PLAN USER GUIDE QUANTITY TRACKING



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# LESSON 1 – QUANTITY TRACKING OVERVIEW

InEight Inc. | Release 24.9

# 1.1 PLAN QUANTITY TRACKING OVERVIEW

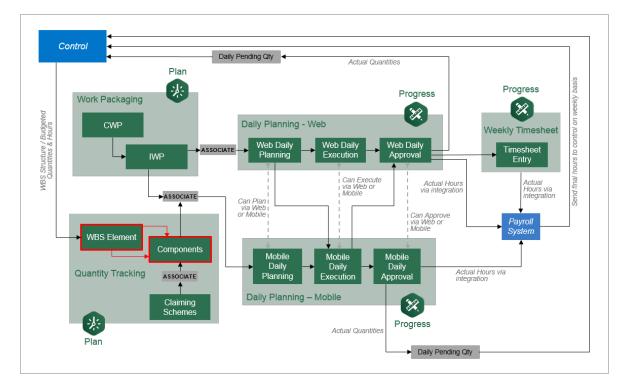
As one of the applications within the InEight portfolio of products, InEight Plan is a tool for engineers and superintendents to plan work and track quantities during the execution of their project.

Plan is organized into two modules:

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

#### 1.1.1 INEIGHT PLAN WORK FLOW

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



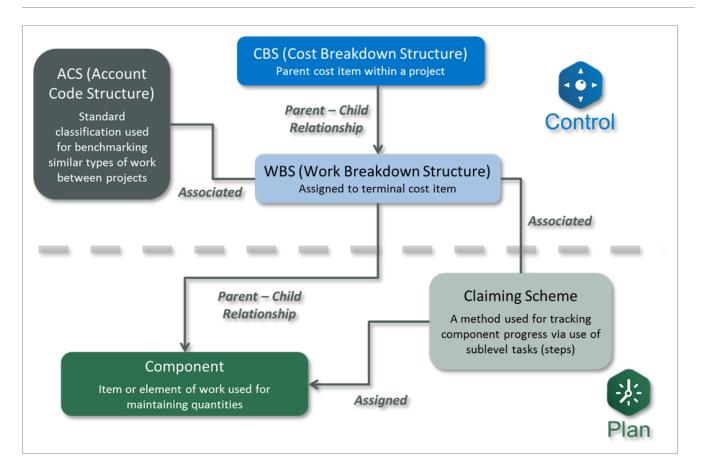
## 1.1.2 QUANTITY TRACKING TERMINOLOGY

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

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

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

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



#### Scenario

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

Турі	cal all m	odules				North	) Area	I							
01	03	05	07	09	11	13	15	17	19	21	23	25	27	29	Î
<u> </u>															╡
02	04	06	08	10	12	14	16	18	20	22	24	26	28	30	
•						Sout	h Are	а							•

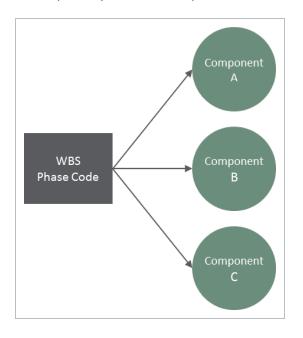
The image above depicts a layout for a steel structure project. The project consists of erecting 30 separate steel structures on opposite sides of a road. Each structure or module has been assigned a number 1-30.

#### **1.1.3 COMPONENTS**

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

Tas	sks			Task De	t <••••	>
	CBS Position	Description	-	WBS Phase = Code	Foreca st TO Qty	UOM
	1	Job Overhead		1002	1.00	Lump Su
	2	Earthwork		1069	10,000.00	СҮ
	3	Concrete		1071	10,000.00	СҮ
	₹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

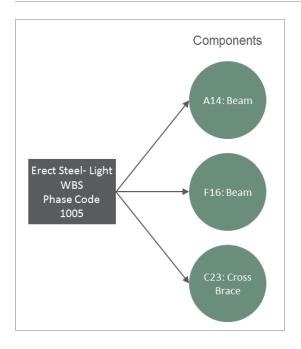
In InEight Plan, the Quantity Tracking module allows you to break down quantities into more manageable tasks to track and claim against. You accomplish this by breaking down your WBS Phase Code quantity into smaller pieces called components.



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

8	Steel Structure Job	(105091)		V Wa	orkspaces 👻	
			CBS		ACS	
Actio	ns 🔻 🕂 🗹	×				
Tas	ks		Tas	sk details	<•>	
	CBS position	Descriptio		e –	Forecast (T/O) =	UoM
	1	Job Over		1002	1.00	Lump Sum
	<b>^</b> 2	Earthwork	k	1069	10,000.00	CY
	2.1	Earthwork	k Review	1003	1.00	Each
	2.2	Earthwork	k 📗	1004	10,000.00	CY
	3	Concrete		1071	10,000.00	CY
	^ 4	Structura	l Steel	1073	1,000.00	Ton
	4.1	Erect Stee	el - Heavy	1074	350.00	Ton
	4.2	Erect Stee	el - Light	1005	200.00	Ton
	4.3	Bolted Co	onnections	1006	2,000.00	Ea
	4.4	Module X	XX - Erect	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:

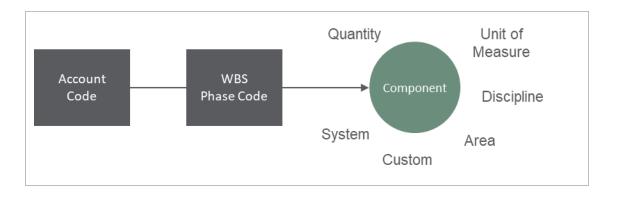
Component	Quantity
A14: Beam	0.44 Tons
F16: Beam	0.45 Tons
C23: Cross Brace	0.26 Tons

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

#### **1.1.4 COMPONENT ATTRIBUTES**

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

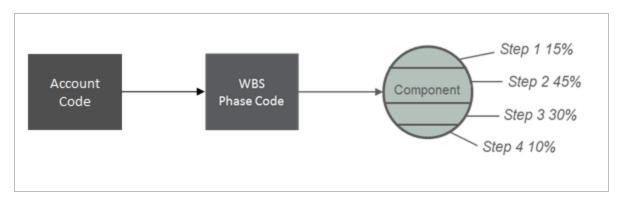
- Schedule ID
- Discipline
- Area
- System
- Customizable Attributes



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

### 1.1.5 CLAIMING SCHEMES

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



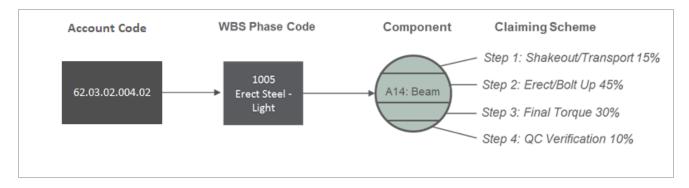
Claiming schemes can be assigned at either the component, WBS, or Account Code level. If a claiming scheme is assigned at the WBS level, then every component that is assigned to that WBS will automatically inherit the same claiming scheme.

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

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

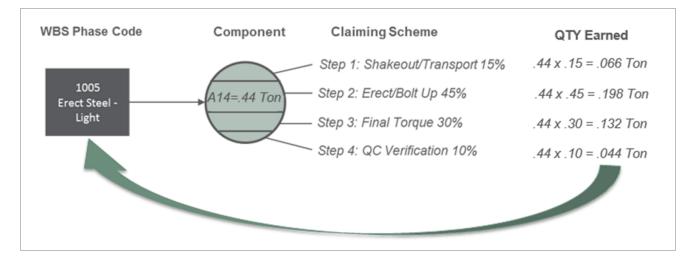
Claiming S	cheme for 'A14: Beam'	Component
Step	Description	Percentage
Step 1	Shakeout/Transport	15%
Step 2	Erect/Bolt Up	45%
Step 3	Final Torque	30%
Step 4	QC Verification	10%

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



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

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



## 1.1.6 QUANTITIES SENT TO INEIGHT CONTROL

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

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.

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# LESSON 2 – GENERAL NAVIGATION

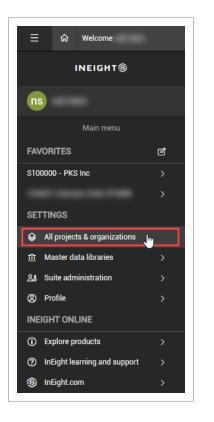
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# 2.1 PAGE NAVIGATION

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

To launch the Plan application, you must first open the InEight software in your web browser, using the link provided by your manager or facilitator.

Open the **All projects & organizations** page from the Main menu.



On the Projects tab you can select any project you are associated with. If your project is not shown on the initial screen, you can search by selecting the **Search** icon in the top right corner.

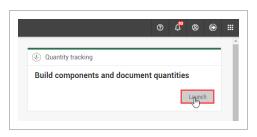
≡ 🗠 !	All projects & organia	zations									0 4	
					PROJECTS	ORGANIZ	ATIONS					
•												(i) C
ID †		Name	Stat.	Organization	Created by	Created on	Original contract	Contract number	Date project start	Contract date	Original contract	Original durat
						07/06/2021 12:29:34			09/09/2019	09/09/2019	09/09/2019	1
						07/06/2021 9:03:18 AM						
						07/06/2021 10:13:31						
						07/09/2021 10:50:48						
						07/12/2021 3:15:06 AM		2021.06.09	08/30/2021	06/09/2021		
						08/04/2021 11:22:04						
						06/01/2020 2:05:49 PM			06/09/2021		05/09/2023	700
						07/05/2021 12:00:54			07/07/2021			
						07/28/2021 10:13:22						
						07/19/2021 5:22:47 PM						
						07/28/2021 12:18:33						
						07/29/2021 10:43:07						
						07/07/2021 6:49:42 AM						
						08/03/2021 3:37:21 PM						
						07/08/2021 11:17:10						
						07/02/2021 4:45:19 AM						
						07/21/2021 7:09:31 AM						
						06/21/2021 8:04:56 AM						
						06/07/2021 8:51:43 AM			06/02/2021			
						06/17/2021 5:25:49 AM						
						12/04/2020 5:59:29 PM			06/01/2021			
						12/04/2020 5:59:29 PM						
						12/04/2020 5:59:29 PM						
						12/04/2020 5:59:29 PM			08/04/2021			
						12/04/2020 5-59-29 PM						

When you select a project, it takes you to the Project home page.

10 <sup>th</sup>	🖉 Links	<ul> <li>Control</li> </ul>		Quantity tracking	
Add project image	Organization	Manage budgets and forecasts		Build components and document	quantities
Minimum of 540px x 360px	LaunchPad		Launch		Launch
	Project				
Model		Work packaging		Daily planning	
Document	(+)				
Schedule	Ŭ	Group work into plans and pac	kages	Assign tasks for your crew	
Design			Launch		Launch
Dashboard					
Quantity forecasting	Project notes	Contracts		Supporting documents	
Engineering				Supporting uscaments	
Estimate		Status	Count		
Control		Executed Non-executed	80		۲
Workspaces		In approval	0		
Project library	Settings	Rejected		Bid packages	
Plan	Project and application settings				
Quantity tracking	Project and application settings			Awarded Unawarded	
Work packaging	Manage sett	ings	•	31 16	۲
Progress					
Daily planning	Project contract summary	<ul> <li>Change milestones</li> </ul>		Change status	
Time center	Actual values		Contract Forecast	Closed In Process Active	
Weekly time sheet			Puleasa		
Capital		0.00 Contract date		issue	
	· ·				

From here, you can launch Plan Quantity tracking in several ways:

• Clicking the Quantity tracking Launch application tile



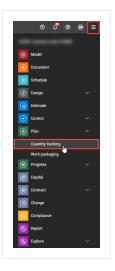
• Selecting Plan > Quantity tracking from the left menu

	est.
	0
	Add project image Minimum of 540px x 360px
	۵
۲	Model
۲	Document
۲	Schedule
۲	Design
	Dashboard
	Quantity forecasting
	Engineering
٢	Estimate
٢	Control
	Workspaces
	Project library
۲	Plan
	Quantitygracking
	Work packaging
8	Progress
	Daily planning
	Time center
	Weekly time sheet
۲	Capital

• Selecting Plan > **Quantity tracking** from the second-level drop-down menu for a specific organization or project at the top of the page



 Selecting Plan > Quantity tracking from the app launcher icon in the upper-right corner of the page



The following steps walk you through launching Quantity tracking using the second-level drop-down menu at the project level.

#### LAUNCH QUANTITY TRACKING

1. From the Projects tab of the **All projects & organizations** page, click on the project name hyperlink to select a project.

This opens the Project home page.

- 2. From the Project home page, click the **main menu** icon, and then click the **project name** to open the second-level menu.
- 3. From the second-level drop-down menu, open the **Plan** drop-down menu, and then select **Quantity tracking**.

This brings you to the Quantity tracking page.

#### Overview - Quantity Tracking Home Page (Standard Grid)

	Title	Description
1	Actions	Contains available actions for the current tab.
2	Left toolbar	Options to add, edit, bulk edit, delete, copy, and split components.

#### Overview - Quantity Tracking Home Page (Standard Grid) (continued)

	Title	Description
3	Grid view options	<ul> <li>Row density: Lets you change the spacing between rows.</li> <li>View as data blocks: Changes to data block view.</li> </ul>
4	Views	Lets you create, save, change and share views.
5	Import, Export, and Save claiming	<ul> <li>Options to import and export data to Microsoft Excel.</li> <li>Lets you save claimed quantities.</li> </ul>
6	Query options	<ul> <li>Filter: Opens the Query builder side panel to filter components.</li> <li>(Clear) Filter: Clears all column filters.</li> <li>CBS tree: Opens the CBS tree to filter by CBS. See <u>CBS tree</u> for more information.</li> <li>AWP filter: Filter associated work packages to quickly find components associated with the selected work packages</li> <li>Clear CBS and user queries: Clears all filters from the Query builder and the CBS tree.</li> </ul>
7	Components	Shows components in a table according to the applied query and filters.
8	Results and selection counts	Shows the counts of results and selected components. Choose whether to view selected components or clear your selection

ŀ		Name	Parent record	Assembly	Туре	Discipline / Commodity	Claiming scheme	WBS	Description	Quantity	To date quantity	UoM	% Complete	WBS forecast QTY	WBS planned QTY	WBS
(	5)	T	T		<b>. .</b>	v T	<b>v T</b>		T	т	T	- T	T	т	T	
Г		Module 30 - A7 Co		<b>7</b>	<ul> <li>Activity</li> </ul>	Metals	Bolted Connectio	1006	Module 30 - A7 Co	1.00000	0.00000	Ea	0	2,000.00000	60.00000	0.90
	0	Module 30 - A6 Co			<ul> <li>Activity</li> </ul>	Metals	Bolted Connectio	1006	Module 30 - A6 Co	1.00000	0.00000	Ea	0	2,000.00000	60.00000	0.90
E		Module 29 - A7 Co			<ul> <li>Activity</li> </ul>	Metals	Bolted Connectio	1006	Module 29 - A7 Co	1.00000	0.90000	Ea	90	2,000.00000	60.00000	0.90
E	0	Module 29 - A6 Co			<ul> <li>Activity</li> </ul>	Metals	Bolted Connectio	1006	Module 29 - A6 Co	1.00000	0.00000	Ea	0	2,000.00000	60.00000	0.90
E		Module 28 - A7 Co			<ul> <li>Activity</li> </ul>	Metals	Bolted Connectio	1006	Module 28 - A7 Co	1.00000	0.00000	Ea	0	2,000.00000	60.00000	0.90
E	0	Module 28 - A6 Co			<ul> <li>Activity</li> </ul>	Metals	Bolted Connectio	1006	Module 28 - A6 Co	1.00000	0.00000	Ea	0	2,000.00000	60.00000	0.90
1		Module 27 - A7 Co			<ul> <li>Activity</li> </ul>	Metals	Bolted Connectio	1006	Module 27 - A7 Co	1.00000	0.00000	Ea	0	2,000.00000	60.00000	0.90
	0	Module 27 - A6 Co			<ul> <li>Activity</li> </ul>	Metals	Bolted Connectio	1006	Module 27 - A6 Co	1.00000	0.00000	Ea	0	2,000.00000	60.00000	0.90
		Module 26 - A7 Co			<ul> <li>Activity</li> </ul>	Metals	Bolted Connectio	1006	Module 26 - A7 Co	1.00000	0.00000	Ea	0	2,000.00000	60.00000	0.90
	0	Module 26 - A6 Co			<ul> <li>Activity</li> </ul>	Metals	Bolted Connectio	1006	Module 26 - A6 Co	1.00000	0.00000	Ea	0	2,000.00000	60.00000	0.90
		Module 25 - A7 Co			<ul> <li>Activity</li> </ul>	Metals	Bolted Connectio	1006	Module 25 - A7 Co	1.00000	0.00000	Ea	0	2,000.00000	60.00000	0.90
	0	Module 25 - A6 Co			<ul> <li>Activity</li> </ul>	Metals	Bolted Connectio	1006	Module 25 - A6 Co	1.00000	0.00000	Ea	0	2,000.00000	60.00000	0.90
		Module 24 - A7 Co			<ul> <li>Activity</li> </ul>	Metals	Bolted Connectio	1006	Module 24 - A7 Co	1.00000	0.00000	Ea	0	2,000.00000	60.00000	0.90
		Module 24 - A6 Co			<ul> <li>Activity</li> </ul>	Metals	Bolted Connectio	1006	Module 24 - A6 Co	1.00000	0.00000	Ea	0	2,000.00000	60.00000	0.90
	0	Module 23 - A7 Co			<ul> <li>Activity</li> </ul>	Metals	Bolted Connectio	1006	Module 23 - A7 Co	1.00000	0.00000	Ea	0	2,000.00000	60.00000	0.90
		Module 23 - A6 Co			<ul> <li>Activity</li> </ul>	Metals	Bolted Connectio	1006	Module 23 - A6 Co	1.00000	0.00000	Ea	0	2,000.00000	60.00000	0.90
	0	Module 22 - A7 Co			<ul> <li>Activity</li> </ul>	Metals	Bolted Connectio	1006	Module 22 - A7 Co	1.00000	0.00000	Ea	0	2,000.00000	60.00000	0.90
	0	Module 22 - A6 Co			<ul> <li>Activity</li> </ul>	Metals	Bolted Connectio	1006	Module 22 - A6 Co	1.00000	0.00000	Ea	0	2,000.00000	60.00000	0.90
	0	Module 21 - A7 Co			<ul> <li>Activity</li> </ul>	Metals	Bolted Connectio	1006	Module 21 - A7 Co	1.00000	0.00000	Ea	0	2,000.00000	60.00000	0.90
	0	Module 21 - A6 Co			<ul> <li>Activity</li> </ul>	Metals	Bolted Connectio	1006	Module 21 - A6 Co	1.00000	0.00000	Ea	0	2,000.00000	60.00000	0.90
	0	Module 20 - A7 Co			<ul> <li>Activity</li> </ul>	Metals	Bolted Connectio	1006	Module 20 - A7 Co	1.00000	0.00000	Ea	0	2,000.00000	60.00000	0.90
	0	Module 20 - A6 Co			<ul> <li>Activity</li> </ul>	Metals	Bolted Connectio	1006	Module 20 - A6 Co	1.00000	0.00000	Ea	0	2,000.00000	60.00000	0.90
	0	Module 19 - A7 Co			<ul> <li>Activity</li> </ul>	Metals	Bolted Connectio	1006	Module 19 - A7 Co	1.00000	0.00000	Ea	0	2,000.00000	60.00000	0.90

#### 2.1.1 STANDARD GRID VS DATA BLOCK VIEW

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

#### 2.1.1.1 STANDARD GRID VIEW

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

							1									
Name †	Parent record	Assembly	Type	Discipline / Commod	Claiming sc	WBS	Description	Quantity	To date qua	UoM	* Complete	WBS foreca	WBS plann	WBS to dat	% WBS QTY	Work p
1083 - Pond - D1A			Activity	Grading	511001 - Mas	1083	Pond - D1A3P	6,157.00000	3,206.00000	CY	52.07081	35,834.00000	35,834.00000	11,835.00000	33.02729	
1083 - Pond - D1A			Activity	Grading	511001 - Mas	1083	Pond - D1A3P	8,046.00000	3,057.00000	CY	37.99403	35,834.00000	35,834.00000	11,835.00000	33.02729	
1083 - Pond - D1A			Activity	Grading	511001 - Mas	1083	Pond - D1A4P	7,564.00000	5,572.00000	CY	73.66473	35,834.00000	35,834.00000	11,835.00000	33.02729	
1083 - Pond - D1A			Activity	Grading	511001 - Mas	1083	Pond - D1A5P	6,228.00000	0.00000	CY	0	35,834.00000	35,834.00000	11,835.00000	33.02729	
1083 - Pond - D1A			Activity	Grading	511001 - Mas	1083	Pond - D1A7P	1,439.00000	0.00000	CY	0	35,834.00000	35,834.00000	11,835.00000	33.02729	
1083 - Pond - D1A			Activity	Grading	511001 - Mas	1083	Pond - D1A7P	1,919.00000	0.00000	CY	0	35,834.00000	35,834.00000	11,835.00000	33.02729	
1083 - Pond - D1A			Activity	Grading	511001 - Mas	1083	Pond - D1A7P	4,481.00000	0.00000	CY	0	35,834.00000	35,834.00000	11,835.00000	33.02729	
1087 - Pond - D1A			Activity	Grading	511002 - Mas	1087	Pond - D1A3P	6,157.00000	0.00000	CY	0	35,834.00000	35,834.00000	13,258.58000	37.00000	
1087 - Pond - D1A			Activity	Grading	511002 - Mas	1087	Pond - D1A3P	8,046.00000	8,046.00000	CY	100	35,834.00000	35,834.00000	13,258.58000	37.00000	
1087 - Pond - D1A			Activity	Grading	511002 - Mas	1087	Pond - D1A4P	7,564.00000	1,395.00000	CY	18.44262	35,834.00000	35,834.00000	13,258.58000	37.00000	
1087 - Pond - D1A			Activity	Grading	511002 - Mas	1087	Pond - D1A5P	6,228.00000	0.00000	CY	0	35,834.00000	35,834.00000	13,258.58000	37.00000	
1087 - Pond - D1A			Activity	Grading	511002 - Mas	1087	Pond - D1A7P	1,439.00000	0.00000	CY	0	35,834.00000	35,834.00000	13,258.58000	37.00000	
1087 - Pond - D1A			Activity	Grading	511002 - Mas	1087	Pond - D1A7P	1,919.00000	0.00000	CY	0	35,834.00000	35,834.00000	13,258.58000	37.00000	
1087 - Pond - D1A			Activity	Grading	511002 - Mas	1087	Pond - D1A7P	4,481.00000	3,817.58000	CY	85.19482	35,834.00000	35,834.00000	13,258.58000	37.00000	
1091 - Pond - D1A			Activity	Grading	511003 - Mas	1091	Pond - D1A3P_	3,694.00000	2,204.00000	CY	59.66432	21,501.00000	21,501.00000	8,011.00000	37.25873	
1091 - Pond - D1A			Activity	Grading	511003 - Mas	1091	Pond - D1A3P	4,828.00000	1,677.00000	CY	34.73488	21,501.00000	21,501.00000	8,011.00000	37.25873	
1091 - Pond - D1A			Activity	Grading	511003 - Mas	1091	Pond - D1A4P	4,538.00000	4,130.00000	CY	91.00926	21,501.00000	21,501.00000	8,011.00000	37.25873	
1091 - Pond - D1A			Activity	Grading	511003 - Mas	1091	Pond - D1A5P	3,737.00000	0.00000	CY	0	21,501.00000	21,501.00000	8,011.00000	37.25873	
1091 - Pond - D1A			Activity	Grading	511003 - Mas	1091	Pond - D1A7P	864.00000	0.00000	CY	0	21,501.00000	21,501.00000	8,011.00000	37.25873	
1091 - Pond - D1A			Activity	Grading	511003 - Mas	1091	Pond - D1A7P	1,151.00000	0.00000	CY	0	21,501.00000	21,501.00000	8,011.00000	37.25873	
1091 - Pond - D1A			Activity	Grading	511003 - Mas	1091	Pond - D1A7P	2,689.00000	0.00000	CY	0	21,501.00000	21,501.00000	8,011.00000	37.25873	
1095 - Pond - D1A			Activity	Grading	511004 - Loa	1095	Pond - D1A3P	2,463.00000	0.00000	CY	0	14,334.00000	14,334.00000	3,218.00000	22.45012	
1095 - Pond - D1A			Activity	Grading	511004 - Loa	1095	Pond - D1A3P	3,218.00000	3,218.00000	CY	100	14,334.00000	14,334.00000	3,218.00000	22.45012	
1095 - Pond - D1A			Activity	Grading	511004 - Loa	1095	Pond - D1A4P	3,026.00000	0.00000	CY	0	14,334.00000	14,334.00000	3,218.00000	22.45012	
1095 - Pond - D1A			Activity	Grading	511004 - Loa	1095	Pond - D1A5P	2,491.00000	0.00000	CY	0	14,334.00000	14,334.00000	3,218.00000	22.45012	

#### 2.1.1.2 DATA BLOCK VIEW

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

					📗 Manage d	etail columns								🗍 Mana	ge step columns 🦳 🗄	Save clair	ming
Com	ponent details						Step 1								🗟 Apply ir	stalled quan	tity t
	Name	Work package ID		Assembly	Discipline / Commodity	1	Step name		Step %		Complete	Quantity		Installed qty	This period qty	UoM	
	Т		Τ	т		v T		т		т	т <u>т</u>		т	т		v	Τ
	S1-10 - B57 - MC4 C	48166			Electrical		Install			100			1,794.00000	0.00000	0.00000	Ea	
	\$3-04 - B16 - Modul	48166			Electrical		Install Prep			5		1	1,312.00000	0.00000	0.00000	Ea	
	\$3-02 - B07 - Modul	48166			Electrical		Install Prep			5		1	1,312.00000	0.00000	0.00000	Ea	
	S1-02 - B20 - 385W	48166			Electrical		Install Prep			5		1	2,656.00000	12,432.00000	0.00000	Ea	
	S1-03 - B26 - 380W	48166			Electrical		Install Prep			5		1	2,656.00000	0.00000	0.00000	Ea	
	S1-02 - B17 - 380W	48166			Electrical		Logistics Of	fload		100	<b>Z</b>	1:	2,992.00000	12,992.00000	0.00000	Ea	
	S1-04 - B33 - 435W	48166			Electrical		Logistics Of	fload		100	2	1	1,200.00000	11,200.00000	0.00000	Ea	
	\$3.CMB.63.5.4 - MC4	48166			Electrical		Install			100			0.00000	0.00000	0.00000	Ea	
	\$3.CMB.63.5.1 - MC4	48166			Electrical		Install			100			0.00000	0.00000	0.00000	Ea	
	\$3.CMB.63.1.2 - MC4	48166			Electrical		Install			100			0.00000	0.00000	0.00000	Ea	
	\$3.CMB.61.2.3 - MC4	48166			Electrical		Install			100			0.00000	0.00000	0.00000	Ea	
	\$3.CMB.61.1.3 - MC4	48166			Electrical		Install			100			0.00000	0.00000	0.00000	Ea	
	\$3.CMB.60.2.4 - MC4	48166			Electrical		Install			100			0.00000	0.00000	0.00000	Ea	
	\$3.CMB.60.2.2 - MC4	48166			Electrical		Install			100			0.00000	0.00000	0.00000	Ea	
	\$3.CMB.64.5.5 - MC4	48166			Electrical		Install			100			0.00000	0.00000	0.00000	Ea	
	S3.CMB.56.4.1 - MC4	48166			Electrical		Install			100			0.00000	0.00000	0.00000	Ea	
	\$3.CMB.53.1.2 - MC4	48166			Electrical		Install			100			0.00000	0.00000	0.00000	Ea	
	\$3.CMB.51.3.4 - MC4	48166			Electrical		Install			100			0.00000	0.00000	0.00000	Ea	
	\$3.CMB.51.1.1 - MC4	48166			Electrical		Install			100			0.00000	0.00000	0.00000	Ea	
	\$3.CMB.49.3.1 - MC4	48166			Electrical		Install			100			0.00000	0.00000	0.00000	Ea	
	S3.CMB.49.2.1 - MC4	48166			Electrical		Install			100			0.00000	0.00000	0.00000	Ea	

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

	View	<i>I</i> :			•
)	•	• T		•	
	Claiming1	-5		es standard grid	<b>,</b>
Work pac	Step na \Xi	Step % [1] 👳	Complet =	Quantity	Ins
	Shakeout/Tr	15		2.49300	-
	Step 1	100		0.30000	

## 2.1.2 URL FILTERING

Custom URLs can be generated from a source program, which can be shared as a direct link to Quantity tracking that filters to a specific WBS code.

The exact URL depends on your organization setup but the URL ends with AppPlan/QuantityPlan/QuantityPlanLaunch?projectId=[ProjectID]&WBSPhaseCode=[WBS].

When the URL is accessed, the grid shows with the applied filters and the URL returns to its default value for the Plan Quantity tracking page. The component edit slide-out shows the matching records.

Image detail columns       Image detail columns <t< th=""><th>6</th><th>104978   NAVFAC Portsmouth Dry Dock P-3 / Pl</th><th>lan / Quantity tr</th><th>acking</th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th></t<>	6	104978   NAVFAC Portsmouth Dry Dock P-3 / Pl	lan / Quantity tr	acking													
• Name is equal to 9066       0       Ass       Step 1       Step 1       Complete is less than or equal to 89.666       Data       Step name       Step 2       Quantity       Install       CLAIMING HE         9086       Step 1       100       1,500.0000       T       Step 2	Actions	• 🕀 🗹 🕼 😣 🕀	А м	anage ITPs													
<ul> <li>Name is equal to 9986</li> <li>Obsomplete is less than or equal to 89.666</li> <li>Ass</li> <li>Step name</li> <li>Step 1</li> <li>St</li></ul>		🛙 Manage de	etail columns					ШN	lanage st	ep column	s 🖪 Save ch	anges					
• & Complete is less than of equal to 89.000 p       Ass       Step name       Step %       Complete       Quantity       Install         9086       Step 1       100       1,500.00000       Step %CL_ComDate				Step 1				-					Edit activ	vity cor	nnon	ent	
Step 1         100         1,500.00000         Step % CL Com. Date			Ass	Step name		Step %		Complete		Quantit	у	Install		-			
	-	3 ~ 1 1	T		Т		Т			T	T		CLAIN	ling	C	LAIMING H	ISTO
Step 1 100 🗆		9086		Step 1			100				1,500.00000	^	Step	% Cl	Com	Date	
													Step 1	100			
													Approver				
Approver																	
Approver																	
Approver													Executor				

The system will filter the following columns which can be combined when creating a custom URL string:

- projectid (required)
- componentname
- scheduleofvaluesitemid
- wbsphasecode
- area
- segment
- system
- subsystem
- turnover
- percentagecomplete

# 2.2 COLUMNS

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

### 2.2.1 MOVE COLUMNS

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

#### **MOVE COLUMNS**

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

Name	Parent record	Assembly	Туре	Discipline / Commod	Claiming sc 👻	wbs_fm_ =	Description
Cross Brace Assem		Cross Brace Assem	Assembly			WBS	
Module 30 - A7 Co			Activity	Metals	Bolted Conne	1006	Module 30 - A.
Module 30 - A6 Co			Activity	Metals	Bolted Conne	1006	Module 30 - A
Module 29 - A7 Co			Activity	Metals	Bolted Conne	1006	Module 29 - A.
Module 29 - A6 Co			Activity	Metals	Bolted Conne	1006	Module 29 - A

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

Name + WRS	Assembly	Туре	Discipline / Commod	Claiming sc 🖃	WBS 🚽	Description
Cross Brace Assem	Cross Brace Assem	Assembly				
Module 30 - A7 Co		Activity	Metals	Bolted Conne	1006	Module 30 - A
Module 30 - A6 Co		Activity	Metals	Bolted Conne	1006	Module 30 - A.
Module 29 - A7 Co		Activity	Metals	Bolted Conne	1006	Module 29 - A

## 2.2.2 ADD AND REMOVE COLUMNS

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

#### ADD ADDITIONAL COLUMNS

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

		?	Û	8
View:	Current viewse	t		•
<b>T</b>	•	Sa	ve clair	n
Work packag	Const area	System	-	Turnov
	North			1
	North			

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

Available columns		Selected columns	
and a contract of the contract		Selected columns	
Search Q		Search	Q
Actual Length Actual Quantity AG/UG Alignment Amperage Approver [11] Approver [12] Approver [13] Approver [14] Approver [15] Approver [16] Approver [17] Approver [17] Approver [19] Approver [20] Approver [21] Approver [22] Approver [23] Approver [24]	▲	Step ≫ [9] Complete [9] Quantity [9] Installed qty [9] This period qty [9] UoM [9] Executor [9] Approver [9] Date [9] Step name [10] Step % [10] Complete [10] Quantity [10] Installed qty [10] This period qty [10] UoM [10] Executor [10] Approver [10] Date [10]	

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

Available columns			Selected columns	
Quantity	Q		Search	Q
Actual Quantity	*			
Quantity		<b>→</b>		1
Quantity [10]				
Quantity [11]		<b>+</b>		1
Quantity [12]				
Quantity [13]				
Quantity [14]				
Quantity [15]				
Quantity [16]				
Quantity [17]				
Quantity [18]				
Quantity [19]				
Quantity [1]				
Quantity [20]				
Quantity [21]				
Quantity [22]				
Quantity [23]				
Quantity [24]	_			_
Quantity [25]	•			*

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

Available columns			Selected columns		
Search	Q		Search	Q	
% Complete			Quantity		
Actual Length		<b>→</b>	Description		•
Actual Quantity			UoM		
AG/UG		←	Const area		•
Alignment			System		
Amperage			Grade		
Approver [10]			Coating		
Approver [11]					
Approver [12]					
Approver [13]					
Approver [14]					
Approver [15]					
Approver [16]					
Approver [17]					
Approver [18]					
Approver [19]					
Approver [1]					
Approver [20] Approver [21]	-			-	

6. Click Save.

#### 2.2.3 SORT COLUMNS

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

#### SORT COLUMNS

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

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

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

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

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

### 2.2.4 FILTER COLUMNS

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

#### FILTER COLUMNS

1. In standard or data block view, type your filtering criteria in the text box of any column header.

A drop-down list shows matching criteria.

Discipline / Commodity		Cl
concrete	T	
Concrete		Ag
Concrete		Co
Misc. Concrete		

- 2. Select a value from the drop-down list or press Enter.
- 3. Optionally, click the **Filter** icon to select a different operator.

	Step
Discipline / Commodity	Cl: Step n
Concrete	7
Concrete	Squal to
Concrete	Is not equal to
Concrete	Is null

4. Click the **Clear** icon to remove the filter.



You can apply filters to multiple columns at the same time.

To clear all column filters at the same time, click the **Clear applied filters** icon on the left of the Quantity tracking page.

Ac	tions <b>v</b>		
T		Name	Parent record
_		pipel 🝸 🏌	T T
-		Pipe	Assembly
÷		Pipe Material	BOM - Pipe
		BOM - Pipe	
Θ		D1A10 - Low Water	

If you hover over the icon, a word bubble shows the current applied column filters.

## 2.2.5 SAVED FILTERS

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

#### CREATE A SAVED FILTER

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

					View:	Curren	nt viewset	•
Filter:	First Last Filter	-	•	7		•	3	Save claim

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

Components					
Actions <b>v</b> (+)	2 🔽	× =	*		
					×
Filter					
Column	Operato	r	Value		
(select one)	▼ (select)	$\nabla$		+	<b>^</b>
(select one)					
Description	Î				
Discipline/Commo					v
Save Elevation					
Estimating material				Cancel	Apply

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

11. ·	
ilter	
Column Operator Value	
Description 🔻 (select) 🔻	
(select)	
Begins with	
Blank	
Contains	
Begins with Blank	

4. Enter a value in the Value field.

		<u></u>	12	×	+	•		
Filte	Column		Oper	ator		Value		
	Description	•	Conta	ains	•	Module 1	+	

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

Filt	or						
гни	Column		Operator		Value		
	Description	•	Contains	•	Module 1	+	

6. Change the filter name.

Filt	or						
1 110	Column		Operator		Value		
	Description	•	Contains	•	Module 1	+	

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

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

### EXERCISE 2.1 – SAVED FILTERS

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

- 1. Find a discipline that you most identify with by using the Discipline column sort function.
- 2. Select the Filter icon and select two (2) parameters you think would help you perform your job.
- 3. Save and apply the filter.

Congratulations, you have completed this exercise!

# 2.3 VIEWSETS

You can create a saved view of your page so that you can always revert to it. This saved view is called a viewset.

# CREATE A VIEWSET

1. Select the **View** drop-down arrow to save your current view.



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

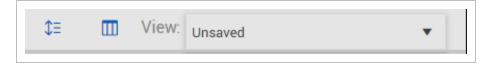
‡≡	View:	Contract		•
	Viewset 123			⊗ _
l atu				
i qty	Save current	viewset as		
Y	Rename curre	ent viewset as		-
		0.00000	Hr	<b>^</b>
5,300	0.00000	0.00000	Cubic Meter	

3. In the dialog box, type a name.

Save this viewset as:	
First Last Preferred View	×
Cancel	Save

#### 4. Click Save.

When making changes to the quantity tracking layout, you will see an **unsaved view** option in the view menu. This lets you know changes have not been saved.



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

# 2.3.1 SEND A VIEWSET

NOTE Certain permissions are needed to send viewsets to roles.

You can send views to all users that have a certain role. You can also send it to specific projects or full organizations. To send to a project, you must be a user on that project or in that organization.

### SEND A VIEWSET

- 1. Open the viewset you want to share.
- 2. Open the View drop-down list, and then select **Send current view**.
- 3. Select **Users** or **Projects** from the drop-down list, and then search by user name or project. You can add multiple users and projects.

# NOTE When you share a view with another project, any project-specific fields are not shown in the receiving project. You can select the Share view as global template option.

Users	
Search for a user	
Send to	
Users	
No users selected	
Projects	
No projects selected	

Click **Send**. A notification is sent to the selected users and the viewset is available in their dropdown list, along with the sender's name and the date when the viewset was sent.

# 2.3.2 DELETE A VIEWSET

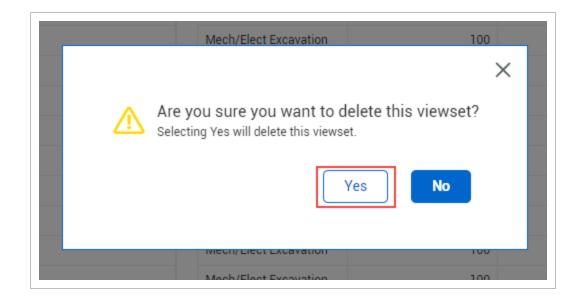
Delete a viewset by selecting the delete icon in the drop-down list directly in the viewset.

### **DELETE A VIEWSET**

1. Open the View drop-down list, and then select the **Delete** icon.

₽≡			Contract			▼
	Viewse	÷				© <b>1</b>
i qty			iewset as nt viewset a	 5		
			0.0	0000	Hr	A
5,300	00000		0.0	0000	Cubic Meter	

2. Select Yes to delete the viewset.



### **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 that let you focus on claiming. Data blocks help you to organize and manage all the columns on a page.

The information in each data block is displayed in a grid-like format, maintaining a spreadsheet look and feel.

				Manage detail calumns					3 Mana	ge step solaries 👘 🗄	2 Save chini	ļ
Con	rponent details				Oliop 1					Si Andyle	winded quantity	l
	Name	Workpackage ID	Assembly	(Vacipline / Commodity	Depname	Step %	Complete	loantity	installed gtp	This period gty	(JuM	ĺ
	τ	τ	Ŧ	- T	Ŧ	Ŧ	* T	Ŧ	Ŧ			ł
0	51-10-057-MOHE.	48155		Detried	install	100	0	1,794,00000	0.00000	6.00008	Ex	
0	50-04 - 016 - Modul.	487.55		Derived	instal Prep		0	11,012,00000	0.00000	6.00008	Ex.	
0	53-02 - 087 - Modul.	487.9.6		Derivad	Instal Prep		0	11,312,00000	0.00000	6.00008	Ex.	
0	61-02-020-305W	487.9.6		Delvid	Instal Prep		0	12556.00000	12,432,00000	6.00008	Ex.	
0	\$1-00-026-300W-	487.94		Decivical	install Prep		0	12,556,00000	0.00000	8.00008	Ex.	
0	81-02 - 817 - 380W	40100		Detrical	Logistics Officed	100		12,992,00000	12,992-388000	8.00008	Ex	
0	11-04-022-638W v.	48155		Excrical	Logistics Officed	100		11,208.00000	11,300-38800	8.00008	Ea .	
	13 DHB 63 5.4 - MC4	40155		Extrical	watel	100	0	E.00000	0.388000	8.00008	Ea .	
0	13 DHB 63 5 F - MD4.	40155		Decrical	ingal	100	0	8.00000	0.00000	8.00008	Ek.	
	10.0HB.6112-M04.	48155		Detrical	install	100	0	E.00000	0.388000	8.00008	63	
0	10.0MB.61.2.2 - MO4.	48155		Decrical	ingal	100	0	8.00000	0.00000	8.00008	Ex	
0	10.0H0.611.0 - M04.	48155		Entried	install	199	0	E.00000	0.00000	6.00008	Ea .	
0	\$0.0M0.002.4 - M04.	48155		Entrod	Intel	100	0	8.00000	0.00000	6.00008	Ex	
	50.0H0.60.2.2 - M04	48756		Derived	install	198	0	8.00000	0.00000	6.00008	Ex.	
0	\$3.0H8.64.5.5 - MC4.	487.55		Detried	Induit	100		8.00000	0.00000	6.00008	Ex.	
0	63.0H8.9L4.1 - MC4	487.56		Detrical	testal.	100	0	E.00000	0.36800	6.00008	Ex	
0	63 DHB.8312 - MC4.	48155		Detrical	watat	100	0	E.00000	0.06800	6.00008	Ex.	
	13 DHB 81 3.4 - MC4	48155		Detrical	matal	100	0	E-00000	0.36800	6.00008	Ea	
0	13 DHB 8111 - MC4.	40155		Detrical	ingal	100	0	E.00000	0.38800	6.00008	Ea .	
	13 DHB 45 31 - MD4.	40155		Detrical	install	100	0	E.00000	0.368000	6.00008	Ea	
	100348-4921-8024	40155		Dervicel	ingal	100	0	8.00000	0.388000	6.00008	<b>1</b> 2	

# 2.4.1 COMPONENT DETAILS DATA BLOCK

The Component details data block on the left side of the page shows basic information about components so you can easily identify, sort, and filter them while claiming.

Component details shows a maximum of seven columns, which limits how much you have to scroll left and right. The Name column is required. You can choose the other six columns.

To choose which columns are shown, click Manage detail columns.

# 2.4.2 STEP DATA BLOCKS

The Step data blocks on the right side of the page show claiming information for each step. You can enter quantities and mark steps complete directly in the data blocks.

You can choose which steps and columns are shown in the Step data blocks. If you want to claim only for a certain step for all components, you can choose only that step to be visible.

To choose what steps and columns are shown, click Manage step columns.

You can use the Apply installed quantity to all button at the top of a step data block to apply an installed quantity to all components in your current view.

NOTE

You can only apply installed quantity up to 50 components at a time, so you must filter your view first to show only the components you want to apply the installed quantity to.

When you click **Apply installed quantity to all**, you can choose to apply an amount or a percentage. After you enter a value, click **Apply**.

NOTE

If you apply a certain amount that exceeds a component's remaining quantity, all the remaining quantity is installed.

		\$≡		Vie	• W:
			🛛 Ma	nage	step columns 🛛 🖹 Save claiming
					Apply installed quantity to all
Quantity		Installed qty			
	T	0.00	ΤÌ	7	O Installed quantity(or maximum remaining)
	20,380.00000		0.000	000	
	20,380.00000		0.000	00	Installed quantity %
	20,380.00000		0.000	00	75
	20,380.00000		0.000	00	
	20,380.00000		0.000	00	Cancel Apply

After you apply the installed quantity, the changes are flagged as pending in each row until you click **Save claiming**.

# 2.5 QUERY BUILDER

The Query builder lets you build queries with multiple conditions to filter the entire table of components. You can add, edit, delete, and share queries with others.

To open the Queries slide-out panel, click the Query icon on the left side of the page.



# 2.5.1 ADD A QUERY

A query is made up of conditions that are made up of columns, values, and operators that connect the columns and operators. Multiple conditions can be grouped as And or Or statements.

The following step by step shows you how to add a query, apply it, and then save it for future use.

### ADD A QUERY

- 1. Click the **Query** icon on the left side of the page to open the Queries slide-out panel.
- 2. Click the **Add** icon. The Query builder opens.
- 3. Select a column and operator from the drop-down lists.
- 4. Enter a value that you want to filter the column for.
- 5. Optionally, click the **Add** icon to add more conditions, and then click **And** or **Or** to change how the conditions are grouped.

- 6. Click **Apply** to update results immediately.
- 7. Click Save query.

# 2.6 CBS TREE

The CBS tree is a filter in Quantity tracking that shows the InEight Control WBS Structure, which helps you filter components to the CBS you want without jumping between Plan and Control.

To open the CBS tree in Quantity tracking, click the **CBS tree** icon on the left side of the page. The CBS tree slide-out panel opens.

r i	CBS tree	×		II Man	age detail coli
	CDS liee	Con	nponent details		
F	⊗ Expand all 🛛 ⊗ Collapse all		Name	Work package ID	Assembly
	<ul> <li>1 Financial Results Analysis</li> </ul>		T	т	
	<ul> <li>1.1 DIRECT LABOR</li> </ul>	0	2" Conduit - D1 - B80		
)	✓ 1.1.1 CIVIL	0	2" Conduit - D1 - B79		
	1.1.2 ELECTRICAL	0	2" Conduit - D1 - B78		
	<ul> <li>1.1.2.1 CONDUIT</li> </ul>		2" Conduit - D1 - B69		
	<ul> <li>1.1.2.1.1 UG CONDUIT - PVC (&lt;4*)</li> </ul>	0	2" Conduit - D1 - B60		
	1.1.2.1.1.1 S1 - UG Conduit - PVC (<4*)		2" Conduit - D1 - B52		
	1.1.2.1.1.2 S3 - UG Conduit - PVC («4")		2" Conduit - D1 - B45		
	1.1.2.1.1.3 D1 - UG Conduit - PVC (<4")		2" Conduit - D1 - B40		
	1.1.2.1.1.4 S1 - UG Stub-ups - PVC (<4")		2" Conduit - D1 - B31		
	1.1.2.1.1.5 S3 - UG Stub-ups - PVC (<4")		2" Conduit - D1 - B30		
	1.1.2.1.1.6 D1 - UG Stub-ups - PVC (<4")				
	<ul> <li>1.1.2.1.2 UG CONDUIT - PVC (s=4")</li> </ul>		2" Conduit - D1 - B23		
	<ul> <li>1.1.2.2 CABLE &amp; WIRE</li> </ul>		2" Conduit - D1 - B23 2" Conduit - D1 - B19		
	<ul> <li>1.1.2.3 TERMINATIONS</li> </ul>		2" Conduit - D1 - B15		
	<ul> <li>1.1.2.4 FACILITY ELECTRICAL EQUIPMENT</li> </ul>				
	<ul> <li>1.1.2.5 GROUNDING</li> <li>1.1.2.6 EQUIPMENT - PHOTOVOLTAIC</li> </ul>		2" Conduit - D1 - B10		
	<ul> <li>1.1.2.5 EQUIPMENT - PHOTOVOLTAIC</li> <li>1.1.2.7 STRING WIRE - PHOTOVOLTAIC</li> </ul>	0	2" Conduit - D1 - B8		
	<ul> <li>1.1.2.7 STRING WIRE - PHOTOVOLIAIC</li> <li>1.1.2.8 CONNECTIONS - PHOTOVOLIAIC</li> </ul>		2" Conduit - D1 - B7		
	<ul> <li>1.1.3 POSTS - PHOTOVOLTAIC</li> </ul>	0	2" Conduit - D1 - B5		
	× 1.14 BACKING - PHOTOVOLTAIC		2" Conduit - D1 - B1		
	<ul> <li>1.1.5 MODULES - PHOTOVOLTAIC</li> </ul>	0	1" Conduit - D1 - B9		
	• 1.1.5 NODOLO • 1101010LINO	· .	1° Conduit - D1 - B9		

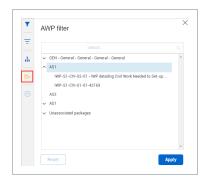
You can expand and collapse levels of the CBS tree using the arrow icons or the Expand all and Collapse all buttons. To select CBS items to filter for, click one or more CBS items, and then click **Apply**. The components list refreshes to show only components that match the selected CBS items.

To clear the CBS query, click either **Reset** in the CBS tree slide-out panel or click the **Clear CBS and user queries** icon to the left of the panel.

# 2.7 AWP FILTER

The AWP filter lets you filter associated work packages which helps you can quickly find the components associated with the selected work packages.

To filter components by work package, click the **AWP filter** icon on the left side of the Quantity tracking page. The AWP filter slide-out panel opens.



Select one or more work packages, and then click **Apply** to filter the list of components.

	×				II Manag	e detail columr	าร	🛛 Mana	age step columns 🛛 🗎	Save claim
AWP filter		Comp	onent details							ē
Search			Name	Work package ID		Assembly		Quantity	Installed qty	This period qt
V GEN - General - General - General	-		T		T		T	T	Т	
^ AS1			7300005494-1	64511				500.00000		
Tyler-64808			Luke testing	64808				100,000.00000	5,300.00000	
IWP-Jack Carr-64805			A1650	63600				500.00000	0.00000	
-64804			A1160	63600				100.00000		
IWP-S1-CIV-02-01 - IWP detailing Civil Work Needed to Set-up	<b>p</b>		A1750	63600				100.00000		
IWP-S1-CIV-01-01-42169			A1170					100.00000		
AS3			A1810					100.00000		
IWP-delete test-64510			A1180					100.00000		
▲ Luke 001			A1830	-				100.00000		
a long time ago-64243			A1190					100.00000		
Luke 002 - 002			A1840					100.00000		
<ul> <li>Unassociated packages</li> </ul>			A1200					100.00000		
			A1850					100.00000		
			A1150					100.00000		

All the components associated to the selected work packages show.

etails Work package ID 42169 42169 42169 42169	Assembly	Ť	Discipline / Commodity  T  Operational Support	Claiming scher	Step 1 Step name	Complete	Installed qty	Apply inst This period qty	alled qu UoM	antity to	
42169 42169			т Т		T	T T	T	This period qty	UoM	- T	r
42169 42169	T	Ţ		301002 - Site S			,			v 7	Ŧ
42169			Operational Support	301002 - Site S	Install		0.000.00000				
						-	3,000.00000	0.00000	SY		
42169			Operational Support	301002 - Site S	Install	<b>~</b>	3,000.00000	0.00000	SY		
			Operational Support	301002 - Site S	Install	<b>~</b>	3,000.00000	0.00000	SY		
42169			Operational Support	301002 - Site S	Install	<b>~</b>	3,000.00000	0.00000	SY		
42169			Civil Utilities	521011 - Utility	Excavate Trench		60.00000	0.00000	LF		
42169			Civil Utilities	521011 - Utility	Excavate Trench	<b>~</b>	60.00000	0.00000	LF		
42169			Civil Utilities	521011 - Utility	Excavate Trench	<b>~</b>	80.00000	0.00000	LF		
42170			Aggregates and Paving	530004 - Instal	Step 1	<b>~</b>	51,325.80000	0.00000	Ton		
			Aggregates and Paving	530004 - Instal	Step 1	<b>~</b>	42,170.14000	0.00000	Ton		
42170			Aggregates and Paving	530004 - Instal	Step 1		51,150.80000	0.00000	Ton		
	42169 42169 42169 42169 42170 42170 42170 42170	42169       42169       42169       42169       42170       42170       42170       42170	42169       42169       42169       42170       42170       42170       42170	42169         Civil Utilities           42170         Aggregates and Paving           L         42170         Aggregates and Paving	42199         Civil Utilities         521011 - Utility           42199         Civil Utilities         521011 - Utility           42169         Civil Utilities         521011 - Utility           42169         Civil Utilities         521011 - Utility           42169         Civil Utilities         521011 - Utility           42170         Aggregates and Paving         530004 - Insta           42170         Aggregates and Paving         530004 - Insta           42170         Aggregates and Paving         530004 - Insta	42169         Civil Utilities         S21011 - Utilities         Excavate Trench           42170         Aggregates and Paving         S30004 - Insta         Step 1           42170         Aggregates and Paving         S30004 - Insta         Step 1           42170         Aggregates and Paving         S30004 - Insta         Step 1	A2169         Civil Utilities         S21011 - Utilities         Exeavate Trench         Cilities           42169         Civil Utilities         S21011 - Utilities         Exeavate Trench         Cilities           42169         Civil Utilities         S21011 - Utilities         Exeavate Trench         Cilities           42169         Civil Utilities         S21011 - Utilities         Exeavate Trench         Cilities           42170         Aggregates and Paving         S30004 - Insta         Step 1         Cilities           42170         Aggregates and Paving         S30004 - Insta         Step 1         Cilities           42170         Aggregates and Paving         S30004 - Insta         Step 1         Cilities	Attach         Circl         Circl <t< td=""><td>Action         Action         Action&lt;</td><td>Action         Action         Action&lt;</td><td>Action         Control         <th< td=""></th<></td></t<>	Action         Action<	Action         Action<	Action         Control         Control <th< td=""></th<>

Select Reset or Clear CBS and user queries to clear or reset the applied filter.

≡	ଜ	Steel Structure Tra	aining Job   105	091 / Plan /	Quantity tracking					
Act	tions 🔻	+ 2	6	⊗ ⊡	4					
<b>*</b>	AW	P filter				×	_	onent detai	ls	
Ξ			Search					Name		Work package ID
н	<u>^ N</u>	North				*			T	
	~	CWP- North Area	Steel Erection-1	2				1069		5
C2		South						1085		5
	^ L	Jnassociated packag	ges							
Θ		IWP-test-9								
Clear (	CBS and	user queries								
		IWP-mn,n-5								
		CWP-hkh-4								
						~				
	R	eset			Ар	ply	Disp	layed results:	: 2   Seleo	cted: 0 View selecte

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# LESSON 3 – CLAIMING SCHEMES

InEight Inc. | Release 24.9

# 3.1 WHAT IS A CLAIMING SCHEME?

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

### Scenario

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

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

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

# 3.1.1 WHAT IS THE PURPOSE?

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

For example, referring to the scenario above:

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

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

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

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

# 3.1.2 SETTING UP A CLAIMING SCHEME

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

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

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

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

General		QUANTITY TRACKING
Control		
Plan	General	
Progress	Enable default component creation?	Refresh default components
Compliance		C Refresh
Contract		Selecting refresh will ensure all default components are
🖄 Change	Associate claiming scheme to WBS phase code?	Enable account code assignment to claiming scheme?
(+) Design		$\bigcirc$
	Associate claiming to Material components	
	Includes WBS value and claiming scheme	
	Schedule groups	
	Schedule group	
	Selectione	
	Maintain schedule group values	
	English	Español (América Latina) ES FR-C4
	ID Description Schedule gro	up values Description

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

NOTE

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

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

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

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.

A Claiming Scheme must add up to 100%.

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

Place/	/Finish/Cure				
	Step name =	Rule type	% claiming	Schedule group	Activity ID format
	Place/Finish/Cure	Construction Step	95	Install	Discipline/Area
$\otimes$	Verify/Document	Quality Step	5	Verification & Documentation	AccountCode/System/Turnov
					-
+	Add step		Total: 100%		

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

# **3.1.3 CLAIMING SCHEME SOLUTIONS**

Claiming schemes:

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

# 3.1.4 ACCOUNT CODE ASSIGNMENT

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

TIP

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

Steel Structure Train	ning Job (105091) 👻 Settings 👻			
General		QUANTITY TRACKING	WORK PACKAGING	INTEGRATIONS
Control				
Plan	General			
🛞 Progress				
Compliance	Enable default component creation?	Refresh default co	omponents	
G Contract		Selecting refresh created in plan qu	will ensure all default comp Jantity tracking	onents are
Change	Associate claiming scheme to WBS phase code?	Enable account c	ode assignment to claiming	scheme?

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

☆ Discipline/claiming scheme ↑	WBS assignment	Default	Account code assignment	
∧ Aggregates and Paving	WBS Assigned	$\oslash$	Account codes assigned	
Agg. and Paving - Gen. Claiming 95/5	WBS Assigned		Account codes assigned	
∧ Building	<u>Assign now</u>	$\oslash$	Assign account code	
Building - Gen. Claiming 95/5	Assign now	$\odot$	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	
Building	Assign now		Assign account code	
Bulk Commodities	<u>Assign now</u>		Assign account code	
Change Orders, Contract Allowances and Back charges	Assign now		Assign account code	

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

# **3.2 CLAIMING SCHEME CREATION**

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

Edit M Name	letals							
Metals	5							
	Step name	 Rule type	 % claiming		Schedule group	Ŧ	Activity ID format	
	Step 1			100				A
								-
<b>(+)</b>	Add step		Total:	100%				
								0
							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	<u>Assign now</u>
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. Practice by creating a claiming scheme under the discipline that you created previously.

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

# **BUILD A CLAIMING SCHEME**

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

Applications				
Model	🙃 Estimate 🛛 🖨	Plan	6 Contract	ts ar
Document	Control	Quantity tracking	🖄 Change	
		Work packaging	]	-
Schedule		Compliance		
Project			Extensions	r yo
Project home	Assigned users		Design	
Project details		3		-
Settings	Assigned operational r	resources	Billing	Jmer
Workflows	Assigned disciplines a	nd commodities		Rej
				0
	B Model     B Document     Schedule  Project  Project details  Settings	Image: Second system       Image: Second system         Image: Second system       Image: Second system         Image: Second system       Assigned users         Project details       Operational rate codes         Settings       Assigned operational rate	<ul> <li>Model</li> <li>Estimate</li> <li>Estimate</li> <li>Control</li> <li>Plan</li> <li>Quantity tracking</li> <li>Control</li> <li>Work packaging</li> <li>Compliance</li> </ul> Project Project details <ul> <li>Operational rate codes</li> <li>Settings</li> <li>Assigned operational resources</li> </ul>	Image: Sectional rate codes       Image: Sectional rate codes       Image: Sectional rate codes       Image: Sectional rate codes         Image: Sectional rate codes       Image: Sectional rate codes       Image: Sectional rate codes       Image: Sectional rate codes         Sectional rate codes       Sectional rate codes       Image: Sectional rate codes       Image: Sectional rate codes

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

Component	S					
Actions <b>v</b>	+			$\otimes$	(+	4
🗹 Manage		chemes	cord		Assembly	-
Config	CWA and	l project v	alues			
Compone	ent import	history				

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

8	105091 (Steel Training Job)   Plan  Quantity tracking
Componer	nts > Disciplines and claimin
$( \bullet )$	$\mathbf{\mathbb{Z}}$ $\otimes$
	☆ Discipline/claiming scheme
	Mechanical Equipment
	∧ Metals
	Bolted Connections
	Erect Steel - Light
	Mining

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

XXX	Erect Steel - Heav	nd .							
	Step name	Ŧ	Rule type	Ŧ	% claiming 👘	Schedule group	Ŧ	Activity ID format	-
	Step 1				100				

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

xxx	Erect Steel - Heav	yl						
	Step name	🐨 Rule	type 📃	% claiming	-	Schedule group	 Activity ID format	
	Step 1				100			
	Add step			Total:	100%			

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

XXX E	rect Steel - Heavy							
	Step name 🔤	Rule type	 % claiming	-	Schedule group	Activity ID form	nat	-
	Shakeout/Transport	Construction Step		15				
$\otimes$	Erect/Bolt Up	Construction Step		45				
$\otimes$	Final Torque	Construction Step		40				
Ð	Add step		Total: 1	00%				

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

8. Click Save.

# 3.2.1 IMPORT AND EXPORT

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

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

### IMPORT CLAIMING SCHEMES

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

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

NOTE You can only import claiming schemes from one project at a time.

3. Click Select.

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

There are two methods to export claiming schemes:

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

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

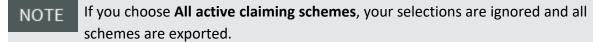
### EXPORT CLAIMING SCHEMES

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

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

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

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



5. Click Send.

The selected claiming schemes are exported to the target project.

### EXERCISE 3.1 – CLAIMING SCHEME

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

Claiming Schemes for commodities are created the exact same way.

- 1. Create your own claiming scheme for any commodity by adding a child claiming scheme to that commodity.
- 2. Create at least 3-4 Steps.
- 3. Define a percentage for each step so the total percentage of all steps equals 100.

Example:

8	Steel Structure Job (105091) -	Pla	lan ▼ Quantity tracking ▼					
Con	Components > Commodities and clai DISCIPLINES COMMODITIES							
(+	$(+)$ $\cong$ $(\otimes)$							
	☆ Commodities / claiming scheme ↑	Ŧ	WBS assignment	Ŧ	Default	Modified	Last modified by	
	∧ Steel		Assign now		$\oslash$			
	Steel Materials		Assign now			$\oslash$		

Add c Name Steel Ma	Name Steel Materials								
	Step name	Rule Type	% Claiming						
	Purchase Order Issued	Construction Step	30						
$\otimes$	Material Delivered	Construction Step	60						
$\otimes$	Material Inspection P	Quality Step	10						
⊕ Ado	d steps	Total:	100%						

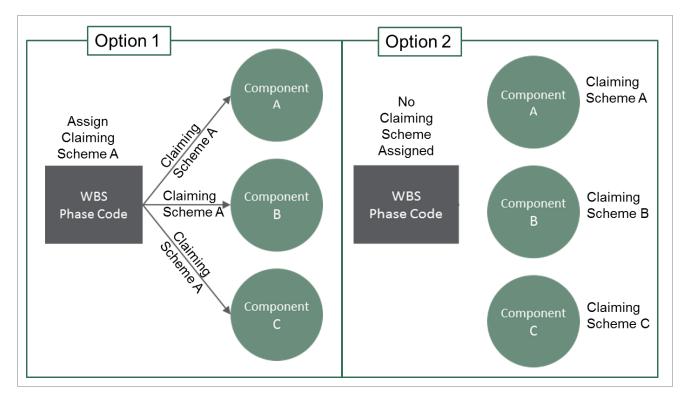
### Congratulations, you have completed this exercise!

# 3.3 CLAIMING SCHEME MANAGEMENT

# 3.3.1 ASSIGNING CLAIMING SCHEMES

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

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



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

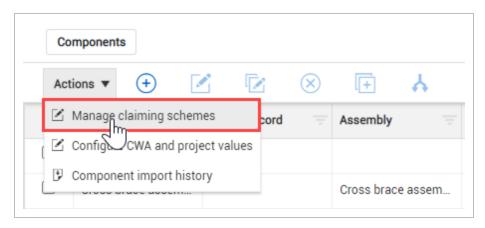
NOTE To change at the level at which your claiming schemes are assigned, navigate to the **Project Settings**.

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

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

### ASSIGN A WBS TO A CLAIMING SCHEME

- NOTE In order to be able to assign a WBS to a claiming scheme, the Allow As-Built setting for that WBS line item in Control should either be "All" or "Quantities." This makes that WBS available for Plan.
- 1. From the Quantity Tracking page, select the **Actions menu** and choose **Manage claiming schemes** from the drop-down list.



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

Job Related Overhead	<u>Assign now</u>
Mechanical Equipment	<u>Assign now</u>
Metals	<u>Assign now</u>
Bolted Connections	WBS Assigned
Erect Steel - Light	WBS Assigned
XXX Erect Steel - Heavy	<u>Assign now</u>
Mining	<u>Assign now</u>

NOTE You cannot assign a WBS or account code to the Contract discipline.

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

Job Related Overhead	Assign now
Mechanical Equipment	Assign now
∧ Metals	<u>Assign now</u>
Bolted Connections	WBS Assigned
Erect Steel - Light	WBS Assigned
XXX Erect Steel - Heavy	<u>Assign now</u>
Mining	Assign now

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

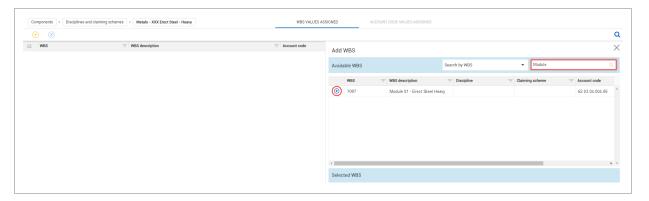
Components > Disciplines and claiming schemes > Metals - XXX Erect Steel - Heavy WBS VALUES ASS					ACCOUNT CODE VALUES ASSIG	
() ⊗					_	
WBS	🐨 WBS description	ion	- Account code			

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

TIP

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

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



- TIP A WBS can only be assigned to one claiming scheme. However, multiple WBS items can be assigned to a single claiming scheme. Make sure to select the Module # of the computer you are using.
- You should see your WBS has moved to the **Selected WBS field** below
- 7. Click **Done** on the bottom right of the screen.

	able WBS	S	Search by WBS		▼ βearch		C
	WBS	WBS description	- Discipline	= (	Claiming scheme	-	Account code
Ð	1002	Job Overhead					20
Ð	1069	Earthwork					51
Ð	1071	Concrete					61
	1074	Erect Steel - Heavy					62.03.02.004.06
Ð	1005	Erect Steel - Light	Metals	1	Erect Steel - Light		62.03.02.004.02
Ð	1006	Bolted Connections	Metals	1	Bolted Connections		62.03.02.006
•	1085	Earthwork - Materials					,
8	) 1074 - Erect Steel - I	Heavy					

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

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

	F (	٦
Last modified by	Last modified on	Ŧ
System	03/10/2017	
System	03/10/2017	

### 3.3.2 EDIT CLAIMING SCHEMES

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

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

#### EDIT A CLAIMING SCHEME

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

Component	S					
Actions <b>v</b>	+			$\otimes$	(+)	4
🗹 Manage		chemes	cord		Assembly	-
🗹 Config	CWA and	l project va	alues			
Compon	ent import	history			Cross brac	

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

Co	mponents > Disciplines and claimi	DISCIPLIN
(+	$ \ge $ $ \ge $	
	Discipline/claiming scheme	WBS assignment
	∧ Metals	Assign now
	Bolted Connection	WBS Assigned
	Erect Steel - Light	WBS Assigned
	XXX Erect Steel Heavy	WBS Assigned
	Mining	Assign now
	Misc Specialty Work	Assign now

- 3. Select the **check box** to the left of the claiming scheme you created.
- 4. Click the **Edit** icon.

Cor	mponents > Disciplines and claimin		DISCIPLIN	IES
(+				
	Discipline/claiming scheme	-	WBS assignment	Default
	∧ Metals		Assign now	
	Bolted Connections		WBS Assigned	
	Erect Steel - Light		WBS Assigned	
/	XXX Erect Steel - Heavy		WBS Assigned	

#### 5. Click Add step.

XXX E	rect Steel - Heavy								
	Step name		Rule type	 % claiming		Schedule group	$\overline{\nabla}$	Activity ID format	$\overline{\tau}$
	Shakeout/Trans	port	Construction Step		15				
$\otimes$	Erect/Bolt Up		Construction Step		45				
$\otimes$	Final Torque		Construction Step		40				
÷	Add step			Total: 1	00%				

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

XXX E	Frect Steel Heavy					
	Step name	Rule type	% claiming	Schedule group	- Activity ID format	
	Shakeout / Transp	Construction Step	15			1
$\otimes$	Erect / Bolt Up	Construction Step	45			
$\otimes$	Final Torque	Construction Step	30			
$\otimes$	Step 4		0			
•	Add step		Total: 100%			

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

XXX E	rect Steel Heavy							
	Step name	Rule type	% claimi	ng \Xi	Schedule group	Ŧ	Activity ID format	Ŧ
	Shakeout / Transp	Construction Step		15				
$\otimes$	Erect / Bolt Up	Construction Step		45				
$\otimes$	Final Torque	Construction Step		30				
$\otimes$	Quantity Verification	Quality Step		10				
٠	Add step		Total:	100%				

	TIP	You cannot save a claiming scheme if your steps' percentages do not add up to 100%.
	NOTE	You cannot edit any claiming scheme that has a quantity claimed against it.
~	lial Caus	

8. Click Save.

This page intentionally left blank.

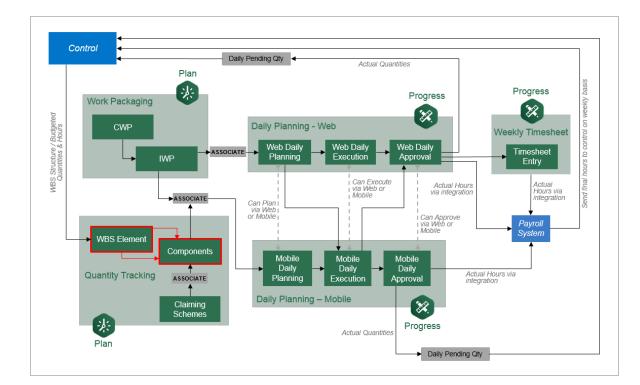




# LESSON 4 – COMPONENT MANAGEMENT

InEight Inc. | Release 24.9

### 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 several types of components in the Quantity Tracking module:

- Activity
- Material
- Assembly
- Contract

You can create activity, material, and assembly components directly in Plan. Contract components can only be created indirectly from InEight Contract.

These different types let you 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								
Act	ions 🔻 🕂 🚺	: 🖸 😣	<b>E</b>					
	Name 🕇 👘	Parent record	Assembly	Туре	Discipline / Commod	Claiming sc =	WBS 😇	Description
	Module 01 - A23: C	Cross brace assem	Cross brace assem	Material	Steel	Steel	1087	
	Module 01 - A23: C	Module 01 - A23: C	Cross brace assem	Activity	Metals	Erect Steel - L	1005	Module 1 - A2.

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.

Component types are shown with different color schemes:

- Activity: Blue
- Material: Gray
- Contract: Metallic purple
- Assembly: Forest green

#### 4.2.2.1 ASSEMBLY COMPONENTS

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

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

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

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

NOTE When you edit an assembly or material component, you can use the Related Components tab in the slide-out panel to associate existing components. Only associated components lower in the hierarchy are shown.

**NOTE** You can only add associations from the Related Components tab. To remove an association, you must edit the Parent record field of the associated component.

Act	tions $\checkmark$ (+) $\checkmark$ ( $\checkmark$ $\otimes$	E 🖌		
	Name 😇	Parent record	Assembly	Туре
	Assembly of build 2x4 wall		Assembly of build 2x4 wall	Assembly
	Material of 2x4's	Assembly of build 2x4 wall	Assembly of build 2x4 wall	Material
	Activity for labor to assembly 2x4's into wall	Assembly of build 2x4 wall	Assembly of build 2x4 wall	Activity
	Activity to cut 2x4's to length from rough cut	Material of 2x4's	Assembly of build 2x4 wall	Activity

#### 4.2.2.2 CONTRACT COMPONENTS

Contract components cannot be created directly in Plan. A Schedule of Values (SOV) item from Contract automatically becomes a contract component in Plan if the SOV is not set to hide in Plan and Progress.

In Quantity tracking, a contract component's basic details from Contract cannot be edited. You can associate a contract component to an assembly.

You can assign a contract component to a claiming scheme by adding a claiming scheme to the Contract discipline in Actions > Manage claiming schemes. You can then edit a contract component to change the claiming scheme. A contract component can only be in the Contract discipline. See <u>Claiming</u> <u>Scheme Creation</u> for more information on how to add a claiming scheme.

### 4.2.3 METHODS OF 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.
Сору	Create one new component from an existing component.
Split	Create multiple new components from an existing component.

### 4.2.4 COMPONENT ATTRIBUTES

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

#### 4.2.4.3 VALIDATED FIELDS

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

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

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

Co	mponents	
Act	ions ▼ (+) 📝 🔽	⊗ 🗄 🖌
	Manage claiming schemes	- Parent record
	Configure CWA and project values	
	Compone mport history	Assembly of build 2x4 wa
	Activity for labor to assembly 2x4's into	wall Assembly of build 2x4 wa
	Activity to cut 2x4's to length from roug	gh cut Material of 2x4's

### 4.2.4.4 LOCATION

In the Location section of the Configure CWA and Project Values page, you can add a construction areas, construction segments, and commodities as data validated tag values to assign to components. Examples of construction areas are North and South. An example of a construction segment is Phase 1. Examples of commodities are rebar and steel. These can then be used to map your components for reporting.

NOTE Depending on how your project is set up, if you assign a component to a work area in Work packaging, the component's location is updated to match the work area and cannot be edited in Quantity tracking. The setting that controls this behavior is called Automatically inherit CWA to component from assigned work package.

Senstruction area     Series     Pation     Pation     North     North <th></th> <th>C</th> <th>2</th>											C	2
Peaklow         D         Decription         Note         T         Peaklow         D         Decription         T         Note         T           1         North         North         North         Image: Compare the standing of the stan	onstru	ction a	rea			Cor	nstru	ction	Segment			
1         North         North         North         ∅         □         1         P1         Phase1         ∅         ∅           2         South         South         South         ∞         □         1         P1         Phase1         ∞         ∞           3         East         East         East         ∞         ∞	5		Enter ID	Enter description	$\odot$		3		Enter ID	Enter description	۲	
1         2         South         South </th <th>Position</th> <th>ID</th> <th>- Description</th> <th>\Xi Note</th> <th>7</th> <th></th> <th>Position</th> <th>ID</th> <th>- Description</th> <th>· · · Note</th> <th>-</th> <th></th>	Position	ID	- Description	\Xi Note	7		Position	ID	- Description	· · · Note	-	
3 East East Sast	0 1	North	North		⊗ ^	1 O	1	P1	Phase 1		8	-
	2	South	South		$\otimes$	11 O	2	P2	Phase 2		$\otimes$	
□ 4 West West )	3	East	East		$\otimes$							
\$	4	West	West		8							
v					1	F						

#### 4.2.4.5 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.

Components > Configure CWA and pro			LOCATION		ENGINEERI	ING	
urnover				Syst	em		
1 Enter II			$( \mathbf{ + }$		4		
Position ID = Desc		👻 Note	-		Position	ID ÷	Description
	No	records available.	<u>^</u>		1	FND	Foundation
				10	2	GEN	General
				10	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.

#### 4.2.4.6 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 provides the drop-down values for the attribute as defined previously on the Configure CWA and Project values page.

Act	tions 🔻 🕂	2 🔽 😣	🗉 😽		Filter: (select one)		•	• 1		•	Save claim
	Name 🕇 👘	Parent record	Assembly	Туре	Discipline / Commod	Claiming sc =	WBS		Const area 👘	System	Turnover \Xi Tur
-	Module 01 - A23: Cr	Cross brace assem	Cross brace assem	Material	Steel	Steel	1087			None 🔺	
	Module 01 - A23: C	Module 01 - A23: C	Cross brace assem	Activity	Metals	Erect Steel - L	1005		North	a	L .
	Module 01 - A24: C			Activity	Metals	Erect Steel - L	1005		North	None	
	Module 01 - A6 Co			Activity	Metals	Bolted Conne	1006		North	FND - Fou	
	Module 01 - A7 Co			Activity	Metals	Bolted Conne	1006		North	GEN - Gen	
	Module 01 - B23: C			Activity	Metals	Erect Steel - L	1005		North	SST - Stee.	
	Module 01 - B24: C			Activity	Metals	Erect Steel - L	1005		North		

#### 4.2.4.7 SPLIT CONTRACT COMPONENTS

You can split a contract component into new smaller components. In Quantity tracking you can select a single component, and then click the Split component icon. The Split component dialog box opens. You can split the original component to up to 50 new components. You can apply quantity to the new components. The original component (line 1 in the split component window) will have its quantity reduced.

The original component cannot be set to a value less than zero. If all the quantities are associated to the split components, then the lowest value the original component can be set to is zero.

	Name	Parent record	mbly	Claiming scheme	WBS ADD	ount Code Desc	ripti Dise	ipline /	Commodity Type		Description	Quantity	To date	quantity	UoM		% Complete	WBS forecast I
	T		1		T		-		* * *	Ŧ	<b>T</b>			T		T	T	
	7300006803-1-2	-		0										2.00000	Ea		100.00000	
	7300006803-1-1			Split componer	nt									1.00000	Ea		100.00000	
	7300006803-1			Original component										0.00000	Ea		0.00000	
	7300008924-1-1			Component name	Description	Quantity	To date	UoM	Work package ID	WBS	Discipline / Com	Claiming scheme		0.00000	Square Mete		0.00000	
	7300008924-1			7300008924-1	Split component testi	118.00000	0.00000	Sau.			Contract	Contract		0.00000	Square Mete		0.00000	
	A1040-copy-1							- 4					_	0.00000	CY		0.00000	11,239.34400
	A1040-copy			Split components										8.00000	CY		100.00000	11,239.34400
	Luke Nov 14.033-c			Component name	Description	Quantity			Work package ID	WBS		Claiming scheme		0.00000			0.00000	
	Luke Nov 14.001-2			7300008924-1	Split component tes	68.00000	0.00000	Squ			Contract	Contract	1	6.00000			150.00000 🛆	
	Luke Nov 14.001-2	Defect testing 2	Defect testing 2	7300008924-1-1	Split component tes	20.00000	0.00000	Squ			Contract	Contract	⊗	0.00000			0.00000	
	Luke Nov 14.001-1			7300008924-1-2	Split component tes	30.00000	0.00000	Squ			Contract	Contract	8	0.00000			0.00000	
	Luke Nov 14.001													1.50000			30.00000	
	Updated name usin												_	10.00000			100.00000	
	Luke Nov 14.033													0.00000			0.00000	
	Luke Nov 14.031													0.00000			0.00000	
	Luke Nov 14.029													0.00000			0.00000	
	Luke Nov 14.028													0.00000			0.00000	
	Luke Nov 14.027												-	0.00000			0.00000	
	Luke Nov 14.017			Total quantity		118.00000	0.00000							0.00000			0.00000	
	Luke Nov 14.026										-			0.00000			0.00000	
	Luke Nov 14.016										l	Cancel	Split	0.00000			0.00000	
	Luke Nov 14.015			Overhead			Ove	rhead	Activity			0.0000	0	0.00000			0.00000	
	Luke Nov 14.025			Overhead			Ove	rhead	<ul> <li>Activity</li> </ul>			0.0000	10	0.00000			0.00000	

#### 4.2.4.8 VALIDATED LISTS IN FIELD ATTRIBUTES

The Field attributes drop-down list is found under the Discipline Specific section of the Edit activity components dialog box.

Edit activity co	mponent	146.43
CLAIMING	CLAIMING HISTORY	COMPONENT DETA
Summary		•
Location		•
Specifications		•
Procurement		•
Discipline Specifi	c	•
#Field attribute list test	AUX 1	AUX 2
Line 4 🔹		
<u> </u>		
None		
Line 1		Cancel Save and close Save
Line 4		
Line 2		
Line 3		

To create the validated lists, go to Platform> Master data libraries> **Attributes** and then click the **Add attribute** icon. The Add attribute dialog box opens, enter the attribute information. In the Type field, select **Validated list**. After you save the attribute, it shows on the Field attributes page.

Attribute name	7 594	1 Markeyb	7.24	Last multiplied by	Last modified on	Created by	Created on
Actual Length	Sect		25 %	System	07/30/2023 7 36 35 AM	System	01/26/2017 10 S1 (M MM
Actual Quantity	Text		25 14	System	01/30/2023 7 25 35 AM	System	01/20/2017 10 ST 24 KM
Alignment	Decoval		25 Tx	Loke Malart	01/30/2020 7 35 35 AM	System	01/25/2017 10:51 34 KM
Amperage	Test					X	01/26/2017 10:51 34.4M
Approved	Test	Add field attribute				Spran	05/26/2017 10 S1 34 AM
Asphah Design	Test					System	01/25/2017 10 51 34 AM
Asphalt Mix	Sect	- Name				System	67,05/2017 10 51 34 MM
AUX1	Text	for demo				System	01-26/2017 10.51 34 AM
AUX 2	Text	- 7 <sub>5</sub> 9#				System	01/25/2017 10 ST 34 MM
AR1	Text	Validated last				System	01/08/2017 10/01 34 AM
A01.4	Text	- Max length				System	0%/2%/2017 10 51 (A AM
ART	Test	50				System	01-25-2017 10:51 (H. HM
84	Sect	- 504				System	05/26/2017 10:01 (A.M.
baceg	Int	24				Spiran	01/25/2017 10 ST 34 MM
Bracker (D	Test					System	01/20/2017 10:51 Se Her
Cable Routing	Sect					System	07-29-2017 10-51 34-4M
Cable Size	Test				Cancel Same	System	01/20/2017 10 51 34 MM
Cable Type	Test				4	System	91/26/2017 10:51.34 AM
Calibration Range	Test		25 Te	System	01-30-2023 7-35-38 AM	System	01/20/2017 10:51 34 Mil
Category	Sec		25 10	Justien.	07-10-2125 7 30-35 AM	System	01/26/2017 10:51 34 MM
Change Order #	Test		25 In	System	01-00/2023 7 35 35 AM	System	01/25/2017 10 ST 34 MM
Cenut #				System	61/30/2021 7 35 35 AM	System	01/25/2017 10 01 34 MM

#### 4.2.4.9 SCHEDULE COMPONENTS

The Schedule section in Edit activity component > **Component Details** tab lets you manage schedule details directly from an activity component. You can enter or update the Activity ID, Activity name, Planned start date, and Planned end date of a schedule. You can enter free-form text or search existing data. If an existing Activity ID is selected, all other fields are populated with any data from InEight XER imports. The Do not schedule check box integrates information from InEight Design.

CLAIMING	CLAIMING HISTORY	COMPONENT DETAILS	
Summary			•
Location			•
Specifications			•
Procurement			•
Discipline Specific			•
Engineering			•
Schedule			
Activity Id		Activity name	
Planned start date		Planned end date	

#### 4.2.4.10 PROJECT VALUES

Assigned project value types are created in the master data library, they can be linked to a project, which then lists the project values in quantity tracking. Go to Quantity Tracking > Column chooser to add the project values to your grid view.

	nponent			
CLAIMING	CLAIMING HISTORY	COMPONENT DETAILS		
Summary				•
Location				•
Specifications				•
Procurement				•
Project Values				
01alphaupdated maxle 🔞	A1 Project value type 2 🔞	Area 🕸	Construction commodity	3
None 🔻	None 🔻	None 🔻	None	,
Decimal TEST 🕸	HDFCBankCreditCardru 🕸	Newtype1 🕸	Scope group 🔞	
None 🔻	None 🔻	None 🔻	None	,
Segment 😂	Subsystem 🕸	System 🕸	Turnover packages 🔞	
None 🔻	None 🔻	None 🔻	None	,

### Overview - New Component Slide Out Panel

	Title	Description
1	Summary Menu	Contains general high-level component information such as Name, WBS, Quantity, Unit of Measure, and Discipline.
2	Location Menu	Contains exact location information of the component such as Building, Elevation, Construction area, and System.
3	Specifications Menu	Contains information regarding exact specification for the component such as: Size, Weight, Thickness, Material code, and External link.
4	Procurement Menu	Contains information regarding the procurement of the component such as Supplier, PO #, and Shop/Field. This section also shows related contract information for contract components
5	Discipline Specific Menu	Contains information that is specific to the discipline selected in the summary menu. This is different for every discipline.

#### Overview - New Component Slide Out Panel (continued)

	Title	Description
6	Engineering	Contains information regarding the engineering of the component such as Turnover, Test Package, and Owner Code.
7	Claiming Scheme Menu	Shows the claiming scheme selected in the summary menu.
8	Claiming History	Shows a log of what has been claimed to date for this component and by whom.
9	View Full Page Link	Opens 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	Shows overall percent complete of the component.



### 4.2.5 COMPONENT CREATION

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

### CREATE A COMPONENT FROM SCRATCH

- 1. From an open project, go to the **Quantity Tracking** module.
- 2. To create a component, select the **Add** icon on the left toolbar.

Components					
Actions 👻 (+)	 $\bigotimes$	Filter:	(select one)	•	0

3. Select Activity.

Co	mponen	ts					
Act	ions 🔻	÷	) 🗹		$\otimes$	(+	*
	Name	الم ال	Activity	nt record	-	Assembly	
	Modul		Material	s brace as	sem	Cross brace	e assem
	Cross		Assembly				

- This opens the new activity component slide out-panel. By default, the summary accordion menu should be expanded
- 4. In the Summary menu, enter your component details.

CLAIMING	CLAIMIN	IG HISTORY	COMPONENT DETAILS	
Summary				
Component name				
				+
WBS	Component quantity	Unit of measure	Schedule ID	
	0.00000		V	
WBS forecast QTY	WBS planned QTY	WBS to date QTY	% WBS QTY complete	
Discipline	Claiming scheme	Work package ID		
Select component t… 🔻		T		<b>_</b>
Parent material				
Farent material				
Description		Comments		
				4
				Ť
Location				
Specifications				

- TIP Depending on what project setting you have set up, when you assign your WBS, the Unit of Measure, Discipline, and Discipline/Claiming Scheme fields might be automatically populated and locked for editing. You can associate material components and assembly components to activity components by adding materials or assemblies to the Parent record field. To associate materials, check that you have the setting Associate Claiming to Material Components turned on in your Project Settings > **Plan Quantity Tracking**.
- 5. Open the Location menu by clicking on the **Location** title header.
- 6. In the Location menu, enter the location and commodity information.
- 7. Open the **Discipline specific** menu and enter your grade and coating information.

CLAIMING	)	CLAIMING HISTORY	COMPONENT DET	AILS
Summary				× ^
Location				~
Specifications				~
Procurement				~
Discipline Speci	fic			^
AUX 1	AUX 2	AUX 3	AUX 4	
AUX 5	Coating	Engineer Responsib	le Foundation Drawing	
	GALV			
Grade	Height	Length	Sequence	
A992				
Structure Drawing	Tons	Torque Value	Total Pieces	
Vendor Drawing	Width			
Engineering				<b>ب</b>
View full page		Can	cel Save and close	Save

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

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

#### COPY AN EXISTING COMPONENT

1. Select a component.

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

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

The Copy component dialog box opens

3. Enter a name for the new component.

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

4. Click Copy.

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

#### SPLIT AN EXISTING COMPONENT

1. Select a component.

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

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

The Split component dialog box opens

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

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

4. Enter names for the split components.

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

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

The following Step by Step walks you through how to edit multiple components at the same time.

#### 4.2 STEP BY STEP 1 – BULK EDIT COMPONENTS

1. Select multiple components.

NOTE You can edit a maximum of 50 components at the same time.

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

- The Bulk edit dialog box shows
- 3. In the dialog box, select a column and enter a new value for the column.
- 4. Add or remove additional columns as necessary, and then click **Save**.

NOTE You can edit a maximum of five columns at the same time.

The Bulk delete components option in the Actions menu lets you delete up to 500 of the first components listed at the same time. The components must have zero claimed quantity to be deleted. Components with installed quantity are never deleted, so only the first 500 zero-quantity components can be deleted.

The following Step by Step walks you through how to delete components with zero claimed quantity in bulk.

#### 4.2 STEP BY STEP 2 – BULK DELETE COMPONENTS

- Open the Actions drop-down menu, and then select Bulk Delete Components.
   A warning dialog box opens.
- 2. Select the confirmation check box.
- 3. Click **Delete**.

## 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

You 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 estimators

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

The Import Template is a Microsoft Excel spreadsheet used to upload multiple components into Plan at once. The import template is generated first by setting up your view to show the columns of information you want to import, in addition to any required columns. 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. After export, 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).

Component IDs are distinct from component names. You can have components with the same name, but they must have unique IDs. To change a component name, you must first know the component ID. This ID is used as the key reference point for all components. To find the component ID, from Quantity tracking in standard grid view, click the **Export** icon, and then select **Data export**. The Microsoft Excel file shows the component IDs in column A.

After import, Plan checks the file for any errors. Errors might include:

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

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

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

- NOTE Component IDs must be unique within the same type of component (activity, material, or assembly). You cannot have two components of the same type with the exact same ID, but you can have an activity component with the same ID as a material component. If you want to duplicate an existing component (such as, the component created manually in the previous section), you must either delete it, or change the ID of either the existing or imported component.
- NOTE Required columns are exported even if you hide them.

#### CREATE COMPONENTS FROM EXCEL IMPORT

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

③ 105091 (Steel Training Job)	Project home 👻				_
	Applications				
Ō	Model	💷 Estimate 🛛 🖨	Plan	6 Contract	ts and
Add project image 105091 (Steel Training Job)	Document	Control	Quantity tracking	Change	
	Schedule		Work packaging		-
Applications	Schedule		Compliance		
Model	Project			Extensions	r you
Document     Schedule	Project home	Assigned users		Design	
(i) Estimate	Project details	Operational rate codes	1	Billing	-
li Report	Settings	Assigned operational r	resources		uments
Reports	Workflows	Assigned disciplines a	nd commodities		Rejec
Explore Dashboards					0
Dashboards API documentation					

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

			Vie	W: Current view	/set	•
(select one)	)	- 0	<b>T</b>	•	)	Save claim
WBS planne	WBS to date	% WBS QTY	Work packag	Const area	System	👻 Tursever 🔲
55.46480	0.00000	0.00000		South		Column Choose
65.46480	0.00000	0.00000		South		
65.46480	0.00000	0.00000		South		
65.46480	0.00000	0.00000		South		

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

	Q		Search	Q
% Complete % WBS QTY complete 2324 Actual Length Actual Quantity AG/UG Alignment Amperage Approved Approver [10] Approver [11] Approver [13] Approver [14] Approver [14] Approver [14] Approver [17]	•	<b>→</b> ←	Description Quantity UOM Const area System Grade Coating	•

4. Click the **Export** icon on the toolbar.

				Vie	W:				•
	•	•	7		•	•		Save c	laim
WBS to date	% WBS QT	Y	Work pa	ckag	Const area	-	System		Turnover
0.15000	6.01685				South				
					South				
					South				

5. Select **Template**.

		View					•	
•	Ţ		•	•		Save c	laim	
(=	Work pac	Templa	ate		ystem	-	Turnover	
		Data e	xport					

- A Microsoft Excel spreadsheet automatically opens or is shown at the bottom of your screen to download
- 6. Click the drop-down arrow for the file, and then select **Open**.

	Module 11 - A7 Co	1006	Activity	Metals
	Module 11 - A6 Co	Open		als
	Module 10 - A7 Co	Always op	en files of this type	als
		Show in fo	older	
© 20	20 InEight Inc. <u>Privacy ar</u>	i <mark>d</mark> Cancel		
×	Light Component Ixl.	~		

• The resulting spreadsheet is now your Import Template and contains all required columns and only the optional columns that were shown in Plan at the time of exporting

A	в	C	D	E	F	G	
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 specif	ic fields					
Note:							
	guration allows associating Claiming sc	neme to WBS, then specifying Discip	line/Commodity is not				
1. If the Project config	guration allows associating Claiming sc ce of WBS. Discipline or Commodity wi		line/Commodity is not				
1. If the Project config mandatory in presence		I be identified based on Type	line/Commodity is not				
<ol> <li>If the Project config mandatory in presence</li> <li>Columns with data to the provide the provided to the pro</li></ol>	e of WBS. Discipline or Commodity wi	I be identified based on Type	line/Commodity is not	Discipline/Commodity	Claiming Scheme	WBS	Description
1. If the Project config mandatory in presenc 2. Columns with data t Name	e of WBS. Discipline or Commodity wil type Text should be formatted as Text	I be identified based on Type to see trailing zeros after decimal.		Discipline/Commodity Text	Claiming Scheme Text	WBS Text	Description
1. If the Project config mandatory in presenc	e of WBS. Discipline or Commodity wil type Text should be formatted as Text Parent record	I be identified based on Type to see trailing zeros after decimal.	Туре				

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

	В	c						
English	User Selected Language							
REQUIRED	Field is required for import							
OPTIONAL								
VALIDATED	JDATED Field must match master data available in application							
IGNORED	Field not to be populated							
DS/CS	Discipline/Commodity specif	ic fields						
Note:								
1. If the Project configuration a	allows associating Claiming scheme t		e/Commodity is not mandatory in					
1. If the Project configuration a presence of WBS. Discipline or	r Commodity will be identified base	d on Type	e/Commodity is not mandatory in					
<ol> <li>If the Project configuration a presence of WBS. Discipline or</li> <li>Columns with data type Text</li> </ol>	r Commodity will be identified base t should be formatted as Text to see	d on Type trailing zeros after decimal.						
1. If the Project configuration a presence of WBS. Discipline or	r Commodity will be identified base	d on Type	Commodity is not mandatory in	Discipline/Commodity	Claiming Scheme	WBS	Description	
<ol> <li>If the Project configuration a presence of WBS. Discipline or</li> <li>Columns with data type Text</li> </ol>	r Commodity will be identified base t should be formatted as Text to see	d on Type trailing zeros after decimal.			Claiming Scheme Text		Description Text	
<ol> <li>If the Project configuration a presence of WBS. Discipline or 2. Columns with data type Text Name</li> </ol>	r Commodity will be identified base t should be formatted as Text to see Parent record	d on Type trailing zeros after decimal.	Туре	Discipline/Commodity		Text		
<ol> <li>If the Project configuration a presence of WBS. Discipline or 2. Columns with data type Text Name</li> </ol>	r Commodity will be identified based t should be formatted as Text to see Parent record Text 200	d on Type trailing zeros after decimal.	Type Text	Discipline/Commodity Text	Text	Text 50	Text	

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

		Erect Heavy Steel Imp	ort - Saved
Ð	Save As		
斺 Home			
🗅 New	(L) Recent	↑ 🗁 Desktop	
		Erect Heavy Steel Import	▼ 🐺 Save
🗁 Open	InEight	Excel Workbook (*.xlsx)	
Print	This PC	all	12/18/2019 3:19 PM
Share	Add a Place		
Export	Add a Place	Bolted Connections Import 18.2	1/7/2020 10:06 AM
Publish	Browse		
Close			
Account			
Feedback			
Options			

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

		Vie	W:	-
	- 0	<b>T</b>	•	Save claim
WBS to date	% WBS QTY	Work packag	Const area	System Turnove
0.15000	6.01685		South	
			South	
			South	

- An Import data dialog box is shown
- 11. Select Browse.
- 12. From the resulting Open window, locate and select your file, and then select **Open**.
- 13. Select Add new items only.

Import data f	rom templ	ate				
The data will be imported i	nto Components					
		Drag and drop the file here Browse	or browse			
<ul> <li>Add new items only</li> <li>Add new items and up</li> </ul>	odate existing				i	
📄 Email me upon comp	etion			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, instead of flagging an error for a component ID that already exists, the system overwrites the data for that component.
- 14. Click the **check box** for Email me upon completion.

Import data from ter The data will be imported into Componen	-	
	Drag and drop the file here or browse Browse	
<ul> <li>Add new items only</li> <li>Add new items and update existing</li> <li>Email me upon completion</li> </ul>	9	
Enanne apor completion		Cancel Import

• This alerts you to the completion of the upload

#### 15. Click Import.

- The import file is added to the import queue
- To see all your import files and their statuses, click View file import queue

NOTE You can continue working in the application while your imports are processed. A notification tells you if your file is imported successfully or not.

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

#### 16. Click Close.

Import data from template
File successfully added to import queue.
You will be alerted once the file has completed the import process.
Oview file import queue
Close

#### 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.

### 4.4 COMPONENT AUDIT LOG

This topic describes the Component audit log and how to use it.

### 4.4.1 SUMMARY

The Component audit log lets you track changes made to components and in which systems the changes are made. To open the audit log from the Components list, click Actions > **Component Audit Log**.

The following table describes the different parts of the audit log.

#### **Overview - Component Audit Log** Title Description 1 Date Adjust the date range of data to be shown. You can choose from standard range ranges or a custom range. 2 Export a filtered view of the audit log. Export 3 Row Adjust how close together rows are shown. density 4 Grid Shows each change organized by columns, which can be filtered and sorted.

Components > A																
															2	E
Component ID	Component name	Description	WBS	(4)	Source		Attribute		Value before		Value after		Changed by		Changed on L	
	maintain T Y		Y	<b>U</b>		т		Ŧ		Ŧ		Ŧ	onanges by	т	Conservation of Conservation	Ľ
924433	Maintain Env. Controls - D1	D1 - Env Controls	1017		Claiming		ToDateQuantity		10.00000		12.00000				02/04/2022	^
2924433	Maintain Env. Controls - D1	D1 - Env Controls	1017		Claiming		InstallQuantity1		10.00000		12.00000				02/04/2022	
2924433	Maintain Env. Controls - D1	D1 - Env Controls	1017		Claiming		ToDateQuantity				10.00000				02/04/2022	1
2924433	Maintain Env. Controls - D1	D1 - Env Controls	1017		Claiming		InstallQuantity1				10.00000				02/04/2022	1
2924433	Maintain Env. Controls - D1	D1 - Env Controls	1017		Claiming		ToDateQuantity		70.00000						02/04/2022	1
2924433	Maintain Env. Controls - D1	D1 - Env Controls	1017		Claiming		InstallQuantity1		70.00000						02/04/2022	
924433	Maintain Env. Controls - D1	D1 - Env Controls	1017		Claiming		ToDateQuantity		44.00000		70.00000				02/04/2022	1
2924433	Maintain Env. Controls - D1	D1 - Env Controls	1017		Claiming		InstallQuantity1		44.00000		70.00000				02/04/2022	11

### 4.4.2 CONSIDERATIONS

- By default, the audit log shows the last 24 hours of changes made to components.
- Changes shown in the log depend on your permissions.

## 4.5 DEFAULT COMPONENTS

This topic describes default components and how they can be used in quantity tracking.

### 4.5.1 WHAT ARE DEFAULT COMPONENTS?

Default components are linked by WBS to cost items in InEight Control. Default components are automatically added to quantity tracking depending on organization and project settings for Plan and cost item properties in Control. Default components can also be used in InEight Progress.

Default components are useful to claim quantities against directly and as points of reference to create your own components that replace or supplement the defaults.

Many properties of a default component are brought in from the cost item in Control. For example, a default component's discipline or commodity and claiming scheme are set to WBS. These values are system generated and help you distinguish default components from user-created components.

A cost item from Control can be a default component depending on the following properties in Control:

- Allow as-built field Values can be None, All, Quantities, or Costs. However, if this field is set to None or Costs, the default component cannot be claimed against in quantity tracking.
- As-built lock If this check box is selected, the default component cannot be claimed against in quantity tracking.
- Hide in Plan/Progress Do not select this check box.
- NOTE If you add a new component with the same WBS, the default component is removed unless it has already been claimed against. If the default already has claiming, its remaining claiming value is reduced to the amount already claimed. Removed default components are still shown in reporting of inactive components and audit logs of claiming if the default component had claiming against it.

NOTE All default components are activity components.

### 4.5.2 ENABLE AND REFRESH DEFAULT COMPONENTS

Default component settings are located in Settings > **Plan**, in the General section. You can turn default component creation on or off at both the organization and project levels. At the project level, you can refresh the list of default components, which is useful when you turn default component creation on after it has been off for some time.

#### 4.5.2.1 CONSIDERATIONS FOR ENABLING DEFAULT COMPONENTS

Before you decide to enable, disable, or refresh default components, consider the following conditions.

If default component creation is:

- On at the organization level:
  - You cannot turn it off at the project level.
- On at any level:
  - If you refresh default components, quantity tracking's list of default components is updated. New default components might be created if their associated WBSs were added in InEight Control while default component creation was switched to *Off*.
  - You do not have to click Refresh every time a change is made to a cost item in Control. If the toggle is *On*, default components in quantity tracking show current data from Control.
- Off at the organization level:
  - You can adjust the setting at the project level as necessary.
- Off at the project level:
  - If you create components associated with WBSs, those components can still send claiming data to Control.
  - If you refresh default components after the setting was previously on, all default components without claiming are removed from quantity tracking.

The following step by step explains how to turn on default component creation for an organization, and then refresh a specific project's default components.

# 4.5 STEP BY STEP 1 – ENABLE AND REFRESH DEFAULT COMPONENTS

- 1. At the organization level, go to Settings > Plan.
- 2. In the General section, turn on **Enable default component creation**, and then click **Save**.
- 3. At the project level, go to Settings > Plan.
- 4. In the General section, click **Refresh**, and then click **Save**.

#### 4.5.2.2 DELETE DEFAULT COMPONENTS

In Quantity Tracking, you can delete a default component. Select your component and then click the Delete icon to delete the default component.

Samson Solar 975MW   104487 / Plan / Quantity trackin	-													QA TO1 :		8 🖲
ctions 🔻 🕑 😰 🛞 👍 🔺					1						View:					
	Parent record		Type		nodit Description		Quantity	To date qua		UoM		% Complete			Y WBS planned QT	
7 Y X	۲			T × T		Ŧ					* T		T			T
2640			<ul> <li>Activity</li> </ul>	WBS	IDF - 026 W	TEC - D	75,000.000	00	0.00000	Each			0.00000	75,000.00000	75,000.00000	0.00
										^						
		<u>^</u>	Are you sure Selecting Yes wi	e you want to delete	this compone rom the project. An	nt ? y associati	ons to work or daily	plans will be rem	oved.							
							_	_		De						
								Yes N	lo							

At the project level under the global options, you can restore the deleted default components by clicking **Refresh**. When you use this option, you will enable all default components.

	GLOBAL OPTIONS	Cancel Saw
eneral		
Enable default component creation?	Refresh default components C Refresh Selecting refresh will ensure all default components are created in plan quantity tracking	
Associate claiming scheme to WBS phase code?	Enable account code assignment to claiming scheme?	
Associate claiming to Material components Includes WBS value and claiming scheme	Automatically inherit CWA to component from assigned work package? C Refresh Selecting refresh will ensure CWA value is inherited to component from assigned work package Only when setting enabled	
Enable ITP mapping between Compliance and Plan	Enable external material tracking integrations?	
Allow overclaiming of components	N	

## 4.6 COMPONENT EXPORT HISTORY

The Export history log in Quantity Tracking lets you track the component export history.

To view the Export history log, go to Action menu > Export history.

Act	ions 1	• 🕀 🗹		Manage ITPs										` 💷 ≡\$	/iew:		
đ	Mana	ge claiming schemes				🛛 Manage de	tail colu	mns						۵	Manage step columns	😫 Save o	chang
		gure CWA and project values							Step 1						🕀 Apply inst	alled quantity	<b>, to all</b>
8	Bulk C	Delete Components	Work package ID	Assembly		Discipline / Commodity			Step name	Step %	Complete		Quantity	Installed qty	This period qty	UoM	
D	Comp	onent import history	т		т		Ŧ	т	т	T		τŢ	T	т			-
C	Export	t history	97847			Aggregates and Paving			Step 1	50			100.00000		0.00000		
	Comp	onent Audit Log				Aggregate											
		testdate	97847			Aggregates and Paving			Step 1	50			100.00000	0.00000	0.00000		
		Banana	97847,95862,85807,90001,86059														
		Testing of a user comp				Electrical			Fusce lacinia arcu et n	100			1.00000	0.00000	0.00000	LF	
		The quick brown fox ju	86108			Deep Foundations			Install	100	2		10.00000	10.00000	0.00000	LF	
	â			_				•	4		-	_					

You can download previous component history logs and see who exported them.

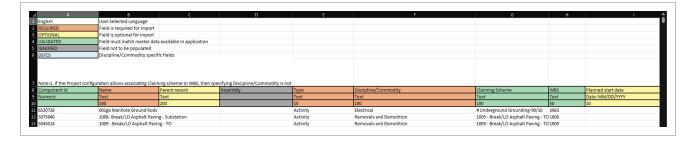
To download, click the **Download** icon,

	File name	Status	Total record count	Exported by	Exported on $\downarrow$	
Ŧ	Quantity Component_Template_a22f595e-c78b-4c41-bfa1-49e47d4ba559_02142024054453.xlsx	🕑 Complete	8784	Luke	02/14/2024	
Ť	Quantity Component_Template_755ff994-bc88-4ee1-9ce3-8c4598db7eea_02132024051121.xlsx	🕑 Complete	8784	Luke	02/13/2024	
Ť	Quantity Component_Template_3b3adba1-7528-41ef-bc4d-85442834c3b0_02122024015704.xlsx	😔 Complete	8784	Sivacharan	02/12/2024	

The export is a Microsoft Excel file with an unlimited component export count.

NOTE Longer record counts will result in a longer download time but, this is unlimited.

When exporting previous version history from yourself or other users, you can also undo changes.



#### 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.

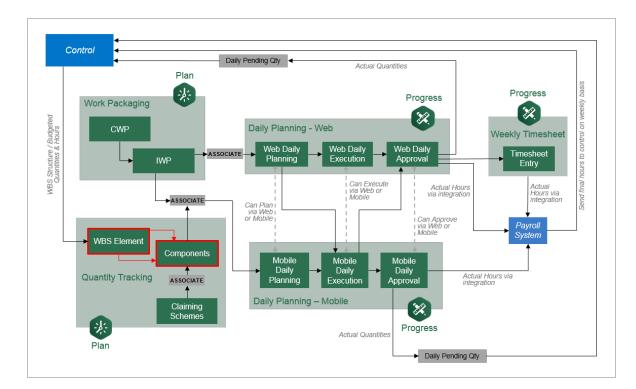
#### Congratulations, you have completed this exercise!





# LESSON 5 – QUANTITY CLAIMING

# 5.1 INEIGHT PLAN WORKFLOW - QUANTITY CLAIMING



# 5.2 QUANTITY CLAIMING

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

# 5.2.1 PROCESS FOR CLAIMING QUANTITIES

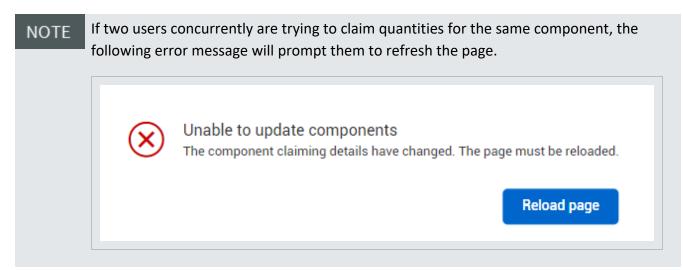
Quantities can be claimed in Control, Plan or Progress. There are reasons to claim in each of the different modules, but this lesson will focus on claiming in Plan. Since labor and material are expensed in the field, quantity for activities and materials can be claimed during the daily planning process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

having to create daily plans, it is important to understand how to use the Quantity Tracking module of Plan.

# 5.2.2 WHY CLAIM AT A COMPONENT LEVEL?

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

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



# 5.2.3 CLAIMING IN THE STANDARD GRID VIEW

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

NOTE Claiming is ideally done in the data block view, which lets you focus on only the information needed for claiming.

### QUANTITY CLAIMING (STANDARD GRID VIEW)

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

Со	mponents					
Act	ions 🔻 +			$\bigotimes$	(+	*
	Name	2	arent record		Assembly	
~	Module 01 - A2	3: Cr	Cross brace as	sem	Cross brace	e assem
	Cross brace ass	sem				

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

	AIMING				HISTORY		COMPONEN	
Step	% Cl	Com	Date	Quantity	Install qty	This perio	UoM	Qty joi
Shakeout/Trans	15		03/17/2020	2.49300	2.49300	2.49300	Ton	<ul> <li>Image: A start of the start of</li></ul>
Erect/Bolt Up	45			2.49300	0.00000	0.00000	Ton	✓
Final Torque	30			2.49300	0.00000	0.00000	Ton	I.
Quantity Verifica	10			2.49300	0.00000	0.00000	Ton	ø
otes				×				×
otes				×				×
otes				×				×
otes				×				×
otes				×				×
	ew full pa	age		×	[ C	ancel	Save and clo	Ţ
	ew full pa	age		×	С	ancel	Save and clo	Ţ

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

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

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

Edit activity of	compo	onent					_	15%
CL	AIMING			CLAIMING	HISTORY		COMPONE	NT DETAILS
Step	% Cl	Com	Date	Quantity	Install qty	This perio	UoM	Qty joi
Shakeout/Trans	15		03/17/2020	2.49300	2.49300	0.00000	Ton	
Erect/Bolt Up	45			2.49300	0.00000	0.00000	Ton	s.
Final Torque	30			2.49300	0.00000	0.00000	Ton	

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

CLA	AIMING			CLAIMING HI	STORY	CON	PONENT 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

#### NOTE

To claim in the Plan Quantity Tracking module, the component WBS must have Allow-As-Built set to All or Quantities in InEight Control. See your Control Manager to verify this setting if unable to claim the component. The same scenario follows for claiming in data blocks.

# 5.2.4 OVER CLAIM COMPONENT QUANTITY

With the applicable permissions, you can overclaim component quantity using the Allow overclaiming of components toggle.

	Name	Parent record	Assembly		Ty Description	Quantity	To date quantity	UoM		% Complete	WBS []]		×
	т	т		т	т	т	т		* 7	т			Edit activity component
	7300006803-1-2				•	2.0000	2.00000	Ea		100.00000		<u>^</u>	
	7300006803-1-1				•	1.0000	1.00000	Ea		100.00000		۰.	CLAIMING CLAIMING HISTORY COMPONENT DETA
	7300006803-1				Test innerduct lining	9.0000	0.00000	Ea		0.00000			Step % Cl., Com., Date Quantity Install gty This perio., UoM Qt
	7300008924-1-1				Split component te	5.0000	0.00000	Square	Meter	0.00000			Step 1 - new. 100  12/07/2022 4.0000 6.0000 0.00000
	7300008924-1				Split component te	118.0000	0.00000	Square	Meter	0.00000			3000 1 100 C 12/07/2020 00000 000000
	A1040-copy-1				•	2.0000	0.00000	CY		0.00000	11,2		
	A1040-copy				•	8.0000	8.00000	CY		100.00000	11,2		
	Luke Nov 14.033-c				•	0.0000	0.00000			0.00000			
	Luke Nov 14.001-2				•	4.0000	0 6.00000			150.00000 🔥			( )
	Luke Nov 14.001-2	Defect testing 2	Defect testing	2	•	4.0000	0.00000			150 00000 200	Quantity	/ comp	complete to date is greater than 100%
	Luke Nov 14.001-1				•	1.0000	0.00000			0.00000			
	Luke Nov 14.001				•	5.0000	1.50000			30.00000			
	Updated name usin				•	10.0000	10.00000			100.00000			Executor
	Luke Nov 14.033				•	0.0000	0.00000			0.00000			
	Luke Nov 14.032				•	0.0000	0.00000			0.00000			Notes
	Luke Nov 14.031				•	0.0000	0.00000			0.00000			
	Luke Nov 14.029				•	0.0000	0.00000			0.00000			
	Luke Nov 14.028				•	0.0000	0.00000			0.00000			
	Luke Nov 14.027				•	0.0000	0.00000			0.00000			
	Luke Nov 14.017				•	0.0000	0.00000			0.00000		C	Cancel Save and close Save
	Luke Nov 14.026				•	0.0000	0.00000			0.00000			Contrast Con
	Luke Nov 14.016				•	0.0000	0.00000			0.00000			
	Luke Nov 14.015				•	0.0000	0.00000			0.00000			
	Luke Nov 14.025				•	0.0000	0.00000			0.00000			

When the component is claimed over 100%, the toggle is locked in the Global options.

	GLOBAL OPTIONS	
	Cancel	Save
eneral		
Enable default component creation?	Refresh default components	
	C Refresh Selecting refresh will ensure all default components are created in plan quantity tracking	
Associate claiming scheme to WBS phase code?	Enable account code assignment to claiming scheme?	
Associate claiming to Material components Includes WBS value and claiming scheme	Automatically inherit CWA to component from assigned work package?	
	O C Refresh	
	Selecting refresh will ensure CWA value is inherited to component from assigned work package Only when setting enabled	
Enable ITP mapping between Compliance and Plan	Enable external material tracking integrations?	
$\odot$		
Allow overclaiming of components	1	
and ore composed to		
Component(s) have steps which are overclaimed.	Ν	
Component(s) have steps which are overclaimed.		

When the component is complete, the % complete is set to 100.

Step name [1]	Step % [1]	Com	Quantity [1]	Installed qty [1]	This period qt	UoM [1]	Date [1]	Executor [1]
T	T	Ŧ	T	T		· · ·	- T	v
Step 1	100		2.00000	2.00000	0.00000	Ea	12/05/2022	
Step 1	100	<b>v</b>	1.00000	1.00000	0.00000	Ea	12/05/2022	
Step 1	100		9.00000		0.00000	Ea		
Step 1 - new t	100		0.00000	0.00000	0.00000			
Step 1 - new t	100		4.00000	4 .	-2.00000		12/07/2022	

## 5.2.5 CLAIMING IN THE DATA BLOCKS VIEW

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

#### QUANTITY CLAIMING (DATA BLOCKS VIEW)

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

3. Select the check box in the Complete column of the Step 1 data block for three of the components in your module.

If the Step 1 data block is not shown, click **Manage step columns**, and then select the step in the dialog box.

4. Click the **Save** button in the upper right of the page.

You can also claim using percentage complete or to-date installed quantity at the component step level.

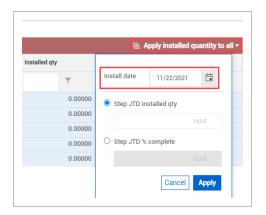
In data block view, there is an Apply installed quantity to all button at the top of each Step data block. You can use this button to apply an installed quantity to all components in your current view.

NOTE You can only apply installed quantity up to 50 components at a time, so you must filter your view first to show only the components you want to apply the installed quantity to.

The following Step by Step shows you how to apply an installed quantity to multiple components.

#### 5.2 STEP BY STEP 1 – APPLY INSTALLED QUANTITY TO ALL

- 1. Filter your view to show only the components you want to apply an installed quantity to.
- 2. Click Apply installed quantity to all.
- 3. Enter the install date.



- 4. Select either the quantity or percentage options.
- 5. Enter a quantity or percentage in the field.

# NOTE

If you apply a certain amount that exceeds a component's remaining quantity, all the remaining quantity is installed.

6. Click Apply.

The changes are flagged as pending in each row.

7. Click Save claiming.

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.

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

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

Step	% Cla	Com	Date	Quantity	Install qty	This period	UoM	Executor	Approver	Qty joined
Assemble	25			10.00000	0.00000	0.00000	LF			
Erect	25			10.00000	0.00000	0.00000	LF			
Detail	40			10.00000	0.00000	0.00000	LF			V
Verification & Do	10			10.00000	0.00000	0.00000	LF			4

# 5.3.2 QUANTITY EDITING

In InEight Plan you can edit quantities by adding or subtracting quantities from components. The following step-by-step shows how to edit claimed quantity.

#### EDIT CLAIMED QUANTITY

1. In the **Quantity Tracking** page, select a component.

NOTE Quantity claiming changes are best made in the Data Blocks view.

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

Actions	• (+)	Edi	C details	$\otimes$	( <del>+</del>	*
Comp	onent deta	ils				
	Name			Assembly	Ŧ	Discipline / Com 😑
	Module 30 -	A7 Conne	ction t			Metals

- 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.

	CLAIMING HISTORY		COMPONENT DE	TAILS
Install date: 03/17/2020 Increment: 0.37395	Approver.	Vicky Pierce		∠
Changed date: 03/17/2020 Changed by: Vicky Pierce	Executor:			
Daily plan ID:	Notes:			
				-
View full page		Cancel	Save and close	Save

- 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. Deselect the **Complete** checkbox for one of your steps.
- 8. Enter a number in the Installed quantity field of that step.

• Note that the This Period quantity automatically recalculates

	LAIMING			CLAIMING	HISTORY		COMPONENT DE	TAILS
Step	% Cl	Com	Date	Quantity	Install qty	This perio	UoM	Qty joi
Shakeout/Trans	15		03/17/2020	2.49300	1.00000	0.00000	Ton	
Erect/Bolt Up	45			2.49300	0.00000	0.00000	Ton	
Final Torque	30			2.49300	0.00000	0.00000	Ton	
Quantity Verifica	10			2.49300	0.00000	0.00000	Ton	
otes				~				~
Vicky Pierce				$\times$				$\times$
otes								
					Ca	incel S	ave and close	Save
) 💌 🔩 vi	ew full pa	ige						
) 🗸 🖏 Vi	ew full pa	ige						

9. When integrated with InEight Design, the Delayed check box lets you mark steps as delayed for further processing on component records.

Edit a	ctivity	y cor	npone	ent					0.00%
C	CLAIMING			CLAIMING HISTORY		COMPONENT DETAILS			
	% Cl	Com	Date	Quantity	Install qty	This perio	UoM	Qty joi	Delayed
	100			1.00000	0.00000	0.00000	Each		

- 10. Click Save.
- 11. Click the **Claiming History** tab.

• You can now see your new entry with its negative quantity adjustment along with the original entry.

#### BATCH EDIT CLAIMED QUANTITY

The following step-by-step shows how to batch edit claimed quantities.

NOTE Batch Quantity claiming changes must be made in the Data Blocks view.

- 1. In the **Quantity Tracking** page, change quantities to one or more components in the Quantity column
- 2. You can free text and change quantities for multiple components under the quantity column. A blue dot will show unsaved changes.

	Name	Parent record	Assembly	Туре	Discipline / Commodity	Claiming scheme	WBS	Quantity	To date quantity
	T	Т	T	<b>• •</b>	<b>v T</b>	т <u>т</u>	Т	T	T
	demo today-copy2			<ul> <li>Activity</li> </ul>	Electrical	810004 - Install b	1317	20.00000 ●	0.00000 E
	demo today-copy			<ul> <li>Activity</li> </ul>	Electrical	810004 - Install b	1315	12.00000	0.00000 E
	demo today-1			<ul> <li>Activity</li> </ul>	Electrical	810004 - Install b	1315	2.00000	0.00000 8
	demo today			<ul> <li>Activity</li> </ul>	Electrical	810004 - Install b	1315	8.00000	0.00000 8
	Everybody		Everybody	Assembly	Anchor Bolts			2.00000	
	Everybody		Everybody	Assembly	Anchor Bolts			2.00000	
∢ Disp	layed results: 30,992	Selected: 1 Vie	w selected Clear Selec	tion			+ 4		

3. Click Save changes.

### 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!