
**PLATFORM USER
GUIDE**

CLOUD PLATFORM

INEIGHT 

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EXERCISES

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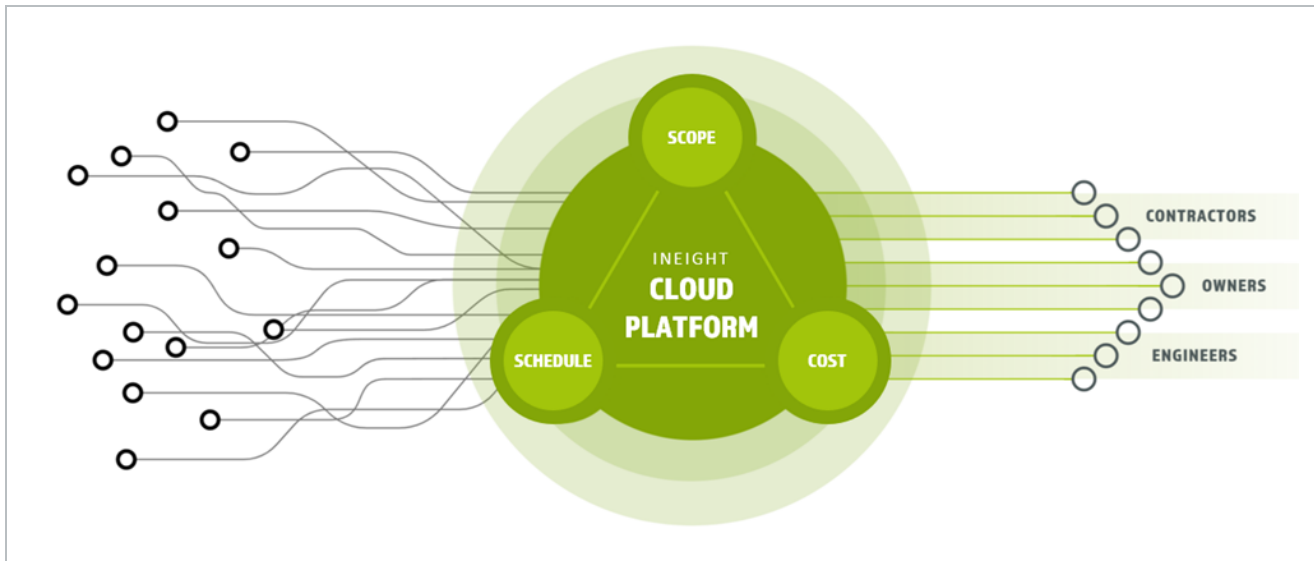
InEight®
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LESSON 1 – INEIGHT PLATFORM OVERVIEW

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2.1 OVERVIEW

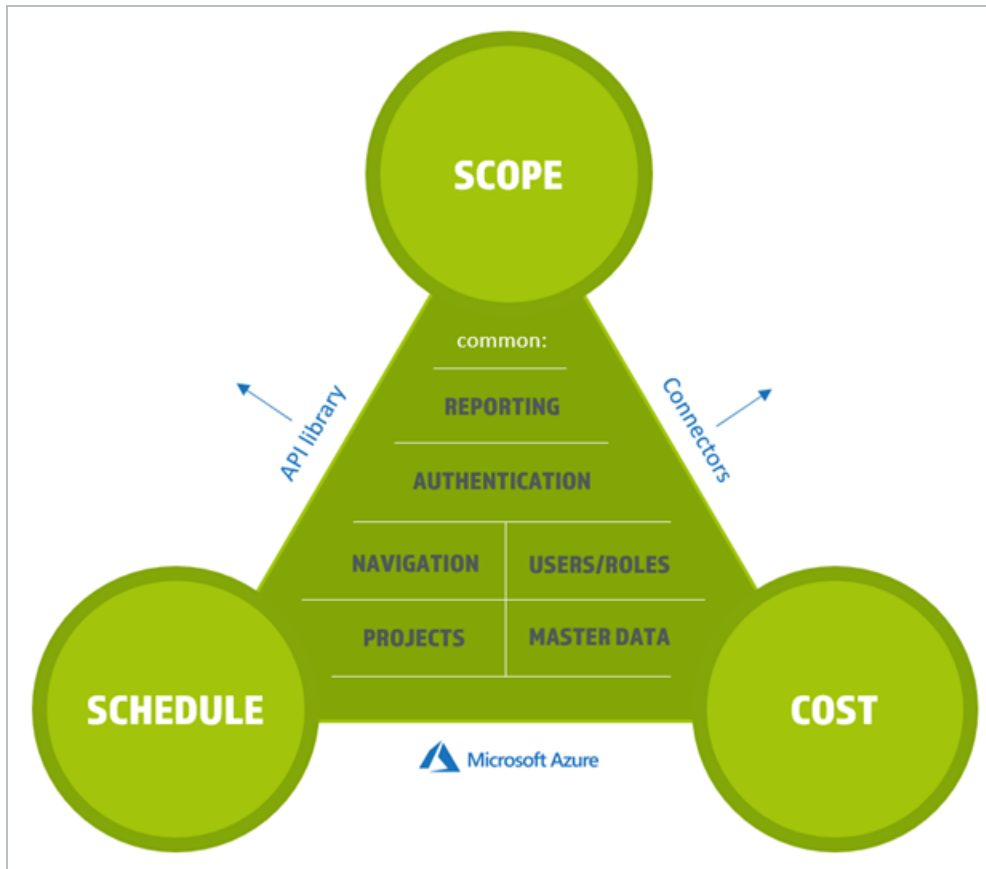


2.1.1 Integration of Applications and Processes

The InEight Cloud Platform performs the primary function of turning disparate data into connected data through a common data environment. Companies using InEight's integrated solutions gain improved ability to collect, manage and report against data, which drives efficiencies in execution.

Connecting and sharing data between all InEight applications involved in managing a project allows project management workflows to pass between jobsite, field office, and front office seamlessly within a consistent and standardized user interface.

The InEight portfolio of products run on the Microsoft Azure platform, which has data centers throughout the world.



Key project information can also be exchanged with 3rd-party applications such as ERP systems (*i.e.*, SAP, Oracle), scheduling applications (*i.e.*, Primavera), and document management applications (*i.e.*, SharePoint) via configurable integration points.

Along with connecting applications, InEight Platform is the underlying administrative system for the InEight product applications. When you first launch the InEight suite of applications, you start out in Platform. From here you can navigate to the other InEight applications that your company has purchased, and have been given permissions to access.

2.1.2 Data Management

InEight Platform is so named because all InEight applications use it as the storage area for master data to be retrieved by all applications. Master data for user management, roles and permissions, application integrations, organization and project settings, and more is located and managed in Platform, and made available to other applications as necessary.

This data used by the InEight applications is organized and stored under Suite administration, Master data libraries, Organization settings, and Project settings that can be accessed from the Main menu.

2.1.3 Cross-Platform Functionality

If you work in more than one of InEight applications, you will find some common functionality that exists regardless of the application you are using.

Cross-Platform Functions	
Communications	Some tasks performed in the InEight applications will trigger notifications to occur, either in the application itself or sent via email.
Document Management	This includes internal document management with InEight Document, as well as integrations with 3 rd -party document management solutions such as SharePoint.
Log Management	Within various InEight applications, you will find audit logs that provide an audit trail of user activity and transactions performed.

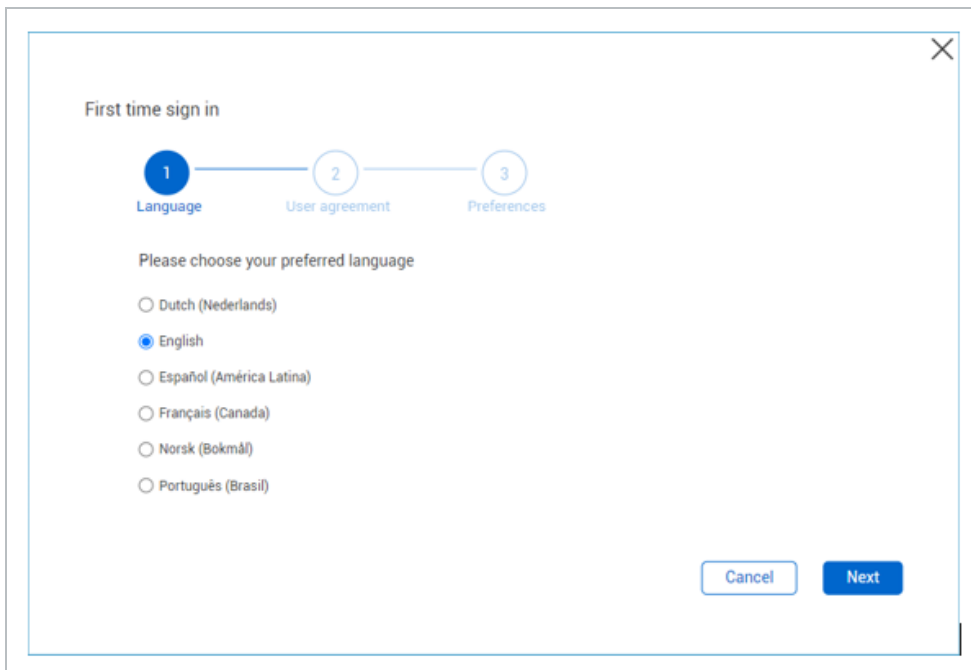
2.2 FIRST TIME SIGN IN

As a new user to the InEight suite of products, the First-time sign in dialog boxes show when you first sign into InEight Platform, which present you with a series of questions about your working environment in the InEight applications. Preferences are set for language, date and number formats, and the User Agreement, which you must accept before you can continue.

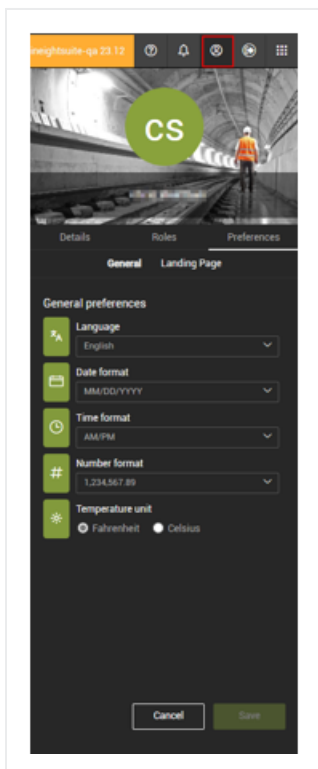
The First-time sign in dialog boxes only show for the initial sign-in to any of the InEight products.

2.2.1 Language

Choose your preferred system language to be shown throughout the application.

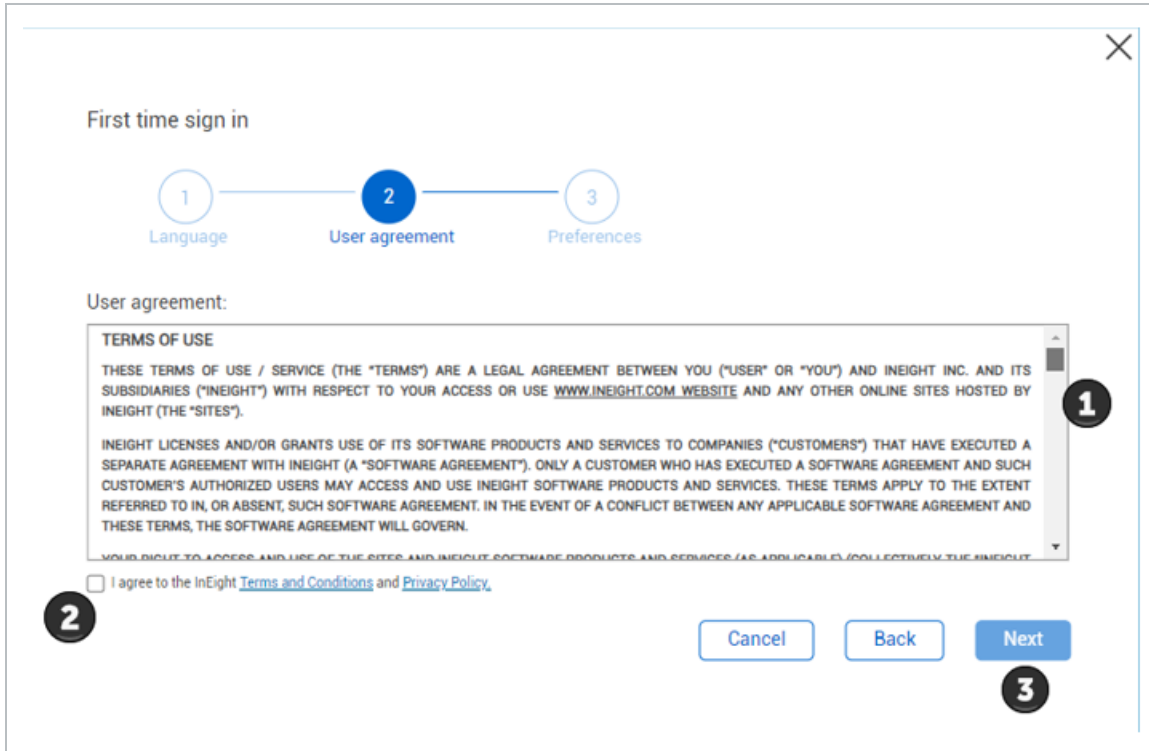


If needed, you can change your selected preferences later in your profile Preferences > **General**.



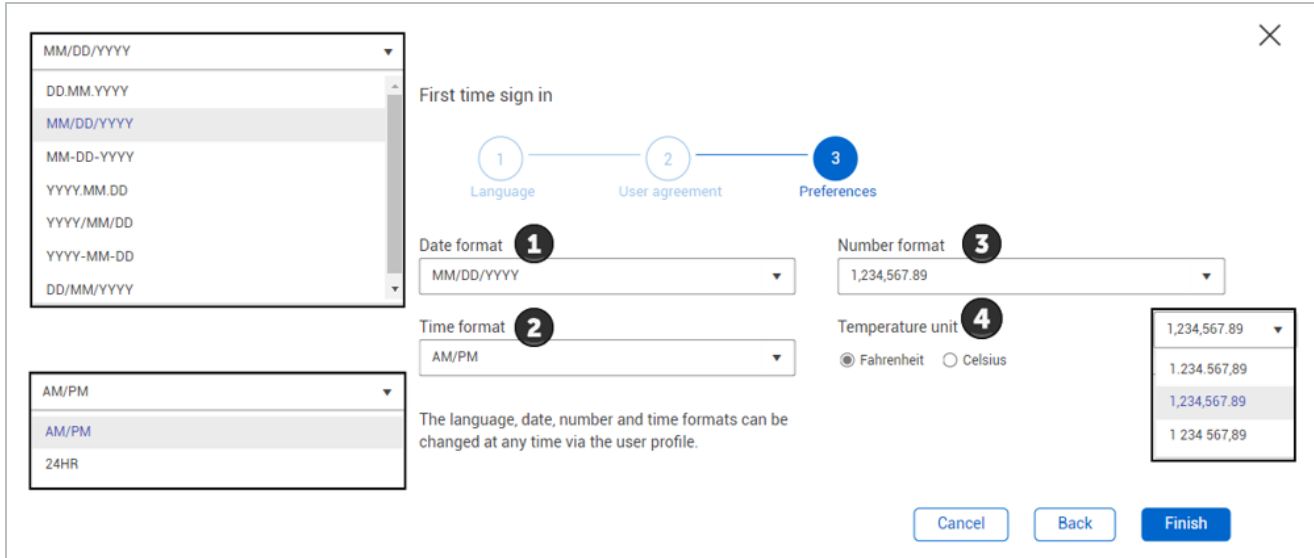
2.2.2 User Agreement

Use the **scroll bar** to read through the entire user agreement. Select the **check box** to agree with the terms and conditions and privacy policy. Click **Next**.



2.2.3 Preferences

Title		Description
1	Date Format	Select the date format that you want to show in all the applications.
2	Time Format	Select either the AM/PM 12-hour format or the 24-hour format.
3	Number Format	Select a numbering format that you want to show in all the applications
4	Temperature Unit	Select either Fahrenheit or Celsius for the temperature unit.



Click **Finish** when you are done selecting preferences.

2.3 NAVIGATION


The top navigation bar can be accessed from any of the InEight applications which gives you the ability to access and visibility to all areas of your daily responsibilities.



Title		Description
1	Main menu	Provides menu type navigation to projects and organizations, and access to all InEight applications in a single location.
2	Home	Returns to your user landing page, organization home page or the project home page that you were last working in.
3	Page	Shows the current site location (breadcrumbs) within the InEight cloud platform.
4	Help	Provides tutorials and other help content.
5	Notifications	Shows communications from administrators when an action is necessary, changes have been made, or other application information.

	Title	Description
6	User profile	Provides access to general settings and other user specific information that includes roles and custom landing page views
7	Sign out	Signs you out of your InEight cloud platform account.
8	Applications	Provides an alternate way to access InEight applications.

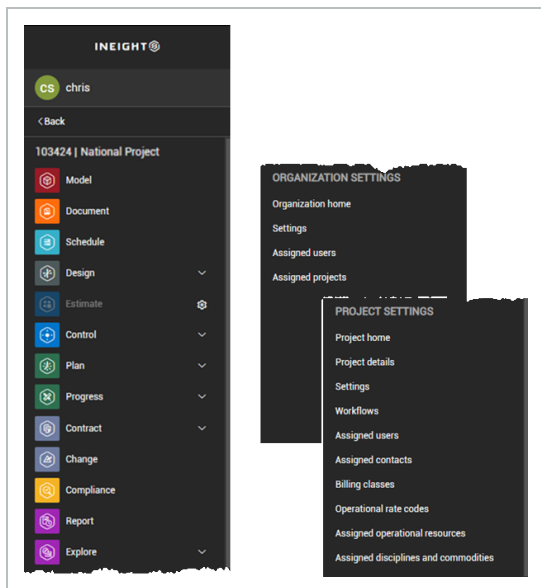
2.3.1 Main Menu

The Main menu navigation dynamically changes based on the selection of a project or an organization, your level of permissions, and the application you choose. The Main menu icon () also changes to match the color associated with the application group you are working in. The Main menu is separated into three major areas of functionality that are accessible at any time, depending on your access and business process. Main menu is separated into three primary sections: Favorites, Settings, and InEight Online.

2.3.1.1 Favorites

In the Favorites section of the Main menu, you can bookmark projects and organizations that you access most frequently. After saving favorites, the Main menu shows a combination of the first five organizations or projects that you selected. If you have more than five favorites saved, click **Show more +** to expand the list and show the additional organizations or projects.

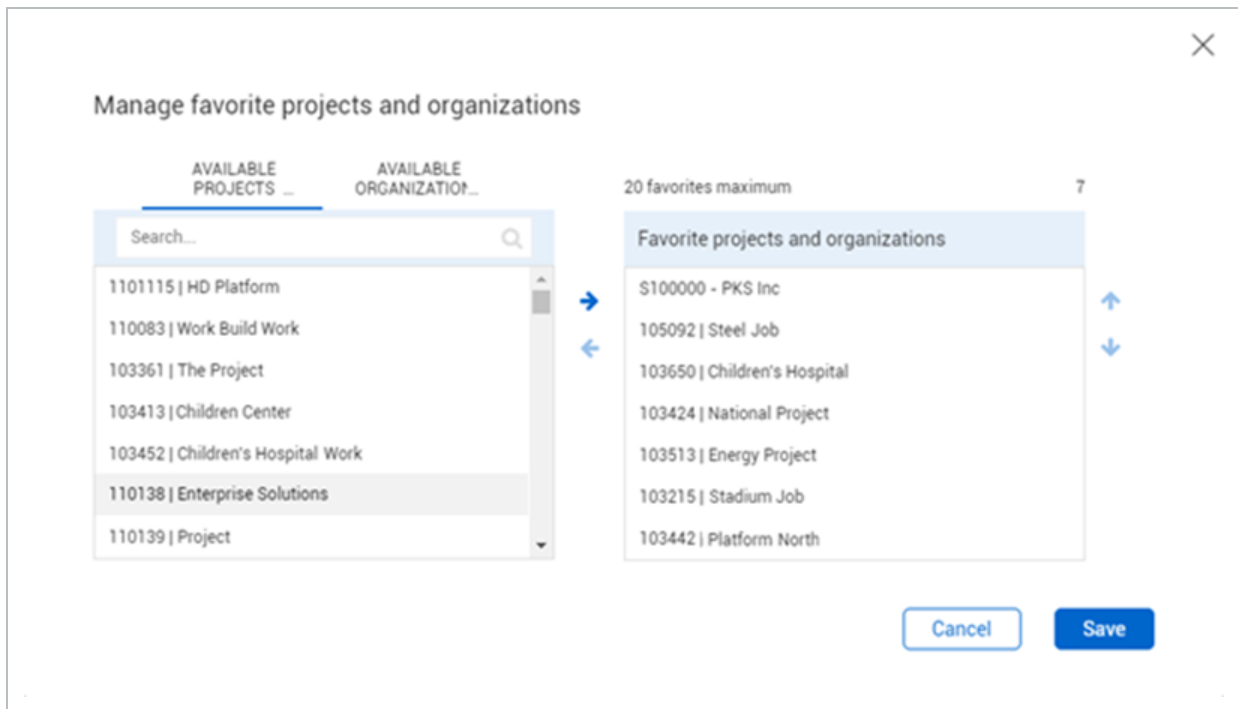
When you select a project or organization from your favorites, the menu updates to show the available applications. From this menu view, you can select and open an application or module, or access project settings or organization settings. Click the project or organization name to open the home page.



Add a project or organization to Favorites

The Main menu provides you with the option to make favorites of those projects and organizations most frequently accessed. The maximum number of organizations and projects that you can include in your favorites list is 20.

1. Click the **Manage favorites** (📌) icon in the Main menu to add favorites or make changes to your current list.
2. Click ➔ to include new projects and organizations or click ⬅ to remove projects and organizations from your list.



3. Click the up and down arrows to change the Favorites list order.
4. Click **Save** to keep the changes.

2.3.1.2 Settings

The Main menu dynamically updates to show access to Master data libraries, Suite administration, and Profile functions if you have the required administrative roles and permissions. If you do not have permissions to access Master data libraries or Suite administration, these items are hidden in the menu.

NOTE

The actions you can perform in the InEight platform and portfolio of products are based on the roles and permissions assigned to your user profile.

All projects & organizations

From the Main menu under Settings, click **All projects & organizations**. The page opens to the Projects tab that shows a list of all available projects, where you can select the project to work in. Select the Organizations tab to see the list of organizations available in the InEight cloud platform and the organization breakdown structure. From these tabs you can view project/organization information, add a new project/organization, change the list order, add or remove columns, and edit certain project/organization information.

For more details and additional information, see [All Projects & Organizations](#).

Master data libraries

Master data libraries can be accessed if you have view permissions for any of the entities at the account level of your environment. When you select an item from Master data libraries, the name of the area shows in the top navigation bar next to the Home icon.

For more details and additional information, see [Master data libraries](#).

Suite administration

Suite administration can be accessed if you have view permissions for any of the administration areas such as User management or Roles and permissions at the account level in your environment. When you select an item from Suite administration, the name of the area shows in the top navigation bar next to the Home icon.

Profile

Profile provides an alternate navigation path to the User Profile, [Notifications](#), and Sign out icons that are located on the right side of the top navigation bar. This functionality ensures you can access user specific areas when your screen resolution or device limits visibility of the top navigation bar.

2.3.1.3 Connected analytics

Quick access links to InEight Report and InEight Explore applications, which are available to all users in an organization that have been assigned the applicable role or permissions.

2.3.1.4 InEight online

The InEight Online navigation provides links to InEight product overviews and solutions, training and support services, and up-to-date information available on the InEight website.

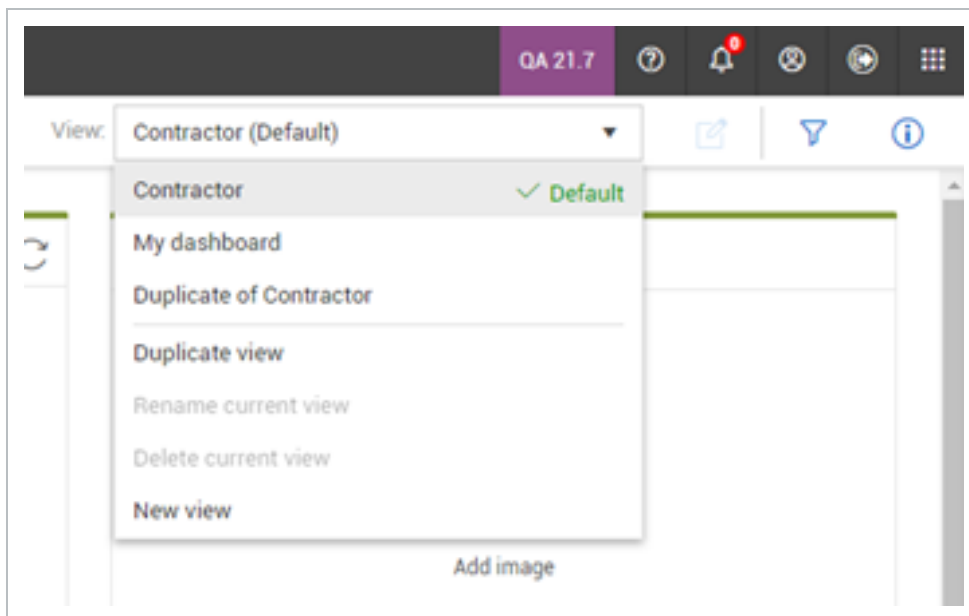
- From the Explore products menu, you can get information on all the InEight product solutions available in the construction project management software offerings. This lets you quickly browse and learn more about each individual product solution.
- From the InEight Learning and Support menu, you can access the InEight Knowledge Library for online help including topics, videos, and release notes. Online training provides a link to InEight U for e-learning courses and certifications, and Contact support provides technical assistance such as creating a support ticket.
- [InEight.com](#) gives you quick access to the website for customer stories, blogs, industry events, webinars, partners and integrations, and the product finder page.

2.4 LANDING PAGE

When you sign in to the InEight cloud platform, the view opens to a user-specific landing page. Initially, the page opens to a predefined view (Owner, Contractor, Subcontractor, Vendor) depending on your assigned role. Landing pages can be customized to focus on your day-to-day tasks and areas specific to your role on projects. You can modify a view or create your own view based on available widgets for those applications you permission to access. There are standard default widgets available across InEight applications that can be filtered to include all your projects or several specific projects. The purpose of these widgets show as tiles in the view that is to give you visibility to high level information and in some instances they can be expanded in the application to show for more details.

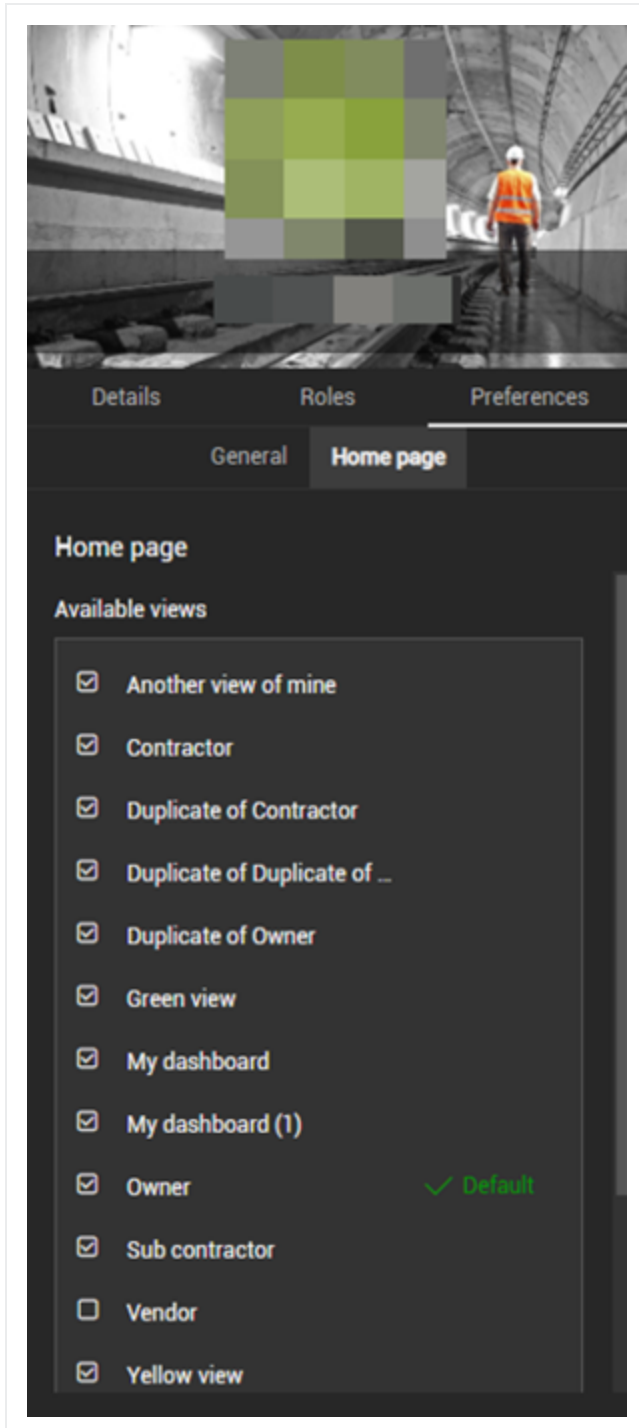
2.4.1 Views list

Landing page views are a collection of tiles with widgets that are organized on the page. The landing page can have one or more views depending on your roles or the customizations you make. Click the **View** list drop-down to select from the available views. From the View list, you can select a different view or change the default view. To change your default view from the View list, hover over a view and then click **Set as default** to select the view as your new default.



Open your user profile to select the landing page views that you want to show in the View list. Click the **User Profile** icon in the top navigation bar, and then click Preferences > **Home page**. The list shows all your available views for the landing page. You can save up to a maximum of 50 views in your user profile list and all available views will show here. However, to keep the landing page View list

manageable, you can have a maximum of 15 views that show in the Views list. If you have more than 15 views in your user profile, you must select the views that you want to show in the View list.



You can change your default view from the Home page tab. In Available views, hover over a view, and then click **Set as default**. Click **Save** to select the view as your new default.

NOTE

If you make changes to your user profile list, you must refresh the landing page to see the changes in the View list.

2.4.1.1 View types

There are three types of views available on the landing page, system, default, and custom.

- The Owner, Contractor, Subcontractor and Vendor views are system views included out-of-the-box from InEight. System views provide examples of some suggested widgets and functionality for each of these views, so you can create your own views based on these system views. System views can be duplicated but cannot be modified or deleted.
- A default view is always loaded when you sign into your account or when you click the Home icon. The default view can be selected for your profile by using the global default setting, from the View list on the landing page, or in your user profile.

An administrator sets the global default and selects one of the system views that is the initial default view for all users on their landing page. This option is set at the account level in Organization > Settings > General > Global Options > **Landing page default view**. By default, the view is set to the Owner view. Access to this setting requires that you to have a role assigned at the Root Org level with the permission View general settings. To update the default view for all users requires the permission View general settings and Edit general settings.

- You can create custom views, which are saved in your user profile and available for you to use. There are two options you can choose from to create views, Duplicate view and New view.
 - A duplicate view is created using an existing view as a template. A duplicate view starts with the configuration of a selected view that you can modify the contents of into another view by adding and removing widgets, rearranging tiles, and then giving the view a new name.
 - A new view starts as a blank view that you can add any widgets and arrange tiles from scratch. A new view should be created when the view you want to use does not conform to any existing views. You will have the option of giving this view a name when complete.

2.4.1.2 Assign views to a role

To assign views to a user role, a new section, View assignments, in roles and permissions has been added to allow up to five system views to be assigned to a single user role. Users inherit any system view that has been assigned to their role.

To view or configure (add, edit) the system views assigned to a role, go to Suite Administration > Roles and permissions. Select either Add role or Edit role. This requires the permissions View roles and permissions, Add roles and permissions, or Edit roles and permissions (respectively).

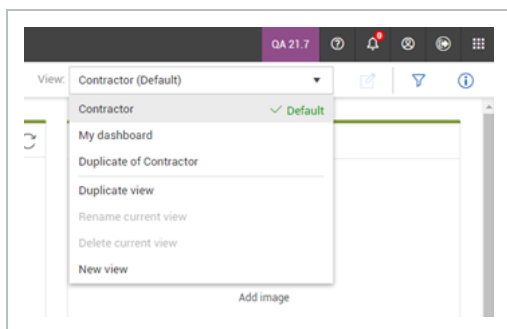
In View assignments, you can assign or unassign system views to that role. Every user assigned to that role will have access to the system views associated with that role.

2.5 CUSTOM VIEWS

NOTE

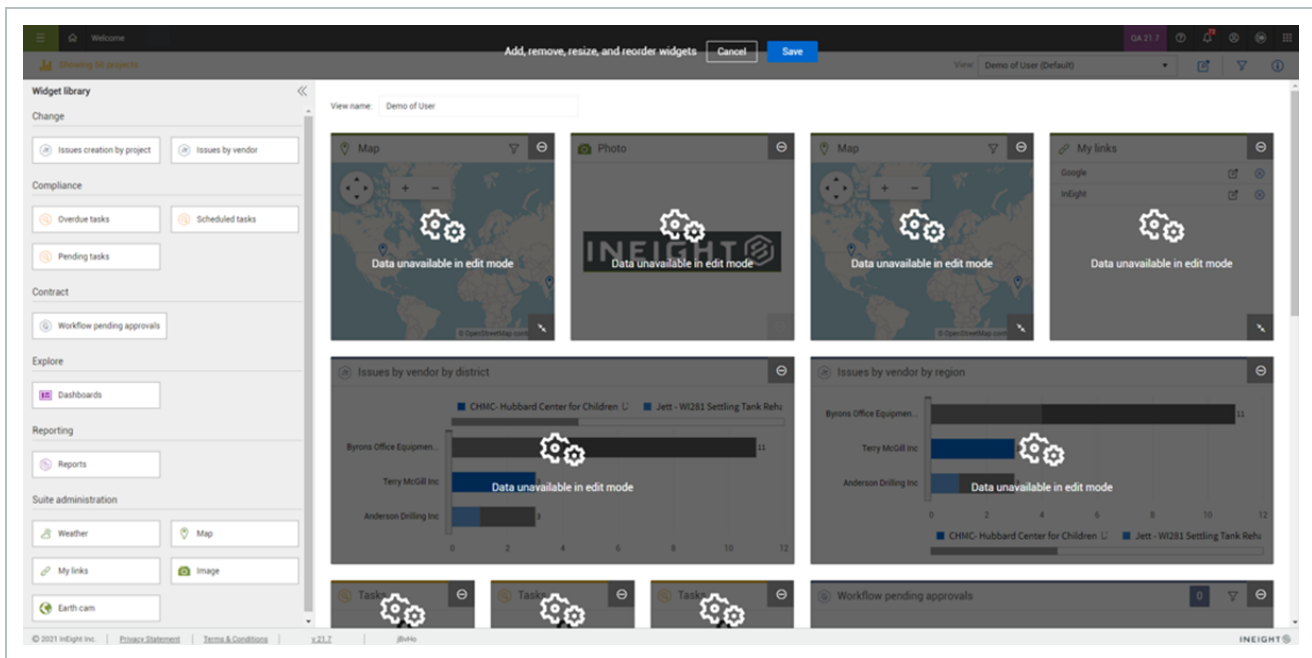
Custom views are only show in a user profile and available to the user that created it. Custom views cannot be assigned to a role.

You can create custom views as needed across projects and applications for your area of responsibility. To create a custom view, click the View list, and then select either **Duplicate view** or **New view**.



A duplicate view is a new view based on the current system or custom view open, and it is an exact copy, which includes widget selection and tile configuration. A new view starts as a blank page that allows you to add any applicable widgets you want and configure the layout as needed.

When choose to create a custom view, the page opens to the staging area (edit view mode). The staging area lets you add and remove widgets, arrange and resize tiles, and modify the view name.

**NOTE**

After your custom view is created and saved, you can click the Edit icon in the View toolbar at any time to make changes.

2.5.1 Save and delete a custom view

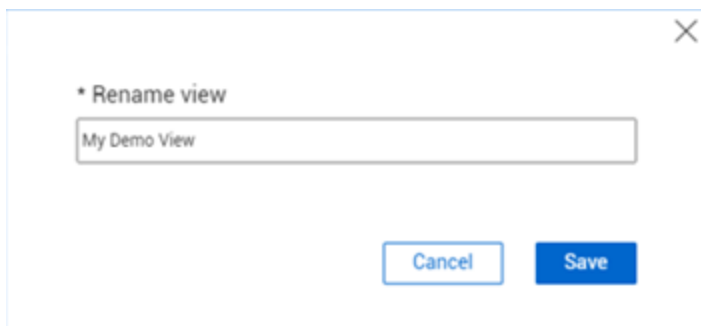
Click **Save** after you have completed creating your new view or making modifications to an existing view. After the view is saved, it opens to the live version of the view, and all widgets will fetch the applicable data.

You can delete a custom view at any time from the View list. To delete a view, select the view, and then click **Delete current view**. A confirmation dialog box opens before the view is deleted. Deleted views cannot be restored.

2.5.2 Change view name

By default, the system assigns the name My dashboard to the view. If there are already instances of the My dashboard view, the system appends a copy number following the name for example, My dashboard (2). To change the view name, click in the View name box and enter the new name. Click **Save** and the view will show in the View list.

You can also change the name of any existing custom view at any time. Open the view, and then select **Rename current view** in the View drop-down list. The Rename view dialog box opens for you to enter the new name, and then click **Save**.



2.6 WIDGETS AND TILES

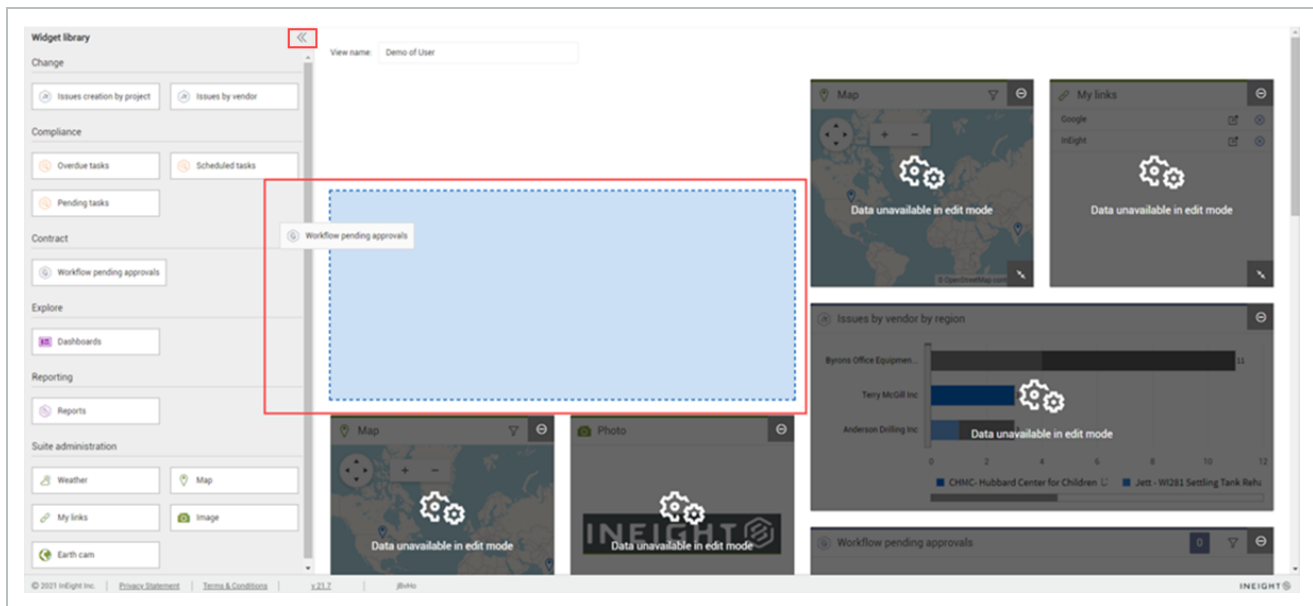
The staging area of the edit screen allows you to add or remove widgets as needed. All the available widgets that you can add are shown in the Widget library on the right side of the staging area page.

NOTE The Widget library contents are based on the applications that are available to you through permissions and licensing.

To add a widget to your view, click and drag the widget from the Widget library into position in the staging area. The widgets in the staging area adjust to allow placement of the new widget. You can add multiple instances of the same widget to the view as needed. Click the arrows to minimize or expand the Widget library.

NOTE Background data fetches might occur when widgets are added to the staging area, but the data is unavailable until you save the view and return to the live mode.

To remove a widget from a view, click the **Remove icon** (🗑️) of a widget in the staging area. If you remove a widget unintentionally, you can add the widget back in the view by from the widget library.



2.6.0.1 Arrange widgets

After you move the widgets you want into the staging area, you can click and drag them into place where you want the widget to show in the view. Existing widgets will move to the closest available area according to the size of the widget. There is no restriction on how you use the available space and whether to fill empty areas or leave them open.

2.6.0.2 Resize widgets

There are some widgets that can be resized and adjusted in the staging area. To resize a widget, click the **Resize** icon (📏) and adjust to the size as needed. The other widgets around it will move to the closest available area.

2.6.0.3 Widget details by application

- **Map (InEight Platform):** Shows project markers on a map determined by the locations of the projects. Projects must have longitude and latitude data entered to show on the map.
- **Weather (InEight Platform):** View various weather metrics of any configurable location.
- **My links (InEight Platform):** Configure quick access links.
- **Image (InEight Platform):** Configure custom image.
- **EarthCam (InEight Platform):** Configure a live EarthCam video stream on the widget area.

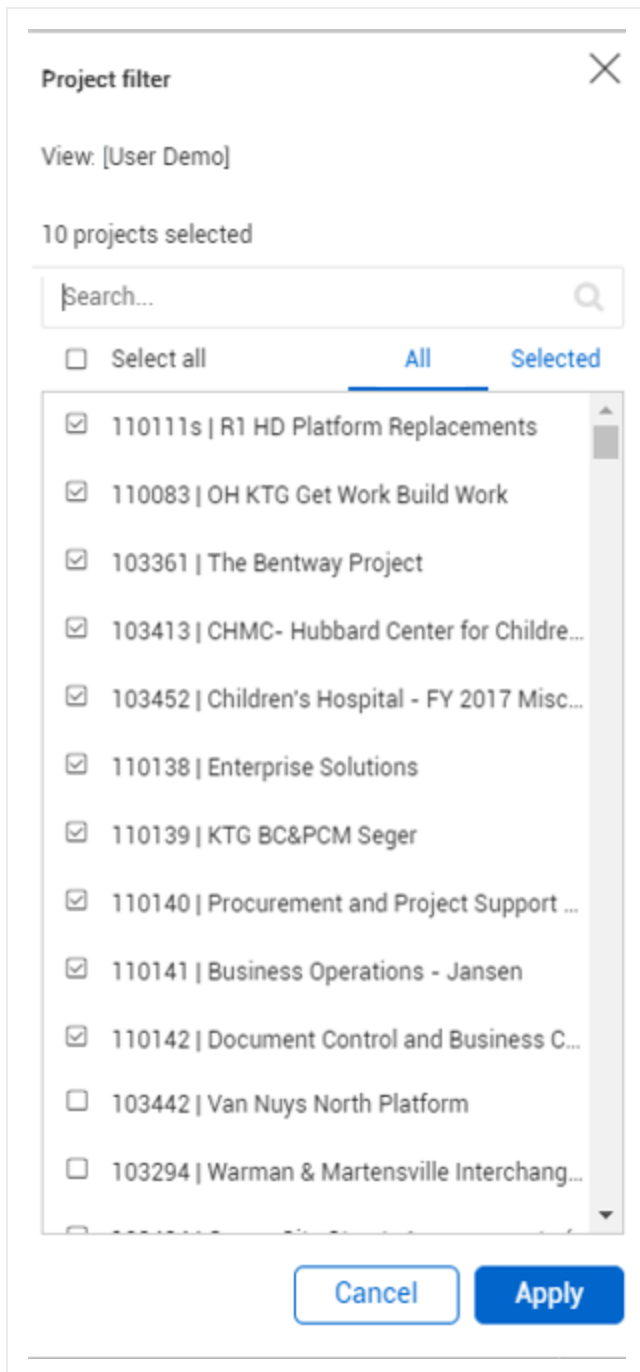
- Overdue tasks (InEight Compliance): Shows a count of overdue tasks, which could be clicked to take you to that page.
- Pending tasks (InEight Compliance): Shows a count of pending tasks, which could be clicked to take you to that page.
- Scheduled tasks (InEight Compliance): Shows a count of scheduled tasks, which could be clicked to take you to that page.
- Workflow pending approvals (InEight Contract): Shows a summary of project specific workflows pending approval.
- Issues by vendor (InEight Change): Shows a count of issues on selected projects for all the vendors on the projects.
- Issue creation by project (InEight Change): Shows a count of all issues on selected projects, including information of when they were created.
- Dashboard (InEight Explore): Shows the selected dashboard from explore in the widget area.
- Reports (InEight Report): Shows a list of reports which could be selected to navigate you to the corresponding report.
- Time phased distribution (InEight Control): Shows a single project specific Control metrics including past and future metrics like Actuals, Earned budget, Time phased budget and Time phased forecast in a graph.
- Value change over time (InEight Control): Shows a single project specific Control metrics including past and future metrics like Current estimate, Current budget, Forecast in a graph.

2.6.0.4 Widgets in system views

- Owner view: All Platform widgets, all Compliance widgets, all Contract widgets, all Report widgets, all Control widgets.
- Vendor view: All Platform widgets, all Compliance widgets, all Report widgets.
- Contractor view: All Platform widgets, all Compliance widgets, all Report widgets, all Control widgets, all Contract widgets.
- Sub-Contractor view: All Platform widgets, all Compliance widgets, all Report widgets.

2.6.0.5 Project filter

You can select and filter a set of projects to show as a collection of tiles using data from those projects in the view. Click the **Filter projects** icon in the top toolbar to include a subset (up to 50 maximum) of your available projects in a view.



The Project filter slide-out panel shows the following:

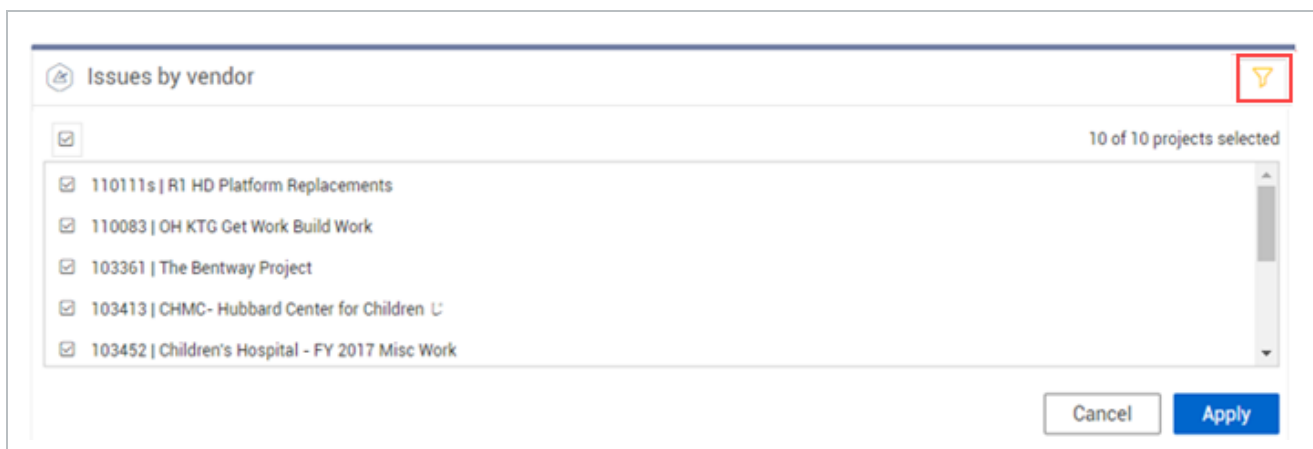
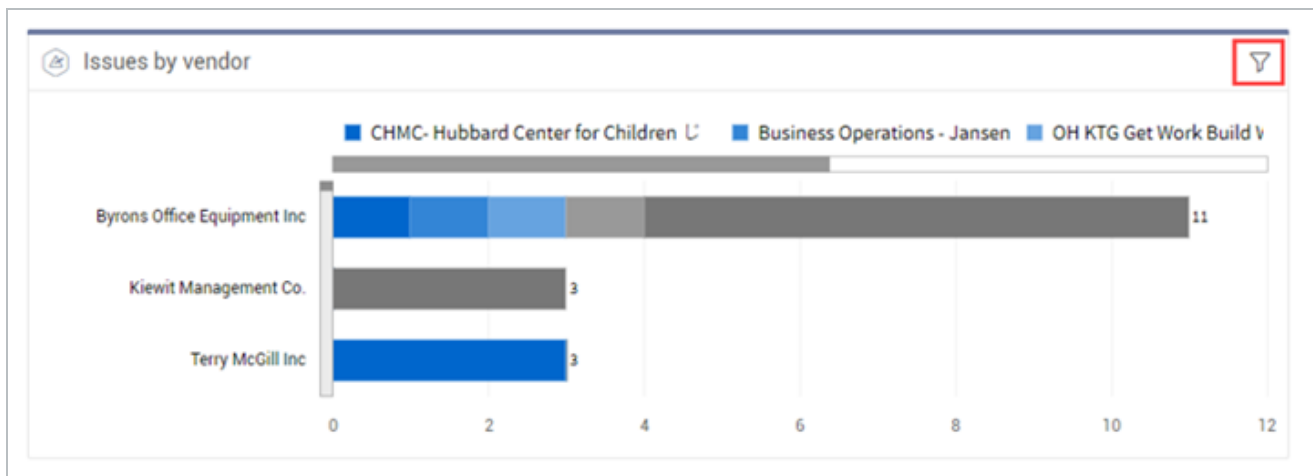
- View: The name of the view currently selected.
- Number of projects selected: Indicates the number of projects currently selected.
- Search: Provides the function to search your list of available projects.

- All or Selected: Toggles to show all projects or to show only selected projects.
- Cancel/Apply: Discards or saves your selection of projects.

The project filters are saved with the current view in your user profile so, every time you open the view your project selection shows. The number of projects, either filtered or total, is shown below the Home icon. If you do not have any projects selected for the view, it shows a prompt to select a project to update your project filter. Some tiles will not show any data if there are no projects selected. A maximum of 1500 projects can be selected in a filtered view.

2.6.0.6 Tile filters

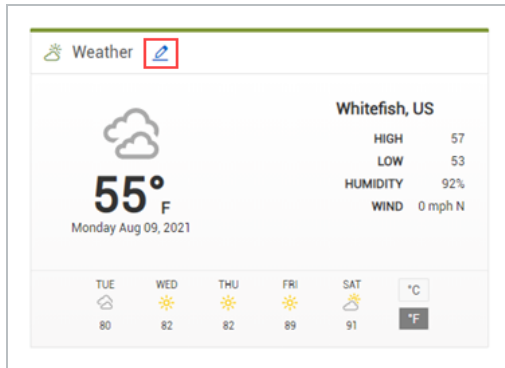
When you have multiple projects in the selected view, depending on the widget used, some tiles show data from all those projects. If the tile shows data for multiple projects, the Filter icon allows you to filter to show only a specific project or projects.



When you duplicate a view, the view level or tile level projects are also copied. The configurations can then be updated in the duplicated view.

2.6.0.7 Tile names

Hover over a tile name to rename it. Click the **Edit** icon, change the name, and then click the **Save** icon. This customization is useful to differentiate between tiles if you have multiple copies of the same tile in the view.

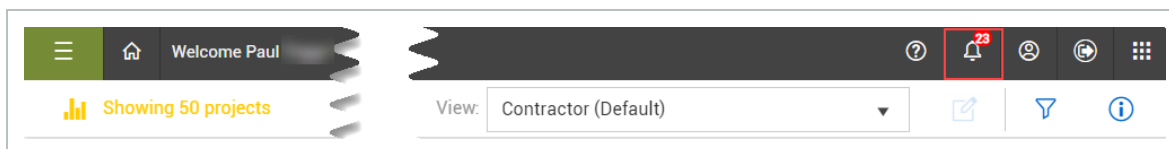


There are some additional options for specific widgets that allow for individual configurations, such as specifying the location for the weather, or adding new links to the My links tile. Other widgets could have additional options to configure that are not detailed in these release notes.

2.7 NOTIFICATIONS

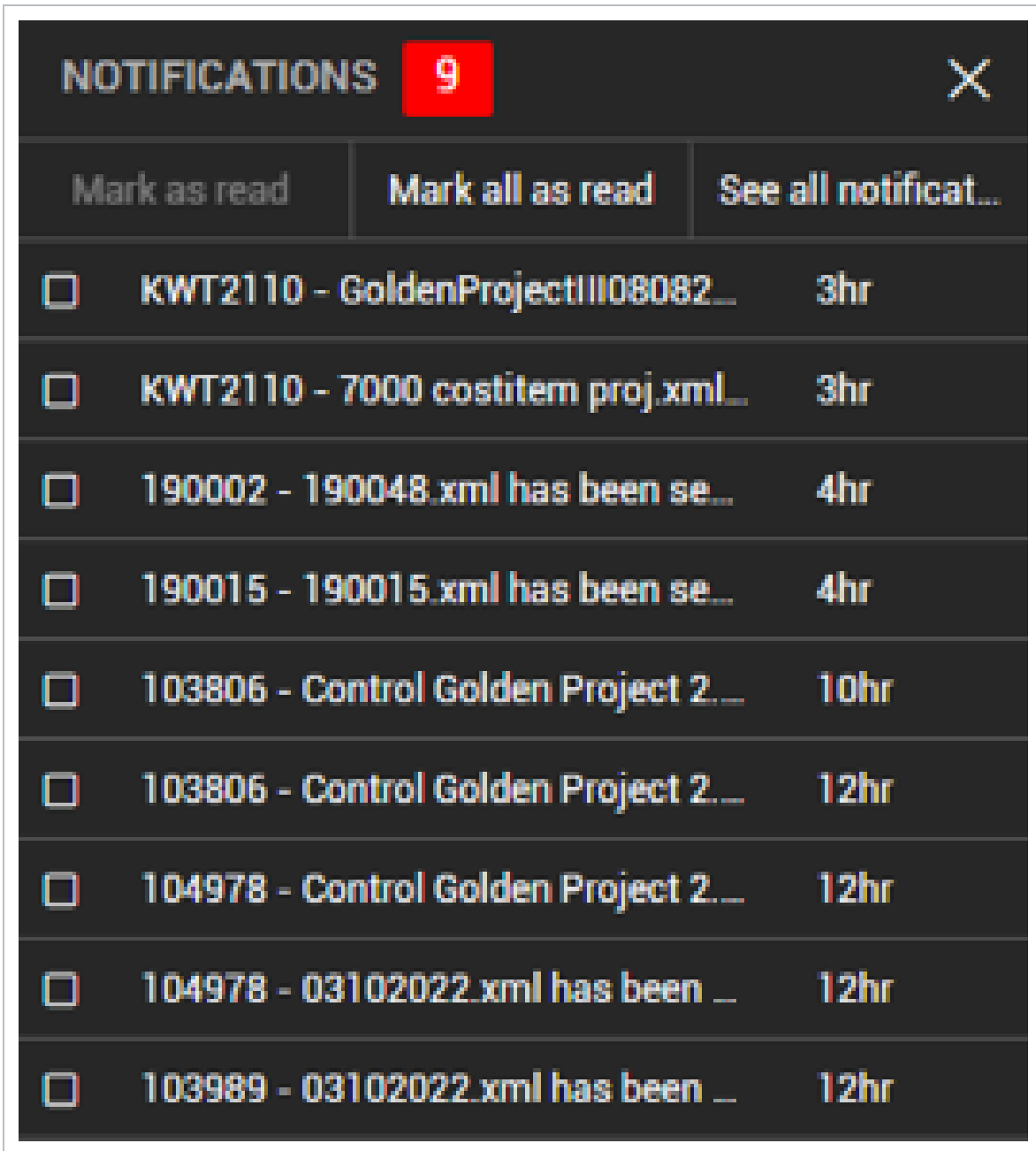
System notifications can be transmitted via in-app messaging from InEight Platform for assigned projects. These notification messages are a means to communicate information to users about certain system activities. Message content can range from a notification informing you of a failed import process, to notification about a planned system outage.

The Notification icon is on the right side of the top navigation bar. The number of unread notifications is indicated by the number shown in red, on the Notifications icon.



2.7.1 Notifications slide-out panel

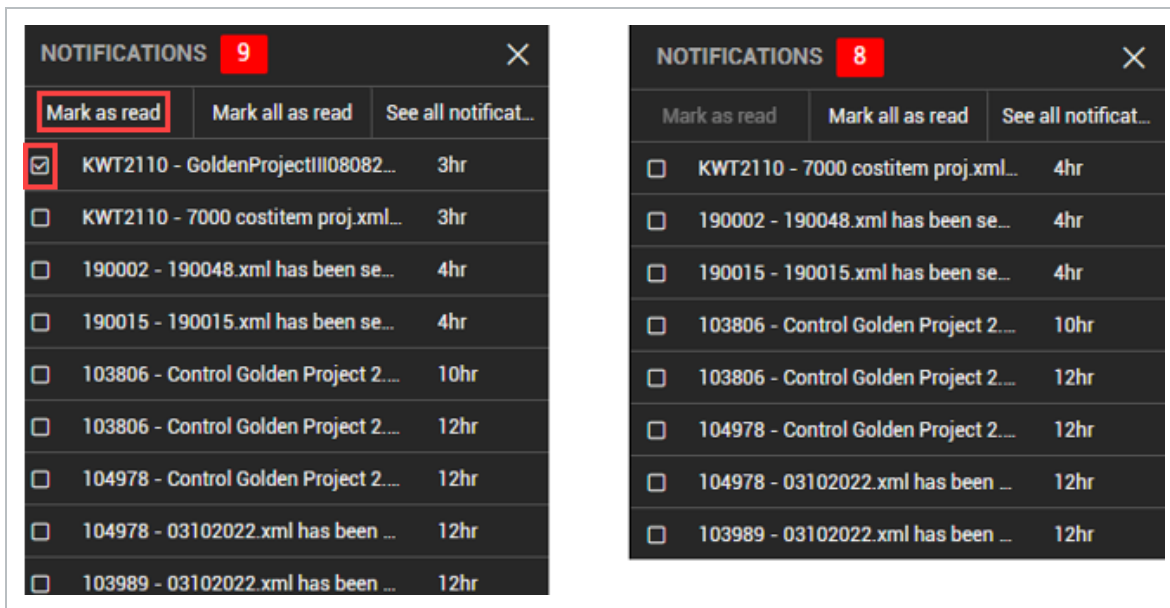
When the Notifications icon is selected, a slide-out panel shows all the unread notifications.



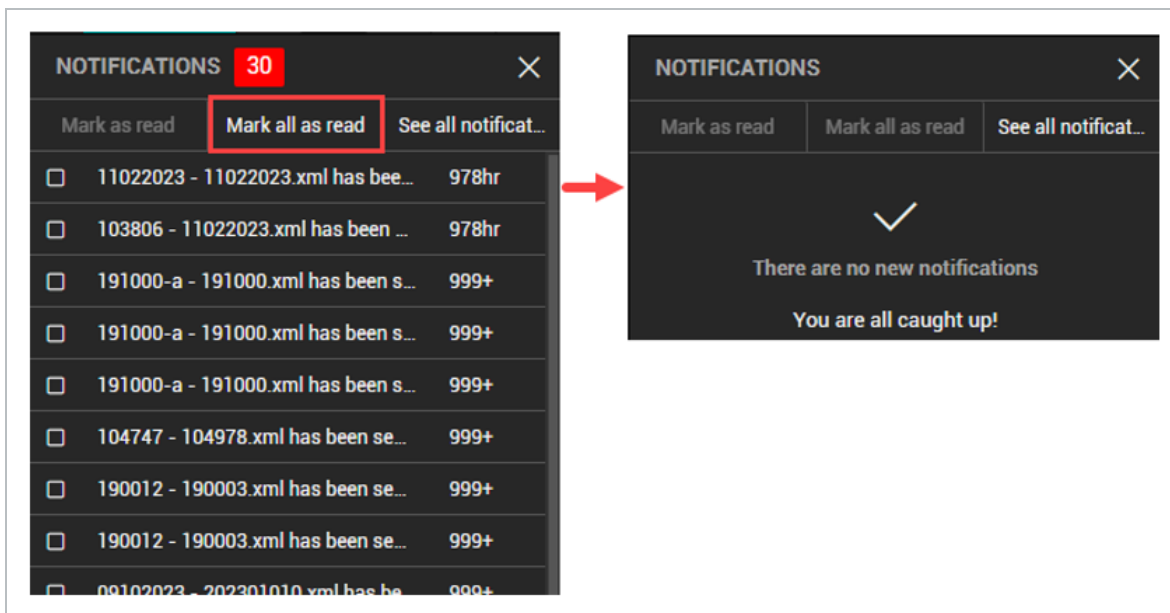
2.7.1.1

2.7.1.2 Mark as Read

Click the **check box** to the left of a notification, and then select **Mark as read**, which removes the selected notification from the slide-out panel.



Select the **Mark all as read** button to clear the slide-out panel of all unread messages.



2.7.1.3 See all notifications

Click **See all notifications** to open a new window, which shows all read and unread notifications. Note the text is bolded in an unread message. In the Notifications window you can do any of the following:

- Select and delete one or more notifications.
- Mark notifications as read.

- Mark all notifications are read.

The screenshot shows a notifications interface. At the top left, a 'NOTIFICATIONS' slide-out panel is open, displaying 8 unread notifications. The panel includes buttons for 'Mark as read', 'Mark all as read', and 'See all notificat...'. Below the panel, a table lists notifications with columns for Project ID, Project name, Details, Application, Created by, and Created on. The table contains 7 rows of notification data.

Project ID	Project name	Details	Application	Created by	Created on
11022023	11022023	11022023 - 11022023.xml has been sent from Estimate to 11022023 - 11022023. Click to refine and import file.		InEight Service Account	11/02/2023 10:44:18 PM
103806	TNMC Misc. 2019-2020	103806 - 11022023.xml has been sent from Estimate to 103806 - TNMC Misc. 2019-2020. Click to refine and import file.		InEight Service Account	11/02/2023 10:20:09 PM
191000-a	191000	191000-a - 191000.xml has been sent from Estimate to 191000 - 191000. Click to refine and import file.		InEight Service Account	10/30/2023 10:05:56 AM
191000-a	191000	191000-a - 191000.xml has been sent from Estimate to 191000 - 191000. Click to refine and import file.		InEight Service Account	10/30/2023 10:02:25 AM
191000-a	191000	191000-a - 191000.xml has been sent from Estimate to 191000 - 191000. Click to refine and import file.		InEight Service Account	10/30/2023 9:38:44 AM
104747	Bethany Dams Restoration	104747 - 104978.xml has been sent from Estimate to 104747 - Bethany Dams Restoration. Click to refine and import file.		InEight Service Account	10/18/2023 9:32:47 AM
190012	190012	190012 - 190003.xml has been sent from Estimate to 190012 - 190012. Click to refine and import file.		InEight Service Account	10/17/2023 10:40:10 AM

2.7 Step by Step 1 — Review in app notifications

1. Click the **Notification** icon to open the notifications slide-out panel.

The list shows all unread notifications. Click **See all notifications** to open the Notifications page and view the list of all read and unread notifications. From this page you can delete, mark as read, and search notifications. In the Details column, select a notification to see more information, such as opening the audit log.

2. In the notifications list, select a notification, and then click **Mark as read**.

When you click **Mark all as read**, it clears the list and the Notification icon does not show.







3. Select a notification, and then click the description to view details about it.

2.7.2 Notifications configuration

NOTE The configuration for notifications is generally a task to be performed by and admin.

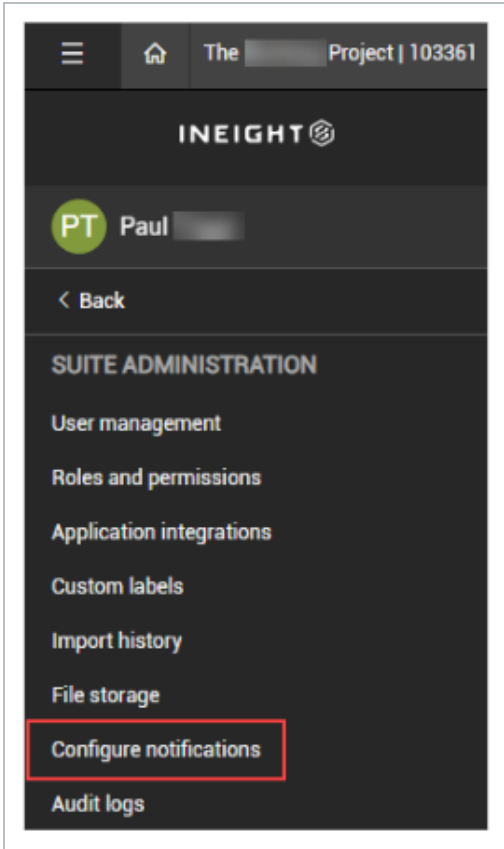
Permissions for notification settings are configured in Suite Administration > Roles and permissions > Suite Administration > **Configure notifications**. With the applicable permissions a user in an admin role can customize the notification preferences for other users.

Configure notifications

-  View recipient lists
-  Add recipient lists 
-  Edit recipient lists 
-  Delete recipient lists
- Send notifications

Configuring notifications triggers the mechanism for sending communications via notifications, either in the InEight application or via email. This allows users to stay informed and engaged with the InEight application's activities and updates.

To access Configure Notifications, click Suite Administration > **Configure Notifications**.



The Configure notifications page shows a list of notification recipients.

The screenshot shows a web browser interface for the 'Configure notifications' page. The breadcrumb is 'Suite administration / Configure notifications'. There are utility icons at the top right, including a help icon, a notification bell with '20', a refresh icon, and a settings icon. A 'Send notification' button and an information icon are also present. Below is a table with the following data:

	Recipient list name ↑	Description	Created by	Created on	Last modified by	Last modified on
<input type="checkbox"/>	Configuration A	Recipient A list	Paul [redacted]	01/16/2024 3:12:54 PM	Paul [redacted]	01/16/2024 3:36:35 PM
<input type="checkbox"/>	Configuration B	Recipient B list	palani [redacted]	12/25/2023 5:11:39 AM	Paul [redacted]	01/16/2024 3:36:54 PM
<input type="checkbox"/>	Configuration C	Recipient C list	palani [redacted]	12/25/2023 5:16:21 AM	Paul [redacted]	01/16/2024 3:37:17 PM

2.7 Step by Step 2 — Add a recipient list

You are a Cost Control Manager, and you want to remind Cost Controllers to submit their forecast before the end of the month for review. You can add a new list and then select your recipient list based on their project roles as Cost Controller. You will want to ensure the applicable roles are already created. In this example, the Cost Controller role will need to be added.

1. Click the **Add** icon to open Add/Edit recipient list page.
2. In the Recipient list name field, add a list name and description. The Description field has a maximum length of 50 characters.

Recipient list summary

* Recipient list name

Recipient C

Description

Recipient C list

3. Select **Add recipients**.



4. The Edit recipient list dialog box opens. Select a recipient list type from the drop-down list, and then search for the Cost Controller role.

The Cost Controller role was previously created. If this role doesn't exist, you can either create a new role or select a different one.

Edit recipient list

Roles ▼

Search...

Current selections

- Cost Controller

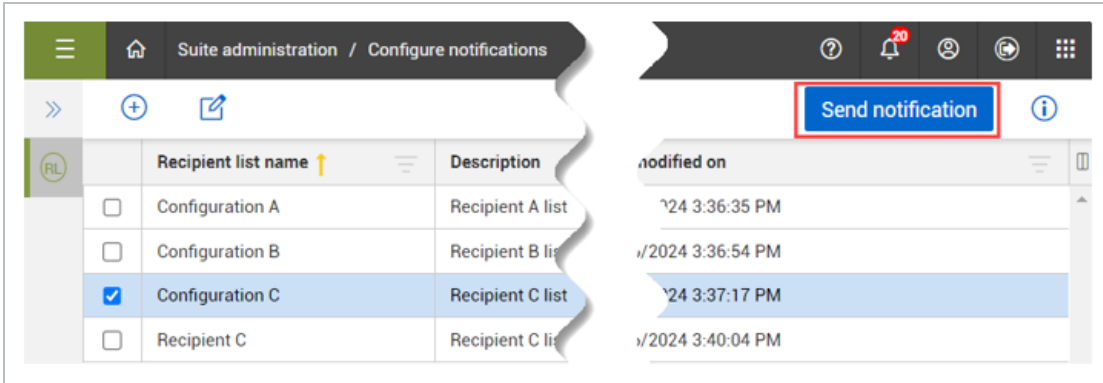
Cancel Save

5. Click **Save** to add the new entry to the list of recipients.

2.7 Step by Step 3 — Send Notifications

Once the recipient list is prepared with the desired notification recipients, you can send out notifications via email, in the application, or both.

1. In the Recipient List register, select a Recipient list name and then select **Send Notification**.



2. In the Send Notification slide-out window, select **In App**, and then type a message description. The In App notification type has a maximum text length of 35 characters.

Send notification ⓘ

Send admin notifications ✕

* Notification type

Email

Subject

Message

In App

Notification text

Please submit your forecast ASAP

Cancel Send

3. Select **Send**.

2.8 COLUMN MANAGEMENT

Pages in Platform with a column and row grid layout give you the flexibility to customize how you want to view the information. You can drag-and-drop a column to change the order of columns, and show or

hide columns depending on if it is relevant or not to what you want to see. You can also sort, filter, and search to find the specific information you need.

2.8.1 Move columns

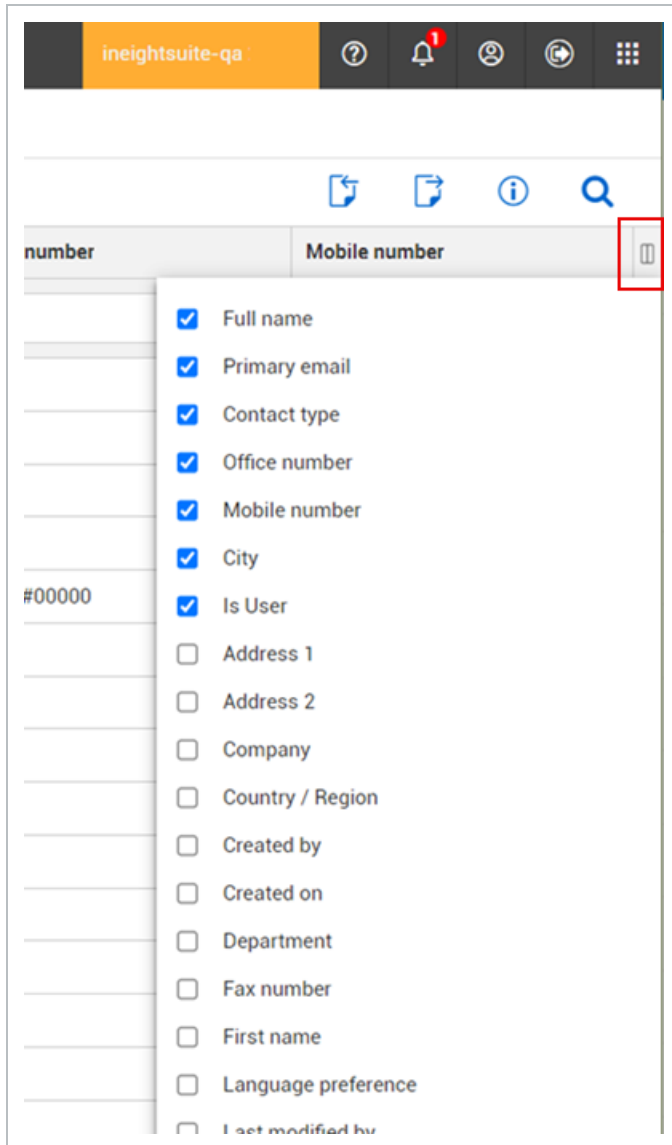
Click in the column header and drag it to another location in the grid to change the order of the column sequence.

2.8.2 Show and hide columns

The default columns are shown on each page, but you can add or remove columns to show in the view.

Show or hide columns

1. To show or hide columns, click the **Column Chooser** icon located on the right side of the page to open the list of available fields.



2. Select the check box next to column name to show it or clear the check box to hide it. The view updates when you select or clear a check box.

Click anywhere outside of the list to exit the Column Chooser.

2.8.3 Sort and filter columns

You can use the columns to sort and filter information specific to your needs. Click in a column header. An arrow shows in the header pointing up and the information is sorted in ascending order.

- Click in the same column header again and the arrow shows pointing down indicating the information is sorted in descending order.
- Click in the same column header again to remove the sorting.

You can use the sort functionality on multiple columns at the same time. Click in a column header to sort the information, and then click in a second column header.

- Click in the column header to change the sorting from ascending to descending.
- Click in the same column header again to remove the sorting.

The screenshot shows a table with the following columns: ID, Description, Created by, Created on, Last modified by, and Last modified on. The 'ID' header has an upward arrow with the number '2', 'Description' has an upward arrow with '1', and 'Last modified by' has a downward arrow with '3'. Below the headers are four rows of data with checkboxes in the first column.

ID	Description	Created by	Created on	Last modified by	Last modified on
<input type="checkbox"/> ESB union1	ESB union1	InEight Service Account	11/30/2023 06:03:39 AM	InEight Service Account	11/30/2023 06:03:39 AM
<input type="checkbox"/> ESB union2	ESB union2	InEight Service Account	11/30/2023 06:04:03 AM	InEight Service Account	11/30/2023 06:04:03 AM
<input type="checkbox"/> MR Union A1	MR Union A1	Mahendra R	11/30/2023 03:11:07 AM	Mahendra R	11/30/2023 03:11:07 AM
<input type="checkbox"/> MR Union A2	MR Union A2	Mahendra R	11/30/2023 03:10:53 AM	Mahendra R	11/30/2023 03:10:53 AM

You can filter columns based on the text content to focus on specific information in the records. Enter text in the box that you want to filter on, and then click the Filter icon to select additional the filter criteria. Note that records will start to be filtered as you type in the text box. Click the **Clear** (filter) icon to reset the filtering.

The screenshot shows the same table as above, but with a filter dropdown menu open over the 'Description' column. The dropdown menu lists several filter criteria: 'Is equal to', 'Is not equal to', 'Contains', 'Does not contain', 'Starts with', and 'Ends with'. The 'ID' column header has a red box around it, and the 'Description' column header has a dropdown arrow. Below the headers are seven rows of data with checkboxes in the first column.

ID	Description	Created by	Created on	Last modified by	Last modified on
<input type="checkbox"/> unions7		palani nadiya	11/23/2023 04:39:36 AM	palani nadiya	12/27/2023 11:19:42 PM
<input type="checkbox"/> unions11		palani nadiya	11/23/2023 04:40:53 AM	palani nadiya	11/23/2023 04:40:53 AM
<input type="checkbox"/> unions12		palani nadiya	11/23/2023 04:41:18 AM	palani nadiya	11/23/2023 04:41:18 AM
<input type="checkbox"/> unions13		palani nadiya	11/23/2023 04:41:29 AM	palani nadiya	11/23/2023 04:41:29 AM
<input type="checkbox"/> unions14		palani nadiya	11/23/2023 04:42:07 AM	palani nadiya	11/23/2023 04:42:07 AM
<input type="checkbox"/> unions15		palani nadiya	11/23/2023 04:43:13 AM	palani nadiya	11/23/2023 04:43:13 AM
<input type="checkbox"/> unions17		palani nadiya	11/23/2023 04:43:28 AM	palani nadiya	11/23/2023 04:43:28 AM



LESSON 3 – ALL PROJECTS AND ORGANIZATIONS


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3.1 ALL PROJECTS AND ORGANIZATIONS

The All projects & organizations page lets you access your organizational breakdown structure (OBS) and all projects within the organization. The page opens to the Projects tab that shows a list of all projects available to you. You can also use the search function to find a specific project or edit an existing project from this page.

3.1.1 Projects

The Projects tab that shows a list of all projects available to you. On this page you can add a new project, edit an existing project, or use the Search function to find a specific project. Click the link in the Name column, to open the home page for the project.



PROJECTS		ORGANIZATIONS			
ID	Name	Status	Organization	Created by	
<input type="checkbox"/> 105091	Steel Structure Job	Active	S100000 - (PKS Inc)	jeremy cheek	

Select the check box for a project from the list, and then click the **Show information details** icon. The project slide-out panel opens, which provides a summary at a glance of project information you can find on the Project details tab and Project home page, as well as links to those pages.

3.1.2 Organizations

The Organizations tab shows the OBS, which represents the hierarchical company structure. On this page you can add a new organization, edit or delete an existing organization, or use the Search function to find a specific organization. In the Organization column, click the link to open the Organization home page.

Select the check box for an organization from the list, and then click the **Show information details** icon. The organization slide-out panel opens, which provides a summary at a glance of organization information. The slide-out panel includes a quick link to the Organization and application settings page.

3.2 ORGANIZATIONAL BREAKDOWN STRUCTURE

The Organizational Breakdown Structure (OBS) represents the hierarchical company structure. It can have regions, such as Eastern and Western, and within those regions, the company can have also divisions, such as Electrical, Paving, and Masonry. The organization can continue to be more refined to the level such as states, cities, districts. Projects are at the lowest level of the structure but they do not show in the OBS.

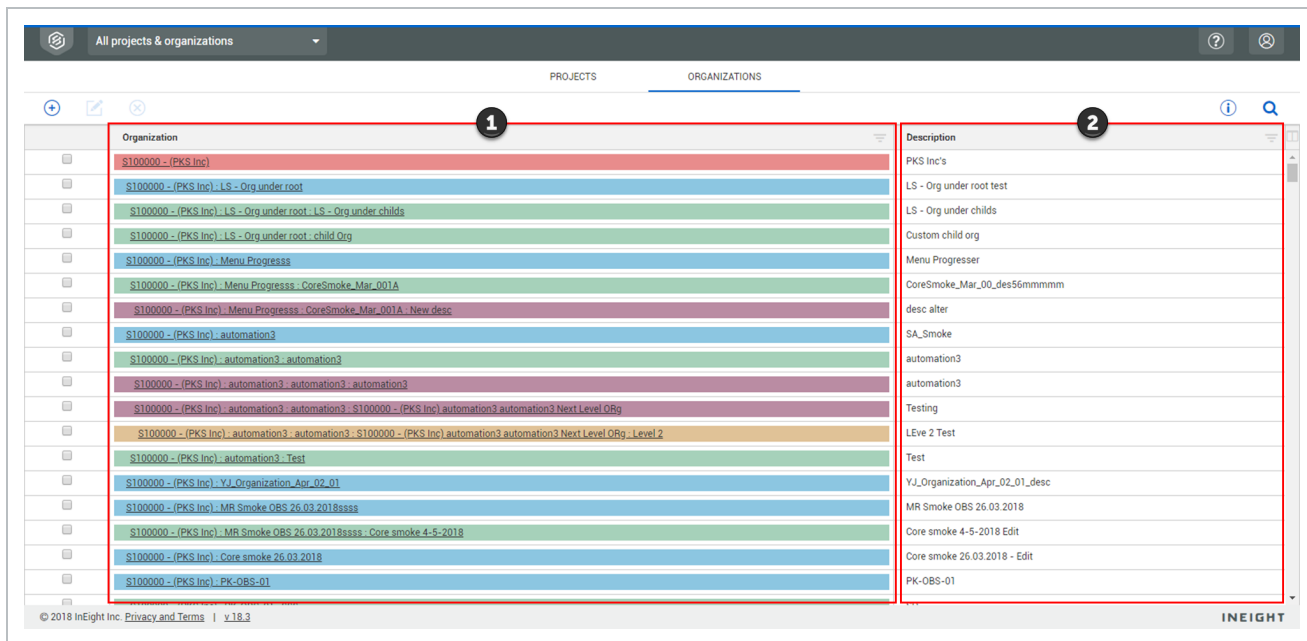
The OBS controls user access. Where users are assigned in the organization determines what access they inherit and the visibility they have to other areas of the OBS. The higher the level a user is placed on the OBS, the more actions they can perform, and the more organizations and projects they can view. A user assigned at only the project level has no visibility to an organization, any other projects, or administrative pages.

[Roles and permissions](#) further control access and actions that can be performed in the InEight cloud platform and the individual applications. The OBS can be manually maintained, but most often it is maintained automatically through integrations with the company ERP systems.

To access the OBS, in the Main menu go to All projects & organizations > **Organization**.

Overview – Organizations Tab

Title		Description
1	Organization	Identifies your company's applicable organization level (e.g., region, division, city). You can expand or collapse levels of the structure as needed.
2	Description	Used with the Organization Name to provide more detail about the structure entity.



NOTE You can use the column chooser to show or hide OBS information such as created by, created on, last modified by, last modified, and external organization ID.

3.3 EDIT THE ORGANIZATIONAL BREAKDOWN STRUCTURE (OBS)

The Organizational Breakdown Structure (OBS) can be edited only if an entity has changed, moved, a re-organization has occurred, or an acquisition has taken place.

3.3 Step by Step 1 — Edit the OBS

1. From the Main menu, click All projects & organizations > **Organizations**.
2. Select an organization from the list, and then click the **Edit** icon. The Edit OBS window opens.

Organization	Description
<input checked="" type="checkbox"/> \$100000 - (PKS Inc)	PKS Inc's
<input type="checkbox"/> \$100000 - (PKS Inc) - LS - Org under root	LS - Org under root test
<input type="checkbox"/> \$100000 - (PKS Inc) - LS - Org under root - LS - Org under child	LS - Org under child
<input type="checkbox"/> \$100000 - (PKS Inc) - LS - Org under root - child Org	Custom child org
<input type="checkbox"/> \$100000 - (PKS Inc) - Menu Progress	Menu Progresser
<input type="checkbox"/> \$100000 - (PKS Inc) - Menu Progress - CoreSmoke_Mar_001A	CoreSmoke_Mar_00_des56mmmm
<input type="checkbox"/> \$100000 - (PKS Inc) - Menu Progress - CoreSmoke_Mar_001A - New desc	desc alter
<input type="checkbox"/> \$100000 - (PKS Inc) - automation3	SA_Smoke
<input type="checkbox"/> \$100000 - (PKS Inc) - automation3 - automation3	automation3
<input type="checkbox"/> \$100000 - (PKS Inc) - automation3 - automation3 - automation3	automation3
<input type="checkbox"/> \$100000 - (PKS Inc) - automation3 - automation3 - \$100000 - (PKS Inc) automation3 automation3 Next Level Org	Testing
<input type="checkbox"/> \$100000 - (PKS Inc) - automation3 - automation3 - \$100000 - (PKS Inc) automation3 automation3 Next Level DBq - Level 2	LeVe 2 Test
<input type="checkbox"/> \$100000 - (PKS Inc) - automation3 - Test	Test
<input type="checkbox"/> \$100000 - (PKS Inc) - VJ_Organization_Aer_02_01	VJ_Organization_Apr_02_01_desc
<input type="checkbox"/> \$100000 - (PKS Inc) - MR Smoke OBS 26.03.2018111111	MR Smoke OBS 26.03.2018
<input type="checkbox"/> \$100000 - (PKS Inc) - MR Smoke OBS 26.03.2018111111 - Core smoke 4-5-2018	Core smoke 4-5-2018 Edit
<input type="checkbox"/> \$100000 - (PKS Inc) - Core smoke 26.03.2018	Core smoke 26.03.2018 - Edit
<input type="checkbox"/> \$100000 - (PKS Inc) - PK-OBS-01	PK-OBS-01
<input type="checkbox"/> \$100000 - (PKS Inc) - PK-OBS-01 - \$\$\$	SD
<input type="checkbox"/> \$100000 - (PKS Inc) - PK-OBS-02	PK-OBS-02

3. Make the necessary changes to the OBS, and then click **Save**.

Organization details

Parent organization
Root organization

Name: \$100000 - (PKS Inc) | Description: PKS Inc's

External organization ID
RootOrg1

Configurations

Default base currency: USD - US Dollar | Account code delimiter: Period ()

Unique budget code: Project

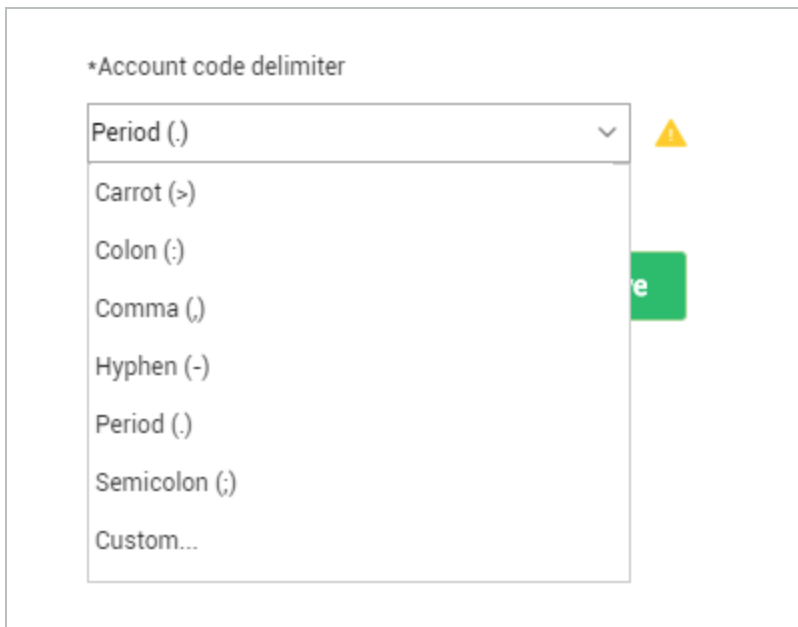
TIP Note on this page you can manage your organization’s **Unique Budget Code**. Budget Code Segments have been added to allow creation of more meaningful accounting strings to identify a Cost Item which can then be utilized throughout the InEight portfolio of products.

3.3.1 Account Code Delimiters

The account code delimiter is the symbol used to separate the nomenclature of the account code levels within an account code. For example, the account code 10.27.02 represents three account code levels and the account code delimiter is a period (.).

An administrator can define the symbol that separates the account codes for a particular organization level by right clicking on the organization level and selecting **Edit organization**.

Under the Configurations section, the administrator can select a symbol from the list or add a custom symbol.

**NOTE**

You can only edit the account code delimiter at the root organization level and when no account codes have yet been created.

3.4 ALTERNATE ORGANIZATION HIERARCHIES

You can group projects into alternate hierarchies as needed for individual applications or customers. Project attributes with *Organization* as the data source are used to indicate an alternate organization node from the OBS are associated to a project for restructuring the OBS.

In its current form, the OBS in InEight Platform is a fixed structure that is completely defined by each customer. Because each branch and level have no defined context within the system, it is not possible to automatically redefine the structure or pivot projects based on specific parameters.

In the OBS, each project is specifically assigned to a node within the hierarchy. A project can be reassigned to a different organization, but each change must be performed manually or through the Project_Import API, and cannot be done as part of application functionality.

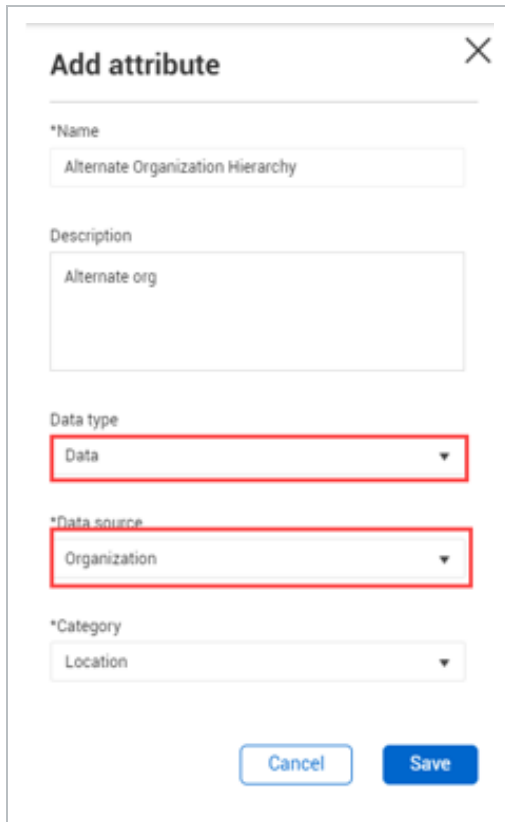
The Alternate Organization Parent feature allows you to define one or more alternate assignment options at the account level and to give each option a specific name. These options appear as attributes of all Projects where an alternate organization node from the OBS can be selected. For example, you can define an alternate assignment option called Region. Within all projects, the Region option shows and an alternate node from the existing OBS can be selected.

Within InEight cloud applications, each user defined alternate assignment option can be surfaced and used to redefine the existing OBS based on the organization selected for that option in all projects. As an example, if you choose to redefine the OBS by region, the entire OBS will be redrawn and all projects will show under the organization node that they were associated in the alternate assignment of Region.

3.5 DEFINE PROJECT ATTRIBUTES FOR ALTERNATE ORGANIZATION PARENTING

To define a project attribute for Alternate Organization Parenting, you must select the following options when creating a new entry on the Attributes definition page (project > Project details > **Attributes**).

- Data type = Data
- Data source = Organization



Add attribute ✕

*Name
Alternate Organization Hierarchy

Description
Alternate org

Data type
Data

*Data source
Organization

*Category
Location

Cancel Save

When these options are specified, the system will enforce selection of a value from the OBS when setting the attribute value at the project level.

You can create as many attributes as needed for this purpose, but the names must be unique. For example, you can choose to create attributes with names such as District, Region, Market, and Sponsoring District. Attributes defined for this purpose can exist with any other project attribute defined for other purposes.

NOTE

The system does not make any project attribute a mandatory field within a project. It is up to you to enforce this as needed.

3.5.1 Alternate organization parents within a project

There are two methods that are available to assign values to a defined attribute, using the UI or Project_Import API.

3.5.1.1 User Interface (UI)

You can assign values for each project, go to project > Project details > **Attributes**.

The screenshot shows a web application interface for editing project attributes. At the top, there is a navigation bar with a home icon, the text 'All projects & organizations', and a dropdown arrow. To the right of the navigation bar, there is a green box containing 'QA20.5', followed by icons for help, notifications (with a red '1'), and a refresh icon. Below the navigation bar, there is a breadcrumb trail: 'All projects & organizations' > 'Edit project'. The main content area is titled 'Project settings' and has 'Cancel' and 'Save' buttons. The form is divided into three sections: 'Location', 'Project classification', and 'Primary contract detail'. Each section contains one or more input fields. The 'District' and 'Sponsoring District' fields have a calendar icon next to them, indicating they are date pickers. The 'Region', 'Market', 'Sub Market', and 'Project Type' fields are simple text inputs.

When a project attribute has a data source of *Organization*, the system shows the OBS as a list for you to select a value.

The screenshot shows the 'Edit project' interface with the 'ATTRIBUTES' tab selected. The 'Alternate Organization Hierarchy' field is highlighted with a red box, and its dropdown menu is open, showing a list of organizations: Demo org 1, demo org 2, demo org 3, DEmo org 4, Demo org 5, and Demoorg 6. Other fields include 'District', 'Primary contract detail', 'Delay days' (5.00000), and 'Project Site Inspection' (05/13/2020).

3.5.1.2 Project_Import API

An optional array ProjectAttributes has been added to the Project_Import external API. The array contains the following fields:

- **AttributeName** – Provide a valid Name of a Project Attribute defined in the system. If a value is provided for this field, do not include the AttributeSourceSystemId field.
- **AttributeSourceSystemId** – Provide a valid SourceSystemId of a Project Attribute defined in the system. If a value is provided for this field, do not include the AttributeName field.
- **AttributeValue** – Provide the value for the Attribute specified by either the AttributeName or AttributeSourceSystemId fields. The entry provided in this field must match the expected Data Type of the Project Attribute. For example, if the Project Attribute expects a date value, this field should contain a date. If the Data Type of the Project Attribute is specified as 'Data' then the entry provided in this field must match a valid option for the Project Attributes Data Source. For example, the Data Source of the Project Attribute is specified as 'Organization' then the entry in this field must match a valid Organization Name or SourceSystemId.

Refer to *"InEight Project Initiation and Maintenance Integration Specification"* for more information.

3.5.1.3 Restructuring the OBS by Project Attribute

When a value for a project attribute with a data source of *Organization* is set, the system creates or updates specific records that provide information about the association of the project to alternate parents.

NOTE

This association happens when values are assigned to projects in Project Attributes, and not when the Project Attribute is defined at the account level. This timing is important, for applications it means that a list of Project Attributes that are used for Alternate Organization Parents will not include any Project attributes that do not have at least one project associated with it.

3.5.1.4 Assignment rules

When a project attribute is defined with the data source of *Organization*, and there is no previous association with the same name and type, and a record does not exist that matches the same project attribute name, then the system will create the necessary records to provide information to the project attribute to enable the actual association of a project to the Alternate Organization Parent.

Example: An association is made between the Civic Center project and a Project Attribute called Region. For this association, Civic Center project can be set to SW Region.

A project cannot be associated to more than one Alternate Parent Organization within the same Project Attribute type.

Example: The Civic Center project in the above example cannot be assigned to multiple project attributes of Region. Within the UI, this is not a possible scenario because of how project attributes are managed, however an error could occur if you attempted it via an import or an API request.

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LESSON 4 – SUITE ADMINISTRATION

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4.1 USER MANAGEMENT

4.1.1 Overview

To access user information from the Main menu, click Suite Administration > **User Management**.

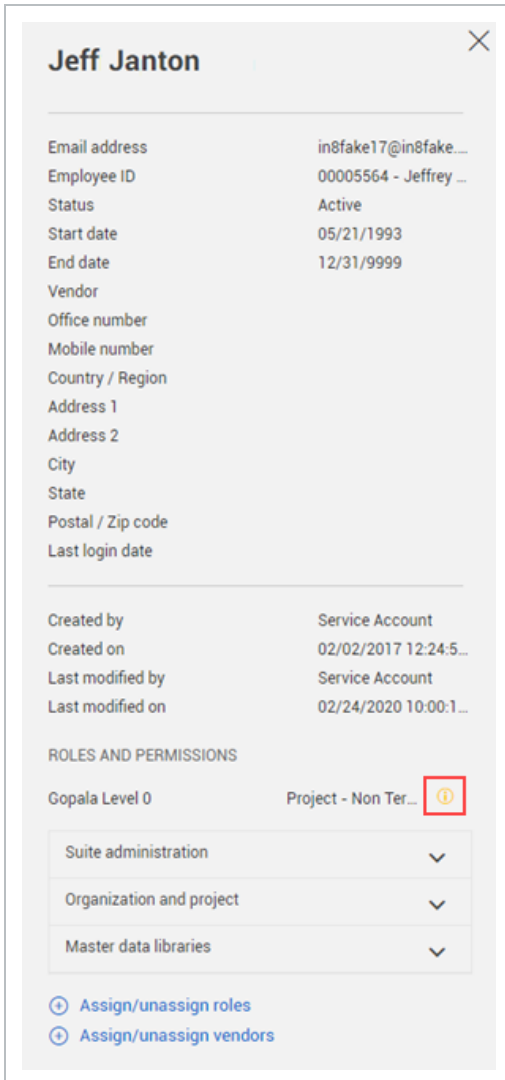
It is important to understand the difference between organization user management and project user management. Organization user management is performed at the organization level. Changes made for users at the highest organization level apply to every project in that organization. If someone is made a Project Administrator at the organizational level, they can act as a project administrator on every company project within that organization level. Changes made at the project level, for example the Steel Structure Job (105091), only apply to the project.

4.1.2 Edit User Information

On the User management page, you can view, add, and edit user information. The following steps walk you through how to view and edit user information.

4.1 Step by Step 1 — View User Information

1. To access user information go to the Main menu, and then click Suite Administration > **User Management**.
2. Select a user account, and then click the **Show information details** icon at the top right side of the page. The User information details slide-out panel opens.




Jeff Janton ✕

Email address	in8fake17@in8fake...
Employee ID	00005564 - Jeffrey ...
Status	Active
Start date	05/21/1993
End date	12/31/9999
Vendor	
Office number	
Mobile number	
Country / Region	
Address 1	
Address 2	
City	
State	
Postal / Zip code	
Last login date	

Created by	Service Account
Created on	02/02/2017 12:24:5...
Last modified by	Service Account
Last modified on	02/24/2020 10:00:1 ...

ROLES AND PERMISSIONS

Gopala Level 0	Project - Non Ter...	
----------------	----------------------	--

Suite administration ▼

Organization and project ▼

Master data libraries ▼

[Assign/unassign roles](#)

[Assign/unassign vendors](#)

- To see the user's roles and permissions, click the information icon.

3. Click another name.

- The details for the other user shows

4.1 Step by Step 2 — Edit User Information

1. Select a user account, and then click the **Edit user** icon at the top left side of the page. The Edit user page opens.

The screenshot shows a web interface for editing a user. At the top, there is a dark header with a 'MENU' icon and the word 'Platform'. Below the header, the breadcrumb 'User management > Edit user' is visible. On the right side of the form, there are two buttons: 'Cancel' and 'Save'. The main content area is titled 'User details' and contains several input fields and labels:

* First name	* Last name
<input type="text" value="User"/>	<input type="text" value="01"/>
Email address	Employee ID
<input type="text" value="user1@ineight.com"/>	
Start date	End date
<input type="text" value="12/31/2016"/>	<input type="text" value="12/31/2025"/>

2. Change the Country/Region to **United States of America**.
3. Change the city to **Scottsdale**.
4. Change the state to **Arizona**.
5. Click **Save** to close the page.

4.1 Step by Step 3 — Notifications

1. Click the **Notification** icon to open the notifications slide-out panel.
 - The list shows all unread notifications, click **See all notifications** to open the Notifications page to see all read and unread notifications. From this page you can delete, mark as read, and search notifications. In the Details column, click a notification to see more information about it, such as in the audit log.
2. In the notifications list, select a notification, and then click **Mark as read**.
 - When you click **Mark all as read**, it clears the list and the resets notification icon to show zero.
3. To view details, select a notification, and then click the description.

4.1 Step by Step 4 — User Profile

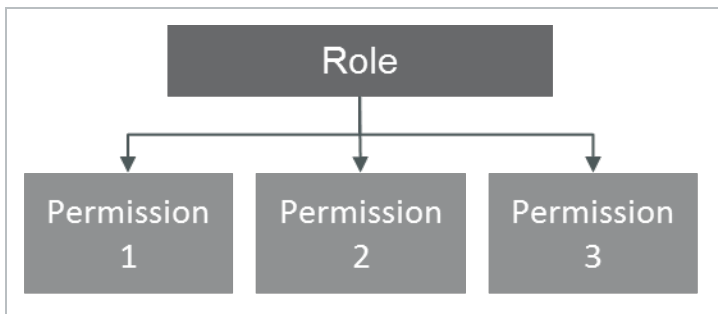
1. Click the **User** icon to open the User profile slide-out panel.
 - This opens to the Details tab and shows your user name and email. Your roles are shown on the Roles tab.
2. Click the Preference tab to change your user preferences.
 - You can change your preferences for language, date format, and number format.

4.2 ROLES AND PERMISSIONS

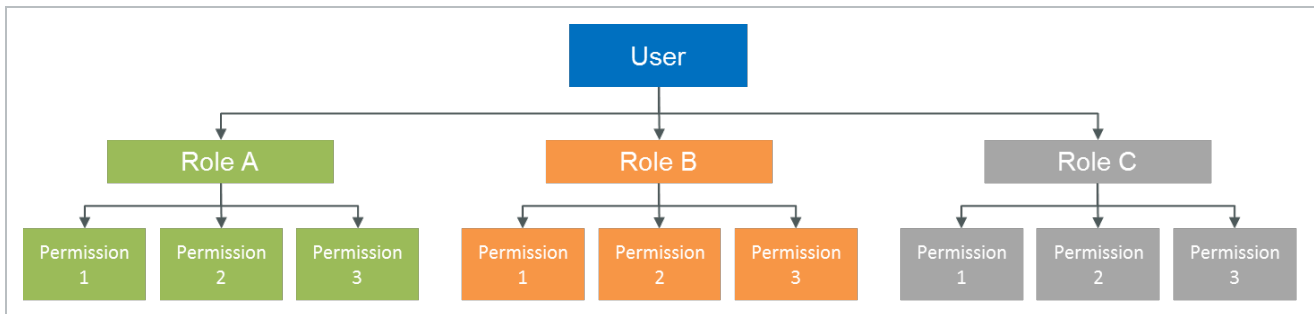
Scenario

You are a project administrator and you want to allow the project engineer access to edit the project. You also have ten field engineers that you want to view the project and claim quantities.

The InEight cloud platform allows you to create roles with assigned permissions, as shown below:



You can then assign roles to users as needed:

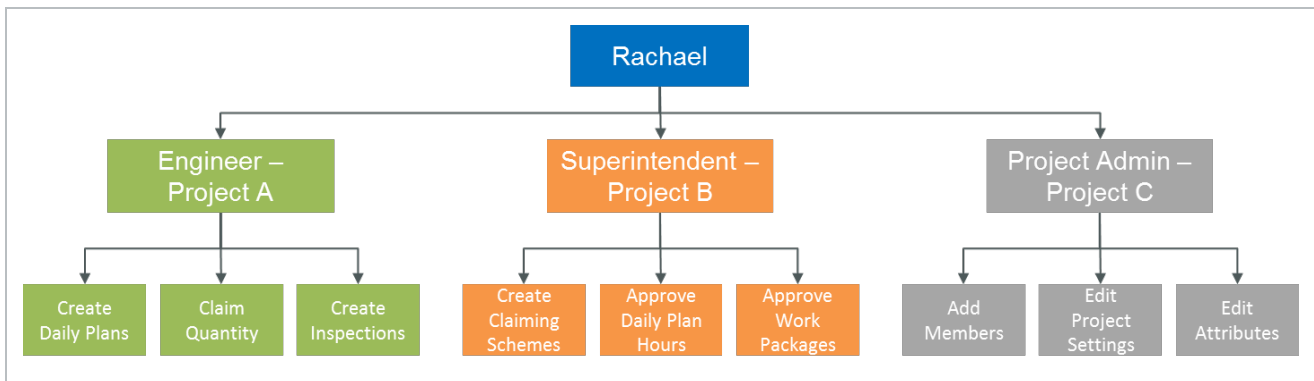


TIP Users with the same role will have the same permissions.

You or the user being assigned to the project will only have the permissions granted for that project. Users would not have the same permissions on another project unless those same permissions are granted on another project.

Some InEight applications require specific roles to be assigned to perform their functions. Even if you have administrative access, you may need to be assigned a specific role to perform a function.

Using the above scenario as an example, your setup of roles and permissions for your project engineer may look something like this:

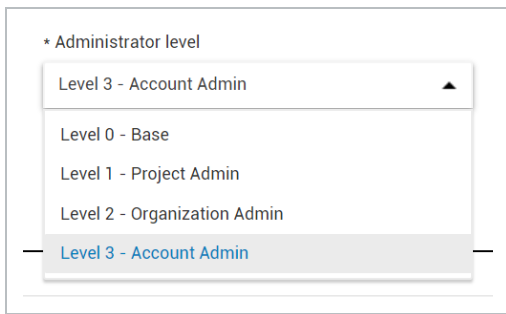


4.2.1 Role Creation

Roles are organized into four Administrator Levels. These levels determine the available permissions you can grant to a new role or custom role. It is a way to filter permission options.

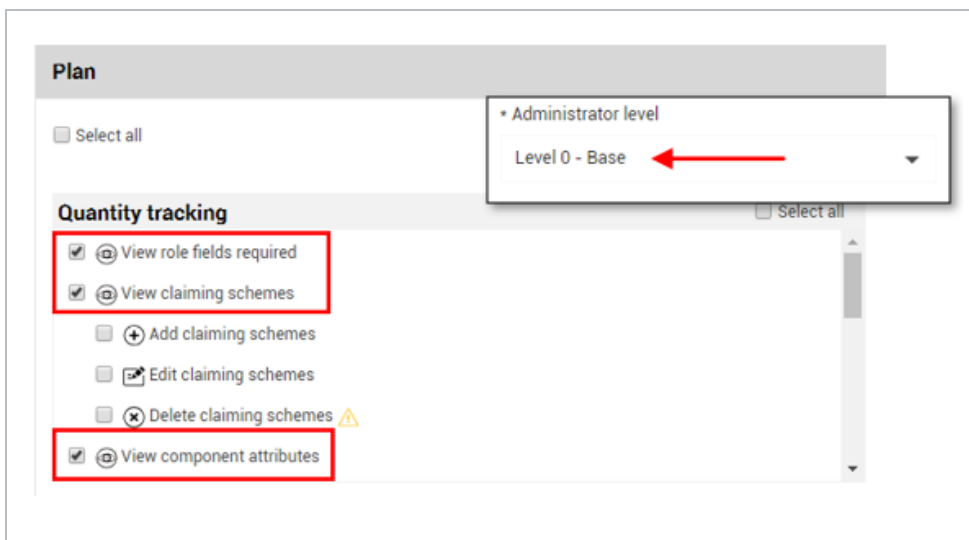
Level	Descriptor	Available Permissions
0	Base	View access only.
1	Project Admin	Edit information for a project.
2	Organization Admin	Edit User information and create new projects.
3	Account Admin	All the available permissions including adding users and editing roles and permissions.

You can change the available permissions by choosing the appropriate Administrative level.

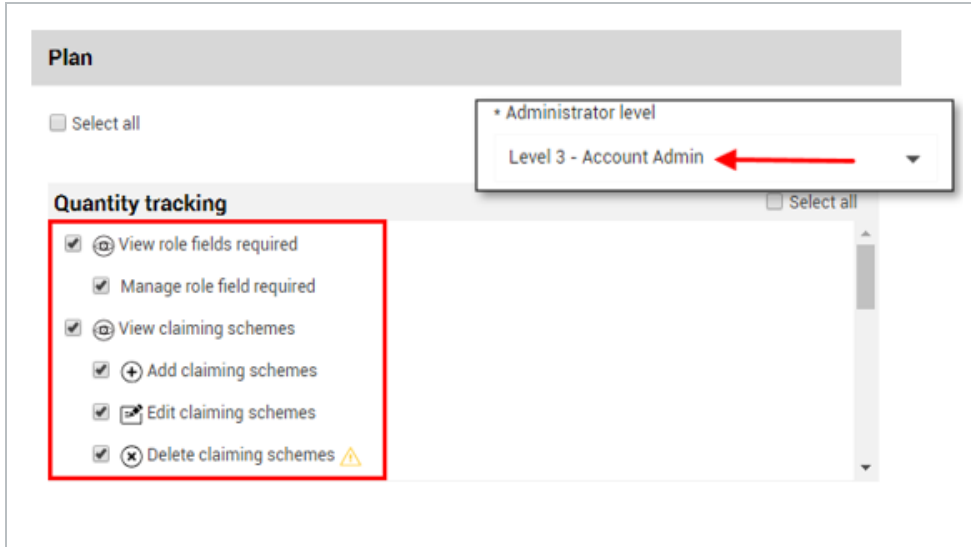


Here is an example of how the permissions are filtered based on which Administrator level is selected.

For an Administrator level of Level 0 – Base, in the Plan application for Quantity Tracking, this role would only be able to view items.



For an Administrator level of Level 3 – Account Admin, in the Plan application for Quantity Tracking, this role would only be able to View, Manage, Create, Edit, and Delete.



TIP Only Levels 0 and 1 roles can be assigned to a project. Levels 2 and 3 must be assigned at the Organizational level.

The permissions available for each role are grouped by the appropriate InEight application. Each application has its own permission settings.

Permissions
Suite administration
Organization and project
Master data libraries
Model Suite
Estimate
Control
Plan
Progress
Inspect
Contract
Reporting
Explore
Design
Billing

You can expand each line to show the available permissions.

Control ←

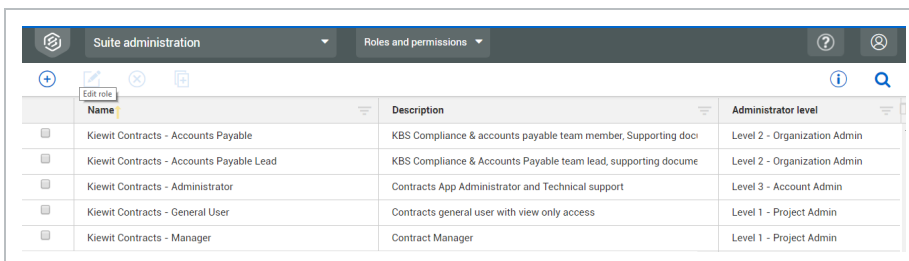
Select all

Tasks and cost items	Select all	View sets	Select all
<input checked="" type="checkbox"/> View task data block	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> View corporate view sets ⚠	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Edit task data block		<input checked="" type="checkbox"/> Add corporate view sets	
<input checked="" type="checkbox"/> Add cost items		<input checked="" type="checkbox"/> Edit corporate view sets	
<input checked="" type="checkbox"/> Edit cost items		<input checked="" type="checkbox"/> Delete corporate view sets ⚠	
<input checked="" type="checkbox"/> Delete cost items ⚠		<input checked="" type="checkbox"/> Share corporate view sets	
<input checked="" type="checkbox"/> Move cost items up/down		<input checked="" type="checkbox"/> View personal view sets ⚠	

You can choose to select all the available permissions, or you can define the permissions individually.

4.2 Step by Step 1 — Create a Role

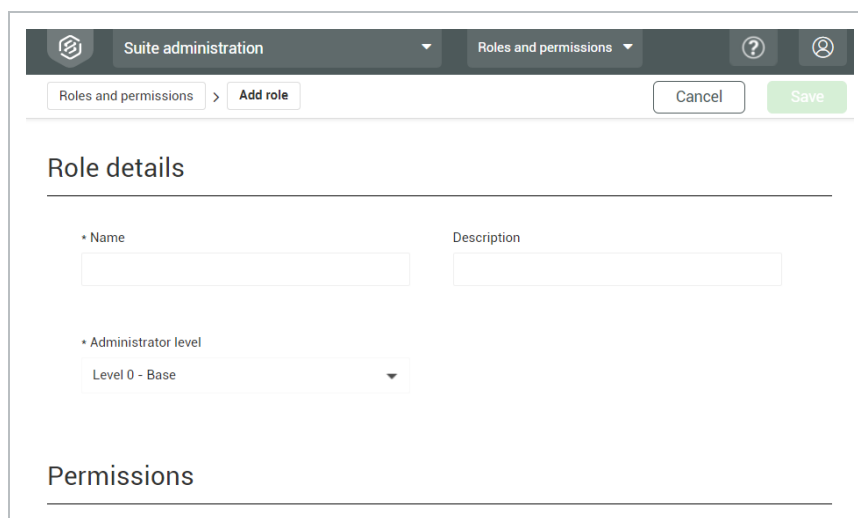
1. From the Main menu, click Suite Administration > **Roles and Permissions**. The Roles and permissions page opens.



Name	Description	Administrator level
Kiewit Contracts - Accounts Payable	KBS Compliance & accounts payable team member, Supporting doc	Level 2 - Organization Admin
Kiewit Contracts - Accounts Payable Lead	KBS Compliance & Accounts Payable team lead, supporting docume	Level 2 - Organization Admin
Kiewit Contracts - Administrator	Contracts App Administrator and Technical support	Level 3 - Account Admin
Kiewit Contracts - General User	Contracts general user with view only access	Level 1 - Project Admin
Kiewit Contracts - Manager	Contract Manager	Level 1 - Project Admin

2. Click the **Add role** icon to add a new role.

- The Add role page opens



Role details

• Name

Description

• Administrator level
Level 0 - Base

Permissions

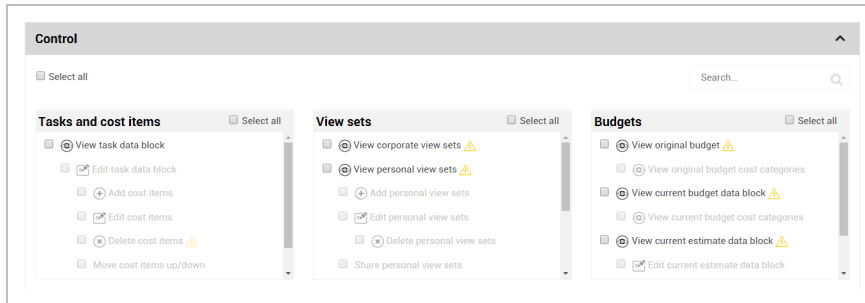
3. Name the role **Engineer 2 – [your initials]**.
4. Define the description as **Role for Field Engineers**.
5. Click the **Save** button.

4.2.2 Permissions

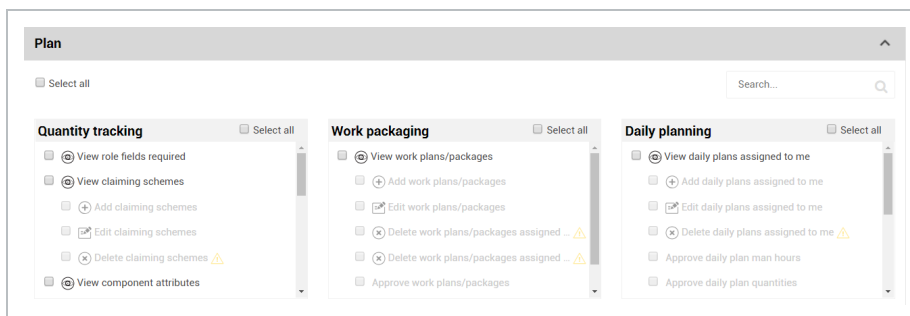
After you create a role, you can edit the role to define its permissions.

4.2 Step by Step 2 — Define Permissions

1. From the Roles and Permissions page, select your Engineer 2 role.
2. Click the **Edit role** icon.
 - Notice that under the Permissions section, none of the permission boxes are checked.



3. Expand the **Plan** section.



4. Click on **Select all**.
5. Click **Save**.

4.2.3 Role Assignment

After you define the permissions for a role, you can assign the role to a user.

4.2 Step by Step 3 — Assign a Role to a User

1. From the Main menu, click Suite Administration > **User Management**.
2. Select a name from the list.

- If this is a class, you will want to assign all the created roles to one user, otherwise cleaning up the system later becomes problematic
3. Click the **Show information details** icon.
 4. Click **Assign/unassign roles**.
 5. In the Roles section, click **Add role**.
 6. In the Role drop-down list, select **Engineer**.
 7. In the Organization/Project field, select **C-XYZ**.
 - C-XYZ is the organization that you are providing permissions for.

Engineer 2-[Your Initials]

Role	Organization/Project
Engineer	S100000 - (PKS Inc)

+ Add role

8. Click the **Save** button.

4.3 CUSTOM LABELS

To view custom labels, from the top navigation go to Suite administration > **Custom labels**.

The permission View custom labels is required to view the page, and the permission Edit label is required to make changes.

To enable custom labels, you must set the **Enable custom labels** toggle to true, which requires additional permissions. At any point you can disable custom labels and all fields will revert to their default label.

4.4 ORGANIZATIONS

4.5 ORGANIZATION SETTINGS

The Organization settings are where the top level of your organization sets the parameters which must be met by the company's requirements, and projects below the root will inherit. Most settings cannot be edited at the project levels, yet there are some that are editable and can be customized to meet each project's needs accordingly.

In Organization settings the administrator defines settings that apply to all projects within your organization. As an administrator, you can configure settings at the organization and project levels. Settings at the organization level are inherited by associated child organizations and projects. At the project level, you can further refine some settings to customize how they are applied in each project.

See [Project Settings](#) for general information about InEight cloud platform project settings.

4.5 Step by Step 1 — Open Organization Settings

1. From the Main menu, click All projects & organizations > **Organizations**, and then select the highest level in the OBS. The organization home page opens.

TIP

If an organization is saved as a favorite, you can select it in the Main menu, and then click **Settings**.

2. In the left navigation menu, click **Settings**. The organization settings General page opens to the Home Page tab.
 - The general organization settings are organized by application on the left and within the application you select on the left, the settings are organized into tabs on the right.

General Settings

Title	Description
Home Page	Contains a register for adding URL links to the organization home page that are visible for all project in the organization.
Global Options	Contains options to allow users to self-assign roles, control how project names and IDs display, and how cost items integrate with other systems.

General Settings (continued)

Title	Description
Fiscal Calendar	Calendar-related settings for the organization.
Custom Lists	Where you can define the tag (label) values you can use to categorize your information within the organization's projects. You can select tags for the Cost Breakdown Structure, account codes, and pay items.
Attribute Definitions	Used to define project attributes which can be of the types text/date/number or can have source values from Organization, Project, and Market master data. These definitions are inherited to all projects in the organization.
Menu Options	Contains a register for adding URL links to InEight applications to the left navigation menu.

The Organization settings for each application are accessed from the left navigation menu. Click the double arrows to expand the menu and show the application name. Select an application to view application-specific settings and any additional tabs.

LESSON 4 – PROJECTS

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4.1 PROJECT HOME

Project settings are where you enter and configure basic information to specify the workflow of your project to communicate with associated InEight applications. The applicable permissions are required to add or edit any settings in your project.

General Settings

Title	Description
Global Options	These options let you assign an equipment resource with a currency that is different than the project currency or alternate currencies, set integration behavior for cost items with InEight Control and an ERP, enable data sharing between InEight applications for AWP, and enable the project to be a template
Home Page	Create custom URL links to show on the Project home page.
Fiscal Calendar	Read-only view of the fiscal calendar settings that determine fiscal reporting time lines and periods for projects. These calendar settings are configured in Organization settings.
Fuel Types	List of fuel types for the project that can be assigned directly to resources. The list defines cost per UoM, currency type, UoM, and can be assigned a specific account code.
Custom Lists	Labels information in your project with additional predetermined information. You can select tags for the Cost Breakdown Structure, account codes, and pay items.
Menu Options	Contains a register for adding URL links to InEight applications to the Project home page left navigation menu.

4.1.1 Application Settings

Project settings for each application are accessed from the left navigation menu. Click the double arrows to expand the menu and show the application name. Select an application to view application-specific settings and any additional tabs. For more information about using these settings, refer to the topics for the specific InEight application.

4.2 PROJECT INITIATION

Scenario

Your construction company, who specializes in steel erection was just awarded a new project to build a hockey arena. You will be the Project Manager and need to set up a new project in the InEight platform. You will need to configure the project settings, add members, and activate the project. The project is set to begin construction in four weeks.

To create a new project in the InEight cloud platform, your estimate in InEight Estimate must be complete, and ready to bring into the system. The project must have a status of New to import from InEight Estimate.

Project Status

Status	Purpose
New	Projects must have the status of New to import from Estimate. This also hides the project from project roles.
Active	Projects must have Active status for project personnel to access this project.
Closed	Closing the project limits who can access the project.

4.2 Step by Step 1 — Add a New Project

1. From the Main menu, click **All projects & organizations**. The page opens to the Projects tab. Click the **Add project** icon.
2. Click the **Add project** icon. The Project details page opens.

The screenshot shows the 'Project details' form in the InEight platform. The form is titled 'Project details' and is located within the 'All projects & organizations' section. It contains several input fields: 'Project ID', 'External project ID', 'Name', 'Status' (defaulting to 'New'), 'Organization' (a dropdown menu showing 'S100000 - (PKS Inc)'), 'Start date', and 'End date' (both with calendar icons). There is also a 'Notes' text area and a 'Location' section with a 'Country / Region' dropdown. The form has a 'Cancel' button and a 'Save and configure project settings' button. The footer of the form shows '© 2018 InEight Inc. Privacy and Terms | v.18.3' and the 'INEIGHT' logo.

- It is best practice to fill out as much project information as possible. This makes organizing and finding projects in the future much easier.
- If you need to make changes to an existing project, you can edit the basic project information at any time.
- The Project ID must match the Job Code in InEight Estimate.
- The External project ID populates automatically from your ERP system.

4.2 Step by Step 2 — Enter Project Details

1. Enter a Project ID of **[your initials]-2017-001**.
2. Enter an External Project ID of **12345**.
 - The Project ID will most likely come from your ERP system (e.g., SAP) and can be entered for reference
3. Give your project a Project Name of **New Hockey Arena**.
 - The Status of the project will default to New
 - This always defaults to New until you save the project

4. Select the Organization where the project is stored.
5. Start Date: **[select today's date]**
6. End Date: **[select a date in the future]**
7. In the Notes field, type: **Project start date of [the date you entered].**

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

- Project ID:** WG-2017-001
- External project ID:** WG-2017-001
- Name:** New Hockey Arena
- Status:** New
- Organization:** S100000 - (PKS Inc)
- Start date:** 10/02/2018
- End date:** 10/31/2018
- Notes:** Project start date of 10/02/2018

There is also a button labeled '+ Add project image' on the left side of the form.

TIP

You can add a project image, but it cannot be any larger than 250 KB.

4.2.1 Location

You can enter Location information manually, or nearly all this information can be imported.

Location

Country / Region
United States Of America ▼

Address 1

Address 2

City

State ▼

Postal / Zip code

* Time zone ▼

Latitude

Longitude

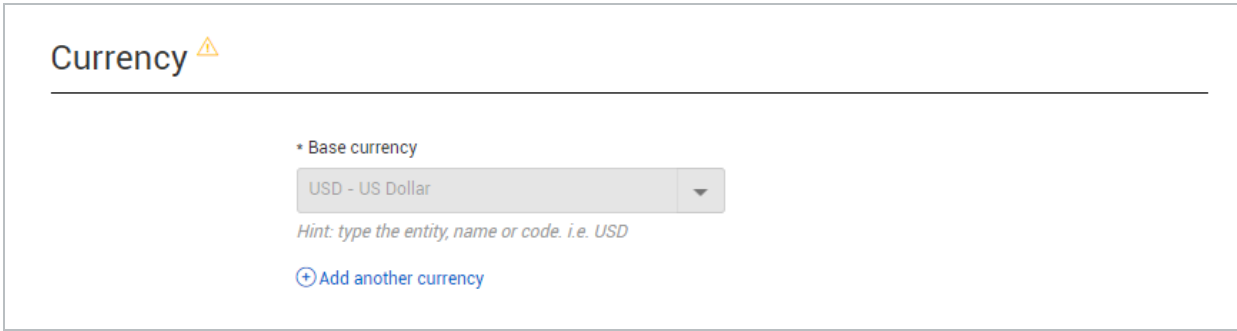
Once again, it is best practice to make sure as much information is filled out as possible.

4.2.2 Currency

Make sure Currency is selected, but this information can also import with your estimate from InEight Estimate. You can also add additional currencies into your project from this screen by selecting **Add another currency**.

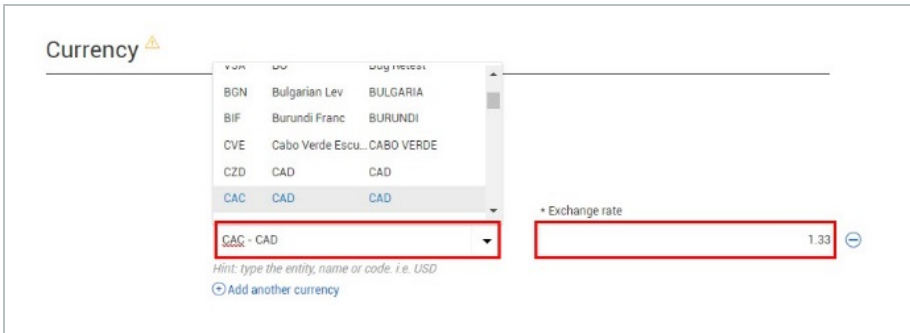
4.2 Step by Step 3 — Add a Currency

1. From the Projects tab, find the project you just created.
2. Highlight the project and select the **Edit** icon.
3. Scroll to the bottom of the screen to the Currency section.

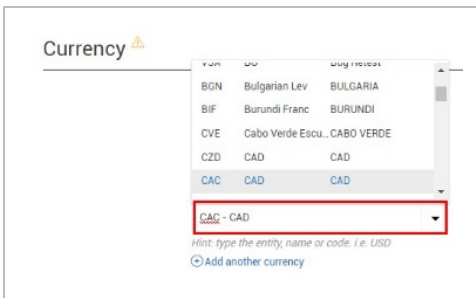


- Notice that there is a base currency. This currency was established at the Organization level and cannot be removed.
- Any other currencies listed can be deleted using the Remove icon.

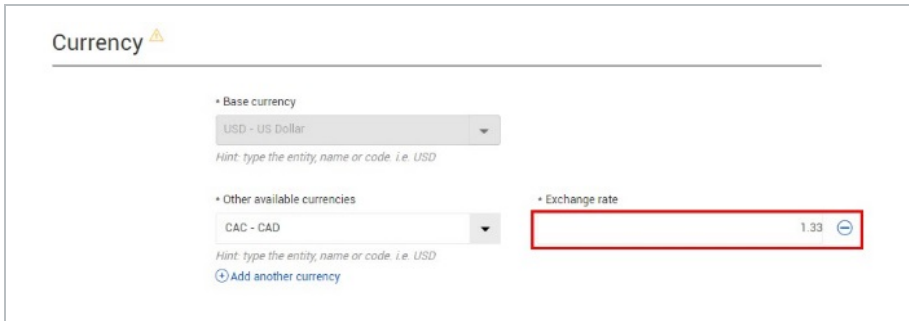
4. Select the **Other available currencies** drop-down list to view all currencies available.



5. Select the currency you want to use.



6. Enter the Exchange rate (required).



7. Click **Save**.

- You can add another currency by clicking the **Add another currency**.

4.3 PROJECT SETTINGS

Project settings are where you enter and configure basic information to specify the workflow of your project to communicate with associated InEight applications. The applicable permissions are required to add or edit any settings in your project.

4.3 Step by Step 1 — Project Settings

1. From the Main menu, click **All projects & organizations**. The page opens to the Projects tab.
2. Select a project from the list, and then click the project name link to open to the project home page.
3. In the left navigation menu, click **Settings**. The project settings General page opens to the Global Options tab.

NOTE If projects are saved in the Main menu Favorites list, you can select a project, and then click **Settings**.

General Settings

Title	Description
Global Options	These options let you assign an equipment resource with a currency that is different than the project currency or alternate currencies, set integration behavior for cost items with InEight Control and an ERP, enable data sharing between

General Settings (continued)

Title	Description
	InEight applications for AWP, and enable the project to be a template
Home Page	Create custom URL links to show on the Project home page.
Fiscal Calendar	Read-only view of the fiscal calendar settings that determine fiscal reporting time lines and periods for projects. These calendar settings are configured in Organization settings.
Fuel Types	List of fuel types for the project that can be assigned directly to resources. The list defines cost per UoM, currency type, UoM, and can be assigned a specific account code.
Custom Lists	Labels information in your project with additional predetermined information. You can select tags for the Cost Breakdown Structure, account codes, and pay items.
Menu Options	Contains a register for adding URL links to InEight applications to the Project home page left navigation menu.

4.3.1 Application Settings

Project settings for each application are accessed from the left navigation menu. Click the double arrows to expand the menu and show the application name. Select an application to view application-specific settings and any additional tabs. For more information about using these settings, refer to the topics for the specific InEight application.

4.4 ASSIGNED PAYROLL INDICATORS

The payroll indicators (allowances, employee premiums, and attendance types) that show in a project are a subset selected from those in master data, which are available to be assigned at the project level and applied if an employee is eligible for the compensation. To assign a payroll indicator from master data to the project, go to Assigned payroll indicators, and then select the Add icon. You can remove a payroll indicator from a project only if the Required value is false and no employees are assigned to the payroll indicator.

4.4.1 Considerations

Permissions for payroll indicators are configured in Roles and permissions > Organization and project > **Projects**.

Permission name	Description	Level
View payroll indicators	Allows the user to view the payroll indicators in projects.	Base user
Assign/unassign payroll indicators to projects	Allows the user to assign and unassign payroll indicators to projects.	Project Admin
Assign/unassign employees to allowances	Allows the user to assign and unassign allowances to project employees.	Project Admin

4.4.2 Allowances

Allowances are extra pay that is made to an employee to cover expenses or compensate for specific working conditions, such as a travel per diem or mileage.

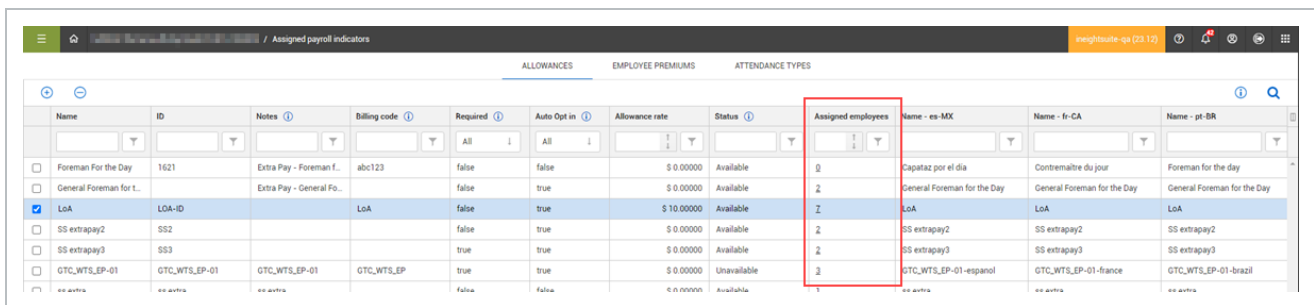
Name	ID	Notes	Billing code	Required	Auto Opt in	Allowance rate	Status	Assigned employees	Name-en
<input type="checkbox"/> Foreman For the Day	1621	Extra Pay - Foreman f...	abc123	false	false	\$ 0.00000	Available	0	Foreman For the Day
<input type="checkbox"/> General Foreman for L...		Extra Pay - General Fo...		false	true	\$ 0.00000	Available	1	General Foreman for the Day
<input type="checkbox"/> LoA	LoA-ID		LoA	false	true	\$ 10.00000	Available	6	LoA
<input type="checkbox"/> SS extrapay2	SS2			false	true	\$ 0.00000	Available	1	SS extrapay2
<input type="checkbox"/> SS extrapay3	SS3			true	true	\$ 0.00000	Available	1	SS extrapay3
<input type="checkbox"/> GTC_WTS_EP-01	GTC_WTS_EP-01	GTC_WTS_EP-01	GTC_WTS_EP	true	true	\$ 0.00000	Unavailable	2	GTC_WTS_EP-01

Field name	Description
Name	Name of the allowance that is defined in master data.
ID	Unique identifier for the allowance that is defined in master data.
Notes	Additional information defined in master data about the allowance that shows in the daily plan for the project employee.
Billing code	Billing code associated with the allowance.

Field name	Description
Required	If set to <i>True</i> , the allowance was automatically assigned to the project when it was created. This setting is configured in master data and cannot be changed in the project.
Auto Opt in	If the value is set to <i>True</i> in master data, the allowance is available in the project and assigned to project employees. When the value is set to <i>False</i> in master data, then changed to <i>True</i> in a project, the allowance is available to all employees associated with the project.
Allowance rate	Amount given for the allowance. This value can be changed in the project and when it is assigned to individual employees.
Status	Default is set to <i>Available</i> . If set to <i>Unavailable</i> , the allowance shows in the list but it cannot be assigned to project employees.
Assigned employees	Shows the number of project employees that are assigned the allowance. Select the link to show the list project employees, which allows you to add or remove employees assigned to the allowance.

4.4.2.1 Assigned employees allowances

In the Assigned employees field, it shows the number of project employees that are assigned to each allowance for the project.



Click the link to view a list of employees assigned to the selected allowance. From this view, you can add or remove employees, and change the rate. The Default option is used to assign the allowance to an employee automatically in Progress daily plan where the employee is assigned.

Employee ID	Name	Default	Allowance rate	Created by	Created on	Last modified by	Last modified on
<input type="checkbox"/> RachelBonner	Rachel Bonner	<input type="checkbox"/>	\$ 10.00000	Luke Mallatt	12/06/2023 11:12:36 AM	Luke Mallatt	12/06/2023 11:12:36 AM
<input type="checkbox"/> 00488153	Daniel Wyman	<input type="checkbox"/>	\$ 10.00000	Luke Mallatt	12/07/2023 11:42:39 AM	Luke Mallatt	12/07/2023 11:42:39 AM
<input type="checkbox"/> 00488154	Troy Merritt	<input type="checkbox"/>	\$ 10.00000	Luke Mallatt	12/07/2023 11:42:39 AM	Luke Mallatt	12/07/2023 11:42:39 AM
<input type="checkbox"/> 00488796	Christopher Chapman	<input type="checkbox"/>	\$ 10.00000	Luke Mallatt	12/07/2023 11:42:39 AM	Luke Mallatt	12/07/2023 11:42:39 AM
<input type="checkbox"/> 00488799	Craig Dipieri	<input type="checkbox"/>	\$ 50.00000	Luke Mallatt	12/07/2023 11:42:39 AM	chris shurman	12/13/2023 07:44:44 AM
<input type="checkbox"/> 12345674567	Thisfrstname	<input type="checkbox"/>	\$ 10.00000	Luke Mallatt	12/14/2023 12:40:23 PM	Luke Mallatt	12/14/2023 12:40:23 PM
<input type="checkbox"/> 00323170	Jakob Sjuts	<input type="checkbox"/>	\$ 10.00000	chris shurman	12/21/2023 10:40:34 AM	chris shurman	12/21/2023 10:40:34 AM

4.4.2.2 Assigned operational resources

From the Assigned operational resources page, you can view the list of project employees and the number of allowances assigned to each of them.

Employee ID	Name	craft	Billing class	Allowances	Rate code	Vendor	Union
<input type="checkbox"/> 00165836	Luke Mallatt	TST - Staff Default		2			
<input type="checkbox"/> 00236124	Joshua Hilsgen	TST - Staff Default		0			
<input type="checkbox"/> 00236162	Joseph Squire	TST - Staff Default		0			
<input type="checkbox"/> 00323170	Jakob Sjuts	TST - Staff Default		2			

Click the link to view a list of allowances assigned to the individual employee. From this view, you can add or remove allowances for the employee, and change the rate. The Default option is used to assign the allowance automatically in Progress daily plan where the employee is assigned.

Name	ID	Default	Allowance rate	Created by	Created on	Last modified by	Last modified on
<input type="checkbox"/> General Foreman for the Day		<input type="checkbox"/>	\$ 0.00000	chris shurman	12/21/2023 10:40:34 AM	chris shurman	12/21/2023 10:40:34 AM
<input type="checkbox"/> LoA	LoA-ID	<input type="checkbox"/>	\$ 10.00000	chris shurman	12/21/2023 10:40:34 AM	chris shurman	12/21/2023 10:40:34 AM
<input type="checkbox"/> Luke default	Luke default	<input type="checkbox"/>	\$ 0.00000	chris shurman	12/21/2023 10:40:34 AM	chris shurman	12/21/2023 10:40:34 AM
<input type="checkbox"/> SS extrapay2	SS2	<input type="checkbox"/>	\$ 0.00000	chris shurman	12/21/2023 10:40:34 AM	chris shurman	12/21/2023 10:40:34 AM
<input type="checkbox"/> SS extrapay3	SS3	<input type="checkbox"/>	\$ 0.00000	chris shurman	12/21/2023 10:40:34 AM	chris shurman	12/21/2023 10:40:34 AM
<input type="checkbox"/> GTC_WTS_EP-01	GTC_WTS_EP-01	<input type="checkbox"/>	\$ 0.00000	chris shurman	12/21/2023 10:40:34 AM	chris shurman	12/21/2023 10:40:34 AM
<input type="checkbox"/> SS extrapay1	SS1	<input type="checkbox"/>	\$ 0.00000	chris shurman	12/21/2023 10:40:34 AM	chris shurman	12/21/2023 10:40:34 AM
<input type="checkbox"/> Premium	Premium	<input type="checkbox"/>	\$ 0.00000	chris shurman	12/21/2023 10:40:34 AM	chris shurman	12/21/2023 10:40:34 AM
<input type="checkbox"/> Additional Lump Sum \$ amount		<input type="checkbox"/>	\$ 0.00000	chris shurman	12/21/2023 10:40:34 AM	chris shurman	12/21/2023 10:40:34 AM

4.4.3 Employee premiums

Premiums are payroll instructions that are used to alter the base wage of an employee for a specific task or reason, such as premiums for work at heights or shift differential.

Name	ID	Notes	Activity type	Billing code	Required	Status	Name - en	Name - es-MX	Name - fr-CA
<input type="checkbox"/> Ironworker - Structural			Labor		false	Available	Ironworker - Structural	Ironworker	Ironworker
<input type="checkbox"/> Carpenter			Labor		false	Available	Carpenter	Carpenter	Carpenter
<input type="checkbox"/> Laborer - Asphalt			Labor		false	Available	Laborer - Asphalt	Laborer - Asphalt	Laborer - Asf
<input type="checkbox"/> Laborer - Common or ...			Labor		false	Available	Laborer - Common or General	Laborer - Common or General	Laborer - Coi
<input type="checkbox"/> Laborer - Concrete			Labor		false	Available	Laborer - Concrete	Laborer - Concrete	Laborer - Coi

Field name	Description
Name	Name of the premium that is defined in master data.
ID	Unique identifier for the premium that is defined in master data.
Notes	Additional information defined in master data about the premium that shows in the daily plan for the project employee.
Activity type	Labor or maintenance
Billing code	Billing code associated with the premium.
Required	If set to <i>True</i> , the premium was automatically assigned to the project when it was created. This setting is configured in master data and cannot be changed in the project.
Status	Default is set to <i>Available</i> . If set to <i>Unavailable</i> , the premium shows in the list but it cannot be assigned to project employees.

4.4.4 Attendance types

Attendance types provides a method to identify employee hours during a normal work day, such as excused absence with pay, unexcused absence, and jury duty.

Name	ID	Notes	Billing code	Required	Allow hours	Sign in/Sign out required	Status	Name - en	Name - es-MX
<input type="checkbox"/> Left early	Left early	Left early		false	true	true	Unavailable	Left early	Left early
<input type="checkbox"/> Absent - Not Excused	Absent - Not Excused			false	false	false	Available	Absent - Not Excused	Absent - Not Exc
<input type="checkbox"/> Absent - Excused	Absent - Excused			false	false	false	Available	Absent - Excused	Absent - Excuse
<input type="checkbox"/> bb attendance1	bb attendance1			false	true	false	Available	bb attendance1	bb attendance1

Field name	Description
Name	Name of the attendance type that is defined in master data.
ID	Unique identifier for the attendance type that is defined in master data.
Notes	Additional information defined in master data about the attendance type that shows in the daily plan for the project employee.
Billing code	Billing code associated with the attendance type.
Required	If set to <i>True</i> , the attendance type was automatically assigned to the project when it was created. This setting is configured in master data and cannot be changed in the project.
Allow hours	If set to <i>True</i> , the time entry field in InEight Progress is editable and a value can be entered for the employee absence.
Sign in/Sign out required	Indicates if sign out on the daily plan is expected for the employee.
Status	Default is set to <i>Available</i> . If set to <i>Unavailable</i> , the attendance type shows in the list but it cannot be assigned to project employees.

Related topics:

[Payroll indicators](#)

[InEight Progress - Organization settings](#)

4.5 PROJECT MANAGEMENT

Scenario

You are a project administrator and you want to grant your project engineer access to edit the project. You also have ten field engineers that you want to view the project and claim quantities. After your team members have been added to the project, you will want to make it active.

4.5.1 Assign Members to the Project

There are key terms to know for managing users and resources for a project.

User Terminology

Classification	Description
User	Person that has an account to use the InEight cloud platform.
Member	<p>Users that are assigned specific roles on a project. Members are also referred to as assigned users in some areas of the application.</p> <p>Examples of specific project roles include: Superintendent, Engineer, Foreman.</p> <p>NOTE: Being assigned a member with specific roles is necessary for access in other InEight applications, such as InEight Progress.</p>
Operational Resource	<p>The specific employee, equipment, and material used to build the work on the project and tracked in Plan and Progress.</p> <p>NOTE: Currently, you can only add employee and equipment operational resources to the project but not materials.</p>
Employee	<p>Employees are operational resources that are assigned to specific projects for cost tracking. For example:</p> <ul style="list-style-type: none"> • Darrel P. Lewis - Ironworker
Equipment	<p>Equipment are operational resources that are assigned to specific projects for cost tracking. For example:</p> <ul style="list-style-type: none"> • Grove Crane RT880E, ID# 110002

- **Example 1:** A Foreman is listed in the program as an operational resource, and he will be assigned as an employee on a project for tracking purposes. He will also need to be added as a user and assigned as a member on his project, so he can use InEight Progress.
- **Example 2:** A carpenter apprentice is an operational resource that is assigned as an employee on a project. He will not be a user because he will not be using the InEight applications.
- **Example 3:** The Area Manager will be a user with a role that allows access to all the projects in his area. He is not assigned as a member, because he doesn't fill a specific role on a project.
- **Example 4:** A Project Engineer will be a user assigned as a member to a project when working on a specific project.
- **Example 5:** An Excavator Cat349 is an operational resource that is assigned as an equipment on a project.

NOTE

You must be assigned as a member with the role of Superintendent, Engineer, or Foreman to use the Progress application.

4.5 Step by Step 1 — Assign Users to a Project

1. From the Main menu, select a project from your favorites list, and then click **Project home**. The Project home page opens.
2. On the **Assigned users** tile, click the **Add user** icon. The Add members to project dialog box opens.
3. For Project role, select **Engineer** from the list.

Add members to project

Project role: Engineer

Members available:

	First Name	Project role	Project roles
+	new		
+	18	Engineer	
+	New22	2	
+	Test1	2	Account Administrator,...
+	swathi	a	Account Administrator

Selected members :

Cancel Add

4. Click the **Add** icon next to your name.

Members available in library :				
	First name	Last name	Inherited roles	Project roles
+	new	1		183Approver,Account A...
+	18.4Pro_fd	18.4Pro		
+	New22	2		
+	Test1	2	Account Administrator,...	183Approver
+	swathi	a	Account Administrator	

5. Click **Add**.

- Notice the total in the users block now is 1

4.5 Step by Step 2 — View Members on a Project

1. On the Project home page Assigned users tile, click **Manage users**.

- The Assigned users page opens

2. Sort the **Assigned Roles** column in descending order.

- All the members that are assigned to the project will be at the top of the screen
- Note the Inherited Roles column. These are the people that are assigned to the organizational level, that have inherited roles on this project. They can access the project per their permission level, but they are not counted as members

4.5.1.1 Users

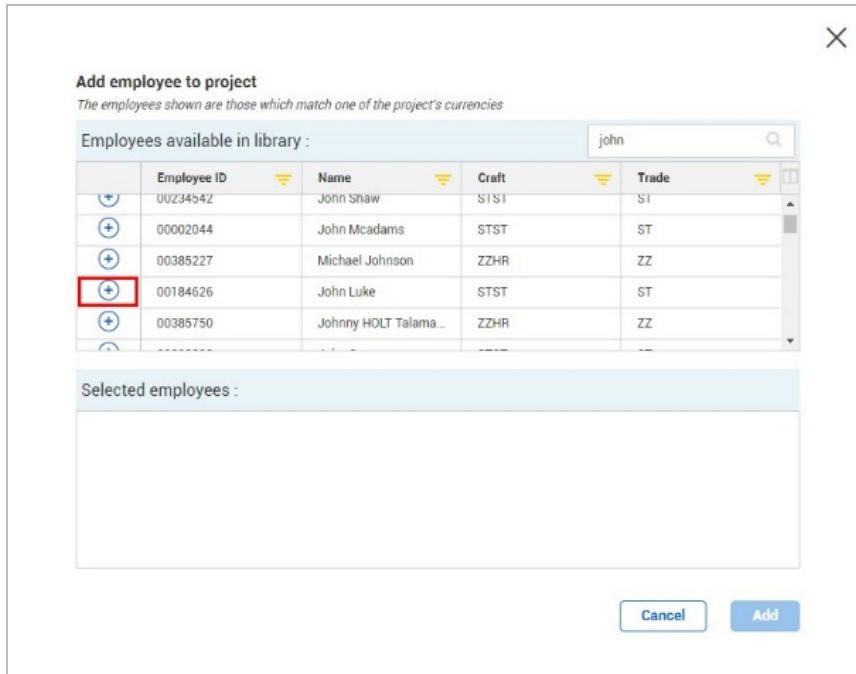
A User is assigned the same permissions as a member. The difference is that they are an outside source to the main organization. For example, a Designer is hired as a contractor and not as a full-time employee. To perform the task effectively, the contractor needs the same permissions as a regular employee.

4.5.2 Add Employees and Equipment to the Project

Along with members, you can add employees and equipment to the project, so they can be used by the InEight applications (e.g., Plan, Progress, Control).

4.5 Step by Step 3 — Add Employees and Equipment on a Project

1. On the Project home landing page, click the **Add** icon on the Assigned employees tile.
2. Click the **Add** icon next to the following names to add them to the project (use the search bar to find the names if necessary):
 - John Luke
 - Joe Farley



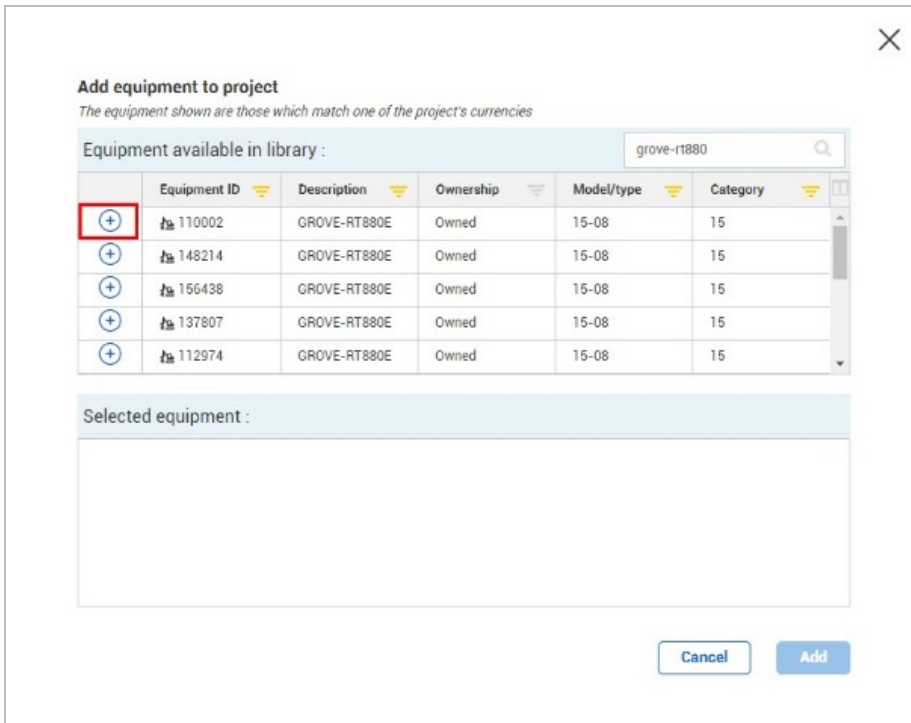
Add employee to project
The employees shown are those which match one of the project's currencies

Employees available in library :

	Employee ID	Name	Craft	Trade
<input type="checkbox"/>	0023454Z	John Shaw	STST	ST
<input type="checkbox"/>	00002044	John Mcadams	STST	ST
<input type="checkbox"/>	00385227	Michael Johnson	ZZHR	ZZ
<input checked="" type="checkbox"/>	00184626	John Luke	STST	ST
<input type="checkbox"/>	00385750	Johnny HOLT Talama...	ZZHR	ZZ

Selected employees :

3. Click **Add**.
 - Notice the number total in the Assigned employees tile increased by two.
4. From the Project home landing page, click the **Add** icon in the Assigned equipment tile.
5. Click the **Add** icon next to the Grove-RT880E (ID# 110002) crane to add it to the project (use the search bar to find it if necessary):



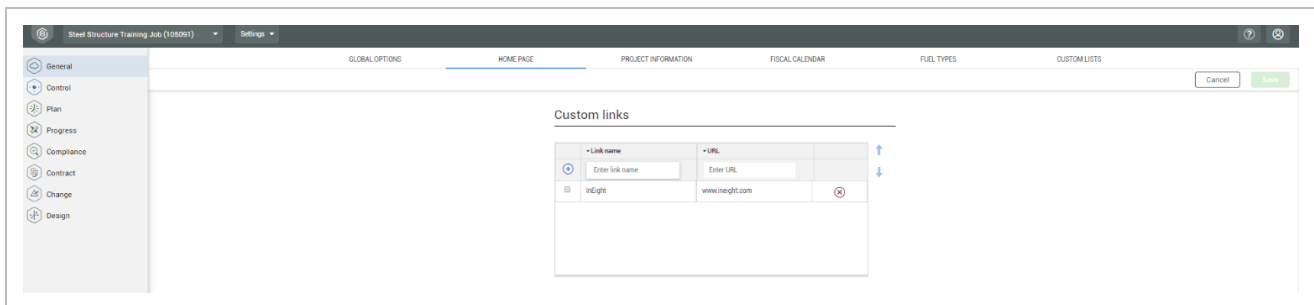
6. Click **Add**.

- You will notice the total number in the Assigned equipment tile increased by one.

4.5.3 Custom Project Links

With the required permissions, you can add custom links to the Project home page Links tile for easy access to associated or needed content.

To add a custom link to the project, click the **Add** icon. This opens the Project settings **Home Page** tab, where links can be added or edited.



4.5.4 Documents

Documents are not stored centrally but instead they are stored at the project level. On the Project home page Supporting Documents tile, click the **View** icon to open Contracts page where you can see all the pertinent documents that have been linked to your project.

Contract ID	Contract Desc.	Title	File/Link	Document type	Subtype	Approval status	Approved/Repecte.	Executed date	Effective date	Expiration date	Days Lin.	Added by	Added on
720001000	Soil Test	insurance	88375058.PNG	Insurance	General Liability	Pending			08/11/2019	08/15/2019	-13	Susan Cafferotti	08/13/2019
720001000	Soil Test	VID 1	Sample for Demo connected.docx	Override memo	Payment term waiver	Not applicable		09/17/2018				Marianne Crane	09/18/2018
720001000	Soil Test	executed contract	Executed contract	Surety		Approved	Marianne Crane	09/14/2018	09/13/2018			Marianne Crane	09/14/2018

TIP

You can also access project documents from the left navigation menu and go to Contract > Contracts > **Supporting Documents**.

Along with entering a Title for your document, you can specify what document type you are uploading, for example:

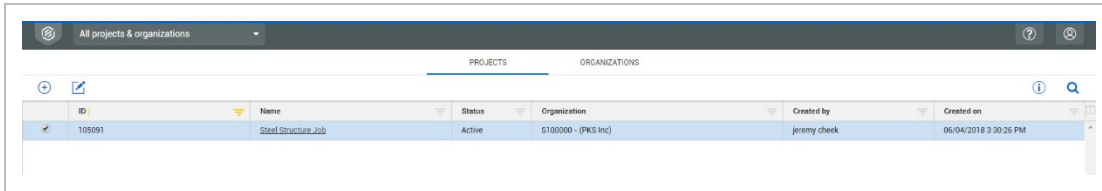
- Change Order
- Contract Document
- Design Document
- Diagram
- Other
- Permit
- Photo
- Request for Information
- Submittal Document
- Transmittal Document

4.5.5 Project Activation

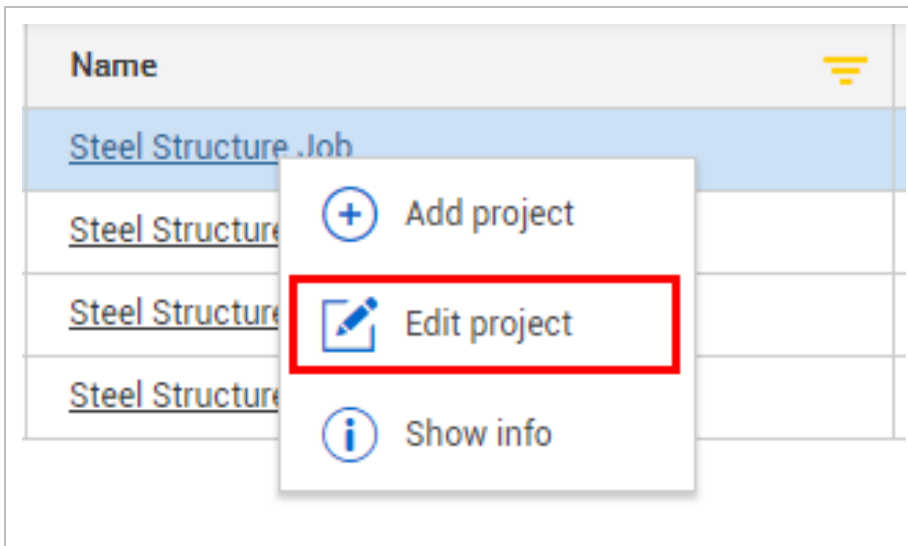
After you have configured the project and received approval from the administrator, the project will be placed into Active status.

4.5 Step by Step 4 — Activate the Project

1. On the Projects tab, find your project and click anywhere in the row to highlight it.



2. Right-click on the row and a window appears.
3. Select **Edit project**.



4. Click the drop-down menu in the Status box and select **Active**.

Project details

+ Add project image

Project ID: 105091

External project ID: 105091

Name: Steel Structure Job

Status: Active

Organization: S100000 - (PKS Inc)

Start date: 10/01/2015

End date: 12/31/2029

Notes

5. Click **Save**.

4.5.6 Close the Project

Scenario

The steel structure was just completed and is ready for opening ceremonies in October. Steve has closed out the contract with the client and is now ready to close the project for archiving.

After the project is complete and all information is finalized, the project can be closed and archived.

4.5 Step by Step 5 — Close the Project






1. On the Projects tab, find your project and click anywhere in the row to highlight it.

ID	Name	Status	Organization	Created by	Created on
105091	Steel Structure Job	Active	S100000 - (PKS Inc)	jeremy check	06/04/2018 3:30:26 PM

2. Right-click on the project row and a menu shows.
3. Select **Edit project**.
4. Click the drop-down menu in the Status box, and then select **Closed**.

Project details

+ Add project image

* Project ID 105091	* External project ID 105091 
* Name Steel Structure Job	* Status Active   New Active Closed
* Organization S100000 - (PKS Inc)	
Start date 10/01/2015 	End date 12/31/2029 
Notes <div style="border: 1px solid #ccc; height: 60px;"></div>	

5. Click **Save**.



LESSON 5 – MASTER DATA LIBRARIES

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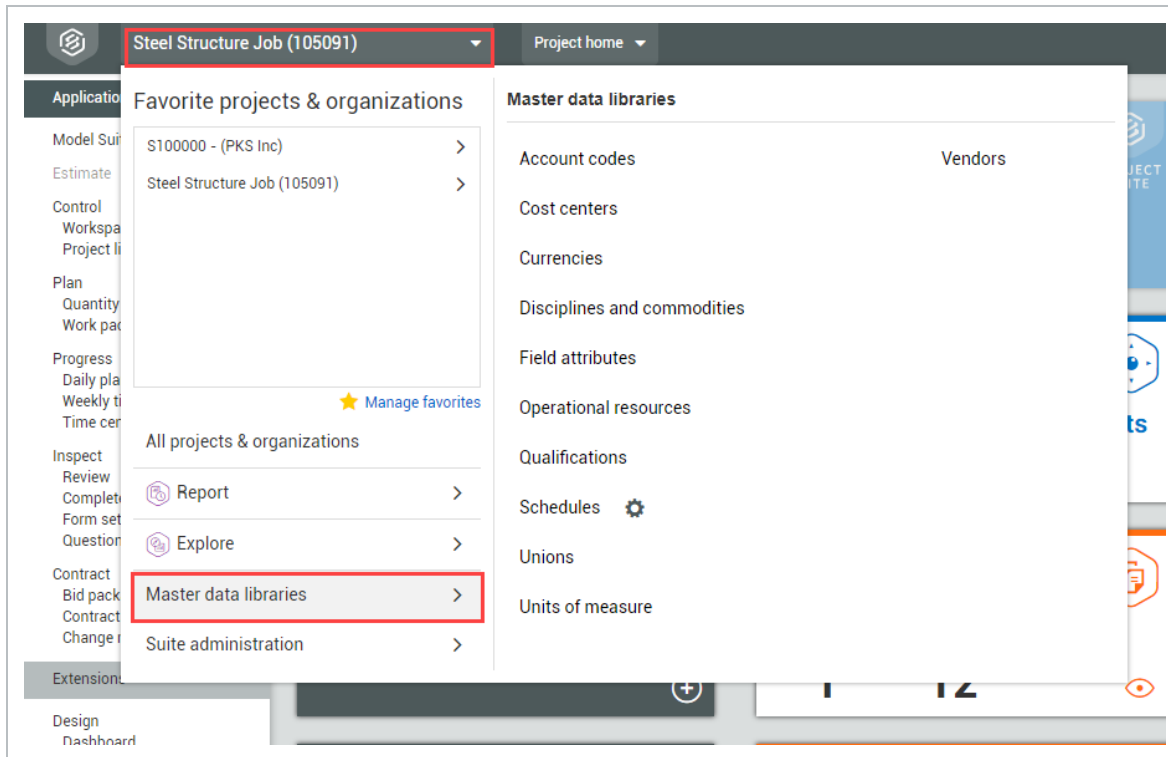
5.1 OVERVIEW

The Master Data Libraries are databases of master information available for use in different projects, specific to your company. The other InEight applications use the information in the Master Data Libraries.

The Master Data Libraries are organized into the following categories:

Section	Description
Account Codes	Assigned to WBS elements in the Control application to standardize cost accounting.
Cost Centers	Indicators of locations for Project resources and possible Budget Code Segment information.
Currencies	Includes all the possible currencies your projects or organization may use.
Disciplines and Commodities	Organization of types of work and materials. Disciplines and Commodities are used in InEight Plan.
Field Attributes	Physical properties assigned to Disciplines for use in the InEight Plan application (Length, Width, Height, etc....).
Operational Resources	All Employees and Equipment. This can be an import from your ERP system or manually created.
Qualifications	Qualifications assigned to people and equipment for use in InEight Inspect. Typically, also housed in your ERP system.
Schedules	This is the list of schedules your project has created.
Unions	Associate Master Data employees or crafts to a local union as required by the organization.
Units of Measure	Includes all the possible Units of Measures your projects may use.
Vendors	This is the list of Vendors for your company to use in your InEight applications.

To access the Master Data Libraries menu, click on the first level menu drop-down and then select **Master Data Libraries**.



5.2 ACCOUNT CODES

Account codes are a list of codes in master data that are generally dictated by the specifications of accounting and ERP systems, which serves as a standardized coding system to track like operations across a company for the purpose of global reporting and benchmarking. Account codes provide a common language that can be used across multiple InEight applications. By using a master set of account codes, it allows for the cross-referencing of cost items and budget line items of your accounting system across the InEight cloud platform.

Account codes typically follow a hierarchical structure, which allows for summary level reporting rolled up to company standards but can also be a flat list. This hierarchy allows tracking at multiple levels in the project and therefore more accurate tracking and more comparable data. For example, in one project you track all the civil work at subordinate levels and in another project you have contracted out the civil work. You can still compare costs for the civil in these two projects as the subordinate account codes would roll up into a parent account code.

The account codes list and hierarchy is created and maintained in Master data libraries > **Account codes**. Account codes are typically maintained at an organization level to ensure that categories and codes remain consistent with company standards.

Account code	Description	UoM primary	Currency	UoM secondary	Auto qty primary	Auto qty second
00	Overhead	PLS	US Dollar		On	On
00.03	OH - Get Work	MWk	US Dollar	KS	On	On
00.03.01	OH - Estimating - Engineering	MWk	US Dollar	KS	On	On
00.03.01.002	OH - Estimating - Engineering - Management	MWk	US Dollar	KS	On	On
00.03.01.010	OH - Estimating - Engineering - Discipline	MWk	US Dollar	KS	On	On
00.03.01.010.02	OH - Estimating - Engineering - Geotech	MWk	US Dollar	KS	On	On
00.03.01.010.04	OH - Estimating - Engineering - Environ, Permitting & ROW	MWk	US Dollar	KS	On	On
00.03.01.010.06	OH - Estimating - Engineering - Civil	MWk	US Dollar	KS	On	On
00.03.01.010.08	OH - Estimating - Engineering - Landscape / Aesthetics	MWk	US Dollar	KS	On	On
00.03.01.010.10	OH - Estimating - Engineering - Drainage	MWk	US Dollar	KS	On	On
00.03.01.010.12	OH - Estimating - Engineering - Utilities	MWk	US Dollar	KS	On	On
00.03.01.010.14	OH - Estimating - Engineering - Maint of Traffic	MWk	US Dollar	KS	On	On
00.03.01.010.16	OH - Estimation - Finisiering - Pavement	MWk	US Dollar	KS	On	On

The account codes within the account code structure are arranged into a hierarchy of parent-child relationships that can contain varying levels of detail for each level of the hierarchy as indicated by color. You can assign account codes to cost items anywhere from the highest level to the lowest level. The lower the level assigned, the higher the level of detail associated to the account code. Terminal items are account codes at the lowest hierarchy level within a group or family of codes. An icon shows in the description field of a terminal account code.

5.2.1 Account codes tabs

The account codes master data library consists of five tabs: Published, Staging, Audit Log, Import Log, and Publish Log. The Account codes page includes both a Published tab for account codes that are live and a Staging tab that lets you make changes without affecting live account codes that are being used by other products in the cloud platform.

Tab Name	Description
Published	Lists all account codes that are available in the InEight cloud platform for use in projects.
Staging	Create and edit account codes, and then publish for use. Account codes are not available for use in projects until they are published.
Audit Log	Tracks changes made to the account code structure, including the value before and after, the changed date, and who made the change.
Import Log	Track the status of all account code import processes. When you hover over the Failed with errors status, an information message shows with next steps. You

Tab Name	Description
	can download the detailed error log.
Publish Log	Lists all published account codes, along with its associated published status, such as completed or cancelled.

5.2.2 Considerations

If you have the applicable permissions, you can add, delete, edit, or replace account codes.

Permission Name	Description	Level
View account code	Allows the user to view the account code structure and access only the Published tab in master data.	Base user
Add account code	Allows the user to create new account codes in Staging.	Organization Admin
Edit account code	Allows the user to make changes to existing account codes in Staging.	Organization Admin
Delete account code	Allows the user to delete account codes in Staging.	Organization Admin
Approve/Reject account code	Allows the user with this permission to approve or reject account codes in Staging. When approved, account codes show in the Published tab.	Organization Admin
Approve all account codes	Allows the user to access all account code tabs. A user with this permission can use the Approve all option in Staging to move all account code changes to show in the Published tab.	Organization Admin

5.2.3 Published

The Published tab shows the account code structure and all live account codes that are available to use in the InEight cloud platform and applications. You can use the Search and Information functions on this page to find a specific account code and see more details about it. The account code structure can also be exported to an Excel file. Account codes cannot be changed from the Published tab.

Account code	Description	UoM primary	Currency	UoM secondary
00	Overhead	PLS	US Dollar	
00.03	OH - Get Work	MWk	US Dollar	KS
00.03.01	OH - Estimating - Engineering	MWk	US Dollar	KS
00.03.01.002	OH - Estimating - Engineering - Management	MWk	US Dollar	KS
00.03.01.010	OH - Estimating - Engineering - Discipline	MWk	US Dollar	KS
00.03.01.010.02	OH - Estimating - Engineering - Geotech	MWk	US Dollar	KS
00.03.01.010.04	OH - Estimating - Engineering - Environ, Permitting & ROW	MWk	US Dollar	KS
00.03.01.010.06	OH - Estimating - Engineering - Civil	MWk	US Dollar	KS
<input checked="" type="checkbox"/> 00.03.01.010.08	OH - Estimating - Engineering - Landscape / Aesthetics	MWk	US Dollar	KS
00.03.01.010.10	OH - Estimating - Engineering - Drainage	MWk	US Dollar	KS
00.03.01.010.12	OH - Estimating - Engineering - Utilities	MWk	US Dollar	KS
00.03.01.010.14	OH - Estimating - Engineering - Maint of Traffic	MWk	US Dollar	KS
00.03.01.010.16	OH - Estimating - Engineering - Pavement	MWk	US Dollar	KS

00.03.01.010.08
OH - Estimating - Engineering - Landscape / Aesthetics

UoM primary: MWk
Currency: US Dollar
UoM secondary: KS

Auto quantity primary: On
Auto quantity secondary: On

Contribute primary to primary: On
Contribute primary to secondary: Off
Contribute secondary to second...: On

Created by: InEight Service Acc...
Created on: 09/23/2020 7:06:05 ...
Last modified by: Ryan Powell
Last modified on: 08/15/2022 6:01:28 ...

General notes
Include all wages and add-ons costs incurred for

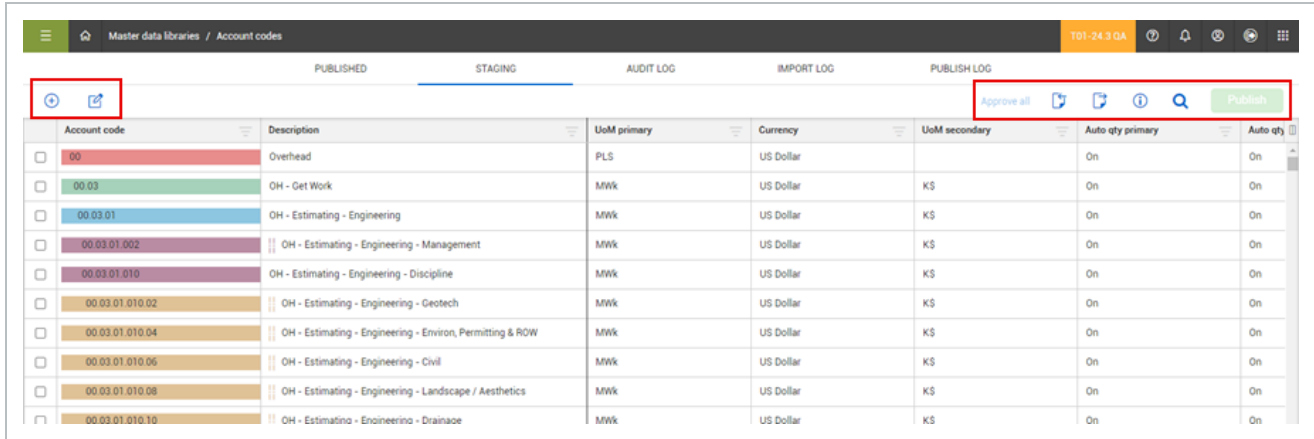
5.2.4 Staging

The Staging tab shows duplicates of the published account codes and is where you can add new account codes and modify or delete existing ones. Staging allows you to make changes without affecting live account codes being used by other products in the platform. Any additions and changes made to account codes in Staging are not available to use until after they are published.

NOTE You can only publish when all pending records have been approved or rejected. The publish option is not available when there are changes pending.

The staging feature allows all account code additions and changes to be published in a batch. Batch publishing allows all changes to remain as pending until they are approved or rejected, and then all changes are publish at the same time to make them available to use. The published changes are then consumed by the InEight application at a time that best suits the application.

To see and review pending account code changes, go to Master data libraries > Account codes > **Staging**.



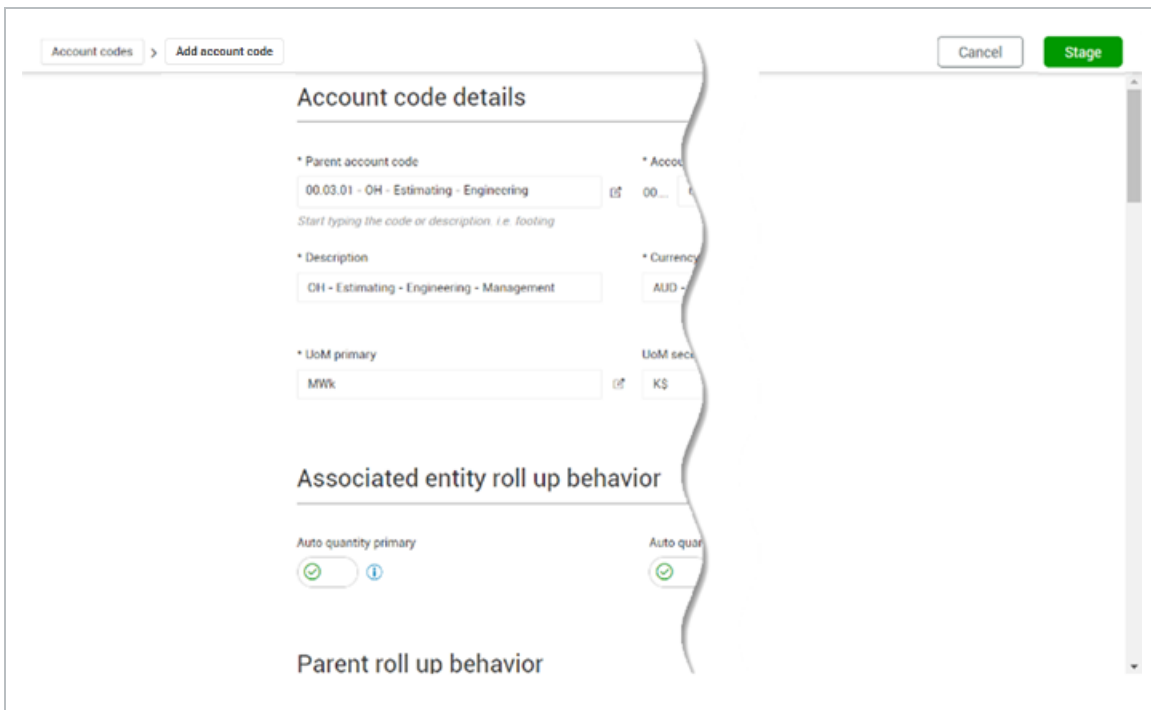
When you select to add or edit an account code, the following details and settings show on the page.

Field Name	Description
Parent account code	Account code with sub-level child account codes below it.
Account code	Alpha numeric sequence assigned as the code.
Description	Description detailing the scope of the account code.
Currency	Currency assigned to and used for the account code.
UoM primary	Primary unit of measure for the account code.
UoM secondary	Secondary unit of measure for the account code.
Auto quantity primary and Auto quantity secondary	When enabled, the option automatically rolls up cost item quantities if the cost items and this account code have the same primary and secondary UoMs. It can also be set on a project specific basis. Changes made to the master list of account codes for Auto quantity secondary will not change existing account codes in InEight Control. New associations going forward will use the updated value of this setting.
Parent Roll Up Behavior	Controls whether primary or secondary quantities of account code roll up to the parent account code's primary or secondary quantity.
Flag for disable	Flagging an account code for disable automatically flags all associated child account codes.

Field Name	Description
Notes	Option information that can be included about the account code, which can be categorized for general, safety, environmental, and quality. These notes are available for editing, staging, and publishing.
Account code structure tags 1-20	Tags that can be associated with the account code, which allows it to be categorized according to the tags.
Custom text fields 1-10	Optional user defined fields that can be used to add information related to the account code.

5.2.4.1 Add an account code

1. In the main menu, go to Master data libraries > Account codes > **Staging**. If you are adding a child to an account code, select the check box of the account code that it will be under.
2. Click the **Add account code** icon. The Add account code page opens to show the new account code details and inherited data from the parent account code. Complete the applicable fields.



3. Click the **Stage** button to show the new account code in the Staging tab with a status of *Pending*. The new account code will not be available to use with a project until it is approved and

published.

4. If you have the permission to approve account codes, select the check box for the account code you created, and then click the **Publish** button.

5.2.4.2 Edit an account code

1. In the main menu, go to Master data libraries > Account codes > **Staging**, and then select the check box for the account code that you want to edit.
2. Click the **Edit account code** icon. When you edit an account code, some changes that you make might impact existing use of the account code on current projects.

3. Make any necessary changes to the account code, and then click the **Stage** button to show the modified account code in the Staging tab with a status of *Pending*. Changes to the account code will not be available until it is approved and published.
4. If you have the permission to approve account codes, select the check box for the account code you edited, and then click the **Publish** button.

5.2.4.3 Delete an account code

1. In the main menu, go to Master data libraries > Account codes > **Staging**, and then select the check box for the account code that you want to delete.
2. Click the **Edit account code** icon.

- On the Edit account code page, click **Delete account code**. If the account has child account codes, you can delete all of it's child account codes or move them under another account code. In the slide-out panel do one of the following:
 - Enter an account code to move the child account codes under, and then click **Next**.
 - Leave the Replacement account code field empty to delete the child account codes. Click **Next**

The screenshot displays the 'Delete account code' interface. The main area is titled 'Account code details' and contains several input fields:

- * Parent account code: 81.74.06 - Wires and Cabling - Modularized Buildin...
- * Account code: 81... 016
- * Description: MA BLD Wire and Cable Pulling - \leftrightarrow1KV Fiber Cable
- * Currency: USD - US Dollar
- * UoM primary: LF
- UoM secondary: (empty)

 Below these fields is the 'Associated entity roll up behavior' section, which includes two toggle switches: 'Auto quantity primary' (checked) and 'Auto quantity secondary' (checked).

On the right side, there is a 'Delete account code' panel. It features a dropdown menu for 'Replacement account code (optional)' with the text 'Select one' below it. Below the dropdown is a 'Warning' message: 'This account had child account codes. Deleting this account code will delete all of it's children. To specify replacement account codes for the child account codes go to the specific child account code to specify the replacement.' At the bottom of this panel are 'Cancel' and 'Next' buttons.

- Click the **Stage** button to show the deleted account code in the Staging tab with a status of *Pending*. The account code will not be deleted until it is approved and published.
- If you have the permission to approve account codes, select the check box for the account code you edited, and then click the **Publish** button.

5.2.5 Audit Log

The Audit Log tracks changes made to the account code structure, including the value before and after, the changed date, whether the change was published or just staged, and the user that made the change.

5.2.6 Import Log

The Import Log allows you to view the import logs for all account code Excel imports that completed or failed, so you can track the import process. You can hover over the status, which provides a brief description. Click the **Download error file** icon to see the results and additional information to help resolve the errors.

5.2.7 Published Log

When you publish a new account code in Staging, a record is created and shows in the Publish Log tab.

5.3 ATTRIBUTES

Attributes are data fields that can be associated with project values, disciplines, and commodities, then assigned to a project to help organize and store pertinent information used for filtering and reporting. Multiple attributes can be assigned to a single project value, discipline, and commodity to enhance the collection of information.

5.3.1 Considerations

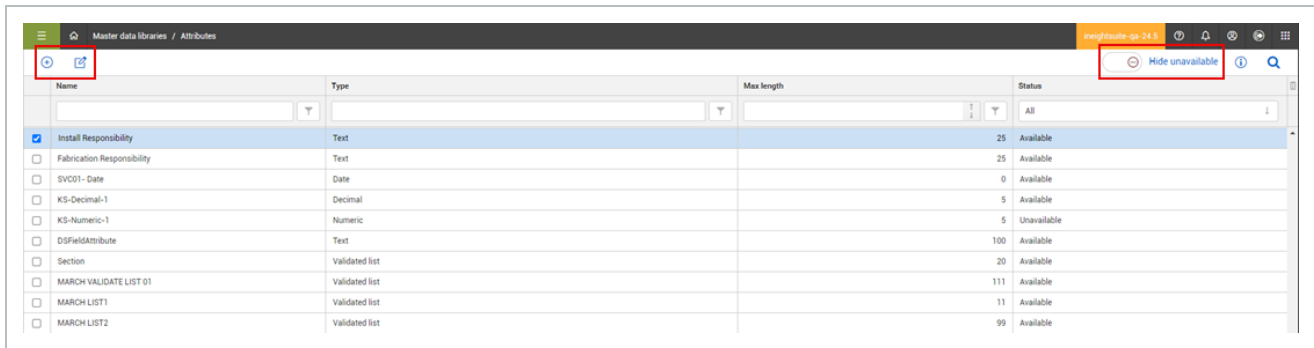
With the applicable permissions, you can select the icon to add, edit, and assign master data attributes. Permissions are configured in Roles and permissions > Master data libraries > **Attributes**.

Permission Name	Description	Level
View attributes	Allows the user to view the list of available attributes in master data.	Base user
Add attributes	Allows the user to create and add attributes to master data.	Organization Admin
Edit attributes	Allows the user to modify existing attributes in master data.	Organization Admin
Assign attributes	Allows the user to assign attributes to project values, disciplines, and commodities in master data.	Account Admin

5.3.2 Attributes master data

The Attributes master data page shows a list of the existing attributes. By default, the Hide unavailable toggle is set to On, which filters the list to show only the available attributes that can be assigned. On this page you can create new attributes or change the status and field length of existing attributes.

Attributes cannot be deleted but the status of an attribute can be set to *Unavailable*, which prevents the attribute from being used and assigned. However, if an attribute is already assigned to a project, then it will still be available in the project.



Field Name	Description
Name	Unique name of the attribute.
Type	Select from date, decimal, numeric, text, and validated list to further define the attribute data format.
Max length	Number of characters allowed for the data field.
Status	Set the status to <i>Available</i> to allow the attribute to be assigned. If the status is set to <i>Unavailable</i> and the Hide unavailable toggle is <i>On</i> , the attribute does not show in the list on the master data page.

To create an attribute, click the **Add** icon. Fill in the necessary fields, and then click **Save**.

To edit an attribute, select it from the list, and then click the **Edit** icon. You can change the max length and status as needed, but the name and type cannot be edited.

5.4 COST CENTERS

Cost centers typically represent business units. These cost centers allow you to further define your integrated data. After available to the InEight portfolio of products, cost centers are utilized as indicators of locations for project resources. Additionally, cost centers, may be included for possible Budget Code Segment information.

Each cost center can have a cost center type, as determined by your business needs within your ERP system.

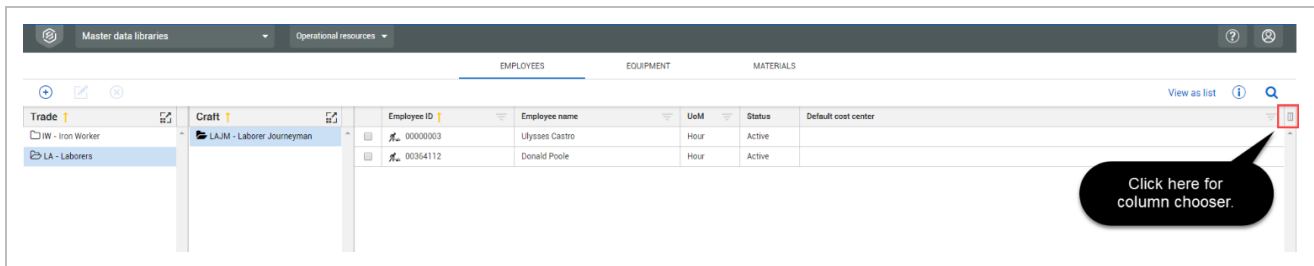
Cost center data is integrated from your external system, and is made available to the following user roles:

At the master data level:	At the project level:
<ul style="list-style-type: none"> Operational resource employee Equipment at the master data level 	<ul style="list-style-type: none"> Project employee Equipment resources

To access the cost centers functionality, new cost center permissions must be assigned to your role. After assigned, from the Main menu select Master Data Libraries > **Cost centers** . The Cost centers page opens.

To view or edit cost center associations for an operational resource employee or equipment, from the Main menu select Master Data Libraries > **Operational resources**.

Select either the Employees or Equipment tab. Then view the desired record:



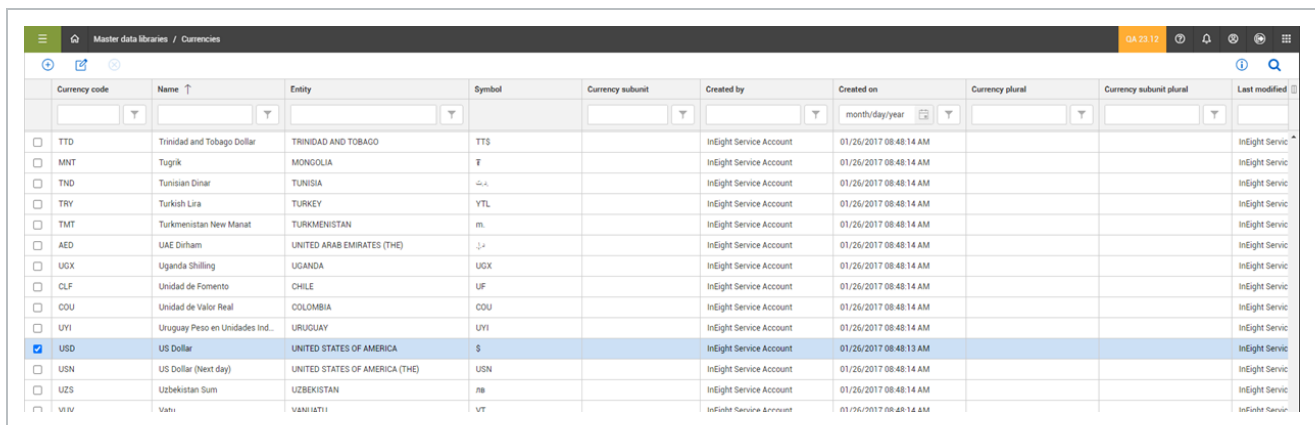
5.5 CURRENCIES

The Currency master data page shows a standardized list of all currencies your company can use, including both system created and user-defined currencies that can be used for various business functions in the InEight cloud platform applications and associated to projects. Each currency allows you to include the applicable plural form of the currency (*i.e.*, Dollar vs. Dollars), the subunit for the currency (*i.e.*, Dollars and Cents), and the plural form of the subunit (*i.e.*, Cents).

With the applicable permissions, you can select the icon to add, edit, or delete master data currencies. Permissions are configured in Roles and permissions > Master data libraries > **Currency**.

Permission Name	Description	Level
View currency	Allows the user to view the list of currencies available in master data. By default, the view permission is selected for all users	Base user

Permission Name	Description	Level
	and cannot be changed.	
Add currency	Allows the user to create and add currencies to master data.	Organization Admin
Edit currency	Allows the user to modify existing currencies in master data. For system created currencies, only the currency subunit, currency plural, and currency subunit plural can be edited.	Organization Admin
Delete custom currency	Allows the user to delete an existing custom currency in master data. System created currencies cannot be deleted. For a custom currency, all associations (e.g., account codes, employees, projects, organizations, etc.) must be removed before it can be deleted.	Organization Admin



When adding or editing currencies, complete the required fields and include any additional fields as needed.

Field Name	Description
Currency code	A three letter unique identifier used for the currency.
Name	Full name of the currency.
Entity	Country of origin or owner of the currency.
Symbol	Symbol associated with the currency.

Field Name	Description
Currency subunit	Name of the currency subunit.
Currency plural	Name of multiple units of the currency.
Currency subunit plural	Name of multiple units of the currency subunit.
Created by	Name of the user that added the currency to the master data library.
Created on	Date and time that the currency was added to the master data library.
Last modified by	Name of the user that last modified the currency record in the master data library.
Last modified on	Date and time that the currency record was modified in the master data library.

5.6 DISCIPLINES AND COMMODITIES

Disciplines and commodities master data provides standardized data that can be shared and used across multiple InEight applications. Disciplines in the InEight cloud platform represent the different types of construction work, which can include many things such as architecture, engineering, project management, electrical, and facilities management. Commodities represent the materials, objects or products used in construction work such as concrete, steel beams, and gravel. These disciplines and commodities with their associated attributes data fields are then assigned to a project to help organize and store pertinent information used for filtering and reporting.

5.6.1 Considerations

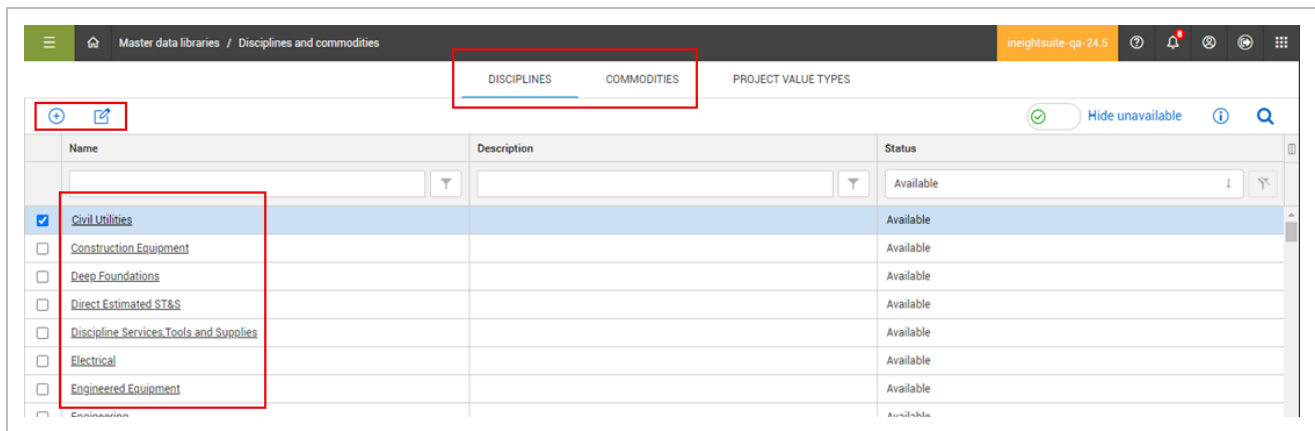
With the applicable permissions, you can select the icon to add or edit master data disciplines and commodities. Permissions are configured in Roles and permissions > Master data libraries > **Disciplines and commodities**.

Permission Name	Description	Level
View disciplines and commodities	Allows the user to view the list of available disciplines and commodities in master data.	Base user
Add disciplines and	Allows the user to create and add disciplines and	Organization

Permission Name	Description	Level
commodities	commodities to master data.	Admin
Edit disciplines and commodities	Allows the user to modify existing disciplines and commodities in master data.	Organization Admin

5.6.2 Disciplines and Commodities master data

Use the tabs to navigate between the Disciplines and Commodities master data pages. By default, the Hide unavailable toggle is set to *On*, which filters the list to show only the available disciplines or commodities that can be assigned to a project. If you change the Hide unavailable toggle to *Off*, the pages show a list of all existing disciplines and commodities that were created.



Field Name	Description
Name	Unique identifier of the discipline or commodity.
Description	Brief description of the discipline or commodity.
Status	Set the status to <i>Available</i> to allow the discipline or commodity to be assigned to projects. If the status is set to <i>Unavailable</i> and the Hide unavailable toggle is <i>On</i> , the discipline or commodity does not show in the list on the master data page.

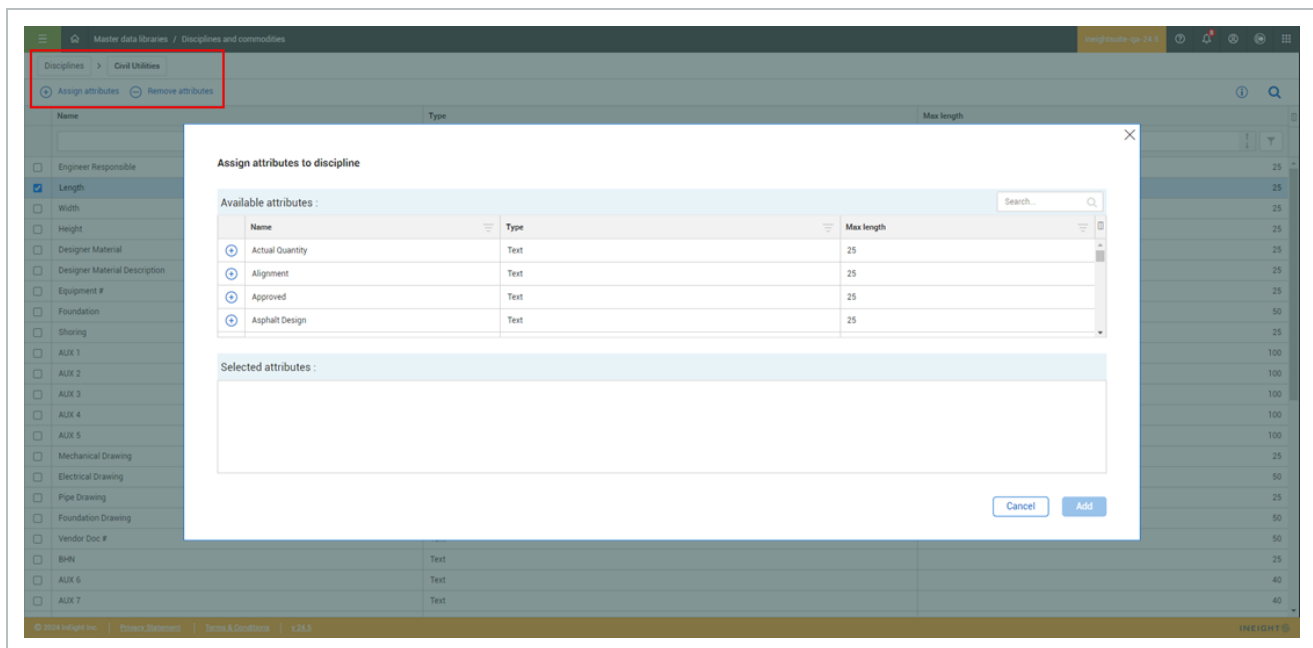
The functionality to add and edit a discipline or commodity on these master data pages are the same. To create a new discipline or commodity, click the **Add** icon. Fill in the necessary fields, and then click **Save**.

To edit a discipline or commodity, select it from the list, and then click the **Edit** icon. You can change the status as needed, but the name and description cannot be edited if the discipline or commodity is assigned to a project.

After a discipline or commodity is created in master data it cannot be deleted. You can set the status of the discipline or commodity to *Unavailable*, which hides it at the project level so it cannot be selected and assigned. However, if a discipline or commodity is already assigned to a project, then the discipline or commodity will still be available in the project.

5.6.3 Assigned attributes

Click the link in the Name column to show a list of the attributes assigned to the item selected. With the applicable permissions, you can add or remove attributes assigned to the selected discipline or commodity.



To add an attribute to the discipline or commodity, click **Assign attributes**. A dialog box opens and shows a list of the attributes available in master data. Select the attributes that you want to assign to the discipline or commodity, and then click **Add**.

To remove an attribute associated to the discipline or commodity, select an attribute or attributes, and then click **Remove attributes**. Removing an attribute only impacts new projects, not existing projects where the project value type is assigned.

5.7 OPERATIONAL RESOURCES

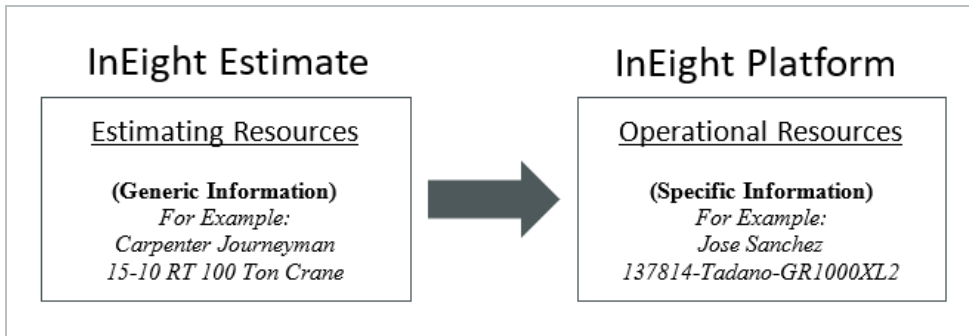
5.7.1 Operational vs. Estimating Resources

In the Operational Resources section of the master data libraries, employee, equipment and material resources are organized and stored for use in the InEight cloud platform. These are not to be confused with Estimating Resources, which also may be used in your project. To clarify, note the following definitions of estimating resources and operational resources:

Project Resources

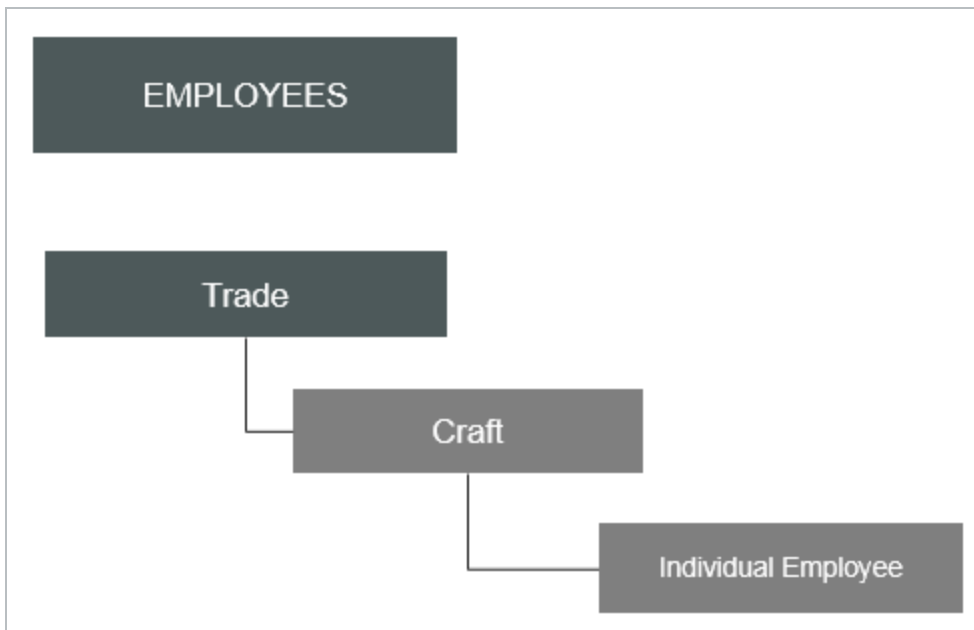
Term	Definition
Estimating Resources	<p>The generic resources used to estimate work for the project. For example:</p> <ul style="list-style-type: none"> • Ironworker Journeyman • RT 80 Ton Crane <p>These are typically imported from InEight Estimate, but additional generic resources can be added in InEight Control as needed for additional work (e.g., change orders).</p> <p>Estimating resources are not accessed from the Settings Master Data Libraries menu. They are accessed at the project level in one of two ways:</p> <ul style="list-style-type: none"> • From the Information (Show Info) slide out for a project • From within the Control application (Control > Project library)
Operational Resources	<p>The specific employee, equipment, and material used to build the work on the project and tracked in Plan and Progress. For example:</p> <ul style="list-style-type: none"> • Darrel P. Lewis - Ironworker • Grove Crane RT880E, ID# 110002 <p>As discussed in <i>Lesson 3</i>, if you have the proper role, you can add operational resources to specific projects.</p> <p><i>Note: currently, you can only add employee and equipment operational resources to the project (not materials).</i></p>

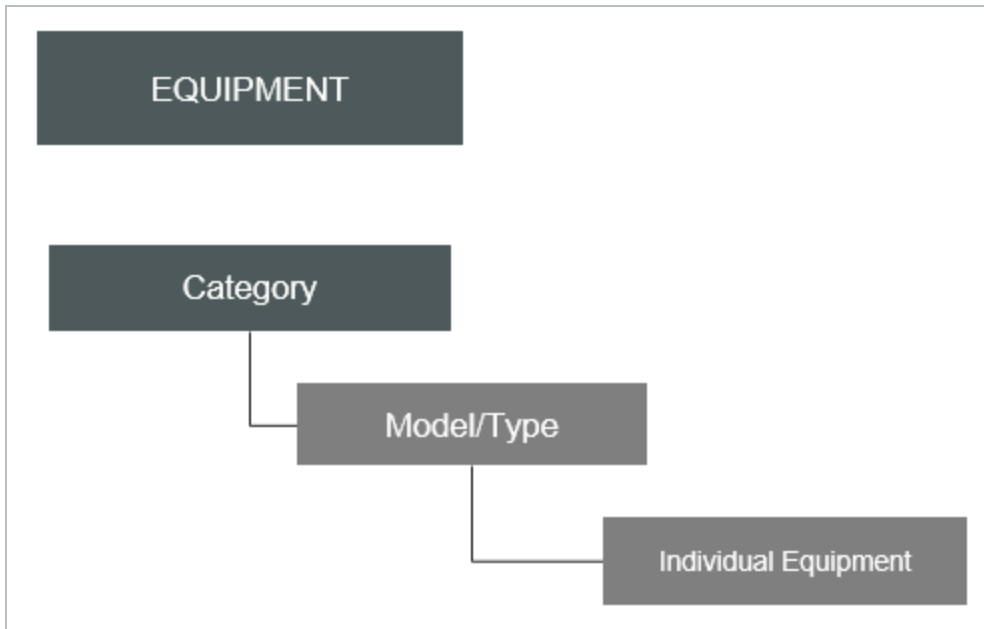
The following diagram illustrates the difference between estimating and operational resources:



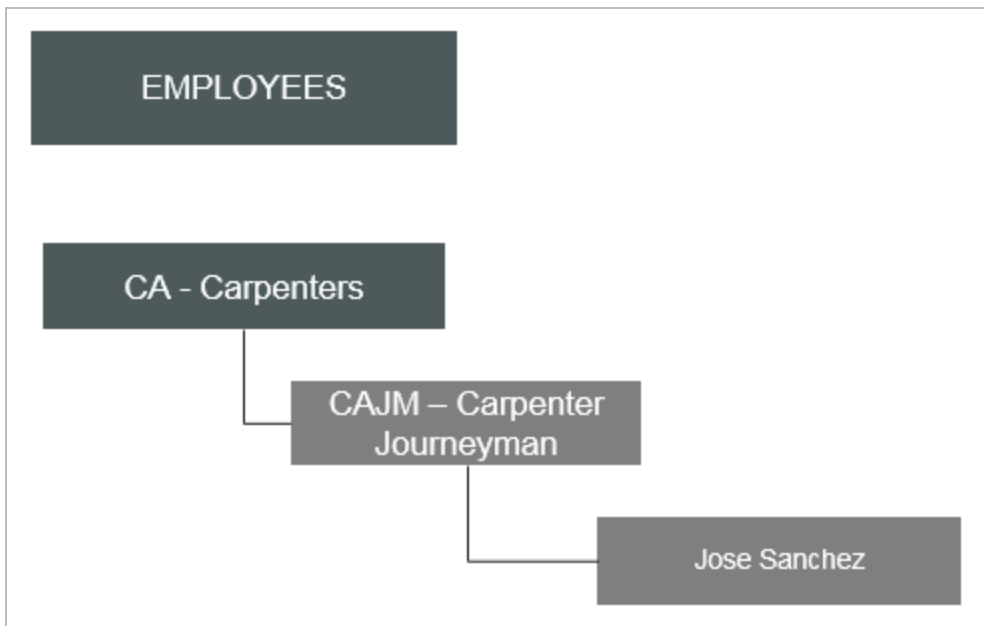
5.7.2 Operational Resources Hierarchy

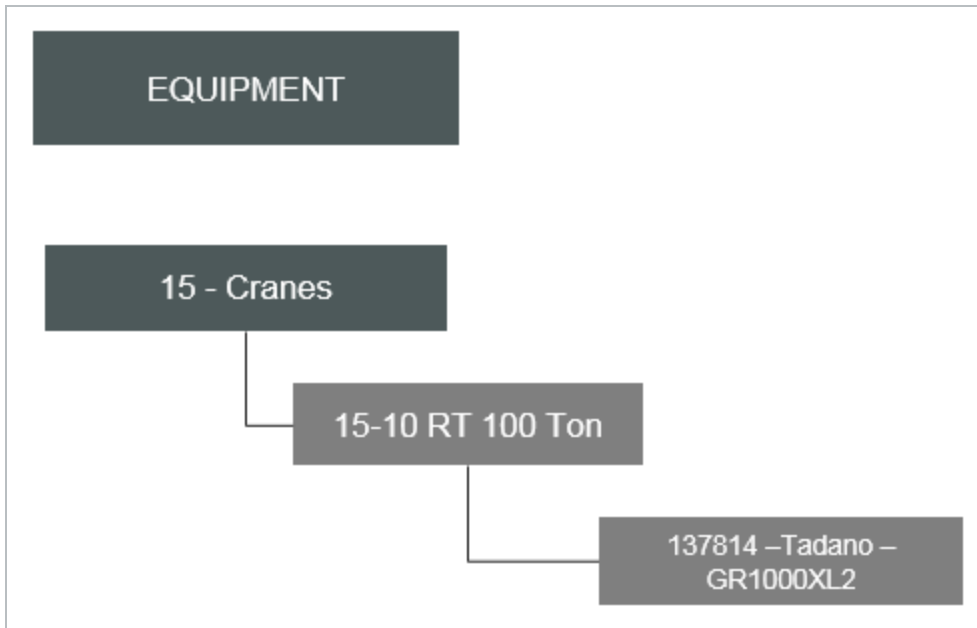
For both employee and equipment resources, there are three tiers.





Below is an example of an employee and equipment resource:





5.7.3 Employees

As mentioned above, employee operational resources are organized into a hierarchy of three levels: trade, craft, and employee. The following table provides definitions for each.

Employee Operational Resources Hierarchy	
Term	Definition
Master Data Trade	Top layer of the Employee Operational Resource entity, traditionally utilized as a method to organize Crafts into operational or functional areas within a company’s structure. An example of a Trade could be “Electricians”.
Master Data Craft	Assigned to a Master Data Trade, traditionally utilized to define a level or category of employees with metadata Details including ID, Description, Union, and Vendor as well as Cost metadata including Currency, Unit of Measure (UoM), and Pay Rates (Standard, Overtime, and Double time). An example of a Craft could be “Apprentice Electrician”.
Master Data Employee	Assigned to a Master Data Craft, traditionally defines the actual named employee with all required metadata including the employee’s ID, name, global start/end dates, Job title, etc. Additionally, includes the individual employee’s pay rates, which are initially inherited from the Master Data Craft to which the employee is assigned.

Employee operational resource records include details such as Vendor and Union which can be inherited from the craft level and can be valuable for tracking payroll when collecting hours from the field.

Employee records also include a cost section, where Standard time (ST), Overtime (OT), and Double time (DT) rates can be recorded for tracking operational costs. These rates can be inherited from the craft level, or you can override the craft rates, allowing you to have different employee rates from project to project. The following section provides more in-depth detail on employee rate inheritance.

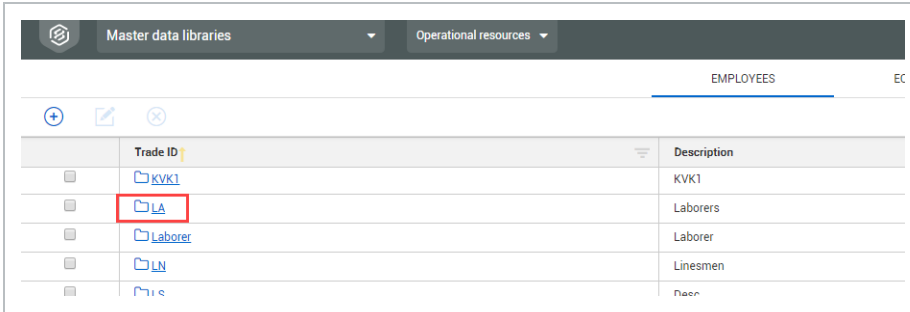
The screenshot shows the 'Edit employee' form within the 'Operational resources' section. At the top, there are navigation tabs for 'Master data libraries' and 'Operational resources', along with a user profile icon and a help icon. Below the navigation, there are buttons for 'Operational resources >', 'Edit employee', 'Cancel', and 'Save'. The main form area contains the following elements:

- Override craft rates
- Currency: USD - US Dollar (dropdown)
- UoM: Hour (dropdown)
- Standard time (ST) rate: \$21.50000
- Use base wage factors
- Overtime (OT) factor: 1.50000
- Double time (DT) factor: 1.00000
- Overtime (OT) rate: \$32.25000
- Double time (DT) rate: \$21.50000
- Default cost center: (empty text field)
- Hint: type the cost center ID or description
- Additional payroll instruction code: (empty text field)
- Allow override of the additional payroll instruction code: No

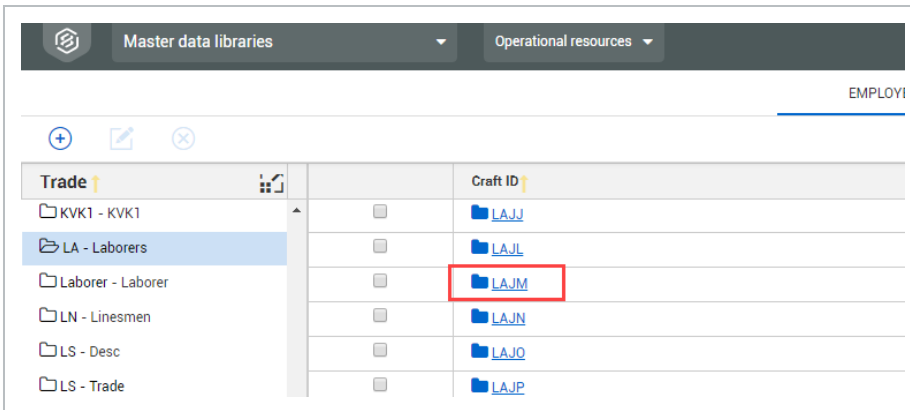
The following steps walk you through viewing an Employee record in the Master Data Libraries. For the following steps you will be working with the employee Donald Poole who is a Laborer General Foreman.

5.7 Step by Step 1 — View Employee

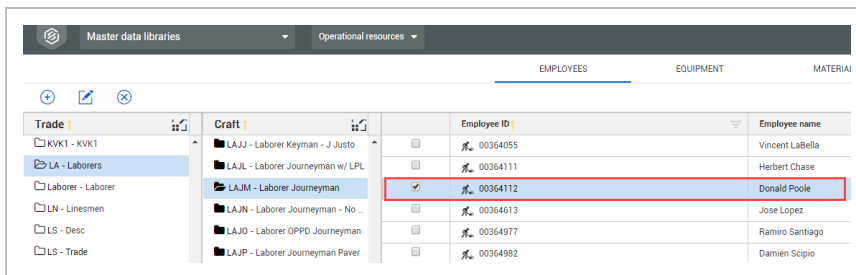
1. From the Main menu, select Master Data Libraries > **Operational resources**. The Resources page opens, which defaults to Employees.
2. In the Trade ID column, click on **LA**.



3. In the Craft ID column, click on the **LAJM** folder to open.



4. Click on the name **Donald Poole**.
 - The row highlights blue



5. Right click and select **Show info**.

	Employee ID	Employee name
<input type="checkbox"/>	00364055	Vincent LaBella
<input type="checkbox"/>	00364111	Herbert Chase
<input checked="" type="checkbox"/>	003	Donald Poole
<input type="checkbox"/>	003	Jose Lopez
<input type="checkbox"/>	003	Ramiro Santiago
<input type="checkbox"/>	003	Damien Scipio
<input type="checkbox"/>	003	Dalton Burgess
<input type="checkbox"/>	003	Eric Guy
<input type="checkbox"/>	00365521	Reinaldo Maradiaqa

- A slide-out panel with the information opens.

00364112 ✕
Donald Poole

Start date 01/03/2017
End date 11/17/2017
Primary company
Vendor
Union
Job title
Union job title
Supervisor
Employment country

PIN *****

Override craft rates No
Currency USD - US Dollar
UoM Hour
ST rate
Use base wage factors No
OT factor
OT factor
OT rate
DT rate
Default cost center
Additional payroll instruction code
Allow override of the additional p... No
Status Active

5.7.3.1 Employee Rate Inheritance

To explain how employee rates are inherited, it is necessary to define additional terms.

Additional Rate Inheritance-Related Terms	
Term	Definition
Rate Codes	Accessible at the Project level, these exist as a 1:1 ratio to the Master Data Crafts and are traditionally used when a Project Employee will be assigned a role/craft on a specific project which differs from their normal Master Data Craft

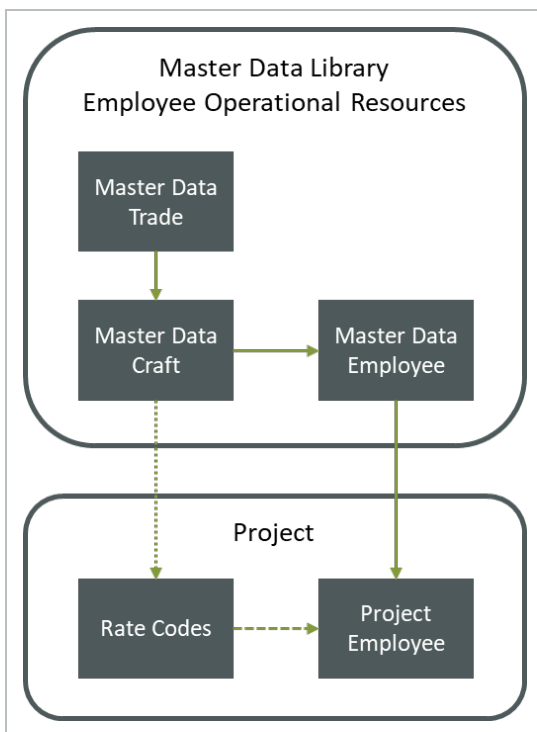
Additional Rate Inheritance-Related Terms

assignment. For example, if a contracted rate has been negotiated which differs from the employees standard Master Data Craft rate only for the given project.

Project Employee	Accessible at the Project level, a Project Employee is a Master Data Employee which has been assigned as a resource for a specific project. In addition to specified Project start/end dates, the employee will initially inherit the pay rates from the assigned Master Data Craft.
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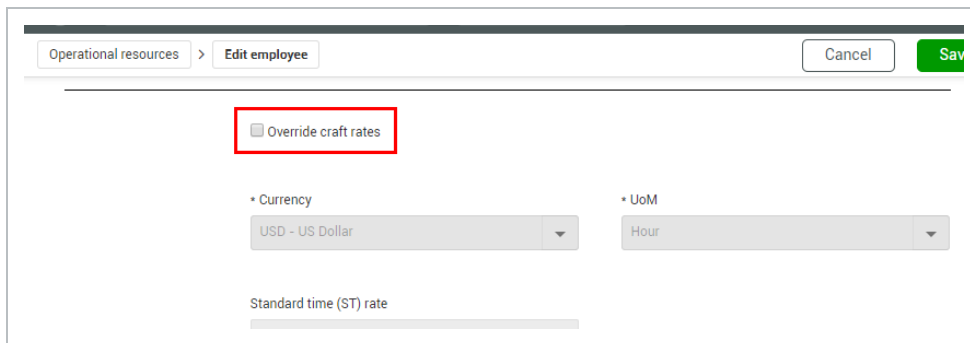
5.7.3.2 Employee Rate Inheritance Use Cases

There are five available options for rate inheritance, depending on your business process and use cases. For this section, as you review each use case, you can reference the following diagram which displays how rates flow and are inherited between levels within the master data library and projects.



Option 1: Full Inheritance (No Overrides)

This model can be used when the project employee pay rate agreement for a project follows the employee’s standard company rate. The employee record will automatically inherit the craft rate, with the **Override craft rates** option unchecked by default.



The screenshot shows the 'Edit employee' form in the 'Operational resources' section. At the top right, there are 'Cancel' and 'Save' buttons. Below the header, the 'Override craft rates' checkbox is unchecked and highlighted with a red box. Underneath, there are two dropdown menus: 'Currency' set to 'USD - US Dollar' and 'UoM' set to 'Hour'. At the bottom, there is a 'Standard time (ST) rate' input field.

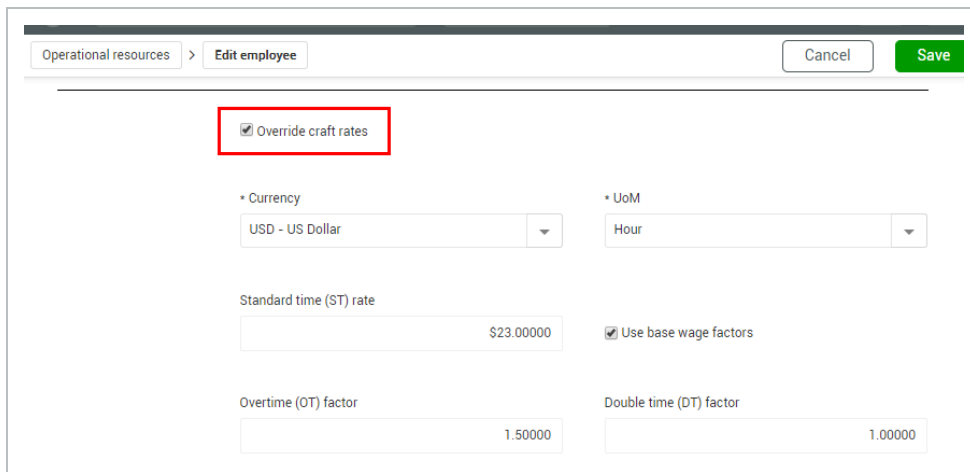
The advantage of this model is that any changes to the values of the master data employee records will automatically inherit down to the project employee.

From a top to bottom standpoint, the project employee's rates would be inherited first from the associated master data employee rates for that employee, which are themselves inherited from the associated master data craft.

The rate data flow is master data craft > master data employee > project employee. (*Project employee will inherit the rate of master data craft*).

Option 2: Master Data Employee Override

This model can be used when the normal standard rates for an employee initially differ or change from those of the associated master data craft. In the example below, Override craft rates is now checked and the Standard time (ST) rate has been changed to \$23/hour.



The screenshot shows the 'Edit employee' form with the 'Override craft rates' checkbox checked and highlighted with a red box. The 'Currency' dropdown is 'USD - US Dollar' and the 'UoM' dropdown is 'Hour'. The 'Standard time (ST) rate' is set to '\$23.00000'. There is also a 'Use base wage factors' checkbox which is checked. At the bottom, the 'Overtime (OT) factor' is set to '1.50000' and the 'Double time (DT) factor' is set to '1.00000'.

Like the "full inheritance" model, any changes to the master data employee will automatically inherit down to the project employee.

Since the master data employee record has been overridden, any changes to the associated master data craft will not inherit to the master data employee, and therefore the rates for the project employee will be held.

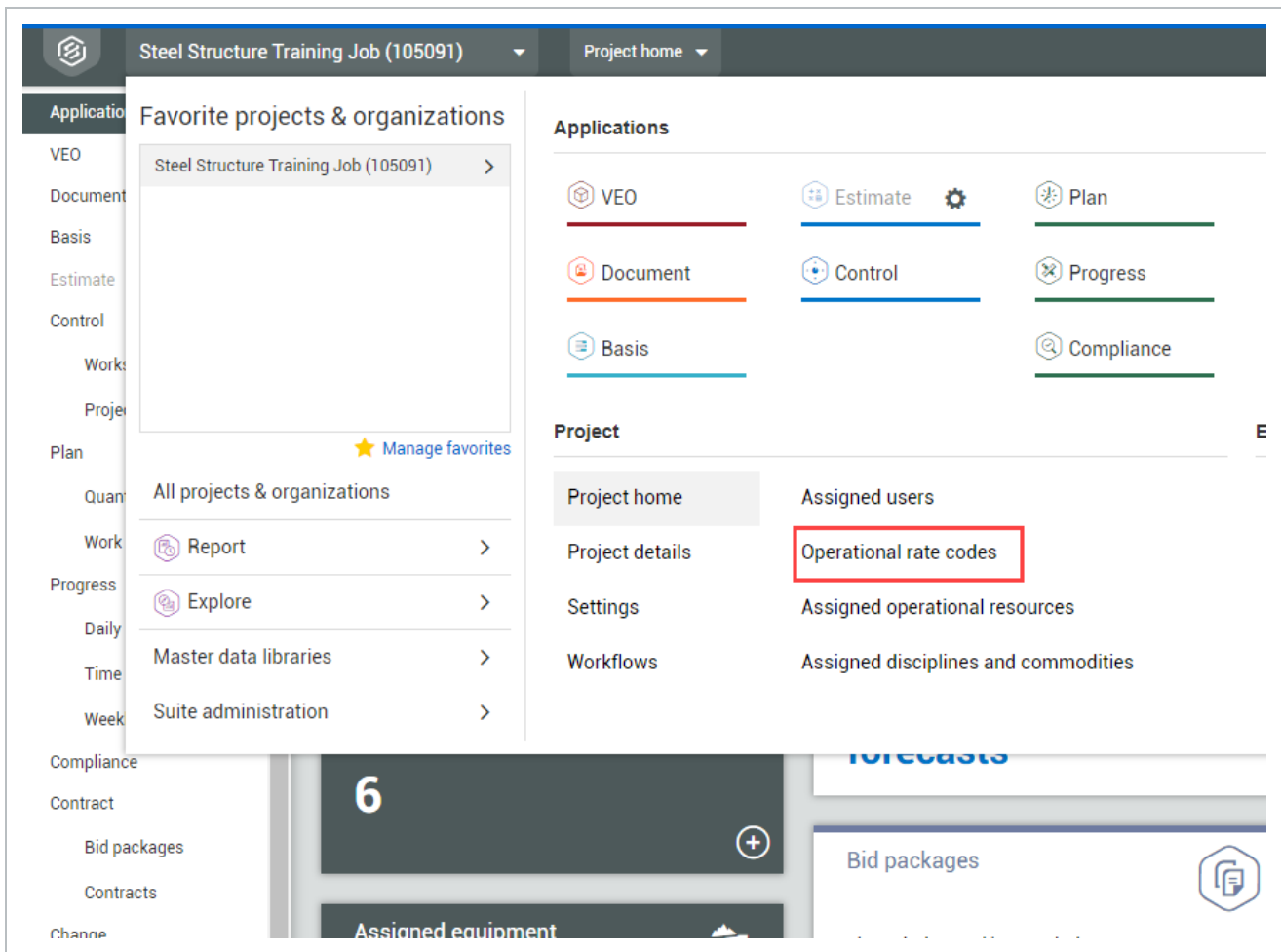
The rate data flow is master data employee > project employee. *(Project employee will have the override rate of master data employee).*

Option 3: Project Rate Code Assigned (No overrides)

This model can be used when the normal standard rates for a project employee differ from the employee's normal master data employee rates for the specific project or the employee will be performing craft duties outside their standard normal associated master data craft.

The advantage is that a rate code can be selected for the specific project employee and will only influence the pay rates for the employee on the specific project.

You can view the rate codes assigned by selecting **Operational rate codes** either from the level one or level two menus or from the left side bar on the Project home landing page.



This opens the Operational rate codes register, where you can view the rate codes assigned. Note that they are assigned at a craft level, which your project employees will generate their rates from.

EMPLOYEES				EQUIPMENT							
Rate code	Vendor	Union	Override	ST rate	Use bas...	OT fac...	DT f...	OT rate	DT rate	UoM	Craft
ABAC1-LEX	ABAC - ABACUS DATAGRAPH...		<input type="checkbox"/>	\$0.00000	<input type="checkbox"/>			\$0.00000	\$0.00000	Hour	ABAC1-LEX - Techn...
ALLP-LEO	ALLP - ALL POINTS TOWING ...		<input type="checkbox"/>	\$0.00000	<input type="checkbox"/>			\$0.00000	\$0.00000	Hour	ALLP-LEO - Labour
BADGO-LEO			<input type="checkbox"/>	\$0.00000	<input type="checkbox"/>			\$0.00000	\$0.00000	Hour	BADGO-LEO - Opera...
BOXX0-LBC	BOXX - BOXX MODULAR		<input type="checkbox"/>	\$0.00000	<input type="checkbox"/>			\$0.00000	\$0.00000	Hour	BOXX0-LBC - Buildi...
BURN0-LME	BURN - BURNT TIMBER LIFTL...		<input type="checkbox"/>	\$0.00000	<input type="checkbox"/>			\$0.00000	\$0.00000	Hour	BURN0-LME - Labour
CLIF1-LEX	CLIF - CLIFTON ASSOCIATES ...		<input type="checkbox"/>	\$0.00000	<input type="checkbox"/>			\$0.00000	\$0.00000	Hour	CLIF1-LEX - Techno...

Since rate code has been assigned, going forward the project employee’s rate will inherit from Rate code even if there has been a change to the employee’s associated master data employee rate. Additionally, changes to the master data craft associated to the rate code will automatically inherit to the project employee.

There are several use cases for this functionality from local project union rates to an employee performing work for the duration of the project outside their main craft.

The rate data flow is master data craft > rate code > project employee. (*Project employee will have rate of rate code, which is inherited from 1:1 association of master data craft*).

Option 4: Rate Code Override

This model can be used when the normal standard rates for a project employee differ from the employee's normal master data employee rates for the specific project or the employee will be performing craft duties outside their standard normal associated master data craft and the rates for the specific rate code itself differ from the standard associated master data craft.

You override rate code amounts by selecting **Override rate** on the Operational rate code page.

		EMPLOYEES		EQUIPMENT	
Rate code	Vendor	Union	Override rate	ST rate	Use bas...
ABAC1-LEX	ABAC - ABACUS DATAGRAPH...		<input checked="" type="checkbox"/>	\$38.00000	<input type="checkbox"/>
ALLP-LEO	ALLP - ALL POINTS TOWING ...		<input checked="" type="checkbox"/>	\$43.00000	<input type="checkbox"/>
BADG0-LEO			<input type="checkbox"/>	\$0.00000	<input type="checkbox"/>
BOXX0-LBC	BOXX - BOXX MODULAR		<input checked="" type="checkbox"/>	\$55.00000	<input type="checkbox"/>
BUDM0-LBC	BUDM - BUDM TIMBER LIFT		<input type="checkbox"/>	\$0.00000	<input type="checkbox"/>

Since the rate code has been overridden, any changes to the associated master data craft rates will not inherit to the rate code and therefore not inherit to the project employee.

The primary use case for this model is in the instance where there may be several employees on the same project performing the same type of work for the duration of the project outside their main crafts and the rate for that craft differs from the standard master data craft rate for the specific project.

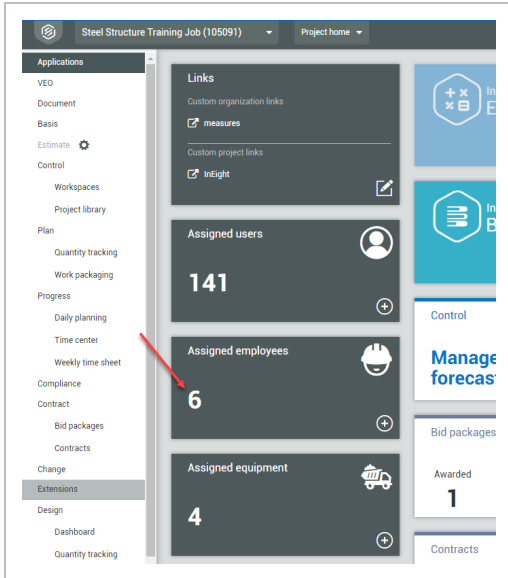
The rate data flow is rate code > project employee. (*Project employee will have the override rate of project craft*).

Option 5: Project Employee Override

This model can be used when all other standard rates for a specific project employee differ from the specific agreed upon project rate. You can override rates at the project employee level by navigating to the Assigned operational resources page from the Project home page.

5.7 Step by Step 2 — Override Rate on a Project Employee

1. From the Project home page on the Assigned employees tile, click Manage employees.



2. On the resulting Assigned operational resources page, check the Override rates check box for the project employee you want to edit.

Steel Structure Job (105091) - Assigned operational res...										
EMPLOYEES							EQUIPMENT			
Employee ID	Name	Master trade > craft	Rate code	Vendor	Union	Override rates	ST rate	Use b		
00012238	Kenneth Moore	CA - Carpenters > CACA - Carpe...				<input type="checkbox"/>	\$0.00000			
00187119	Ulysses Castro	LA_11 - Laborers > LAJM - Lab...				<input type="checkbox"/>	\$0.00000			
00199021	Colin Connolly	IW - Ironworkers (Structural) > L...				<input type="checkbox"/>	\$0.00000			
00240370	Darrell P Lewis	IW - Ironworkers (Structural) > L...				<input type="checkbox"/>	\$0.00000			
00240641	Nick J Cole	IW - Ironworkers (Structural) > L...				<input type="checkbox"/>	\$0.00000			
00342546	Troy Brown	IW - Ironworkers (Structural) > L...				<input type="checkbox"/>	\$0.00000			
00376348	John Walsh Jr	IW - Ironworkers (Structural) > L...				<input type="checkbox"/>	\$0.00000			
<input checked="" type="checkbox"/> 00383163	Danielle Shovel	ST - Trade Discription > STST - ...			MR bulk-006 - ...	<input checked="" type="checkbox"/>	\$50.00000			
00386639	Joseph Kelly	IW - Ironworkers (Structural) > L...				<input type="checkbox"/>	\$0.00000			
00391277	Richard Gushue	IW - Ironworkers (Structural) > L...				<input type="checkbox"/>	\$0.00000			

3. Click in the ST rate field of the project employee.

craft	Rate code	Vendor	Union	Override rates	ST rate	Use base wage factors
rs > CACA - Carpe...				<input type="checkbox"/>	\$0.00000	<input type="checkbox"/>
ers > LAJM - Lab...				<input type="checkbox"/>	\$0.00000	<input type="checkbox"/>
rs (Structural) > I...				<input type="checkbox"/>	\$0.00000	<input type="checkbox"/>
rs (Structural) > I...				<input type="checkbox"/>	\$0.00000	<input type="checkbox"/>
rs (Structural) > I...				<input type="checkbox"/>	\$0.00000	<input type="checkbox"/>
rs (Structural) > I...				<input type="checkbox"/>	\$0.00000	<input type="checkbox"/>
rs (Structural) > I...				<input type="checkbox"/>	\$0.00000	<input type="checkbox"/>
cription > STST - ...			MR bulk-006 - ...	<input checked="" type="checkbox"/>	5d	<input type="checkbox"/>

4. Change the rate.

Since the project employee rate has been overridden, any changes to any associated master data craft, master data employee, or rate code will not inherit to the project employee.

The primary use case for this terminal level override model is a specific project contract agreement pay rate for the specific project employee which may be a onetime only rate.

The rate data flow is only at project employee. *(Project employee will have the override rate entered at project employee).*

NOTE One of the integral pieces of the override logic is that when an override is in place, changes which occur “above” the override are not inherited. Therefore, for example, if you override a rate at the project employee level, a rate change “above” at the master data craft or master data employee level will NOT affect the already overridden project employee rate.

5.7.4 Equipment

Equipment operational resource records include details such as manufacturer, serial number, and ownership. Under the Status section, you can provide an availability status and location for the equipment, and when it was last inspected.

Under the Cost section, you can include a unit cost and assign it to a cost center for tracking purposes. The cost center can be inherited from the Craft level.

5.7.5 Materials

Materials like vendors come from import and there is no place in UI to add, edit or delete material resources. Materials do not operate on a tier, but information is accessible through filters. The variety

of filters offered will help you navigate and find the material information you will need on the project. It is important for you to be familiar with the manufacturer and type of material you are searching for.

Column	Operator	Value
ID	Starts with	
AND Name	Contains	
+ AND Product category	Contains	ID or description

5.8 PAYROLL INDICATORS

The payroll indicators master data, which includes allowances, employee premiums, and attendance types, provides a means that allow users of InEight Progress to give more information about an employee's compensation for the workday.

By configuring payroll indicators in master data and establishing a baseline, an administrator at the project level can easily assign available payroll indicators to project employees, so they have all applicable payroll indicators assigned when they are added to daily plans.

5.8.1 Considerations

With the applicable permissions, you can select the icon to add, edit, or delete master data payroll indicators. Permissions are configured in Roles and permissions > Master data libraries > **Payroll indicators**.

Permission Name	Description	Level
View payroll indicators	Allows the user to view the payroll indicator master data.	Base user
Add payroll indicators	Allows the user to create and add payroll indicators to master data.	Account Admin
Edit payroll indicators	Allows the user to modify existing payroll indicators in master data.	Account Admin

Permission Name	Description	Level
Delete payroll indicators	Allows the user to delete existing payroll indicators in master data.	Account Admin

5.8.2 Allowances

Allowances are extra pay that is made to an employee to cover expenses or compensate for specific working conditions, such as a travel per diem or mileage.

Name	ID	Notes	Activity type	Billing code	Required	Name - en	Name - es-MX	Nar
SB_EMP_PRE_001	SB_EMP_PRE_001	SB_EMP_PRE_001	Labor	SB_EMP_PRE	true	SB_EMP_PRE	SB_EMP_PRE	SB
Premiums-tc - main	Premiums-tc - main	Premiums-tc - main	Maintenance	3545674	true	Premiums-tc - main	Premiums-tc - main - espanol	Pre
Premiums-TC	Premiums-TC	test1	Labor	12345678	true	Premiums-TC	Premiums-TC - espanol	Pre
Premium-Oct13	Premium-Oct13	Premium-Oct13	Labor	Premium-Oc	true	Premium-Oct13	Premium-Oct13	Pre
Premium 20_oct_Main	PremiumID 20_oct_M...	Premium 20_oct_Main...	Maintenance	Premium 20	false	Premium 20_oct_Main	Premium 20_oct_Main	Pre
PremiumAuto_42700	PremiumAuto_03673	notee	Labor		false	PremiumAuto_42700	PremiumAuto_42700	Dra

Field Name	Description
ID	Unique identifier for the allowance.
Name	Name of the allowance.
Notes	Additional information about the allowance that shows in the daily plan for the project employee.
Billing code	Billing code associated with the allowance.
Required	When the value is set to <i>True</i> , the allowance is automatically assigned at the project level when a new project is created.
Auto Opt in	When the value is set to <i>True</i> , the allowance is made available to all active project employees.

5.8.3 Employee Premiums

Premiums are payroll instructions used to alter the base wage of an employee for a specific task or reason, such as premiums for work at heights or shift differential.

Name	ID	Notes	Activity type	Billing code	Required	Name - en	Name - es-MX	Nar
SB_EMP_PRE_001	SB_EMP_PRE_001	SB_EMP_PRE_001	Labor	SB_EMP_PRE	true	SB_EMP_PRE	SB_EMP_PRE	SB
Premiums-tc - main	Premiums-tc - main	Premiums-tc - main	Maintenance	3545674	true	Premiums-tc - main	Premiums-tc - main - espanol	Pre
Premiums-TC	Premiums-TC	test1	Labor	12345678	true	Premiums-TC	Premiums-TC - espanol	Pre
Premium-Oct13	Premium-Oct13	Premium-Oct13	Labor	Premium-Oc	true	Premium-Oct13	Premium-Oct13	Pre
Premium 20_oct_Main	PremiumID 20_oct_M...	Premium 20_oct_Main...	Maintenance	Premium 20	false	Premium 20_oct_Main	Premium 20_oct_Main	Pre
PremiumAuto 42790	PremiumAuto 93573	notes	Labor		false	PremiumAuto 42790	PremiumAuto 42790	Pre

Field Name	Description
ID	Unique identifier for the premium.
Name	Name of the premium.
Notes	Additional information about the premium that shows in the daily plan for the project employee.
Activity type	Defines the activity as either labor or maintenance.
Billing code	Billing code associated with the premium.
Required	If the value is set to <i>True</i> , the premium is automatically assigned at the project level when a new project is created.

5.8.4 Attendance Types

Attendance types provide a method to identify employee hours during a normal workday, such as excused absence with pay, unexcused absence, and jury duty.

added.

Field Name	Description
ID	Unique identifier for the attendance type.
Name	Name of the attendance type.
Notes	Additional information about the attendance type that shows in the daily plan for the project employee.
Billing code	Billing code associated with the attendance type.
Required	If the value is set to <i>True</i> , the attendance type is automatically assigned at the project level when a new project is created.
Allow hours	If the value is set to <i>True</i> , the time entry field in InEight Progress is editable, and a value can be entered for the employee absence.
Sign in/Sign out required	Indicates if sign out on the daily plan is expected for the employee.

Related topics:

[Assigned payroll indicators](#)

[InEight Progress - Organization Settings](#)

5.9 PROJECT VALUE TYPES

Project value type master data provides standardized data that can be shared and used across multiple InEight applications. Project value types in the InEight cloud platform represent the different entities common in construction and engineering work. The system managed project value types include Area, Segment, System, Subsystem, Construction commodity, and Work classification. A business can also configure their own standard entities in the system. These project value types with their associated attribute data fields are configured at a project level to help organize and store pertinent scope information used for filtering and reporting.

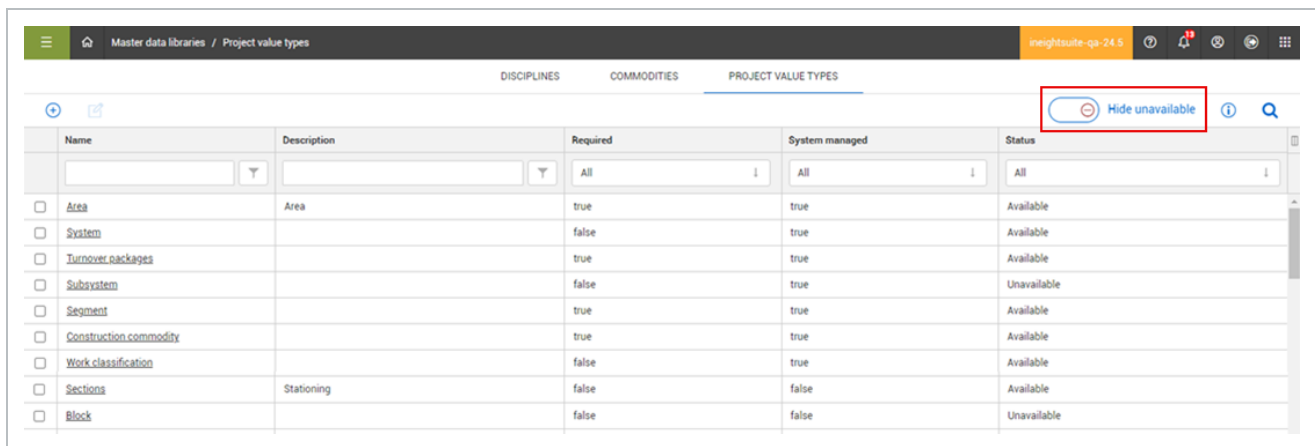
5.9.1 Considerations

With the applicable permissions, you can select the icon to add or edit master data project value types. Permissions are configured in Roles and permissions > Master data libraries > **Project value types**.

Permission Name	Description	Level
View project value types	Allows the user to view the list of available project value types in master data.	Base user
Add project value types	Allows the user to create and add project value types to master data.	Account Admin
Edit project value types	Allows the user to modify existing project value types in master data.	Account Admin

5.9.2 Project value types master data

The Project value types master data page shows a list of all the values created. By default, the Hide unavailable toggle is set to *On*, which filters the list to show only the available project value types that can be assigned to a project. You can change the Hide unavailable toggle to *Off* to show all existing project value types that were created.



Field Name	Description
Name	Unique identifier of the project value type. The name of system managed project value types cannot be edited.
Description	Brief description of the project value type.
Required	If the Required field set to <i>True</i> , the project value type is automatically included in the data set of predetermined values that are available when a new project is created and is also pushed out to existing projects. Required can only be selected when the status of the project value is set to <i>Available</i> . If the Required field set to <i>False</i> , the project value type can still be added from master data at

Field Name	Description
	the project level.
System managed	Set of project value types that are always listed in master data. These values are Area, Segment, System, Subsystem, Construction commodity, and Work classification. The names of system managed value types cannot be changed.
Status	Set the status to <i>Available</i> to allow the project value type to be assigned to projects. When the status is set to <i>Unavailable</i> and the Hide unavailable toggle is <i>On</i> , the project value type does not show in the list on the master data page.

To create a new project value type, click the **Add** icon. Fill in the necessary fields, and then click **Save**.

NOTE

When you add a new project value type in master data, do not initially set it to be required before assigning attributes. If you save project value type initially as required, the attributes will not show assigned at the project level. Instead, create the new project value type, save it, and then assign attributes. Next, select the project value type, then edit it and select the **Required** check box.

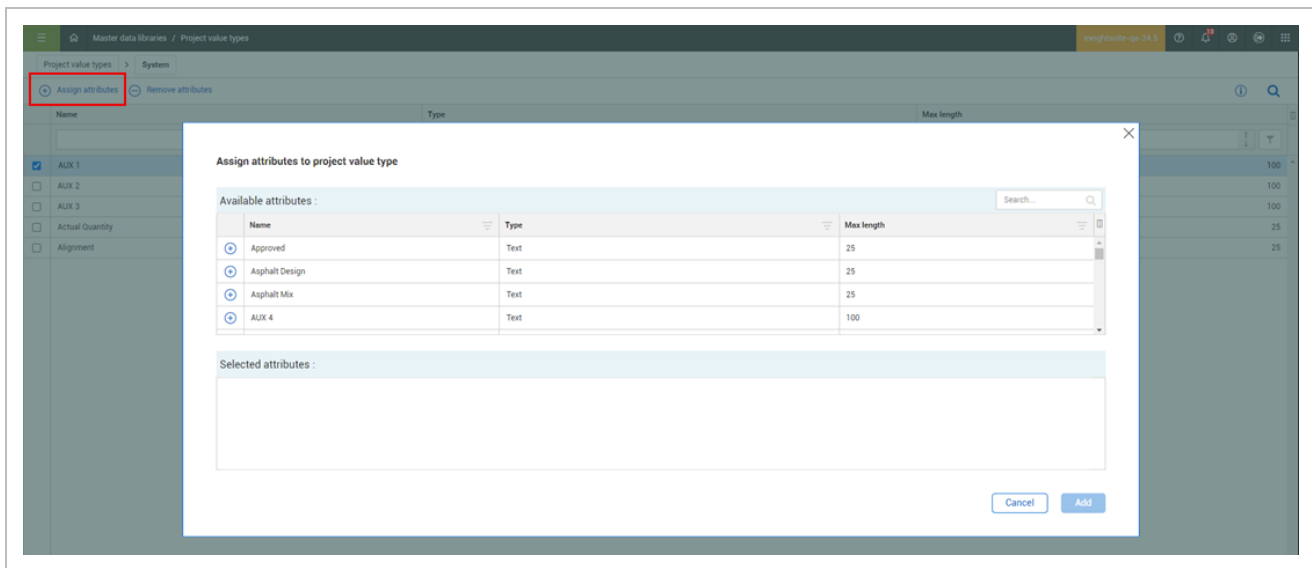
To edit a project value type, select an item from the list, and click the Edit icon. You can change the name, description, or change the Required setting. After a project value type is created in master data it cannot be deleted. You can set the status of the project value type to Unavailable, which hides it at the project level so it cannot be selected and assigned. However, if a project value type is already assigned to a project, then the project value type will still be available in the project.

To edit a project value type, select an item from the list, and click the **Edit** icon. You can change the name, description, or change the Required setting.

After a project value type is created in master data it cannot be deleted. You can set the status of the project value type to *Unavailable*, which hides it at the project level so it cannot be selected and assigned. However, if a project value type is already assigned to a project, then the project value type will still be available in the project.

5.9.3 Assigned attributes

Click the name of the project value type to show a list of attributes assigned to it. If you have the applicable permissions, you can assign or remove attributes associated with the project value type.



To add an attribute to the project value type, click **Assign attributes**. A dialog box opens and shows a list of the attributes available in master data. Select the attributes that you want to assign to the project value type, and then click **Add**. If the attribute is associated to a project value type that is required, it is added to all projects. If the project value type is not required, the attribute will only be added to new projects.

To remove an attribute associated to the project value type, select an attribute or attributes, and then click **Remove attributes**. Removing an attribute only impacts new projects, not existing projects where the project value type is assigned.

5.10 QUALIFICATIONS

Qualifications are used to assign inspection tasks to people or equipment. For example, a person with a forklift qualification would be able to inspect that forklift. Qualifications are assigned in your ERP system, but you can view them here. Qualifications are used in InEight Compliance.

NOTE

With the proper permissions, you can add new qualifications manually.

5.10 Step by Step 1 — View Qualification

1. From the Main menu, select Master Data Libraries > **Qualifications**. The Qualifications page opens and shows all the Qualifications, name and type of qualifications.

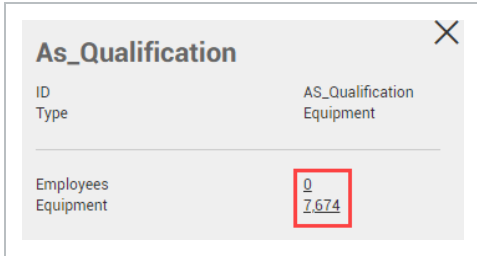
Qualification ID	Name	Type
7776	Add qualification	Equipment
Apart from counting words and characters, our onl...	To check word count, simply place your cursor into the text box above a...	Safety
AS_Qualification	As_Qualification	Equipment
AS_Qualification AS_Qualification AS_Qualificat...	AS_Qualification AS_Qualification AS_Qualification AS_Qualification AS...	Equipment
AS_Qualification1 AS_Qualification1 AS_Qualificat...	AS_Qualification1 AS_Qualification1 AS_Qualification1 AS_Qualification...	Equipment
AS_QualificationAS_QualificationAS_Qualificat...	AS_QualificationAS_QualificationAS_QualificationAS_QualificationAS_Q...	Safety

2. Select the **Qualification**, and then click the **Information** icon.

Qualification ID	Name	Type
Apart from counting words and characters, our online ...	To check word count, simply place your cursor into th...	Safety
<input checked="" type="checkbox"/> AS_Qualification	As_Qualification	Equipment
AS_Qualification AS_Qualification AS_Qualification AS...	AS_Qualification AS_Qualification AS_Qualification AS...	Equipment
AS_Qualification1 AS_Qualification1 AS_Qualification1 ...	AS_Qualification1 AS_Qualification1 AS_Qualification1 ...	Equipment
AS_QualificationAS_QualificationAS_QualificationAS...	AS_QualificationAS_QualificationAS_QualificationAS...	Safety
AS_test	AS_test_009	Equipment

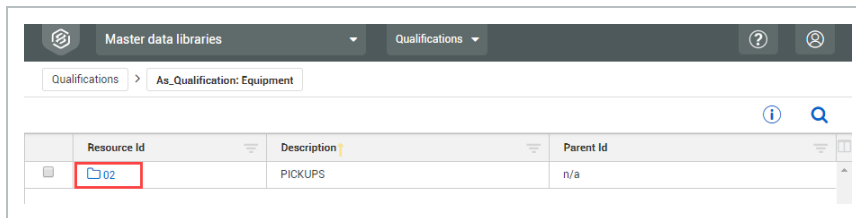
- The information slide-out panel opens. Employees and Equipment show with or without numbers.

3. Select the **number** link next to either Employees or Equipment.

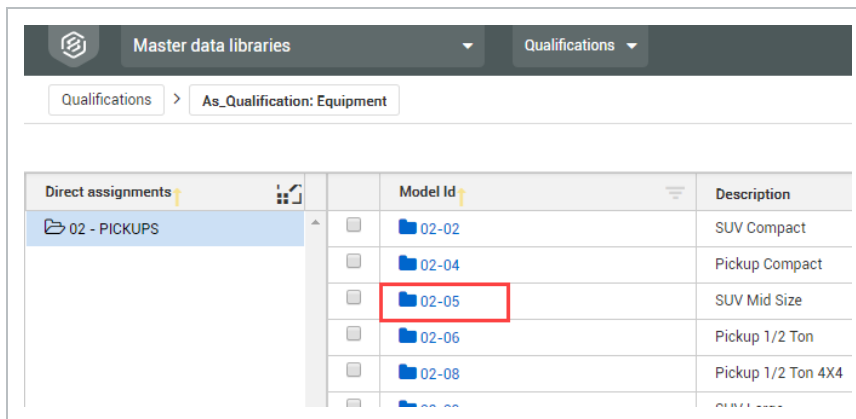


4. Click through file structure to get to list of equipment or employees.

- Click the **Resource ID**



- Click on the **Model ID**



- The list of the Equipment or Employees will appear

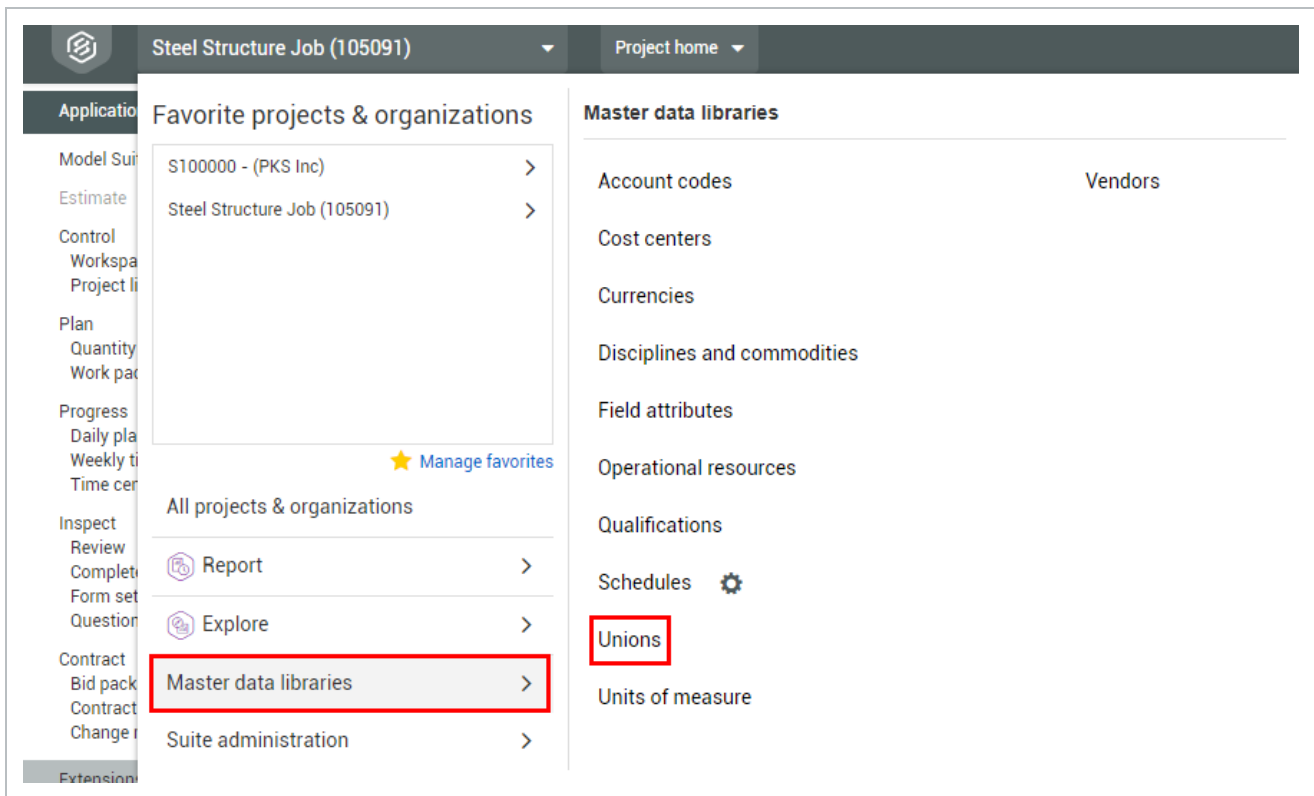
The screenshot shows a web application interface for 'Master data libraries'. At the top, there are tabs for 'Master data libraries' and 'Qualifications'. Below this, a breadcrumb trail shows 'Qualifications > As.Qualification: Equipment'. The main content area is a table with the following columns: 'Direct assignments', 'Model Id', 'Equipment ID', 'Description', and 'Ownership'. The 'Direct assignments' column shows a tree view with '02 - PICKUPS' selected. The 'Model Id' column lists various vehicle models like '02-02 - SUV Compact' and '02-05 - SUV Mid Size'. The 'Equipment ID' column contains numerical values, and the 'Description' column lists vehicle models like 'FORD-4X4 XLT' and 'FORD-EXPLORER'. The 'Ownership' column indicates that all listed vehicles are 'Owned'.

Direct assignments	Model Id	Equipment ID	Description	Ownership
02 - PICKUPS	02-02 - SUV Compact	103196	FORD-4X4 XLT	Owned
	02-04 - Pickup Compact	103201	FORD-EXPLORER	Owned
	02-05 - SUV Mid Size	106727	FORD-ESCAPE	Owned
	02-06 - Pickup 1/2 Ton	106728	FORD-ESCAPE	Owned
	02-08 - Pickup 1/2 Ton 4X4	106941	FORD-EXPLORER	Owned
	02-09 - SUV Large	107309	FORD-EXPLORER	Owned
	02-10 - Pickup 3/4 Ton	107373	FORD-EXPLORER	Owned
	02-12 - Pickup 3/4 Ton 4X4	107783	FORD-EXPLORER	Owned
	02-16 - Van Compact	108349	FORD-EXPLORER	Owned

5.11 UNIONS

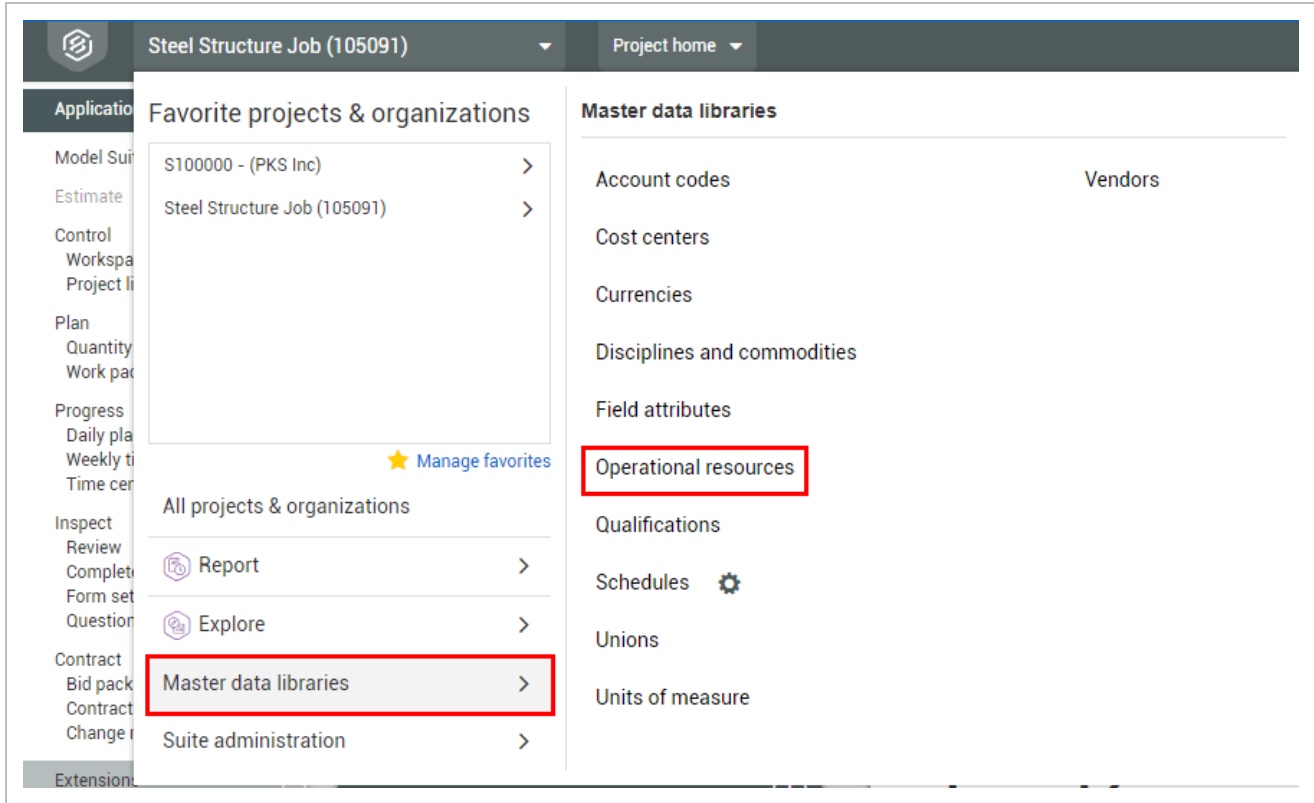
The Unions master data library gives you the ability to associate Master Data employees or crafts to a local union as required by the organization. Union data was initially imported from your external system as part of your company’s implementation of the InEight Platform.

To access the Unions master data library, new Union permissions must be assigned to your role. Once assigned, you access Unions by navigating to the first level menu, clicking **Master Data Libraries** and then selecting **Unions**. This will take you to the Unions page.

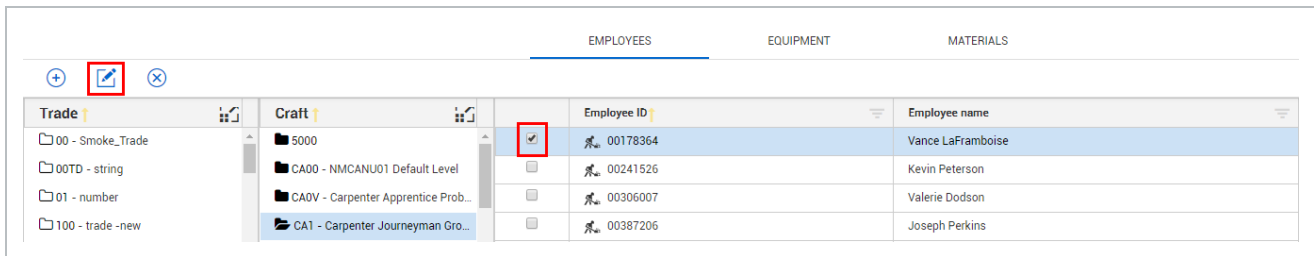


You can associate the unions listed in your Unions master data library with your employee operational resources by opening either the craft or employee within the Operational resources master data library and editing the Union field.

To view or edit Union association for an Operational Resource Craft or Employee, from the Main menu, select Master Data Libraries > **Operational Resources**.






Then select **Employees** tab. Select a Trade, Craft, and then an employee. Then click the **Edit** icon.



Now edit the **Union** field under Employee Details.

Employee details

 + Add employee image	* Employee ID <input type="text" value="00178364"/>	
	* First name <input type="text" value="Vance"/>	* Last name <input type="text" value="LaFramboise"/>
	Start date <input type="text" value="10/10/2017"/> 	End date <input type="text" value="12/31/9999"/> 
	Primary company <input type="text"/>	Vendor <input type="text"/> <i>Hint: type vendor name or ID</i>
	Union <input type="text"/> <i>Hint: type the union ID or description</i>	* Craft <input type="text" value="CA1 - Carpenter Journeyman Group 1"/>

NOTE

Operational employee resources will inherit the Union associated from the Operational craft assignment. To change an Operational employee resource's Union association, either the Operational craft's Union association must be modified, or the Operational employee resource's craft assignment must be modified.

5.11.1 Union Use Cases

Optionally combining Union and Vendor associations further enhances the security of your account level information by restricting visibility to employee Union association information dependent on a user's Vendor assignment.

Once consumed by other applications such as InEight Progress and Time Center, Unions will allow you to assign Allowances, Premiums and other characteristics to multiple employees associated with the selected Union.

5.12 UNITS OF MEASURE

The Units of measure page contains all the units you may use on a project. From the Main menu, select Master Data Libraries > **Units of Measure**. The Units of Measure page opens.

Each unit of measure comes with details, as indicated below:

Unit of Measure Details

Term	Definition	Example
Term	Definition	Example
Name	The name of the unit of measure.	Yard
Measurement type	Indicates whether the unit is area, length, volume, power, unit, or weight.	Length
Base UoM	What the unit of measure references to relate to other units of measure.	Meter
Conversion factor	Provides the factor to convert the unit of measure to its Default alternate measurement.	0.9144000
Measurement system	Indicates if the unit of measure is English or Metric.	English
Default alternate measurement	The measurement the unit of measure converts to by default.	Meter

NOTE With the required permissions, you can add new units of measure manually.

5.13 VENDORS

The Vendors page is a list of all the vendors that your company uses. This list is referenced and used by the various InEight applications. To access your list of vendors, From the Main menu, select Master Data Libraries > **Vendors**.

NOTE Vendors can only be added by import from your ERP system.

5.13.1 Vendor Use Cases

When using other InEight applications, you can access your list of vendors as needed via drop-down vendor-related fields.

For owners and prime contractors that have invited users from other companies to access your environment, you can assign them to a vendor code and description, so they can only view the operational resources tagged for that vendor. This is an effective way to secure your resources and their rates, so each contractor only sees the rates that pertain to them.