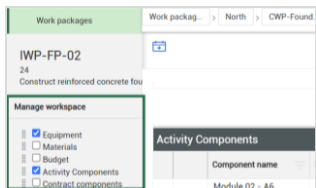


CREATE A DAILY PLAN FROM AN IWP

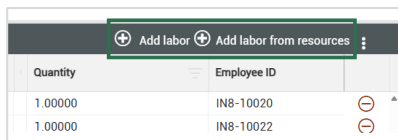


SET UP AN IWP

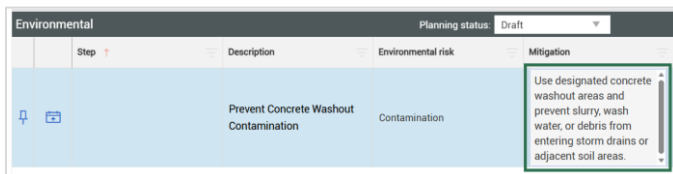
1. From Plan Work Packaging, open an IWP.
2. On the Overview tab, add high-level details and assigned personnel.
3. On the Workspace tab of an IWP, select the check boxes in the Manage workspace panel to add data blocks.



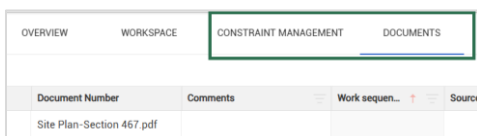
4. In each data block, use the **Add** icons to add relevant details.



5. For items with free text fields, click inside the cell to enter details as needed.

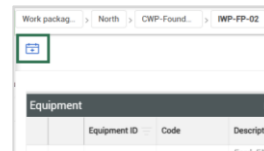


6. Add constraints and documents as needed.

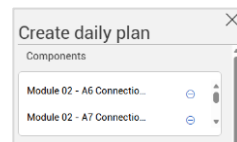


CREATE DAILY PLAN

1. From the Workspace tab, click the **Daily Plan** icon at the top of the page.

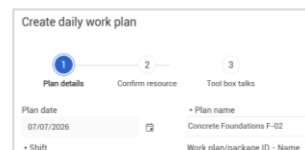


2. On the Create daily plan slide-out panel, review elements of the daily plan. You can delete elements if needed. Then click **Next**.



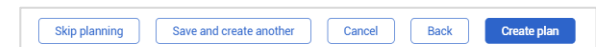
3. In the Create daily work plan window, enter the plan name, approvers and executors, and any planner notes. Then click **Next**.

- **Note:** Approvers and executors are configured in Suite Administration and must be assigned at the project level.



4. On the Confirm resource step, review the components and operational resources assigned to this daily plan. Click the **X** icon to remove a resource. Then click **Next**.

5. On the Tool box talks step, review your Safety, Quality, and Environmental notes.
6. To create the daily plan, select one of the options from the bottom of the window.



- Select **Create plan** to open the new plan in the Planning phase.
- Select **Save and create another** to create the plan and return to Work Packaging.
- Select **Skip planning** to open the new plan in the Execution phase.
- **Note:** Plans in the Execution phase cannot return to the Planning phase.

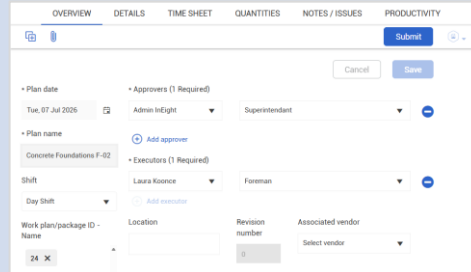
CREATE A DAILY PLAN FROM AN IWP

COMPLETE THE DAILY PLAN

Open the daily plan in Progress Daily Planning to complete the details.

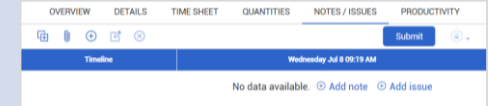
Overview Tab

- Includes details added in the Create daily plan window.
- Note the IWP is associated under Work plan/package ID.
- Add an Associated vendor if needed.



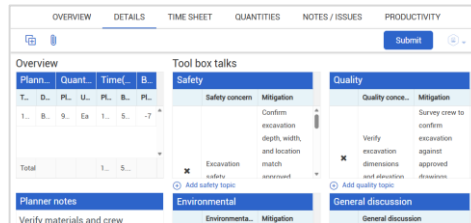
Notes/Issues Tab

- Add notes as needed.
- Issues will be sent to InEight Change.



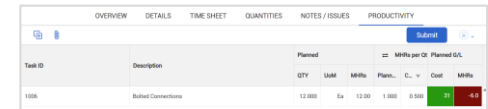
Details Tab

- See a summary of planned tasks, tool box talks, and planner notes.
- Add General discussion topics as needed.



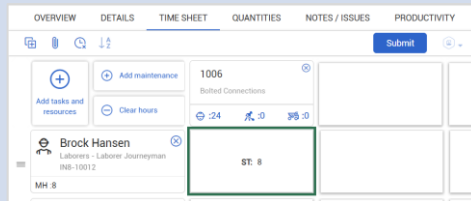
Productivity Tab

- See productivity calculations based on planned hours and quantities.



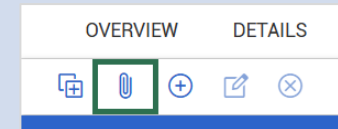
Time Sheet Tab

- Click the white resource tile to input planned hours for operational resources.



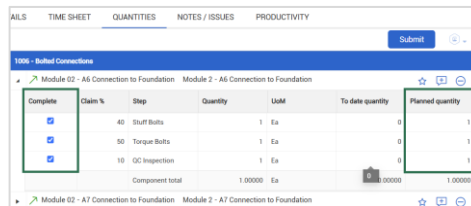
Links and Attachments

- The Links and attachments icon can be accessed from any tab.
- Click the **Links and attachments** icon to manage attachments to the daily plan.



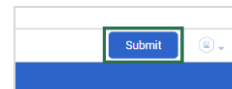
Quantities Tab

- Enter planned quantities for each component.
- Use the **Complete check boxes** to indicate 100% of the quantity as planned.
- Use the **Planned quantity** field to enter a custom planned quantity.



SUBMIT THE DAILY PLAN

- To submit a daily plan for Execution, click **Submit**.



- A dialog box prompts you to confirm your selection. Click **Yes** to confirm.