## QUICK GUIDE – QUANTITY TRACKING



#### BUILD A CLAIMING SCHEME

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



- 2. Select a discipline or commodity from the left menu.
- 3. Click the **Add** icon on the left toolbar.

Ξ			Plan / Quantity tracking
	Components > Disciplines and claiming s	chem	es
	Ð <b>(† 19</b>		
	DISCIPLINES COMMODITIES		Name Metals
	Job Related Overhead	^	WBS
	Mechanical Equipment		
•	Metals		
	Mining		

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



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

	Name	Erect Steel-Heavy				+ Add step
-	Step na	me	% claiming	Schedule group	Activity ID format	0
	Step 1		100			<b>^</b>

6. Rename the new steps and add rule types and percentages.

•	Step name	Rule type	% claiming	_
	Shakeout/Transport	Construction Step	15	<b>^</b>
	Erect/Bolt Up	Construction Step	45	$\otimes$
	Final Torque	Construction Step	40	$\otimes$

7. Click Save.

#### EDIT CLAIMING SCHEMES

- 1. From the Actions drop-down menu, select **Manage claiming schemes** to return to the Disciplines and claiming schemes page.
- 2. Select a claiming scheme from the left menu.
- 3. In the center panel, select a field to make changes.

	Components > Disciplines and claiming scher	nes Claiming Scheme Deta	ils 🕂 Assign WBS	S 🗐 Assign Account Code				
	) <b>()</b> () ()			Cancel	ive			
	DISCIPLINES COMMODITIES	Name Erect Steel - Heavy		(+) A0	d step			
-	Mechanical Equipment	Step name	Rule type	% claiming				
	Metals	Shakeout/Transport	Construction Step	15				
	Bolted Connections	Erect/Bolt Up	Construction Step	45	$\otimes$			
	Erect Steel - Light	Final Torque	Construction Step	40	$\otimes$			
	Erect Steel - Heavy							
	Mining							

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#### ASSIGN WBS TO CLAIMING SCHEME

- 1. From the **Disciplines and claiming schemes** page, select a claiming scheme from the left menu.
- 2. Select the Assign WBS tab from the top menu.

plines and	claiming	schemes	Ľ	Claiming S	Scheme Details	🕂 Assign WBS	🛄 Assign Acc
a 🕻		Q					
ES	COMMO	DDITIES		Name			
			*	WBS			WBS descriptio
: Steel - H	leavy		$\otimes$				

#### 3. Click Add WBS.



4. Click the Add icon to select a WBS.

Add V	/BS								
Avail	abe account o	code		Search	n by V	/BS	•		
	WBS	WBS descrip	Disci	pline		Claiming	Sc		Accou
	1071	0-m-mt							01
•	1071	Concrete							UI
<b>B</b>	1074	Erect Steel - Heavy	Mate	1-		Errort Oto			
Ð		Erect Steel - Light	Meta	IS		Erect Ste	el - Li	ght	

5. When finished, click **Done** at the bottom of the slide-out panel.

#### • EXPORT CLAIMING SCHEMES

1. Click the **Export** icon from the top left menu.

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Ð	٦		Q
		соммо	

3. Select a destination project from the list.



4. Click Send.

#### IMPORT CLAIMING SCHEMES

1. Click the **Import** icon from the top left menu.



2. Select a project from the list.

Project ID		Project Name		Status	Organization	
183850		Warde Jeland WWTP		Active	C-XXZ	
163630		Hurds faidlig HWTF		APRILE.	V-016	
Heavy PM Estima	ate	Heavy PM Estimate	Լիդ	Active	C-XYZ	

4. Click **Select**.

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