla...	Com...	Date	Quantity	Install qty	This period...	UoM	Executor	Approver	Qty joined
Assemble	25	☐		10.00000	0.00000	0.00000	LF			☒
Erect	25	☐		10.00000	0.00000	0.00000	LF			☐
Detail	40	☐		10.00000	0.00000	0.00000	LF			☒
Verification & Do	10	☐		10.00000	0.00000	0.00000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

5.3.2 Quantity Editing

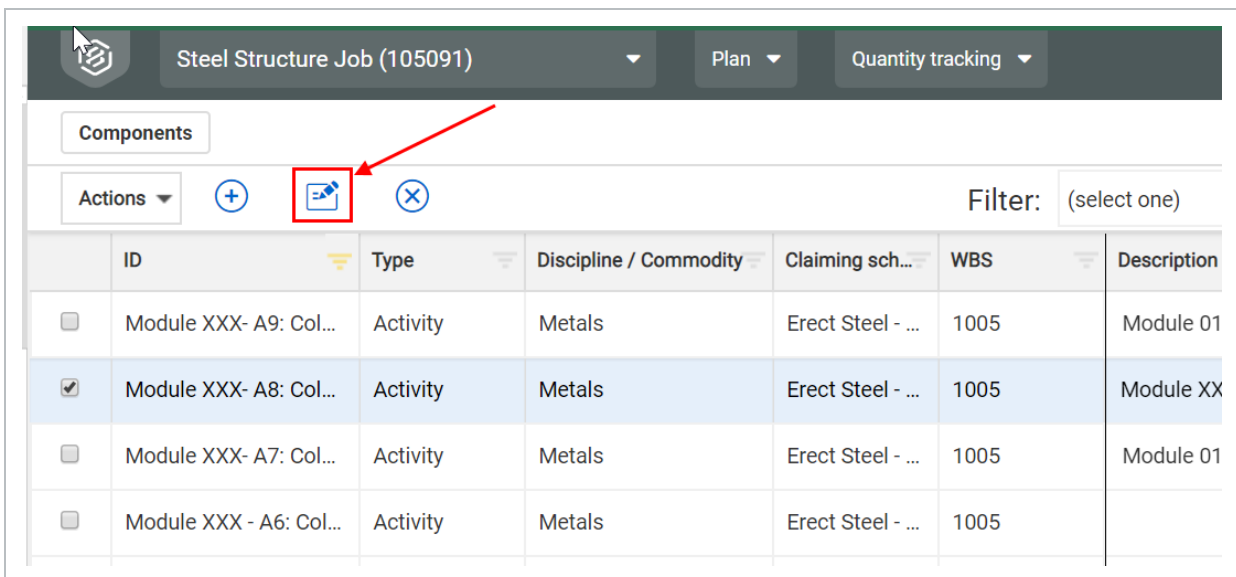
Using InEight Plan, you can easily add or subtract quantity from components. The following Step by Step will detail this process.

5.3 Step by Step 1 — Edit Claimed Quantity

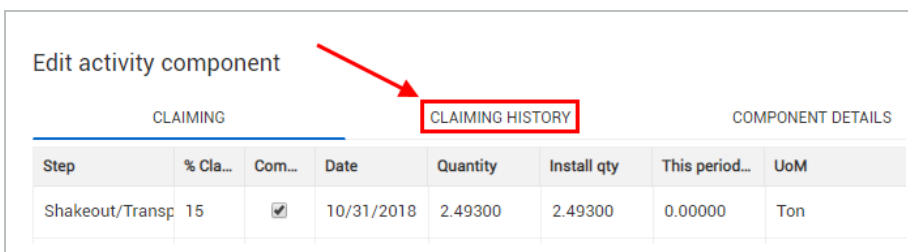
1. Navigate to the **Quantity Tracking** page and make sure you are in the Standard Grid view.



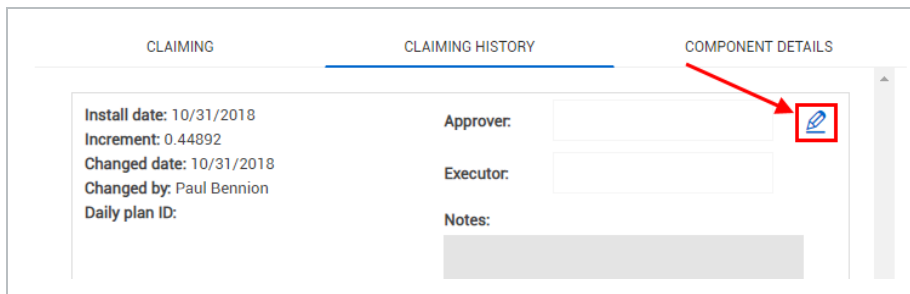
2. Find and select the **check box** to the left of one of the components you created.
3. Click the **Edit** button to open the Edit component slide out panel.



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.



- Note 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 Shakeout Transport.

8. Type **1** in the Installed quantity field.

- 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