

PLAN USER GUIDE



Release 25.5
Last Updated: 24 June 2025

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LESSON 1 – WORK PACKAGING OVERVIEW

1.1 PLAN WORK PACKAGING OVERVIEW

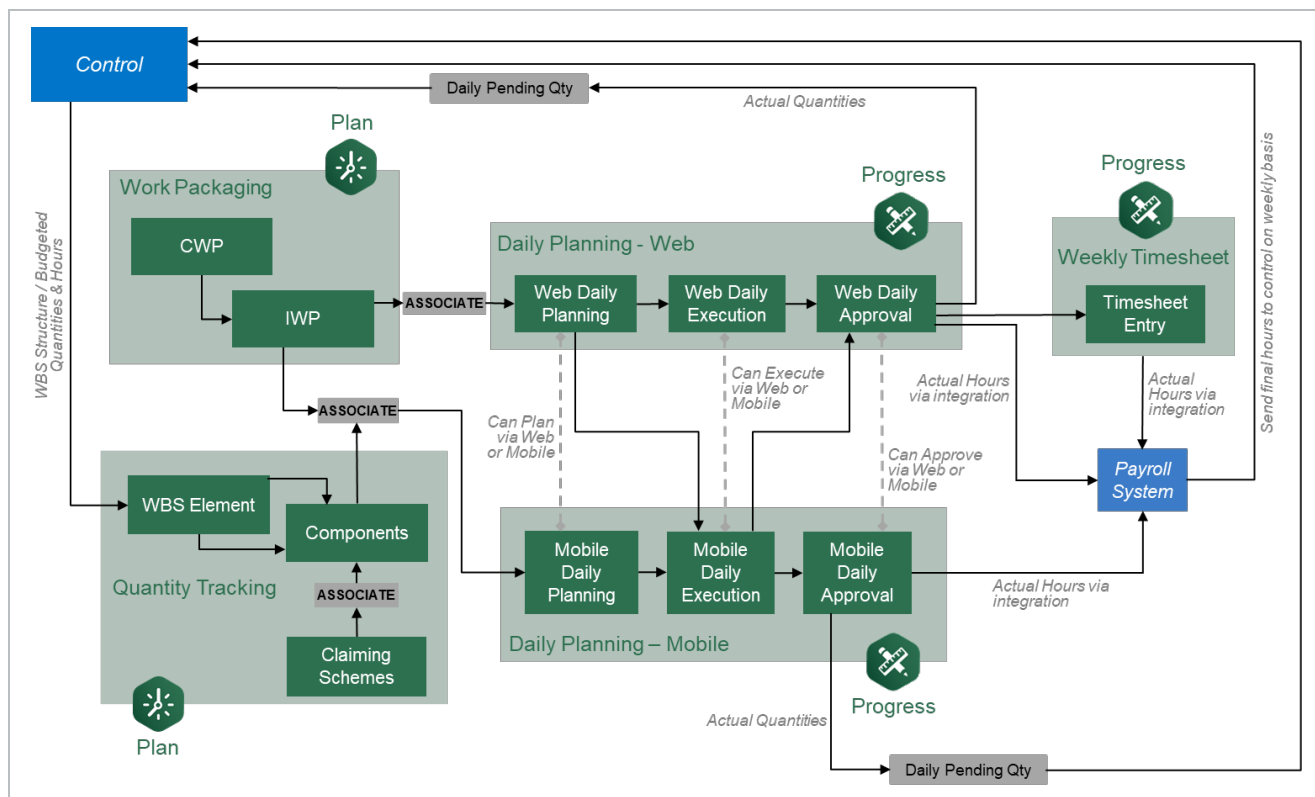
InEight Plan is an application within the InEight portfolio of products. It is a tool for engineers and superintendents to plan their work and track quantities during the construction of the project.

InEight Plan is organized into two modules:

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

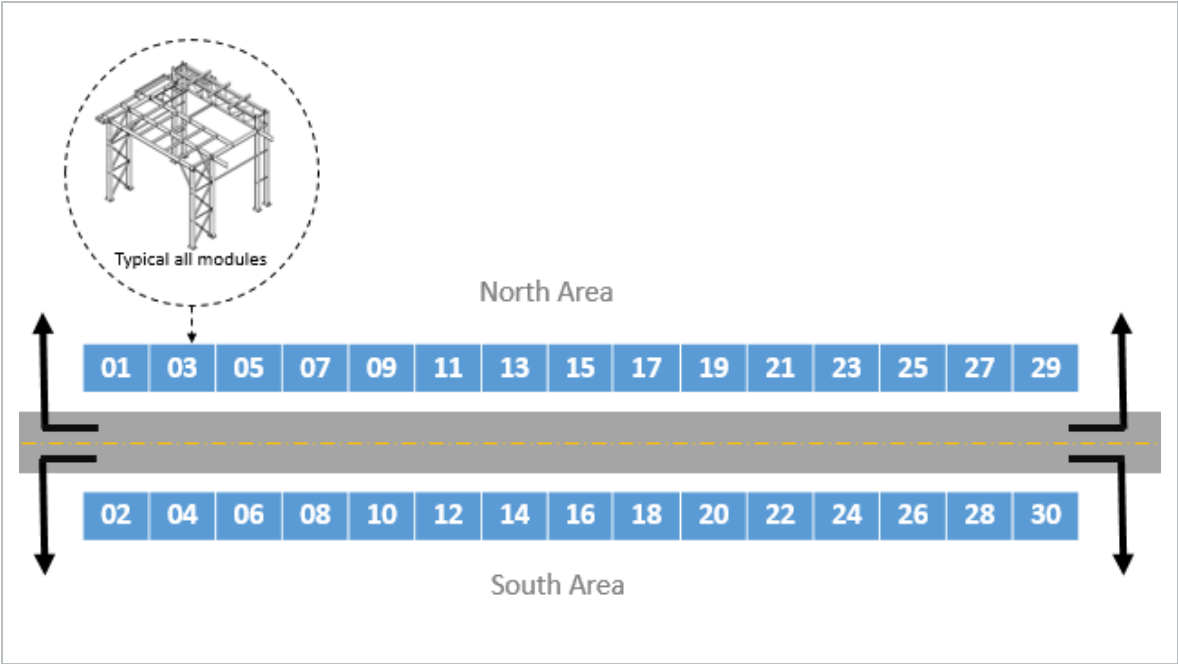
1.1.1 INEIGHT PLAN WORK FLOW

The below workflow illustrates the functions of both InEight Plan and InEight Progress, and how data flows between the two applications.

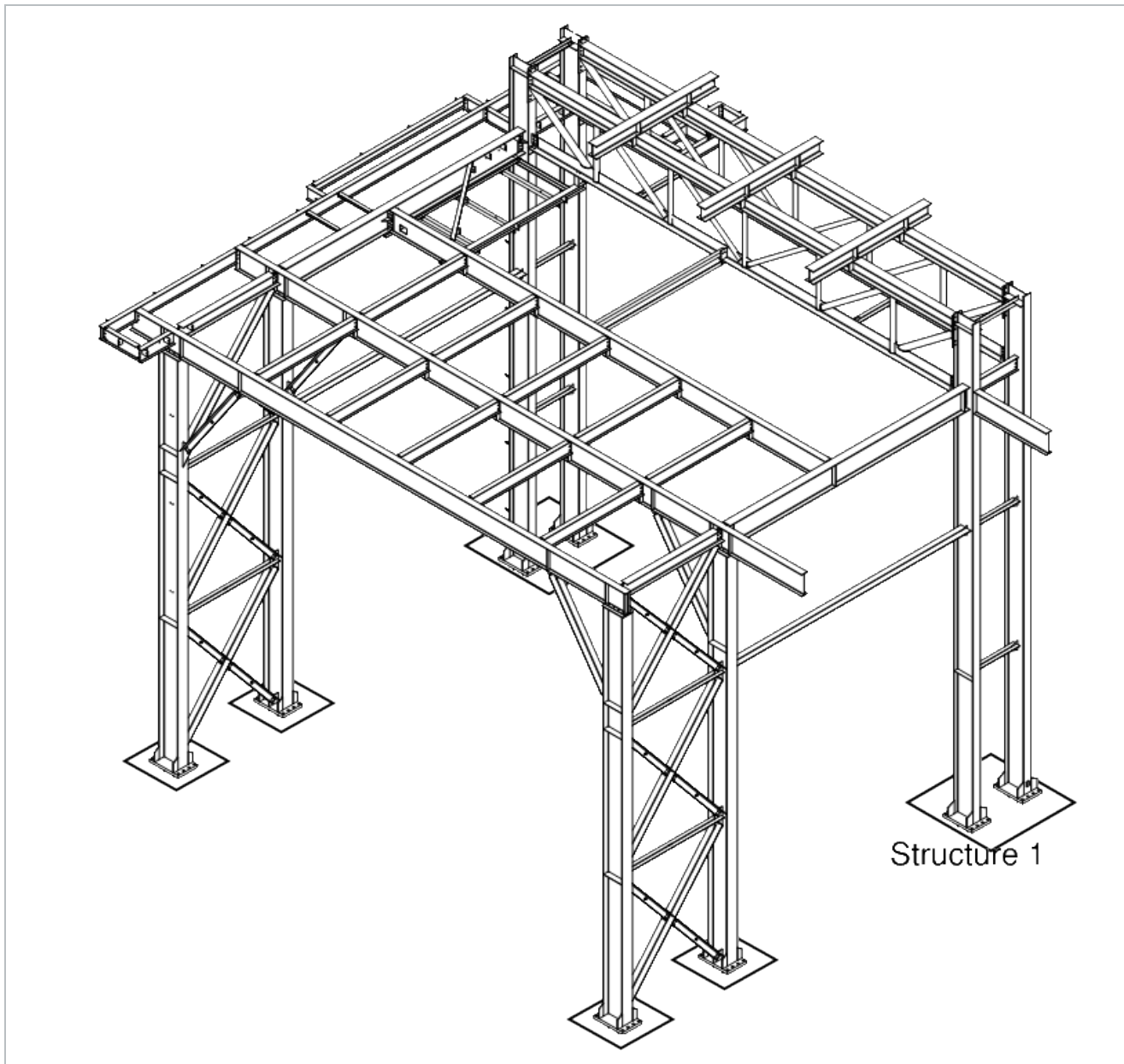


Scenario

You are a Project Manager about to start construction of a Steel Structure project. Your first step before starting construction is to break the project down into pieces that are more manageable.

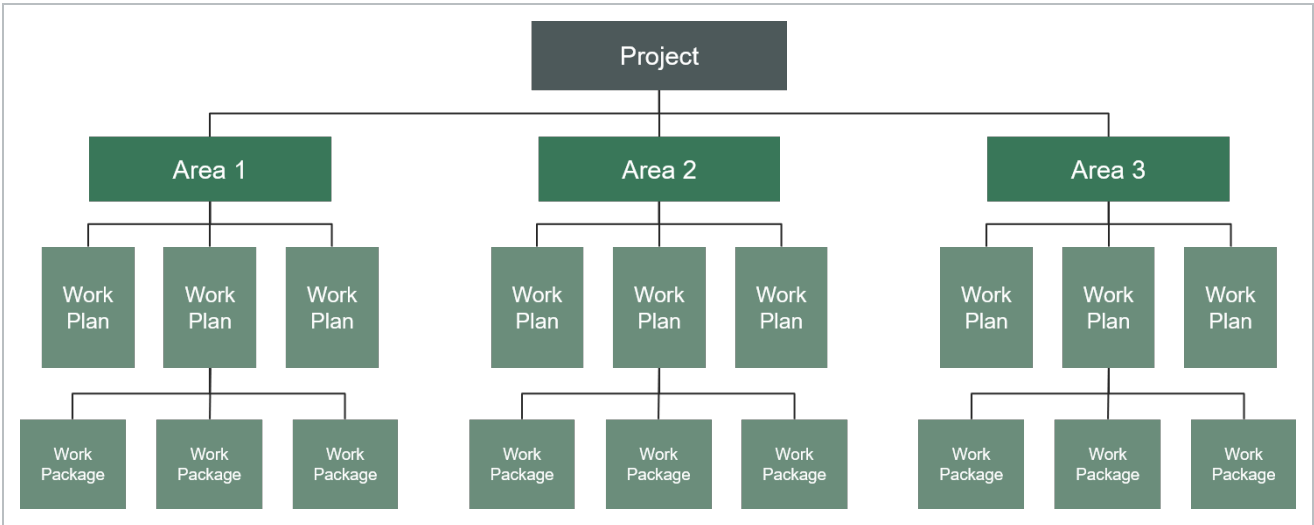


The image below depicts a layout for a steel structure project. The project consists of erecting 30 separate steel structures on opposite sides of a road. Each structure or module has been assigned a number 1-30.

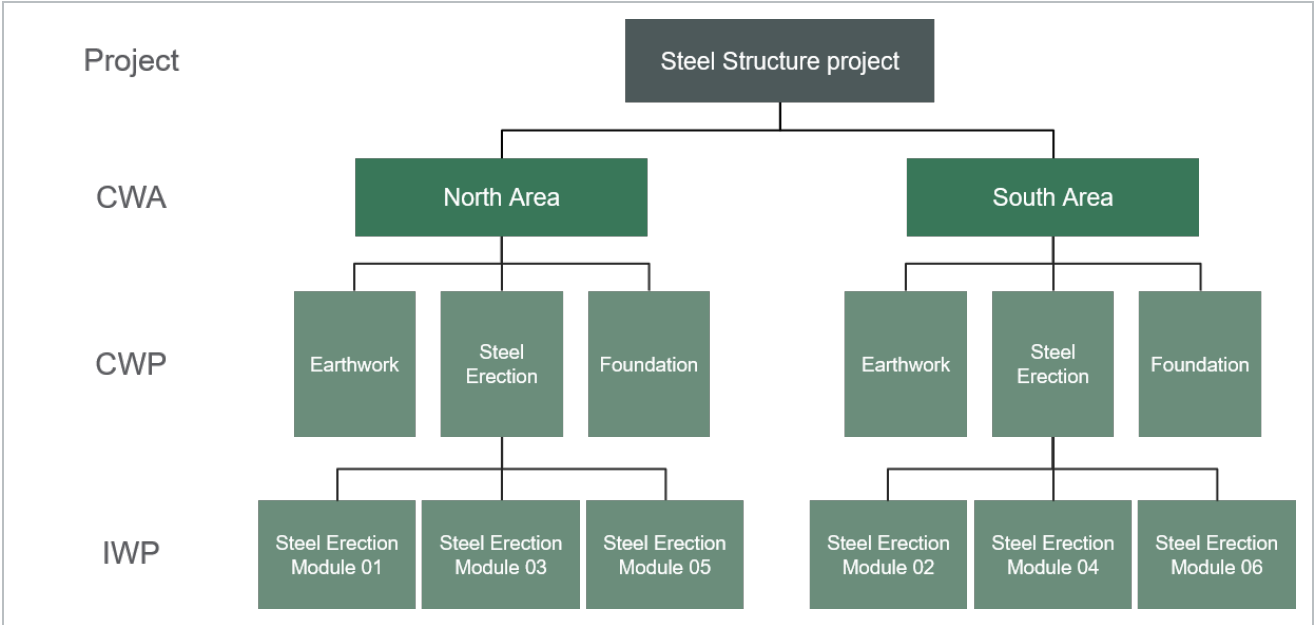


1.1.2 WORK PACKAGING

Work Packaging breaks down projects into small, manageable scopes of work so that operations can be assigned to responsible supervision, executed, and tracked effectively. In InEight Plan, you can break the work of your project into construction work areas (CWAs), construction work packages (CWPs) and installation work packages (IWPs).



As mentioned in the scenario above, the scope of the Steel Structure project was too big to manage without segmenting it down to work packages representing one to four weeks’ worth of work. In Plan, this breakdown of the project could look like this:

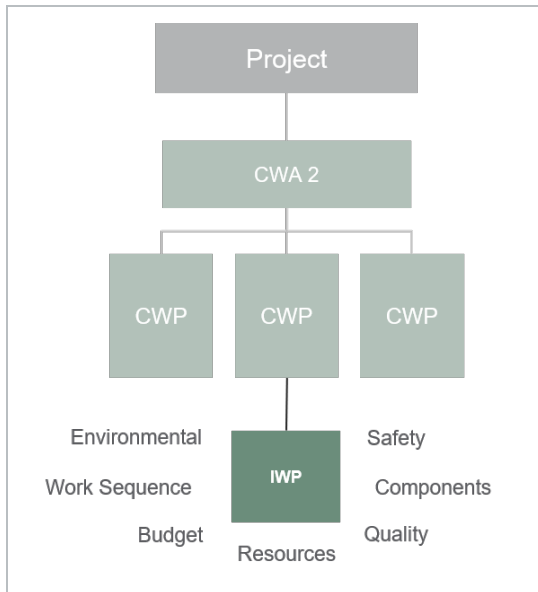


1.1.2.1 WORK PACKAGE DETAILS

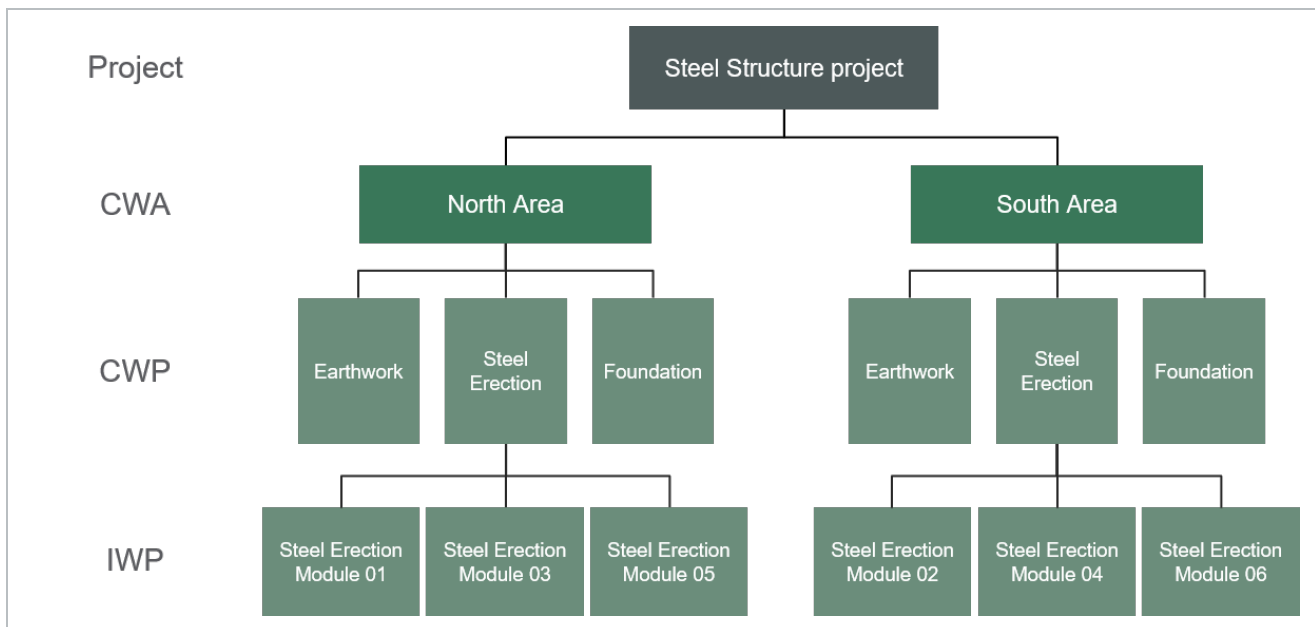
Work package details include the following information:

- Work sequence
- Budget

- Resources required
- Components and quantities
- Constraint Management
- Safety, quality, and environmental concerns



For your Steel Erection work plan, you can create a work package for each module.



NOTE

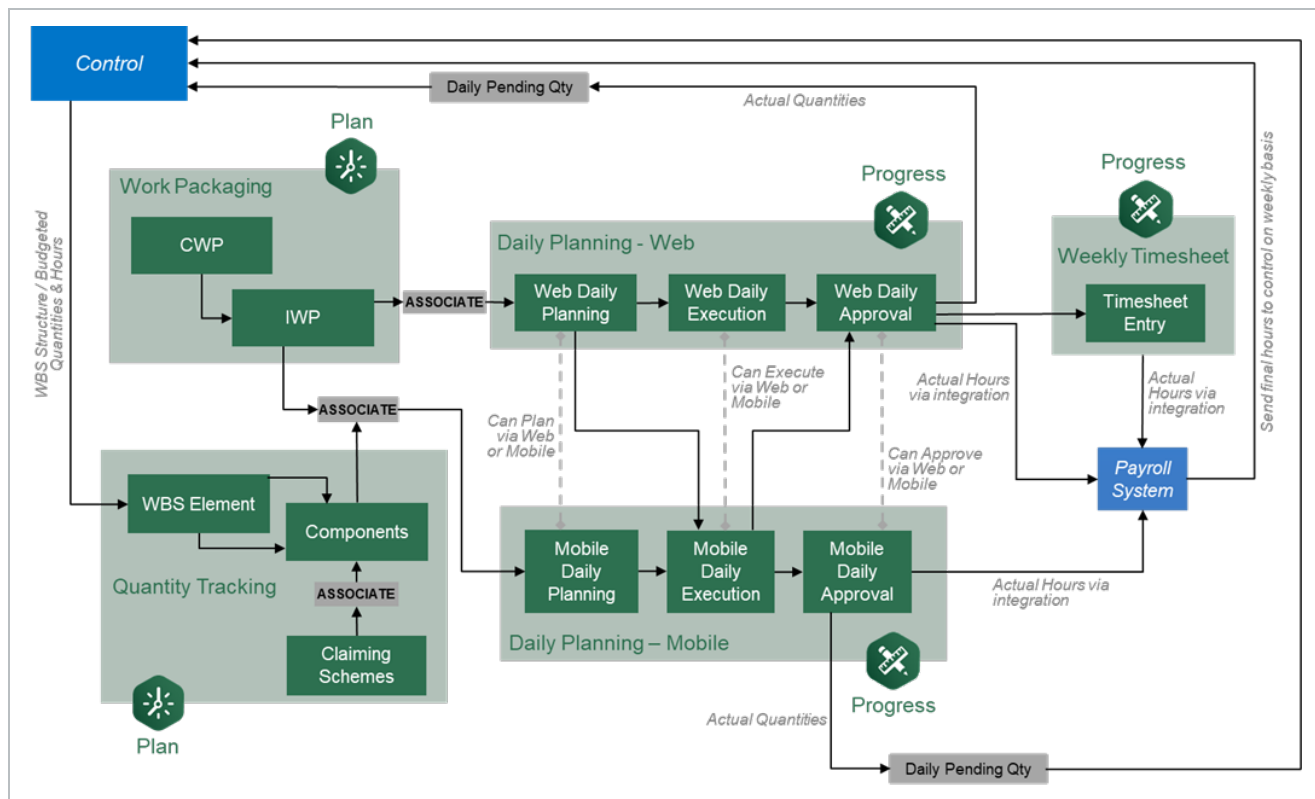
In Work Package Management, you will learn about work plans and work packages in detail, including how to create them and define plan details.

1.1.2.2 COMPREHENSIVE WORKFLOW

The diagram below displays both sections of Plan and how they integrate with InEight Progress, InEight Control and your Payroll system.

You will notice the areas where you create associations between work packages and daily plans, work packages and components, and components and claiming schemes.

The details of this workflow and the step by step functions within it will be covered in the remaining lessons of this and the Plan Quantity Tracking module and the Progress module.



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LESSON 2 – GENERAL NAVIGATION

2.1 PAGE NAVIGATION

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

You access InEight Plan through your web browser. When you first log in, you will land on the **All projects & organizations page** within the **InEight project platform**. Here you can select any your projects.

All projects & organizations

?

PROJECTS

ORGANIZATIONS

+

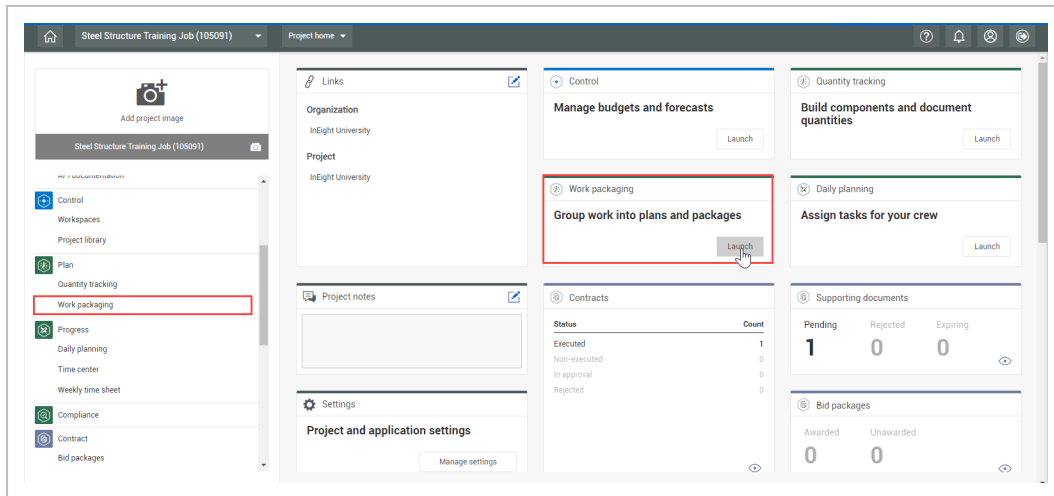
i

	ID	Name	Status	Organization	Created by	Created on
<input type="checkbox"/>	105091	Steel Structure Job	Active	S100000 - (PKS Inc)	jeremy cheek	06/04/2018 3:30:26 PM

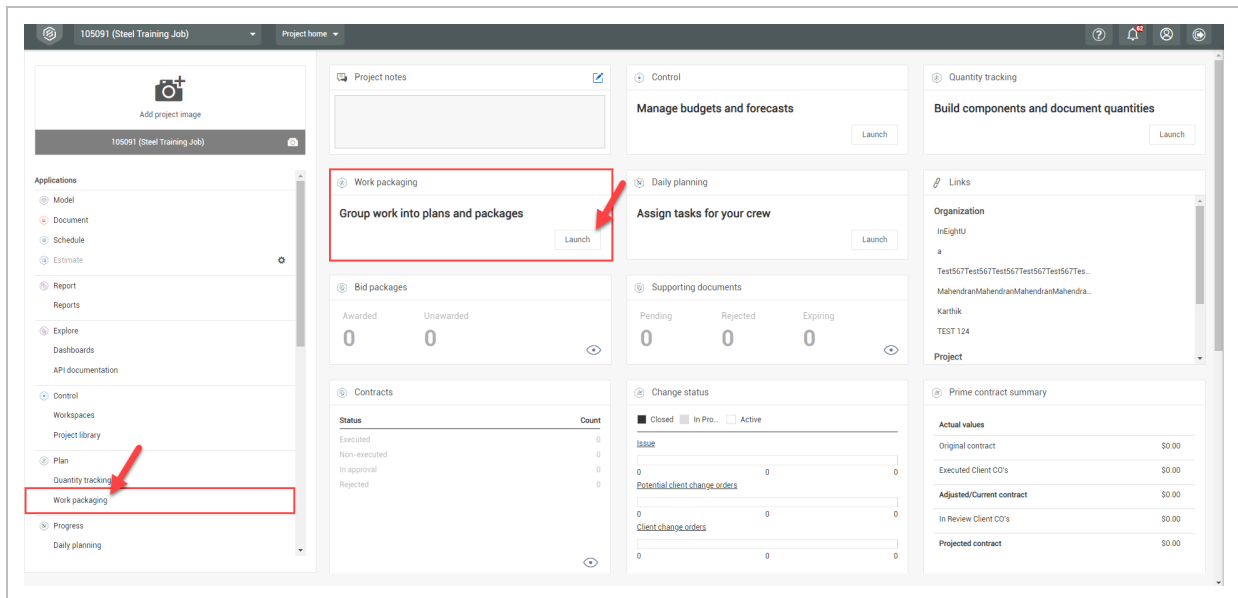
From the All projects & organizations page, selecting a project navigates you to the home page for that project. From your project home page, there are two different ways to access the **Work Packaging module** of Plan.

NAVIGATE TO THE WORK PLANS MODULE VIA THE PROJECT HOME PAGE

1. From the All projects & organizations page, select your project.

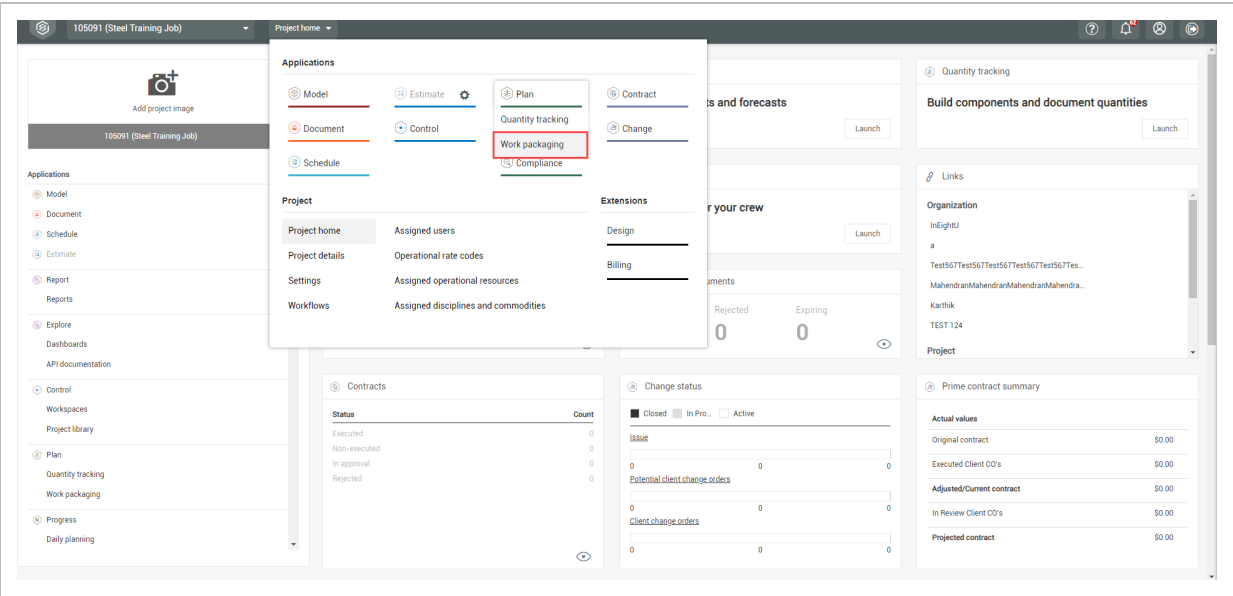


2. Select the Work Packaging module by clicking on the **Work packaging** tile on the right or selecting **Work packaging** from the side bar menu on the left.



NAVIGATE TO THE WORK PLANS MODULE VIA THE NAVIGATION BAR

- 1. From the Projects page, select the **second level drop-down menu**, hover over **Plan**, and then select **Work packaging**.

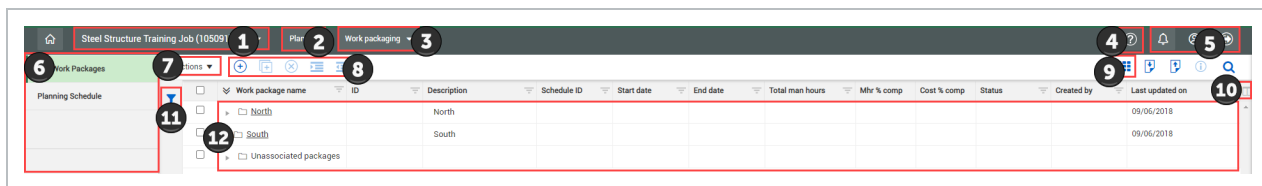


Overview - Work Plans/Packages Page

Title		Description
1	First Level Menu	Shows the selected project and provides access to favorites, All projects and organizations, reports, master data libraries, and suite administration.
2	Second Level Menu	Displays the list of applications (Control, Plan, etc.), and navigates you to other project settings.
3	Third Level Menu	Navigates to individual modules inside each application (e.g., Contract > Bid packages, Plan > Quantity tracking). Options in this menu are dependent upon the application you are currently using.
4	Help Menu	Contains Walkthroughs to walk you step by step through processes within the module.
5	Notifications and	View notifications, user profile and log out.

Overview - Work Plans/Packages Page (continued)

Title		Description
	User Profile	
6	AWP Panel	Allows you to access work plans (Work Packaging tab) or see planning progress (Planning Schedule tab).
7	Actions Menu	Select available actions for the current register tab you are viewing.
8	Toolbar	Contains functions for the page you are on: add, edit, delete, export, import, show details, and search.
9	Block View	View the Work Plans/Work packaging page in a card view layout, the page displays the most recent saved work package, as well as a card for each work package associated with the CWA or CWP in the same order and data as the default grid view.
10	Column Chooser	Allows you to add or hide columns to make the plans/packages list user specific.
11	Query builder	Lets you add, edit, delete, copy, and share queries to search for work areas and packages.
12	Work Plans/Packages Register	List of all work plans and packages in your project.



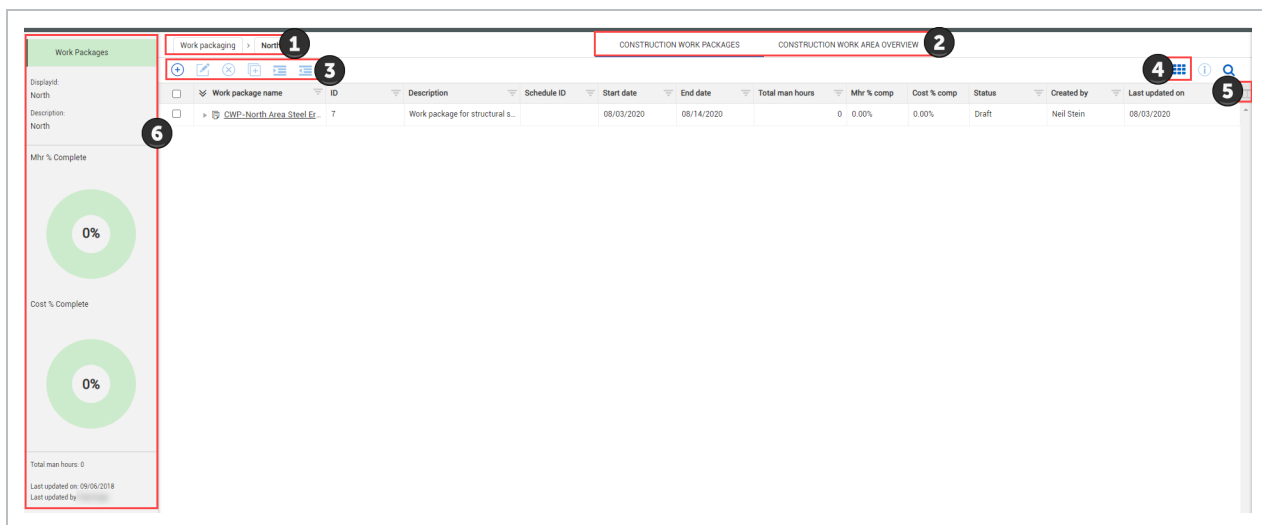
Overview - Area/Construction/Installation Work Packages Pages

Title		Description
1	Breadcrumbs	Navigational links that allow you to track your path from the page you are currently viewing back to the work plans/packages page. Furthermore, identifies what and where you are within a work package.
2	Tabs	Navigate between different functions on a page. The blue line indicates what tab you are currently on.

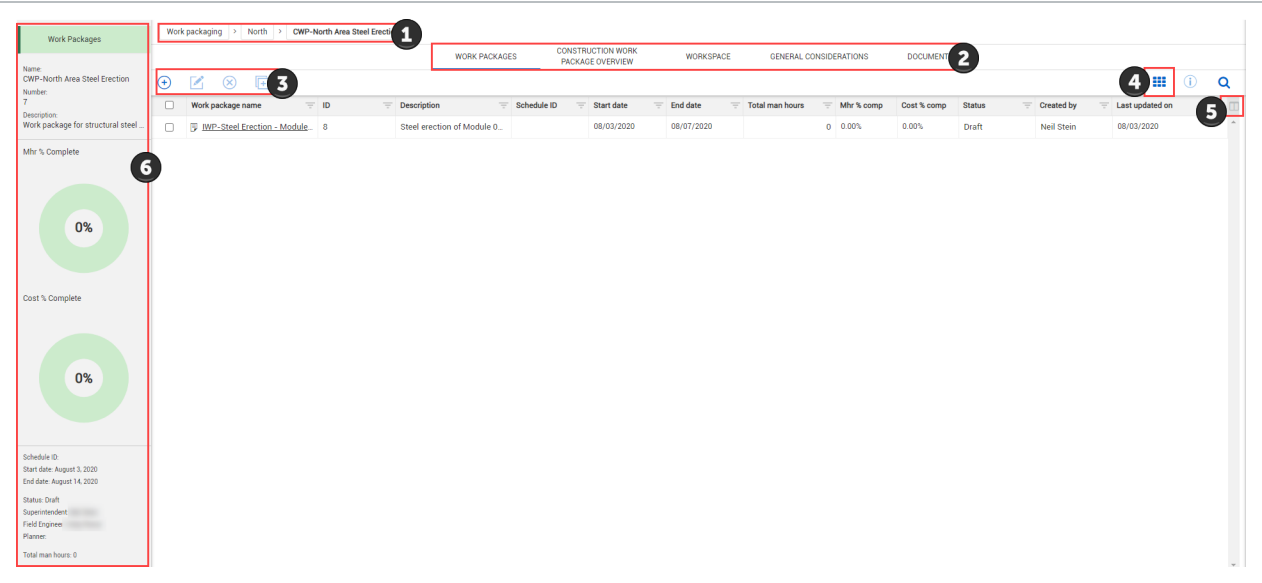
Overview - Area/Construction/Installation Work Packages Pages (continued)

Title		Description
3	Toolbar	Contains functions for the page you are on: add, edit, delete, export, import, show details, and search.
4	Block View	View the Work packages page in a card view layout, the page displays the most recent saved work package, as well as a card for each work package associated with the CWA or CWP in the same order and data as the default grid view. Not pictured: When in block view, you can use a toggle to switch between viewing calculations in Cost % Complete and Mhr % Complete.
5	Column Chooser	Add or hide columns to make the plans/packages list user specific.
6	Side Panel	Contains a brief summary of your CWA, CWP, or IWP, fed from their overview and workspace tabs as well as associated components. Percent complete charts are shown for man-hours and cost in dollars.

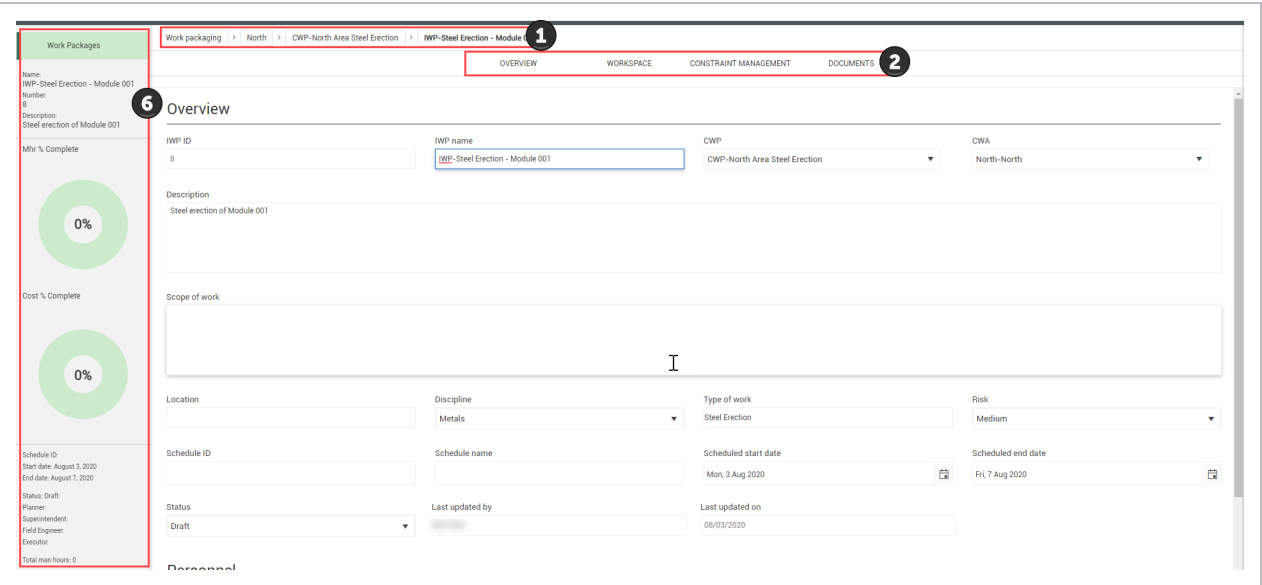
2.1.1 CONSTRUCTION WORK AREAS (CWA) PAGE



2.1.2 CONSTRUCTION WORK PACKAGES (CWP) PAGE



2.1.3 INSTALLATION WORK PACKAGES (IWP) PAGE



TIP The **Construction Work Packages/Work Packages** tab displays all the work plans that you have created or are assigned to as the Superintendent, Engineer, or Foreman.

2.2 COLUMNS

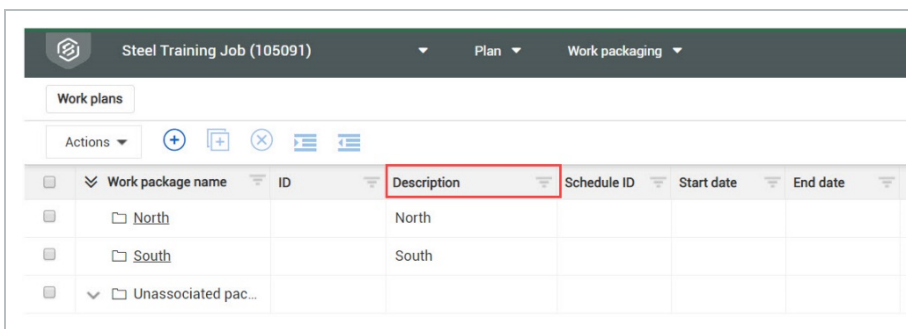
Customize columns according to your preferences from the Work plans/packages page. Changes you make to the placement of your columns will be retained the next time you access any page you have customized.

2.2.1 MOVE COLUMNS

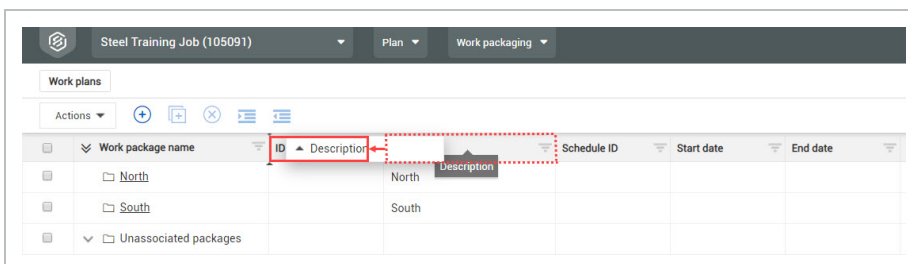
Drag and drop to move a column from one place to another to customize your view.

MOVE COLUMNS

1. On the Work plans/packages page, click on and hold a **column header**.



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



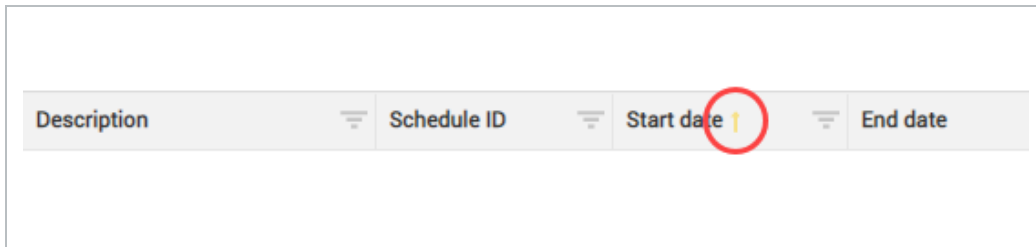
2.2.2 SORT COLUMNS

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

SORT COLUMNS

1. On the Work plans/packages page, click on any column header to sort the column in ascending order.

- Notice the yellow “up arrow” designating you are sorting in ascending order



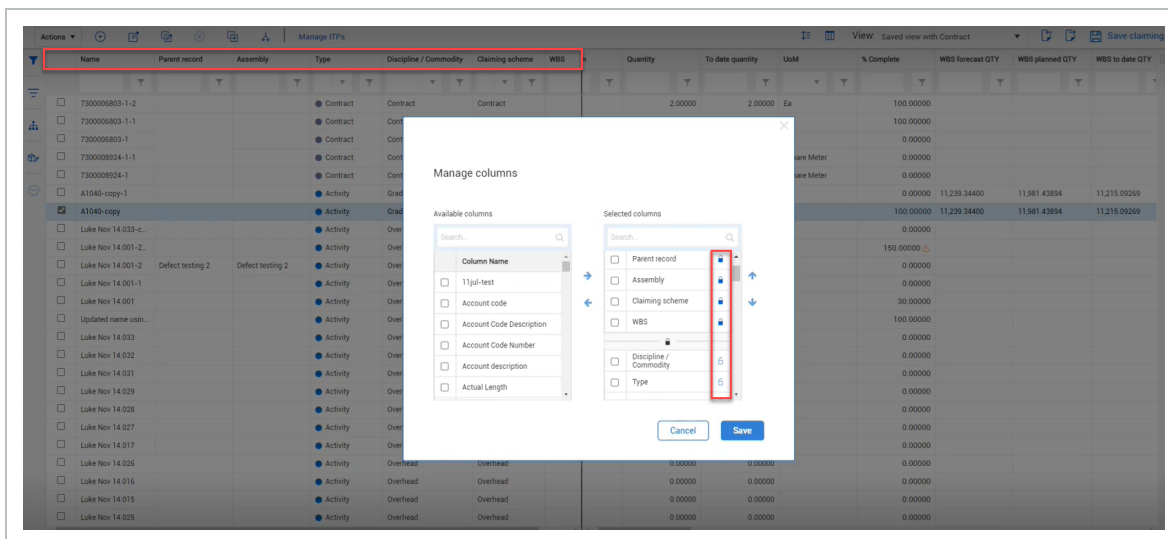
Description	Schedule ID	Start date	End date
-------------	-------------	------------	----------

2. Click on a column header again (a second time) and the column will filter in descending order.

- Notice the yellow arrow is now pointing down

2.2.3 COLUMN CHOOSER LAYOUT

In quantity tracking, the Lock icon shows to the right of each column's name in the Selected columns section of the dialog box. To lock a column's position, click the unlocked icon next to the column name. The unlocked icon changes to solid blue, and the column position cannot be moved.

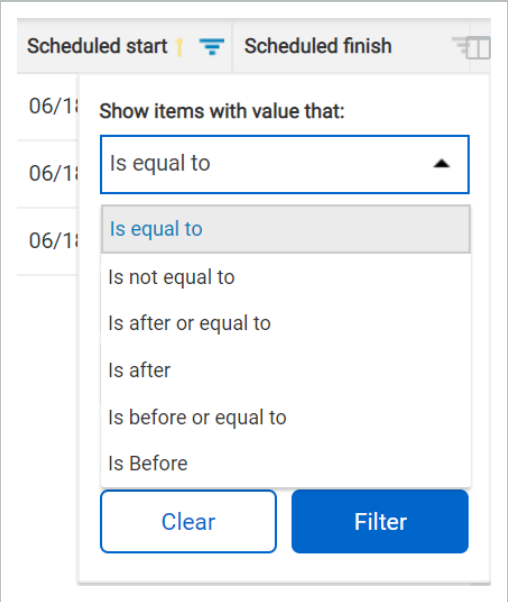


2.2.4 FILTER COLUMNS

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

FILTER COLUMNS

- 1. On the Work plans page, click the **filter pyramid** of any column header.
- 2. In the resulting drop-down list, select an **operator**.



- 3. In the first search box, enter a **date**.

Scheduled start	Scheduled finish
06/18/2018	Show items with value that:
06/18/2018	Is equal to
06/18/2018	6/18/2018
	And
	Is equal to
	Clear Filter

- Click **Filter**.
 - The table now only shows items that qualify for your filter
 - Notice that the filter pyramid is now in yellow indicating that this column is filtered

Steel Structure Job (105091)

Plan

Work packaging

?

⌕

Work plans

MY WORK PLANS

ALL

Actions

+

⌕

×

≡

≡

📄

📄

📄

📄

📄

☐	⌵	ID	Description	Name	Scheduled start	Scheduled finish
☐	⌵	4972	Work plan for the structural steel of the North area	North Area Steel Erection Work Plan - 001	06/18/2018	06/29/2018
☐	⌵	3996		South Area Steel Erection Work Plan -001	06/18/2018	06/29/2018
☐		4758		Structural Steel Mobilization	06/18/2018	06/19/2018

5. Select the **filter pyramid** again. Hover over **Filter**, then click **Clear** to remove your filter.

Scheduled start

Scheduled finish

06/18/2018	Show items with value that:
06/18/2018	
06/18/2018	

Is equal to

6/18/2018

And

Is equal to

Clear

Filter

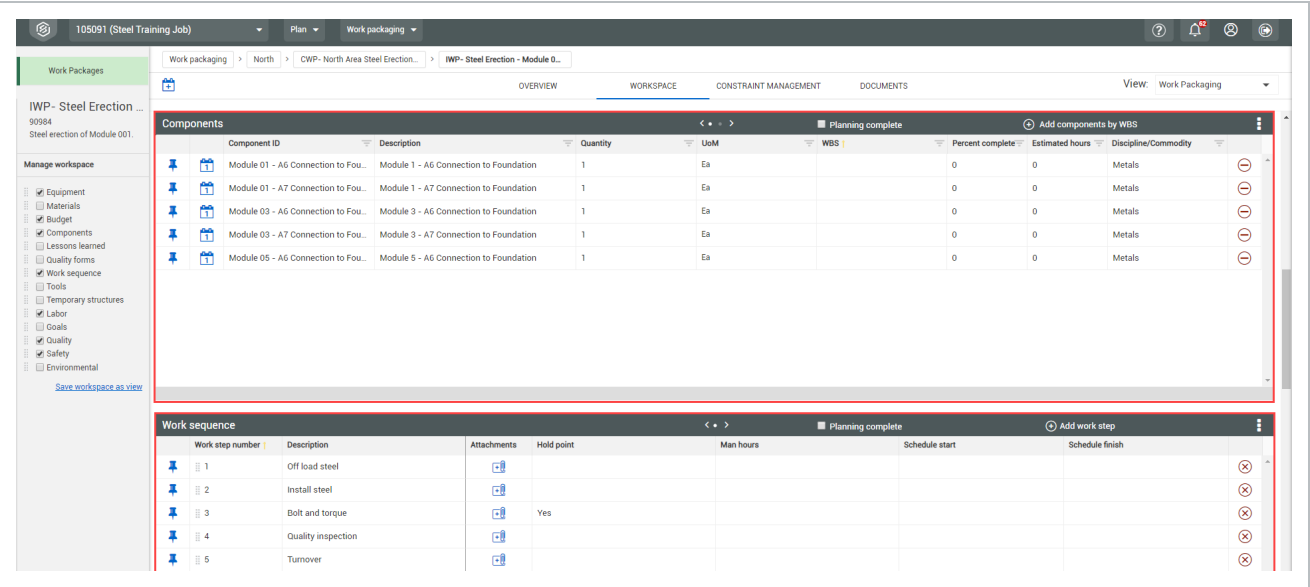
TIP

Apply multiple rules to your filter. For example, setting a “Contains” or “Is equal to” filter for your column would allow you to bring in two distinct results at once.

2.3 DATA BLOCKS

On the Workspace tab of an opened installation work package, the work package details are contained within data blocks. Each data block is a set of columns grouped together based on categories of information. Data blocks help you to organize and manage all the columns on a page.

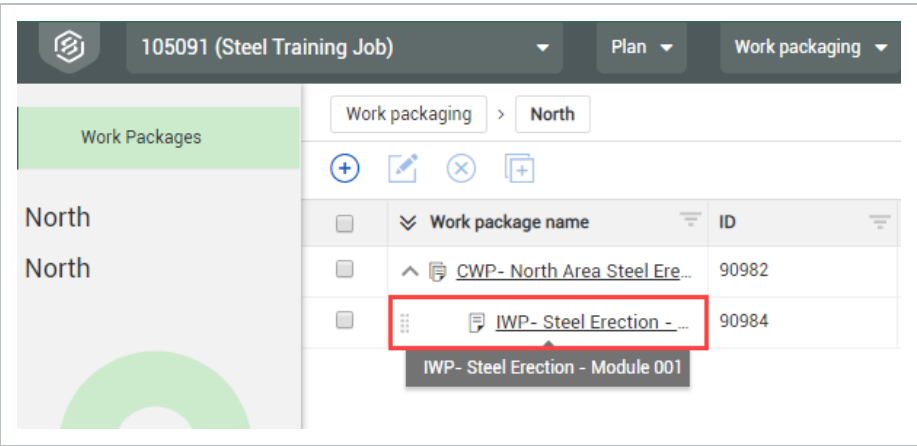
Data blocks are customizable, and can be viewed moved up or down in the register. Sort and filter data block information to organize your view. The information in each data block is displayed in a grid like format, maintaining a spreadsheet look and feel.



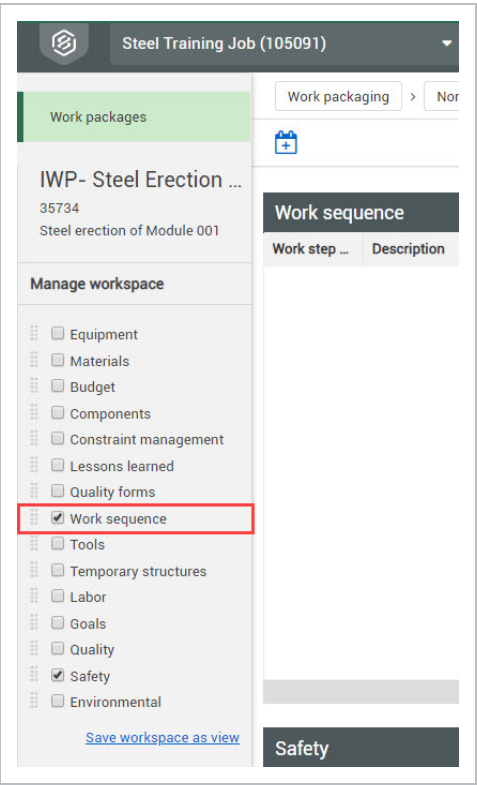
2.3.1 ADD DATA BLOCKS

ADD DATA BLOCKS

1. From the Work plans/packages page, select a **hyperlink** under the ID Column for an installation work package (IWP).



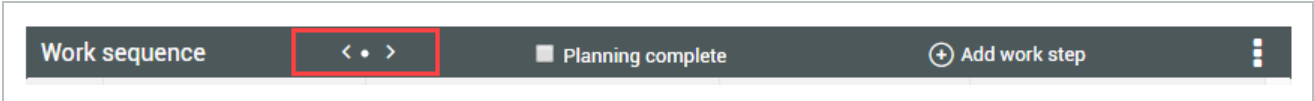
- 2. Once you are in an individual work plan, select the **Workspace** tab.
- 3. From the **Manage workspace slide out panel** on the left, select data blocks to include in your workspace.



NOTE Scroll up and down between the data blocks to view all your data blocks.

2.3.2 NAVIGATE DATA BLOCKS

Use the arrows at the top of your data block to view more columns associated with each data block that are not in the current pane.

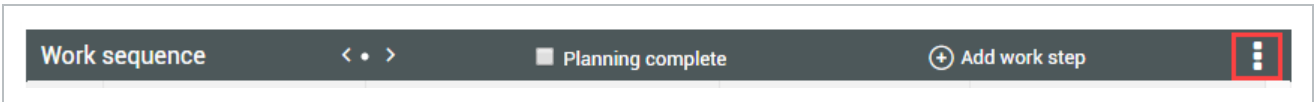


The number of dots between the arrows represent how many panes are in that data block.

2.3.3 MANAGE DATA BLOCKS

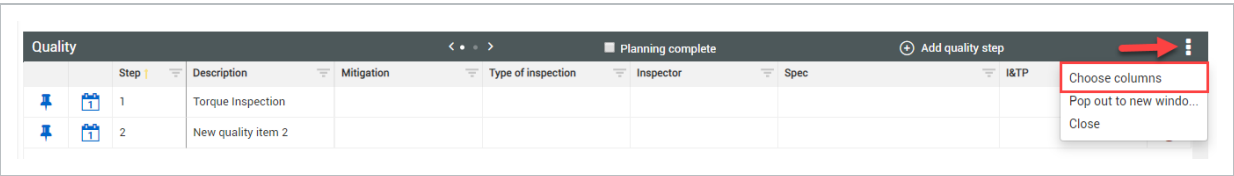
2.3.3.1 CONTEXT MENU

The Context Menu allows you to customize the order of columns in each data block. You can also use the Context Menu to add or remove columns from a data block.



USE THE CONTEXT MENU

- 1. On your data block, click on the **Context Menu** icon.
- 2. Select **Choose columns** from the drop-down menu.



- 3. On the resulting slide out panel, search by name or category for a column. Then, select your **column** from the list and click on the **right arrow** to add that column to your data block on the right.

[illegible]

TIP

You can also drag and drop columns into your data block. Once in your data block, you can reorder columns by dragging and dropping.

4. Repeat step three as needed. When finished, click **Done**.

NOTE

Each type of data block has its own unique default settings. Default settings include specific locked columns and total number of columns and panels.







2.3.3.2 RESOURCE BUTTON

Uniquely named for each data block, the Resource Button allows you to add information or resources to your data block.

Quality < • > ■ Planning complete + Add quality step ⋮

2.3.3.3 DAILY PLAN ICON

The Daily Plan icon is a shortcut that allows you to create daily plans directly from an IWP by selecting which details to include in a daily plan.

Quality				
		Step ↑	Description	Hold point
		1	Torque Inspection	Yes
		2	New quality item 3	
		3	New quality item 2	

Clicking on this icon will open a slide out panel to the right where you can view the items you've selected to include in your daily plan and continue onto the creation window.

Work packaging > North > CWP- North Area Steel Erection... > IWP- Steel Erection - Module 0...

OVERVIEWWORKSPACECONSTRAINT MANAGEMENTDOCUMENTS

Quality

Step ↑

Description

Hold point







Quality risk

Mitigation

Type of inspection

Inspector

Spec

		1	Torque Inspection	Yes				
		2	New quality item 3					
		3	New quality item 2					

Safety





Step ↑

Description

Safety risk

Mitigation

Required safety ite

		1	Crush points		
		2	Watch for falling objects		

Create daily plan

Labor

Equipment

Quality

Safety

Environmental

Torque Inspection

Clear

Next

×

Create daily work plan

1 Plan details

2 Confirm resource

3 Tool box talks

* Plan date

📅

* Plan name

Shift

First Shift

Work plan/package ID - Name

90984 - IWP- Steel Erection - Module 001

Planner notes

Location

Hint type "133" or "Site"

Approvers (1 Required)

No approvers added

+ Add approver

Executors (0 Required)

No executors added

+ Add executor

Cancel

Next

ADD AND MANAGE DATA BLOCK CONTENTS

1. On your data block, click on the **Resource** button to add an item.

Quality									
Planning complete									
Add quality step									
Step	Description	Hold point	Quality risk	Mitigation	Type of inspection	Inspector	Spec	IS/TP	
	New quality item 3								⊗
1	Torque Inspection	Yes							⊗
2	New quality item 2								⊗

2. Rename your items by clicking on the item **Description** cell and entering a new name.

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Quality					
		Step	Description	Hold point	Quality risk
			New quality item 3		
		1	Tor New quality item 3	Yes	
		2	New quality item 2		

3. Reorder your items by click on the item **Step** cell and adding or changing the order number.

TIP

You can sort and filter your data block columns.

Quality					
		Step	Description	Hold point	
		1	Torque Inspection	Yes	
		2	New quality item 3		
		3	New quality item 2		











NOTE











Delete an item by selecting it then clicking on the red "x" to the right.

		1	Torque Inspection	Yes			
		2	New quality item 3				
		3	New quality item 2				


2.3.3.4 PIN ICON

The Pin icon allows to flag critical components that will hold up the start of the operation if not addressed. When pinned, an item will automatically appear under the Constraint Management tab of the Work plans/packages page. There, you can review and further manage all pinned items.

Quality							
		Step 	Description 	Mitigation 			
		1	Torque Inspection				
		2	New quality item 2				

Work sequence						
■ Planning complete						
Add work step						
	Work step number	Description	Attachments	Man hours	Schedule start	Schedule finish
	1	Off load steel				
	2	Install steel				
	3	Bolt and torque				
	4	Quality inspection				
	5	Turnover				

- Notice that when you pin an item, the data block row turns blue

Constraint management						
■ Planning complete						
Add constraints						
Item number	Description	Category	Responsibility	Due date	Status	
001	Bolt and torque	Work Sequence			Open	

TIP To unpin an item, go to the Constraint Management tab, and delete the item. Changing the status from "open" to "closed" will not unpin or remove the item from the Constraint Management tab.

NOTE You can also manually add constraints under the Constraint Management tab.

2.3.3.5 COMPLETION INDICATOR

The Completion Indicator allows you to indicate which data blocks are completely planned.

Quality			
■ Planning complete			
Add quality step			

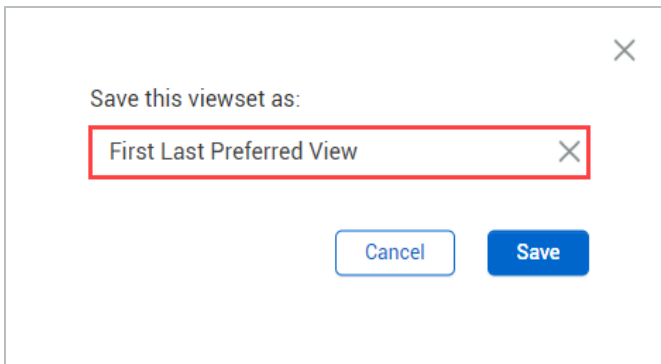
As you check off data blocks, you can track your planning progress from the Planning Schedule tab on the AWP panel (Work plans/packages page of Plan Work Packaging).

2.4 VIEWSETS

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

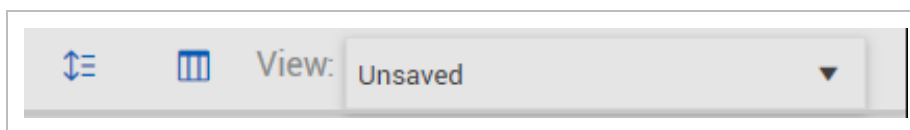
CREATE A VIEWSET

1. Select the **View** drop-down arrow to save your current view.
2. Select **Save current viewset as** from the viewset drop-down list.
3. In the dialog box, type a name.



4. Click **Save**.

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



NOTE Each viewset is user-specific and can be used in any plan.

2.4.1 SEND A VIEWSET

NOTE Certain permissions are needed to send viewsets to roles.

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

SEND A VIEWSET

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

NOTE

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

Send view (Demo 2312) to

Users

Search for a user

Send to

Users

No users selected

Projects

No projects selected

⊖

Remove all

☒ Share view as global template.

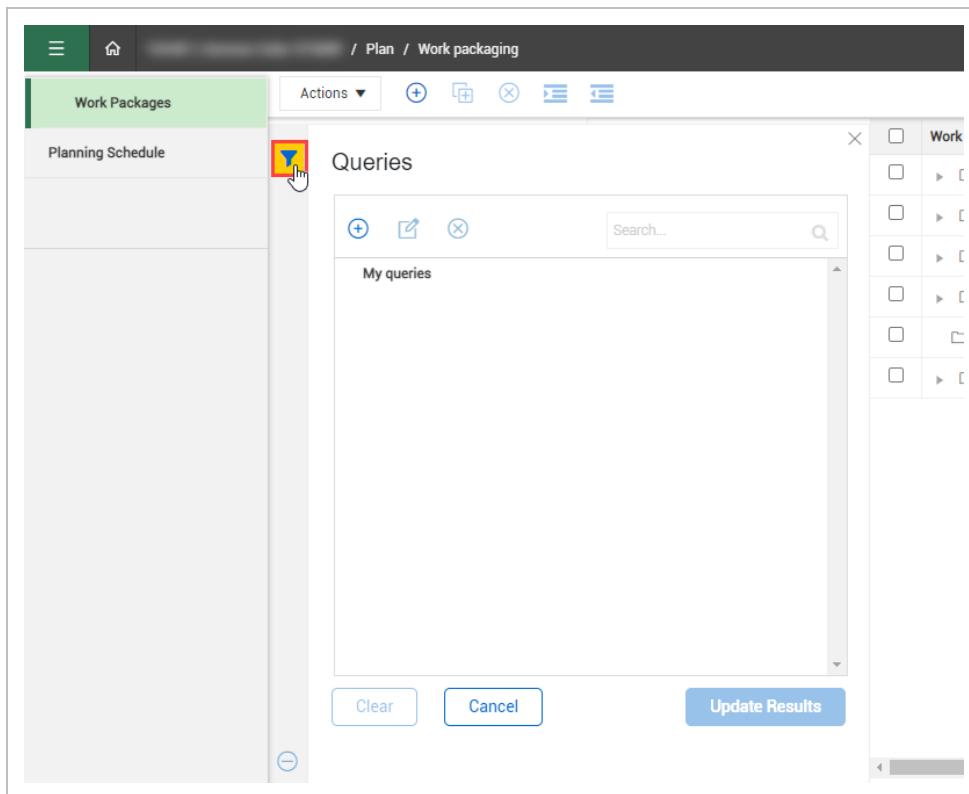
Cancel

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

2.5 QUERY BUILDER

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

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



2.5.1 ADD A QUERY

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

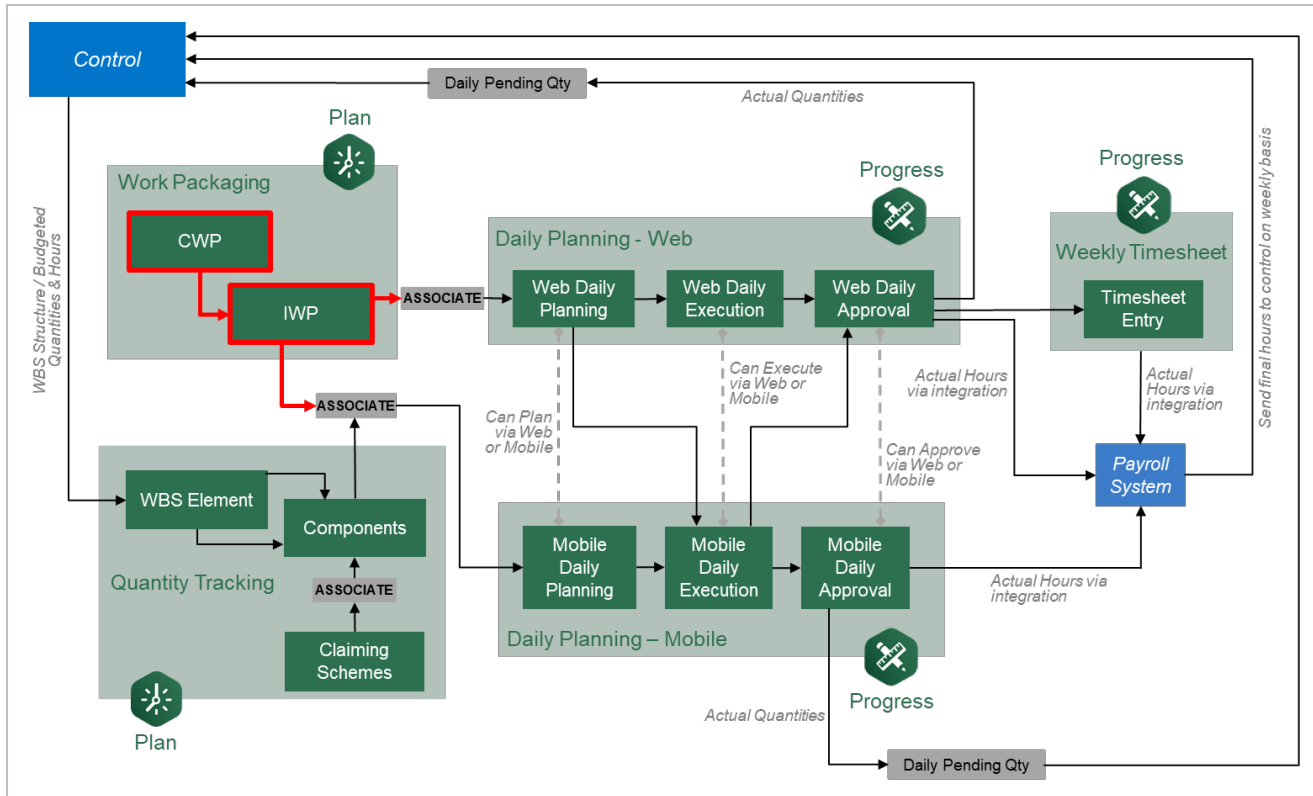
The following step by step shows you how to add a query, apply it, and then save it for future use.

ADD A QUERY

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

LESSON 3 – WORK PACKAGE MANAGEMENT

3.1 INEIGHT PLAN WORKFLOW - WORK PACKAGE MANAGEMENT



3.2 WORK PACKAGE MANAGEMENT OVERVIEW

3.2.1 WHAT IS ADVANCED WORK PACKAGING (AWP)?

Advanced Work Packaging (AWP) is a standardized way to plan the execution of a construction project including design, procurement, and installation. AWP aims to change the planning process to be execution driven: approaching the beginning of your construction project with the end in mind. In the past, planning was siloed, Engineering first, then Procurement, and finally Construction. AWP starts with the priorities of Construction and or commissioning and works backwards.

The Work Packaging module of InEight Plan provides an organized platform to break down your project into manageable scopes of work. Work packages can be developed to include all items necessary to complete the scope as well as all constraints that would impede progress.

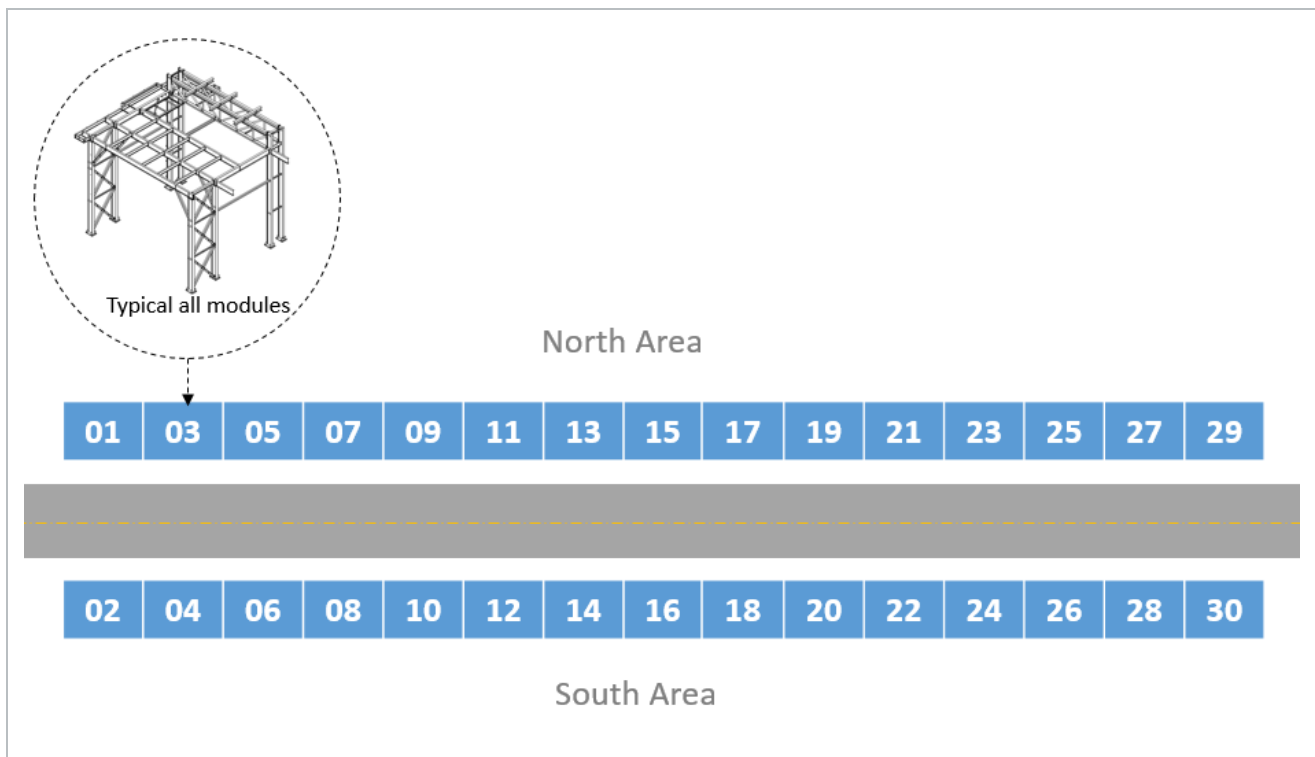
3.2.2 WORK PACKAGES

There are three levels of work package definition that can be used in InEight Plan:

- Construction Work Area (CWA)
- Construction Work Package (CWP)
- Installation Work Package (IWP)

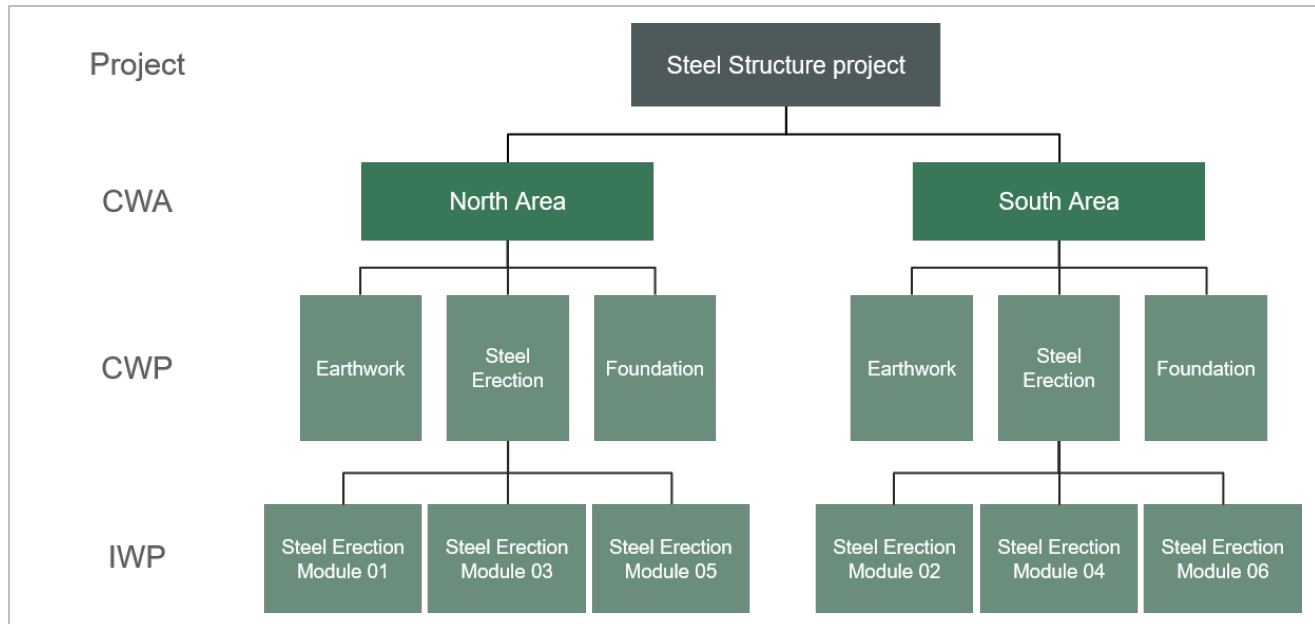
Scenario

Imagine you are working on a project with the following scope: 30 modules in which you need to complete earthwork, foundations, and erect the steel support structures.



Using the scenario above as an example, assume that you initially break the project into two construction work areas (CWA): North Area and South Area. You break each area of work into three different construction work packages: Earthwork, Foundation, and Steel Erection. From there, you can

break each construction work package into multiple installation work packages so you can plan at a detailed level and identify the specific constraints, components, safety and quality risks.

**TIP**

Construction work areas (CWAs) are created for the project or organization in the Configure CWA and project values page prior to defining construction work packages.

3.2.2.1 CONSTRUCTION WORK PACKAGE (CWP)

A construction work package (CWP) defines a logical and manageable division of work within the construction scope. CWPs are aligned with the project execution plan (which includes the construction plan) and the WBS. The division of work is defined such that CWPs do not overlap within a discipline. CWPs are to be measurable and in alignment with project controls. CWPs are the basis for the development of detailed installation work packages. They should also align with engineering and procurement work packages. A typical CWP includes the following:

- Safety requirements
- At least one EWP
- Schedule
- Budget (work hours/cost/productivity)
- Environmental requirements

- Quality requirements
- Special resource requirements

A CWP can also contain activity, material, and contract components.

A CWP may be divided by area, system, or as otherwise determined by the project (construction) execution plan. In general, it is better to develop CWPs by discipline. A large project will likely contain multiple CWPs. CWPs can be the basis of contractual scopes of work. A contractual scope may contain more than one CWP. Complete specifications of CWPs grow over time to include productivity factors, detailed cost reports, and other considerations.

3.2.2.2 INSTALLATION WORK PACKAGE (IWP)

An installation work package (IWP) is the deliverable that enables a construction work crew to perform work in a safe, predictable, measurable, and efficient manner. An IWP is scoped to be manageable and “progressable”; it is typically of limited size such that a crew can complete the work in about a week. An IWP contains the necessary documentation supporting workplace execution. IWPs should be approved by the responsible stakeholders, and all constraints should be completed before issuance to the field. A typical IWP includes the following:

- Work package summary – inclusive of description of work, location, system or facility code, originator, contact information, sequenced work steps, reference documents, estimate of work hours and quantities, cost codes, witness or hold points, and special comments quantity work sheet
- Safety hazard analysis, specific to tasks in work package
- Material Safety Data Sheet
- Drawings (engineering and vendor design)
- Specifications (engineering and vendor design)
- Change documents (i.e., field change request, deficiency report/non-conformance report and design change notice)
- Manufacturer’s installation instructions model shots
 - Bills of Materials
 - Required tools
 - Installation test results forms
 - As-built documentation

- Inspection checklists
- Completion verification signatures

All elements necessary to complete the scope of the IWP should be organized and delivered before work is started. As the originator, you should cover the work with the responsible safety, quality, superintendent, and craft personnel in a preparatory meeting, with special focus on anticipated constraints.

Generally, the scope of work associated with the IWP should be small enough that it could be completed by a single foreman and crew within a pre-defined block of work hours. Work hour blocks should be between 500 and 1,000 hours. An IWP contains all applicable and pertinent documents in support of safe and efficient installation of a specific portion of a system by a given trade. These documents are written specifically for the crew performing the activity.

3.3 WORK PACKAGE CREATION

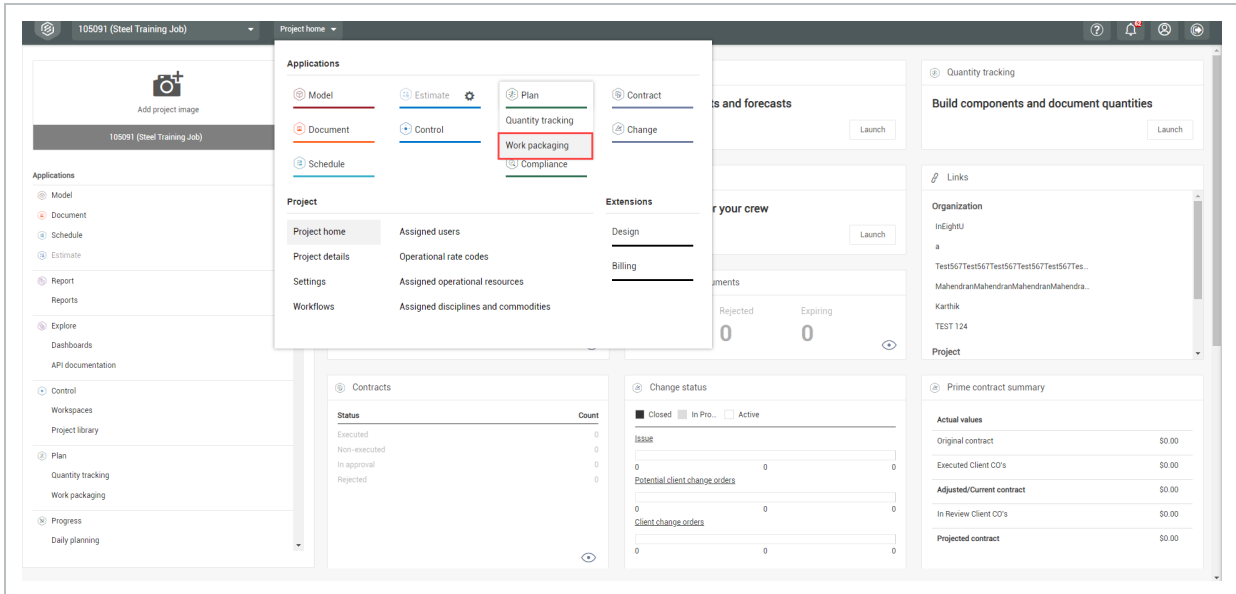
The first step in utilizing the Work Packaging module is to set up your work package structure.

3.3.1 CREATE A CONSTRUCTION WORK PACKAGE (CWP)

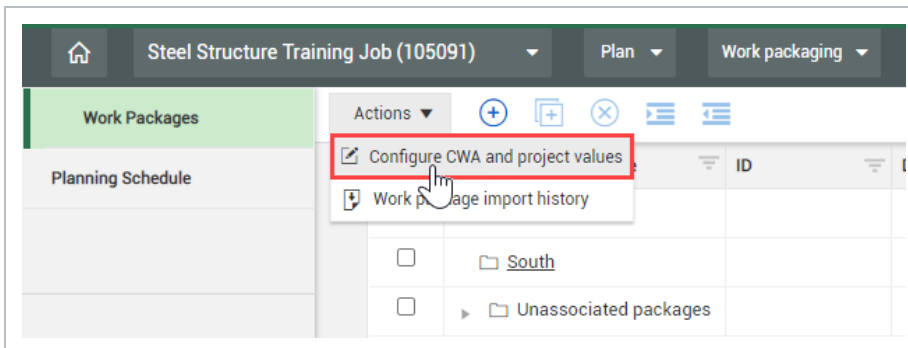
The following steps walk you through creating a construction work package.

CREATE A CONSTRUCTION WORK PACKAGE (CWP)

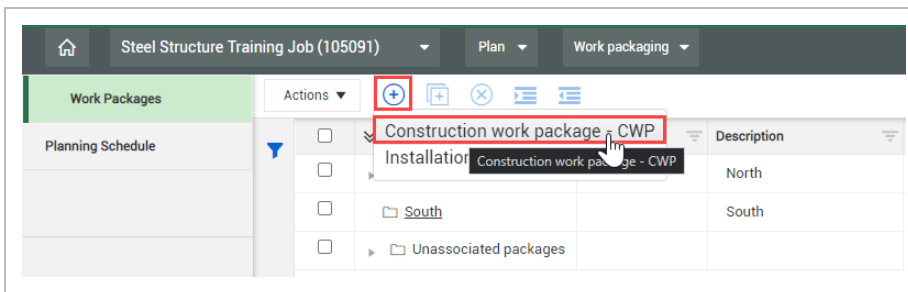
1. From your project's home page, navigate to the **Work packaging** module.



2. Click on the **Action** menu and select **Configure CWA and project values** from the drop-down list.

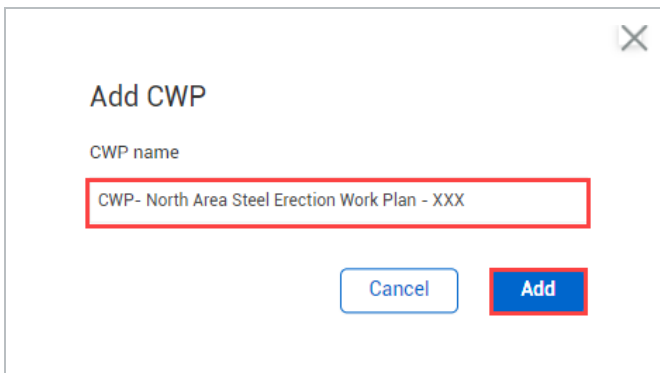


3. Click on the **Add** icon on the left toolbar and select **Construction work package - CWP** from the drop-down list.

**TIP**

Construction work packages and installation work packages can also be created within the construction work areas, for example the North construction work area, by clicking on the North construction work area folder then select the add button.

4. In the new dialog box, name your CWP. Work package names can be 100 characters in length.

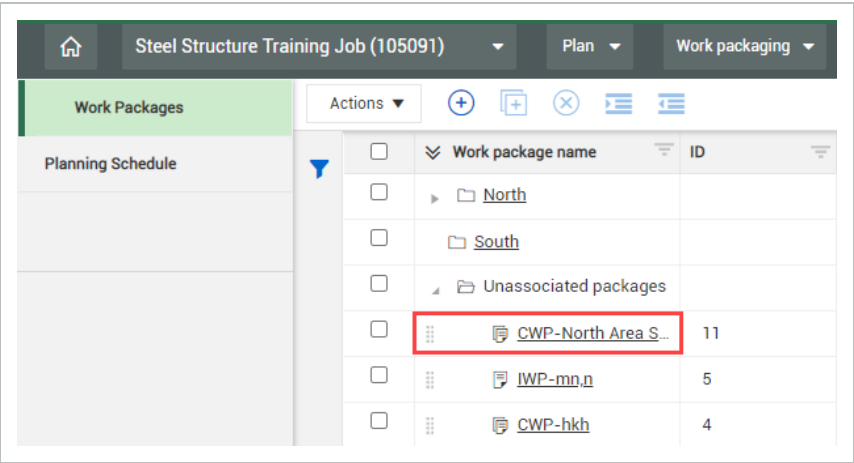
**NOTE**

Note that the CWP name automatically begins with “CWP-” by default. You can erase it.

5. Click **Add**.

NOTE

Your created CWP will be located in the **Unassociated packages** folder by default when you create them outside of a construction work area folder.



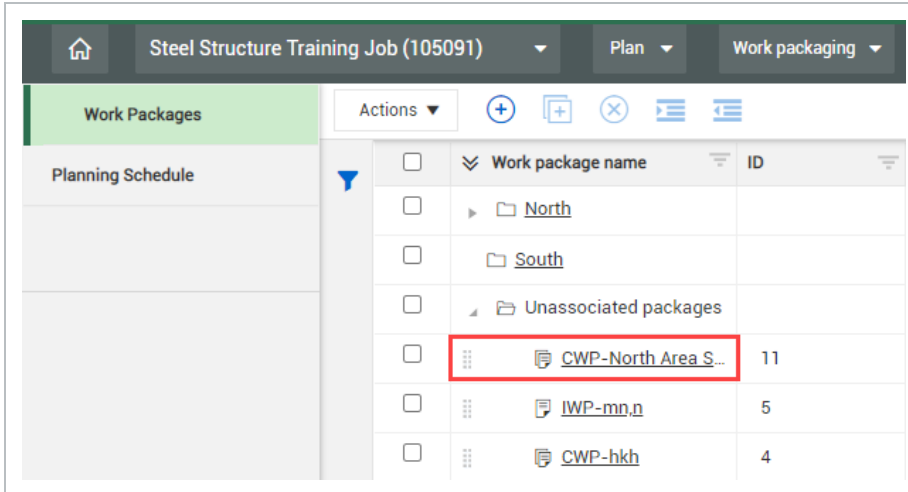
3.3.2 EDIT WORK PACKAGES

After creating the work package, you might need to go in and edit the details. This includes:

- Schedule start and finish dates
- Planning start and end dates
- CWP Description
- CWA description and ID
- Plan Status
- Other fields

EDIT A WORK PACKAGE

1. From the Work plans/packages page, select the **hyperlink ID** on your newly created package.



2. Select the **Construction Work Package Overview** tab.
3. Under CWP description, enter a description.
4. In Scheduled start date, select a date.
5. In Scheduled end date, select a later date.
6. Select an Engineer.
7. Select a Planner.
8. Select a Superintendent.

TIP

The Engineer, Superintendent, and Planner fields are validated fields and will bring up a list of people from which to select, once you enter a character.

Work Packages

Name

CWP-North Area Steel Erection

Location

62116

Description

Work package for structural steel ...

Mfr % Complete

0%

Cost % Complete

0%

Schedule ID

Start date

End date

Status: Draft

Superintendent

Field Engineer

Planner

Total man-hours: 70

Work packa... > Area > CWP-North...

WORK PACKAGES

CONSTRUCTION WORK
PACKAGE OVERVIEW

WORKSPACE

GENERAL
CONSIDERATIONS

DOCUMENTS

CWP ID

62116

CWP name

CWP-North Area Steel Erection

CWP Last updated on

04/21/2022

CWP Last updated by

CWP Description

Work package for structural steel of North area

CWA ID

Area

CWA description

Area

Planning start date

Planning end date

Plan Status

Draft

Superintendent

Engineer

Planner

Hint type "Jobn"

Hint type "Jobn"

Hint type "Jobn"

Schedule ID

Schedule Name

Scheduled start

Scheduled finish

Work package summary

WBS	WBS description	Quantities	UCM	Hours
2618	Sub Tracking - D1 Mv Terms	20.12346	Each	70.43211

9. Now that you have all the CWP overview details, you can go back to the Work plans/packages page by selecting **Work packaging** in the breadcrumbs.

Work Packages

Work packaging > CWP- North Area Steel Erection...

CWP- North Area Ste...

90982

Work package for the ...

CWP ID

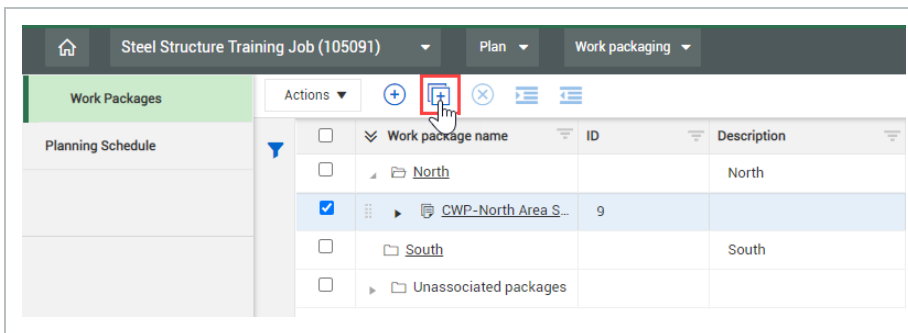
90982

3.3.3 COPY WORK PLANS

You might need to create the exact same work package for a new area with only a few small changes. Instead of repeating the entire process of creating a new work package, your best choice would be to create a work plan from an already existing one, making the few small changes as necessary.

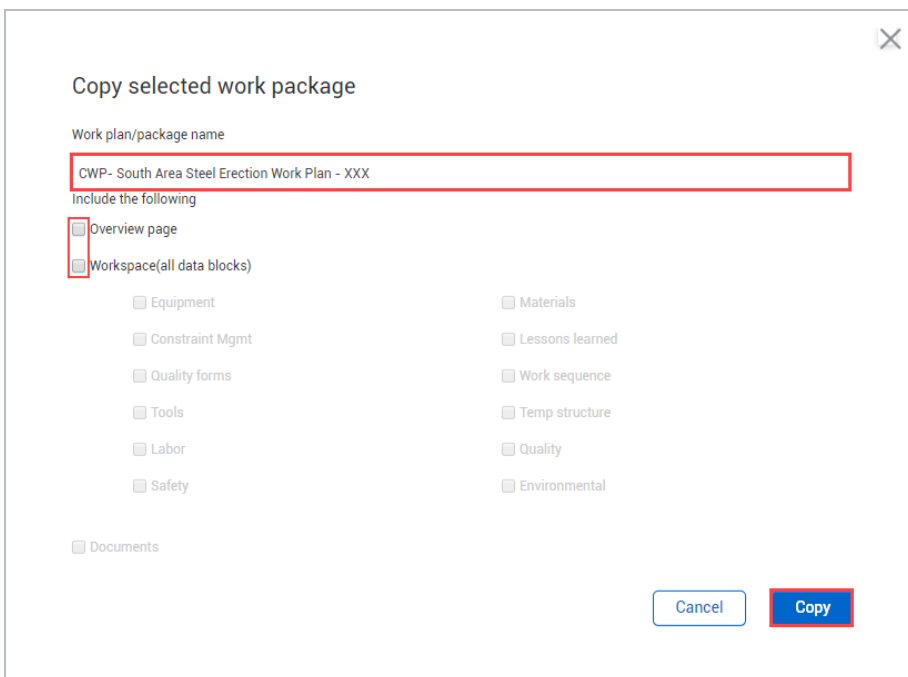
COPY A WORK PACKAGE

1. On the Work plans/packages page, select your previously created work plan, then select the **Copy** icon.

**TIP**

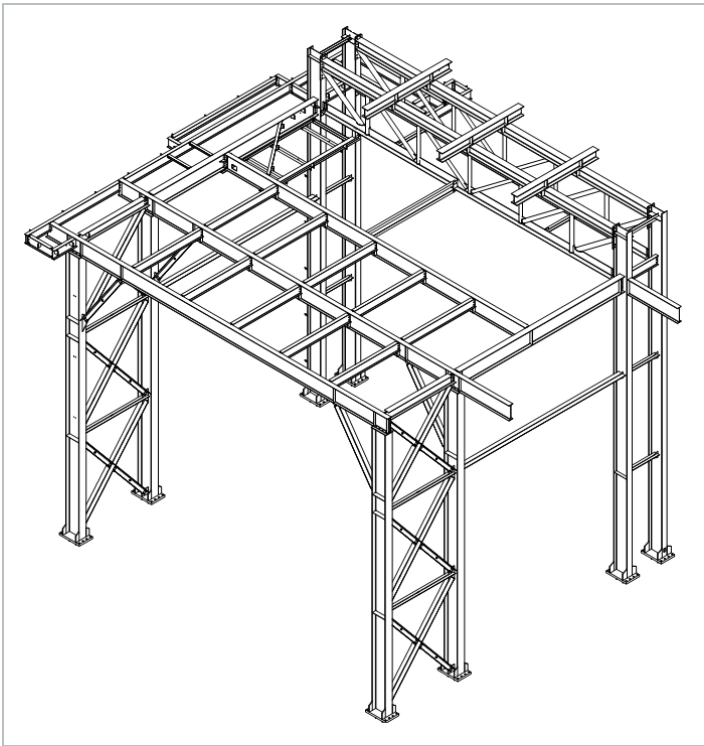
You can copy as many as ten work packages in the same project at the same time.

- This brings up a new dialog box for you to select what information to carry over
2. Rename the work plan.
 3. Uncheck **Overview page** and **Workspace (all data blocks)**.
 4. Click **Copy** to finish creating your new work plan.



3.3.4 CREATE AN INSTALLATION WORK PACKAGE (IWP)

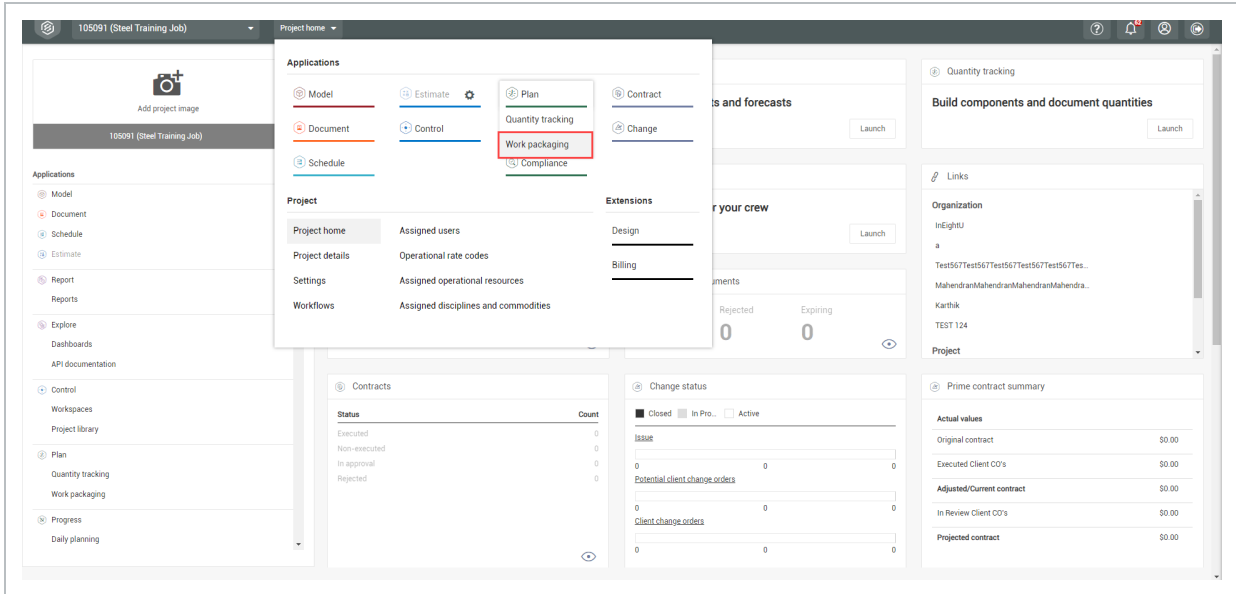
Continuing with the scenario above, you will create an installation work package.



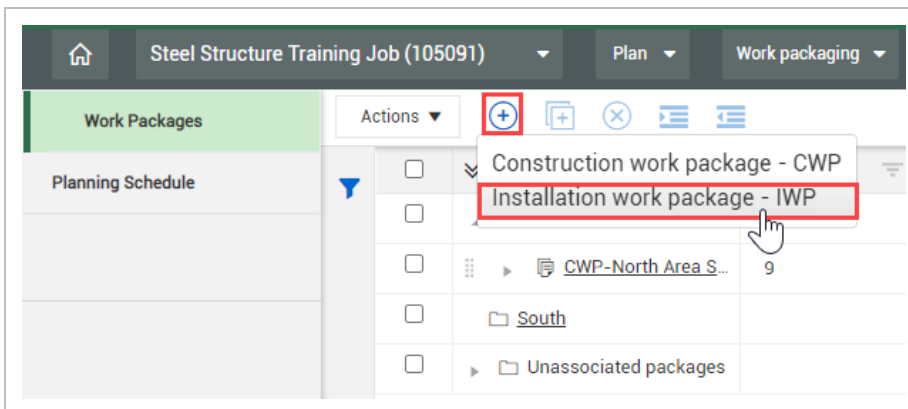
Within each installation work package, you can assign the labor, components, equipment, materials, and other aspects you need to complete the work.

CREATE AN INSTALLATION WORK PACKAGE (IWP)

1. From your project's home page, navigate to the **Work packaging** module.



2. On the Work plans/packages page, select the **Add** icon and select **Installation work package - IWP**.



TIP

When in data block view, you can right-click to add and assign IWPs to a work package.

3. In the Add IWP dialog box, name your work package, and then click **Add**. Work package names can be 100 characters in length.

✕

Add IWP

IWP name

IWP- Steel Erection - Module 001

Cancel

Add

3.3.5 ENGINEERING WORK PACKAGE (EWP)

An engineering work package lets you link engineering schedules created in InEight Design to a CWP, so you can quickly see the schedule without exiting Plan. You can add an EWP from the Work Packages overview page. This option is enabled only when Plan is integrated with Design.

To add an EWP, select the **Add** icon in the Work packaging menu, and then select Engineering work package-EWP.

1000002 | Samson J Sider / Plan / Work packaging

Go 100-25.5

Work Packages

Actions

Work

Construction work package - CWP

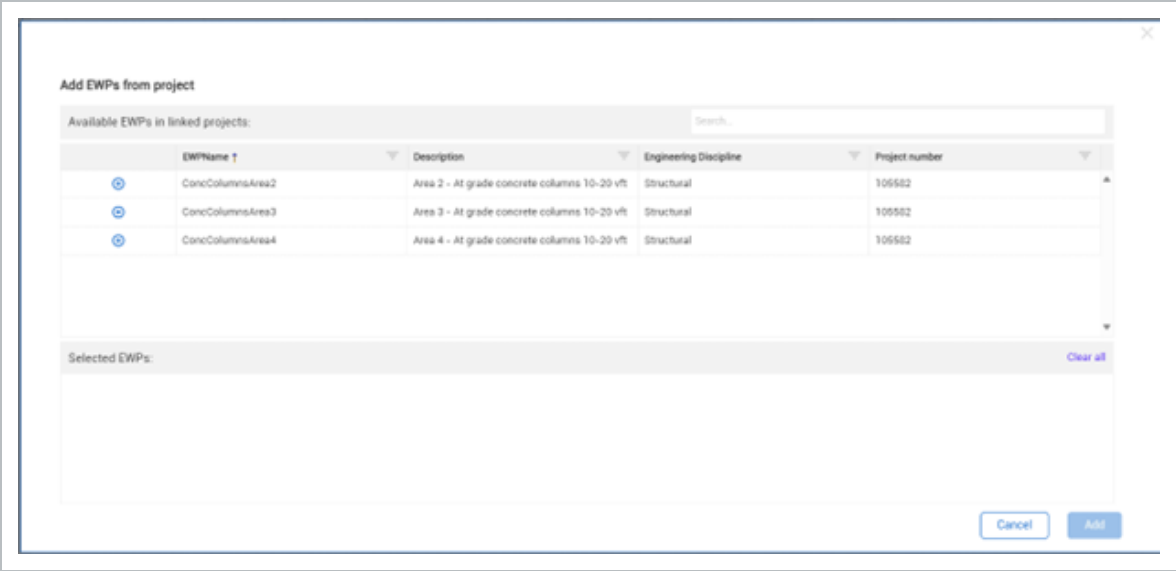
Installation work package - IWP

Engineering work package - EWP

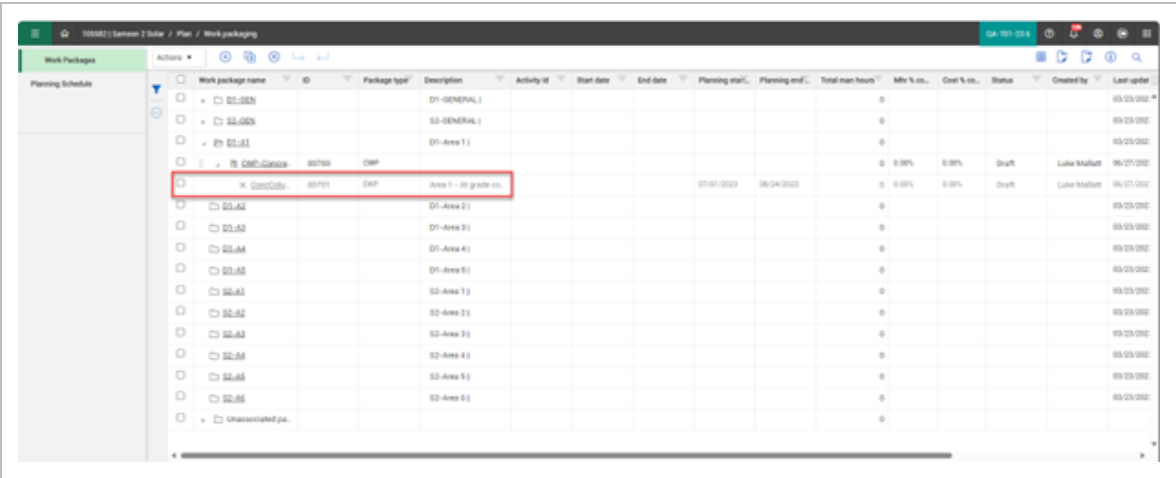
Unassociated pa...

Package type	Description	Activity id	Start date	End date	Planning start	Planning end	Total man-hours	Mile % est.	Cost % est.	Status	Created by	Last update
Engineering work package - EWP	D1-GENERAL						0					09/29/2012
Engineering work package - EWP	D1-Area 1						0					09/29/2012
CWP-Genoa - 80790	CWP						0	0.00%	0.00%	Draft	Luke Muffert	06/27/2012
GLA2	D1-Area 2						0					09/29/2012
GLA3	D1-Area 3						0					09/29/2012
GLA4	D1-Area 4						0					09/29/2012
GLA5	D1-Area 5						0					09/29/2012
GLA1	S2-Area 1						0					09/29/2012
GLA2	S2-Area 2						0					09/29/2012
GLA3	S2-Area 3						0					09/29/2012
GLA4	S2-Area 4						0					09/29/2012
GLA5	S2-Area 5						0					09/29/2012
GLA6	S2-Area 6						0					09/29/2012
Unassociated pa...							0					

The Add EWPs from project search dialog box opens, and you can select one or more available EWPs to associate with a construction work package (CWP).



After they are added, the linked Engineering work package (EWP) shows in the associated work package.



3.3.6 GROUP WORK PACKAGES

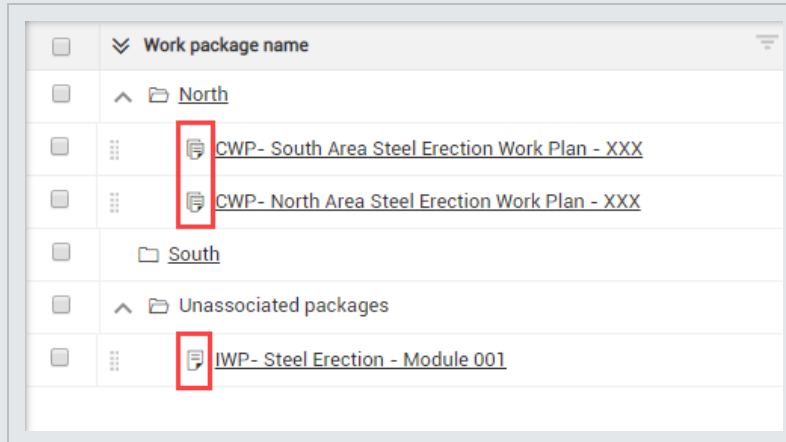
After creating work packages, you can group them under the plans you have created. This helps with the organization and planning of the work.

GROUP A WORK PACKAGE

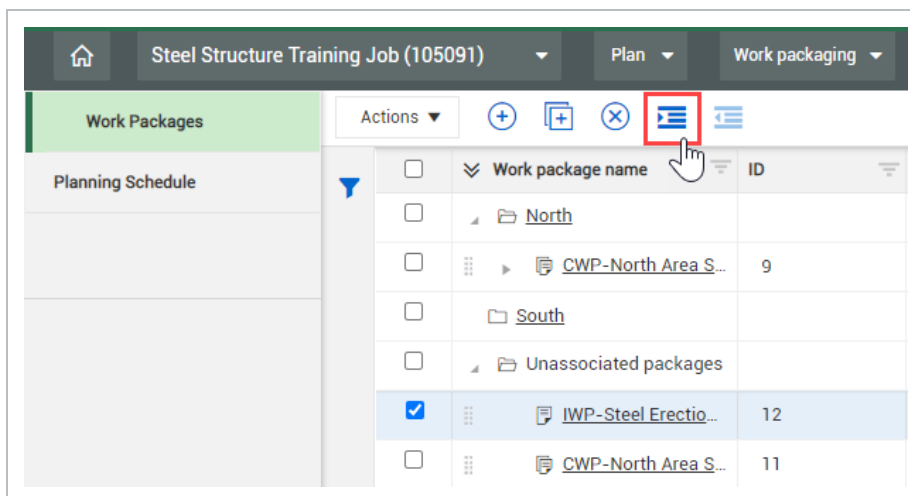
1. On the Work plans/packages page, select a work package.

NOTE

Notice that CWP and IWP have different icons.

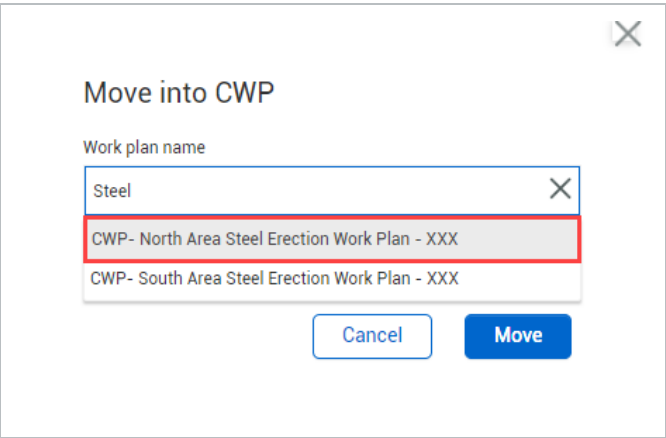


2. Click the **Move into CWP** icon.

**TIP**

You can also group installation work packages into construction work packages by clicking anywhere in the row for the installation work package and dragging it over top of the desired construction work package.

3. In the Move into CWP dialog box, start typing the name of your construction work package.



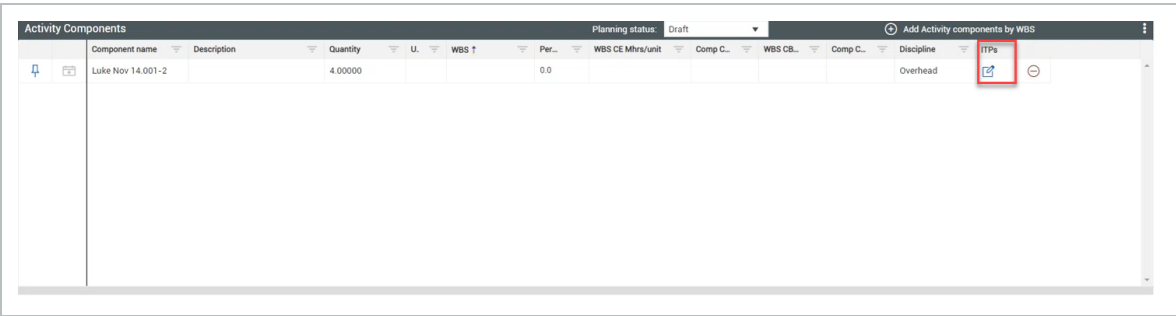
4. Select the CWP you want to move it to, then click **Move** to move the package to finish grouping your packages.

TIP

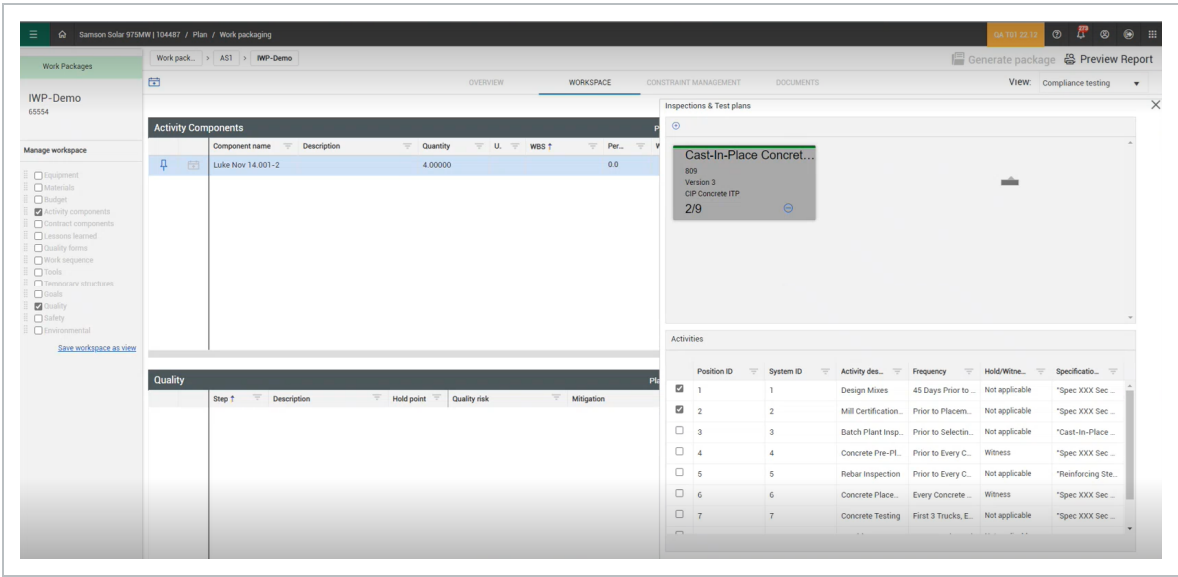
You can also group construction work packages into construction work areas by editing the CWP in the Construction Work Package Overview tab, then selecting the appropriate CWA ID or CWA Description from the drop-down.

3.3.7 LINK ACTIVITY COMPONENTS

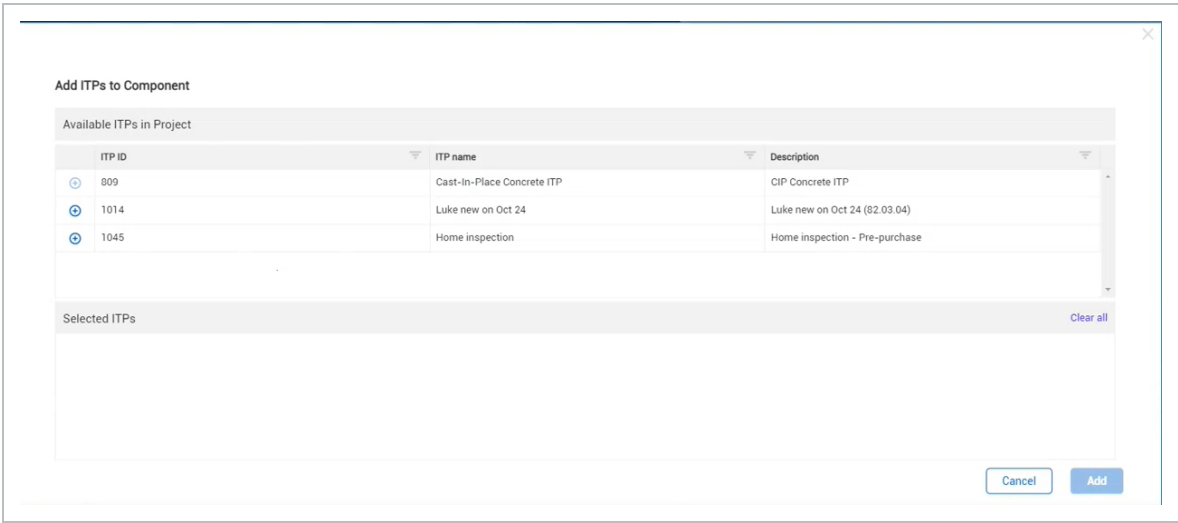
The activity components can be managed in both the Quantity Tracking and Work Packaging modules. To link the components, click the **Edit** icon in the ITP’s column.

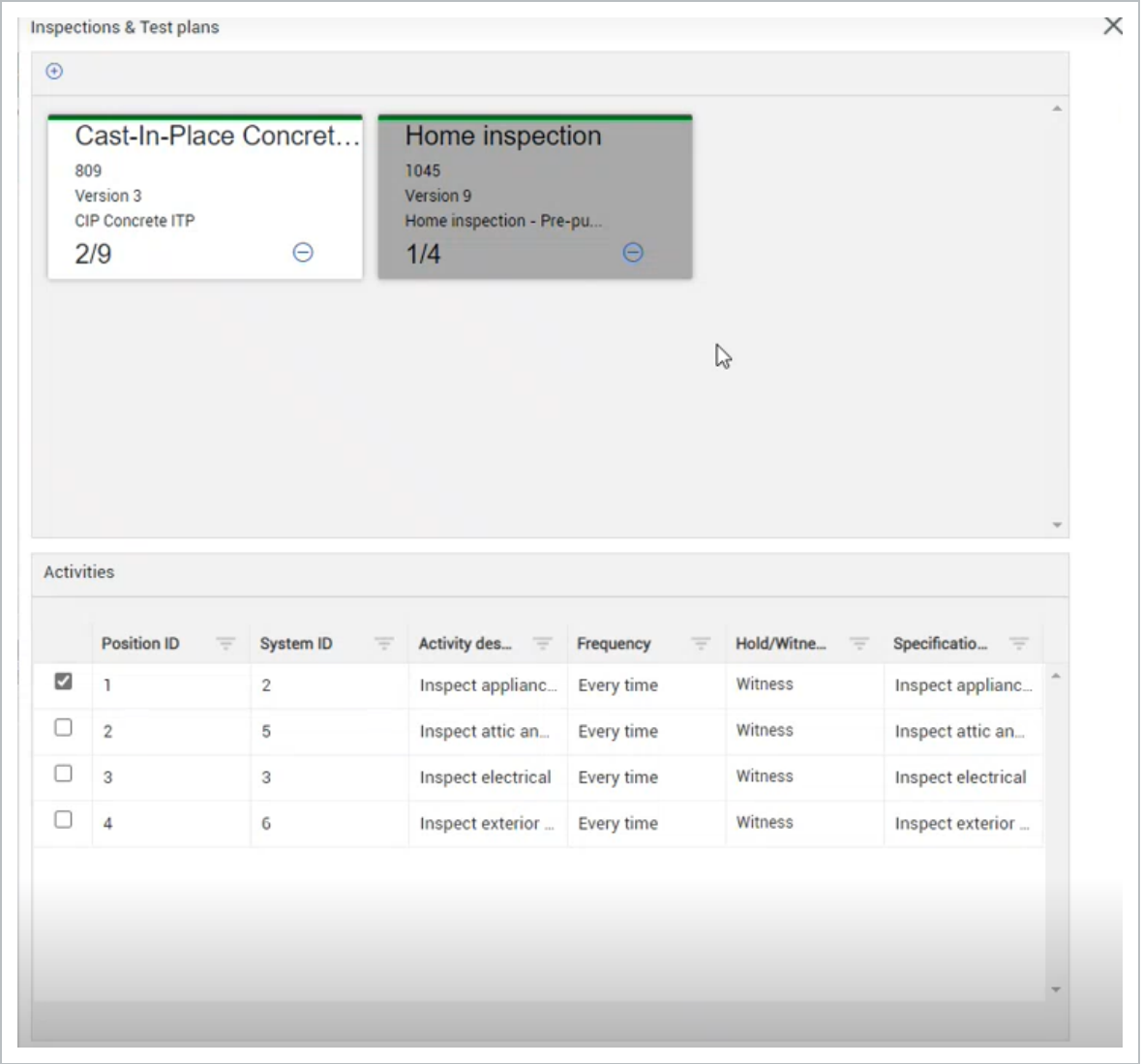


Select the **Add** icon to show all available and approved ITPs.



To add ITPs to Components, click the Add icon next to the available ITP. When an approved ITP is selected and added, it brings it to the component where you can mark the activities as complete. The data integrates with InEight Compliance, so you can schedule and manage the inspections.



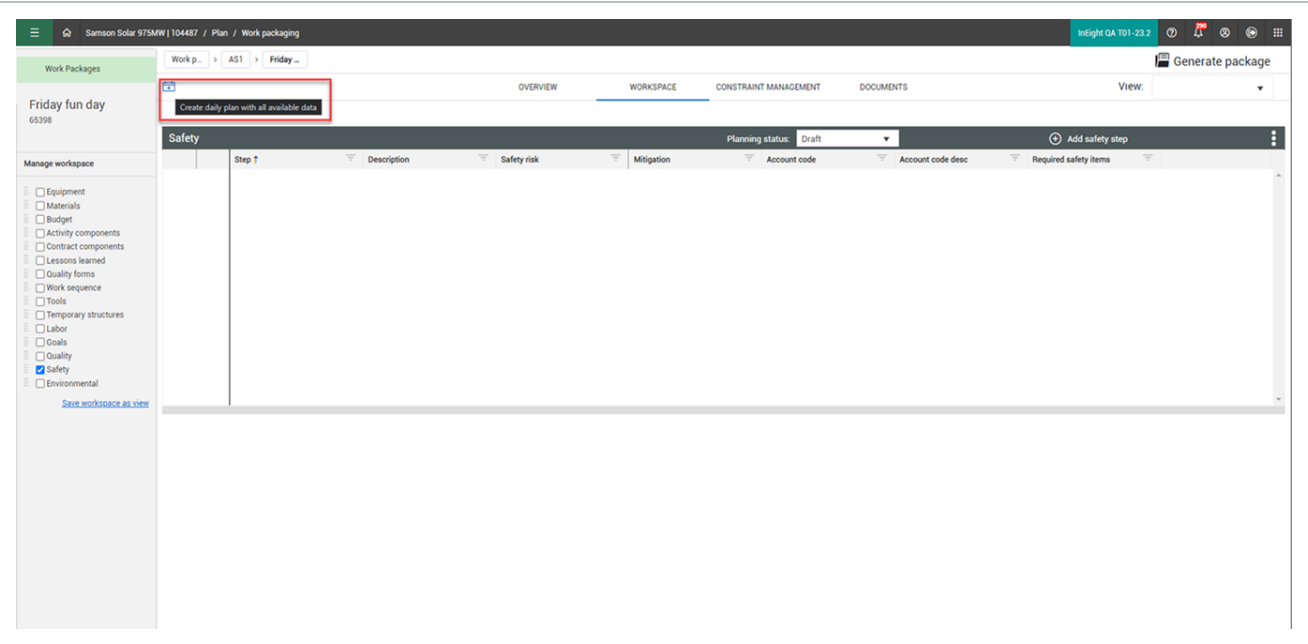


3.3.7.1 DAILY PLAN CREATION WITH ALL LINKED PROJECT VALUES

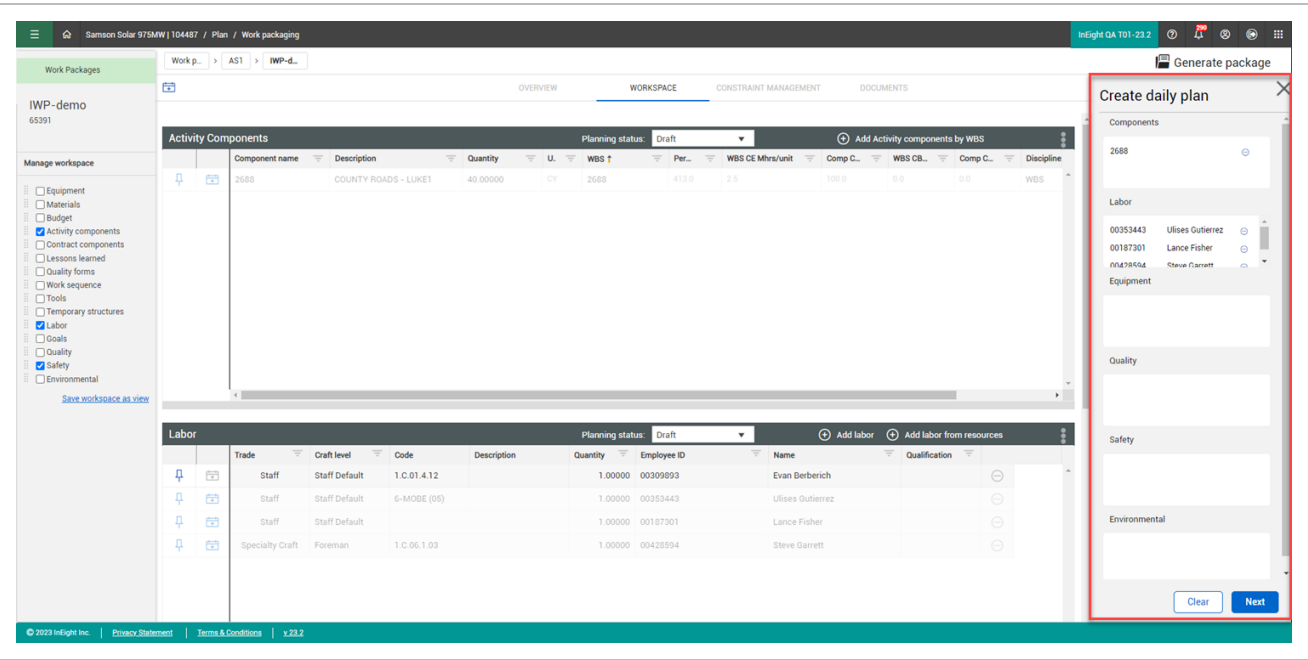
You can select multiple records with linked project values, so you can see all available data points. This selects all the eligible data from an IWP that can be used in an InEight Progress daily plan.

To create a daily plan with all linked projects values, select a work package, and then go to the Workspace tab. Click the **Create daily plan with all available data** icon, and then create a daily plan

with all available data.



The eligible data from the IWP shows, and the Create daily plan panel opens on the right side of the page.



Click **Next** to start the create a daily plan wizard with all the linked project values.

×

Create daily work plan

1 Plan details

2 Confirm resource

3 Tool box talks

* Plan date

Fri, 24 Mar 2023

* Plan name

Shift

FIRST SHIF

Work plan/package ID - Name

65391 - IWP-demo

Hint type "133" or "Site"

Planner notes

Location

Approvers (1 Required)

No approvers added

+

 Add approver

Executors (1 Required)

No executors added

+

 Add executor

Cancel

Next

Confirm resources and Tool box talks and then select **Create plan**.

×

Create daily work plan

1 Plan details

2 Confirm resource

3 Tool box talks

Component

	Component name	Description	Total MHRs	
⊗	2688	COUNTY ROADS - LUKE1	100	▲ ▼

Employee

	Employee ID	Name	Trade	
⊗	00353443	William Williams	Staff	▲ ▼
⊗	00187301	James Taylor	Staff	▲ ▼

Equipment

	Equipment ID	Description	Category	
--	--------------	-------------	----------	--

Cancel

Back

Next

×

Create daily work plan

1 Plan details

2 Confirm resource

3 Tool box talks

Safety

Safety concern	Mitigation	
----------------	------------	--

Quality

Quality concern	Mitigation	
-----------------	------------	--

Environmental

Environmental concern	Mitigation	
-----------------------	------------	--

Skip planning

Save and create another

Cancel

Back

Create plan

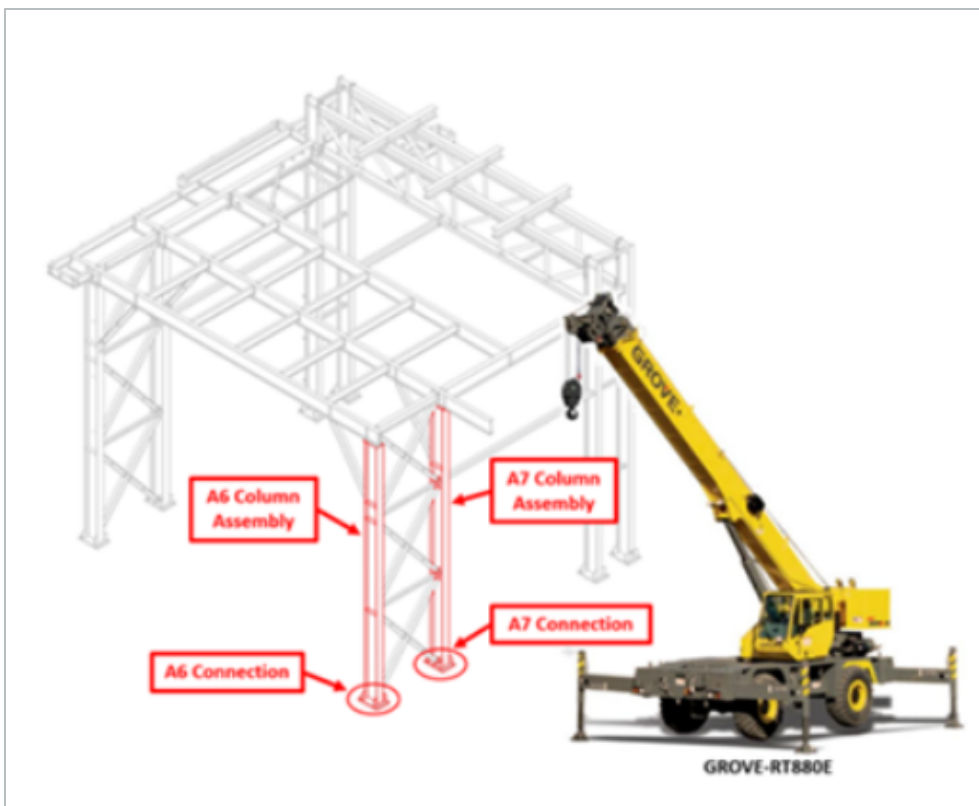
NOTE

Resource must be active to show available data points.

3.4 DAILY PLAN FROM WORK PACKAGE (DAILY PLAN WIZARD)

Scenario

Tomorrow, your crew will be starting the steel erection work on your module. You are now ready to plan the work for your crew. During this first day, you want your crew to install the A7 connections to foundations. Your crew will consist of a Grove-RT880E crane, 3 Ironworkers and 1 Laborer. You want to make sure to communicate the work to your crew and identify safety concerns for the day.



In this topic, you will create a daily plan from an already existing work package using the Daily Plan Wizard in the InEight Plan web application.

3.4.1 WHAT IS A DAILY PLAN?

After you put your work package together, you break it down into daily segments, or the work you plan to accomplish in a given day.

Using the scenario above as an example, your steel erection work package for your module will take multiple days to complete. You will use daily planning to plan the work in the sequence you are looking to do it in, day by day. Daily planning is a good tool to communicate to your crew your safety concerns, quality and environmental risks, and expected productivity.

Daily planning combines:

- Components
 - Activity components
 - Material components associated with WBS
- Resources (employees, and equipment)
- Planned hours
- Planned quantities
- Notes/Issues
- Attachments (for example, safety notes, plan specifications)

3.4.2 DAILY PLAN WIZARD

The Daily Plan Wizard is a powerful tool that can help automate the process of setting up daily plans by copying information from an already existing work package to avoid duplicate work. The Daily Plan Wizard allows you to choose which parts of the work package will be brought into the daily plan.

You access the Daily Plan Wizard from Plan Work packaging module.

Overview - Daily Plan Wizard

Title		Description
1	Plan Date	The date on which the plan will be executed.
2	Plan Name	Unique name of the daily plan.
3	Shift	A drop-down field where you can select either the Day or Night Shift.
4	Work Plan/Package ID-	This should be auto populated with the name of the

Overview - Daily Plan Wizard (continued)

Title		Description
Name		work plan/package that the current daily plan is being created from.
5	Planner Notes	A free text field where you can add any relevant notes.
6	Location	A free text field where you can enter the location where the work will be performed.
7	Approvers (1 required)	Responsible for the approval of the plan.
8	Executors (1 required)	Responsible for the execution of the plan.
9	Navigation Buttons	Allows you to either cancel or create the new daily plan.

Add daily plan

1

* Plan date

2

* Plan name

3

Shift

Day Shift

4

Work plan/package ID - Name

5

Planner notes

6

Location

7

* Approvers (1 Required)

No approvers added

Add approver

8

* Executors (1 Required)

No executors added

Add executor

Skip planning

9

Cancel

Create plan

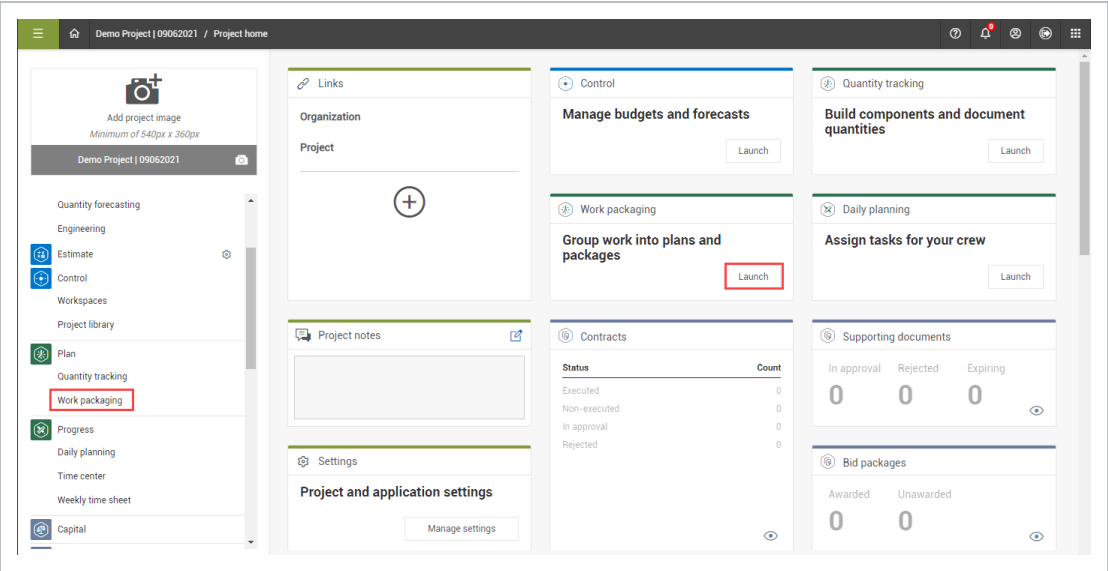
The following Step by Step walks you through how to use the Daily Plan Wizard.

NOTE

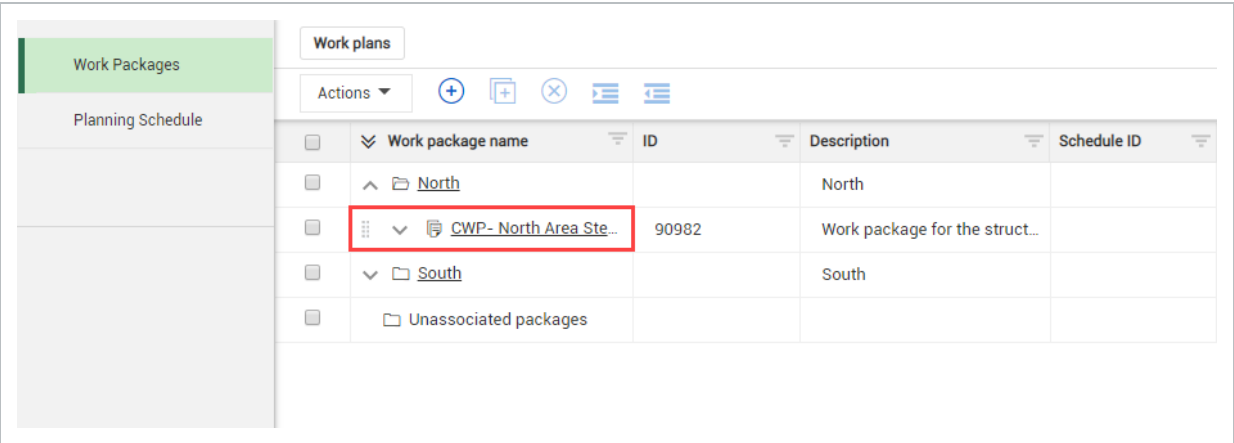
This Step by Step assumes you already have a work package (CWP or IWP) created containing work package details (e.g., labor, equipment, components, safety). See [Work Package Creation](#) for details on setting up work packages.

CREATE A DAILY PLAN USING THE DAILY PLAN WIZARD

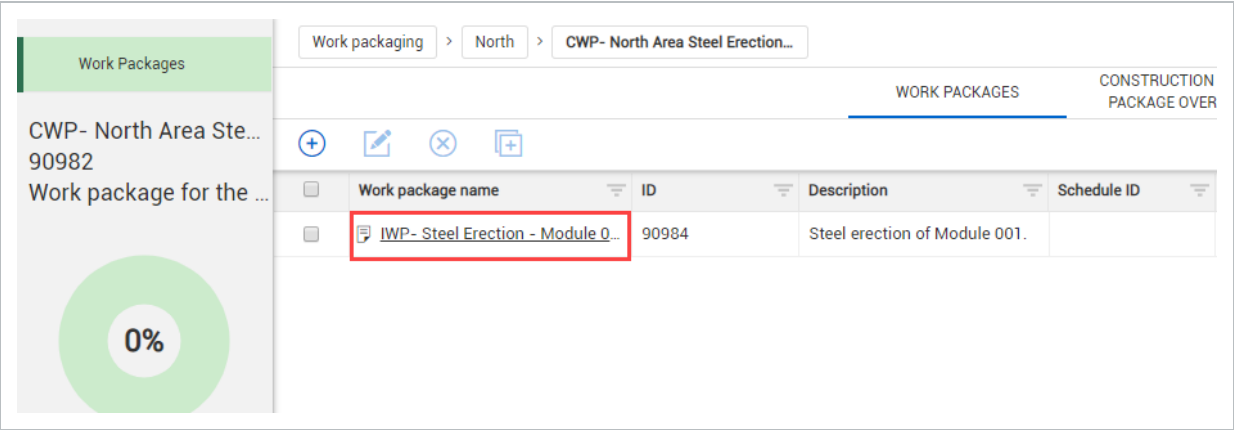
- 1. From your project home page, navigate to Plan > **Work packaging**.



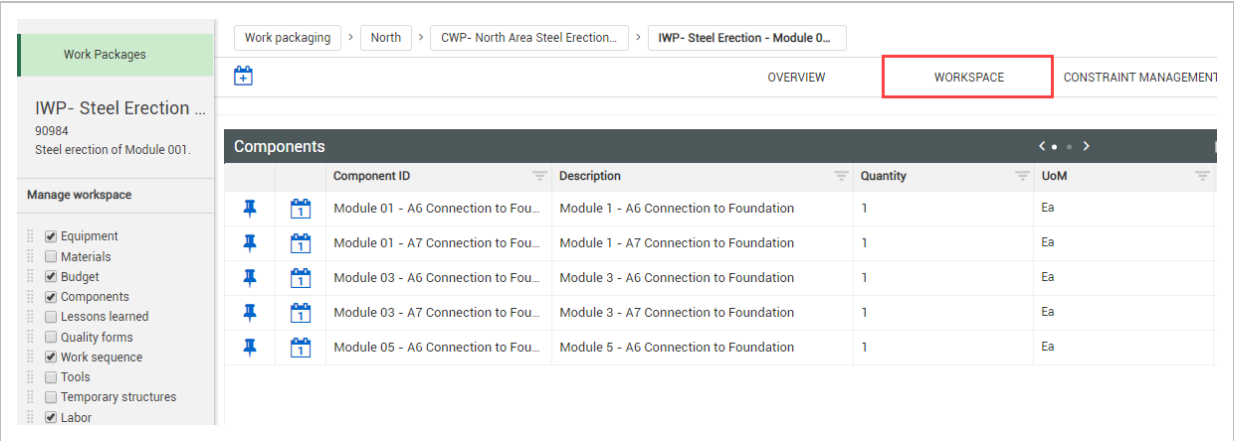
- 2. From the Work Packages tab, open a Construction Work Area (CWA) and click on the **arrow** in the ID column of your Construction Work Plan (CWP) to extend the work package below.
- 3. Select a Construction Work Package (CWP) by clicking on its **hyperlink ID**.



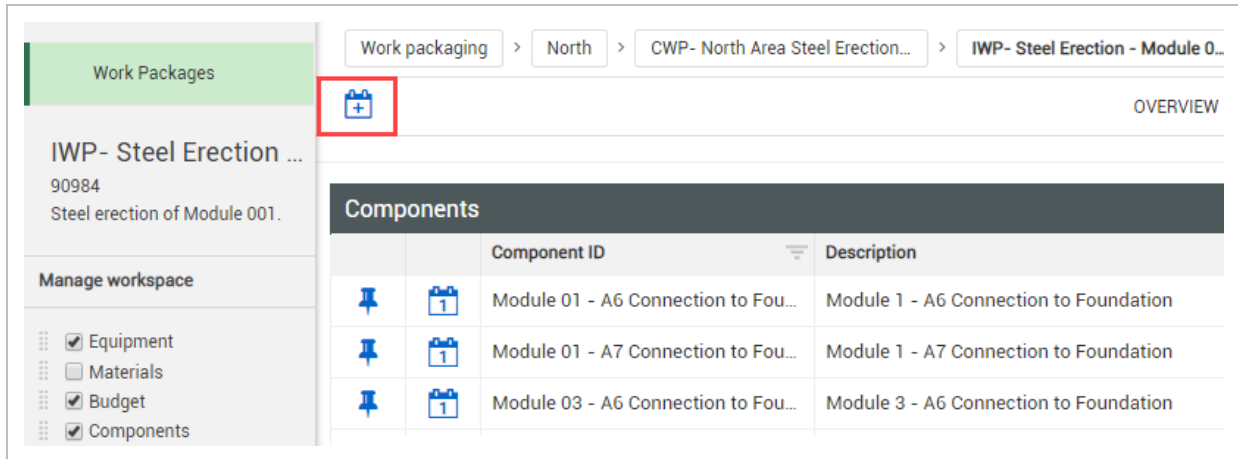
4. Open your Installation Work Package (IWP) by clicking on its **hyperlink ID**.



5. From the IWP page, click on the **Workspace** tab.

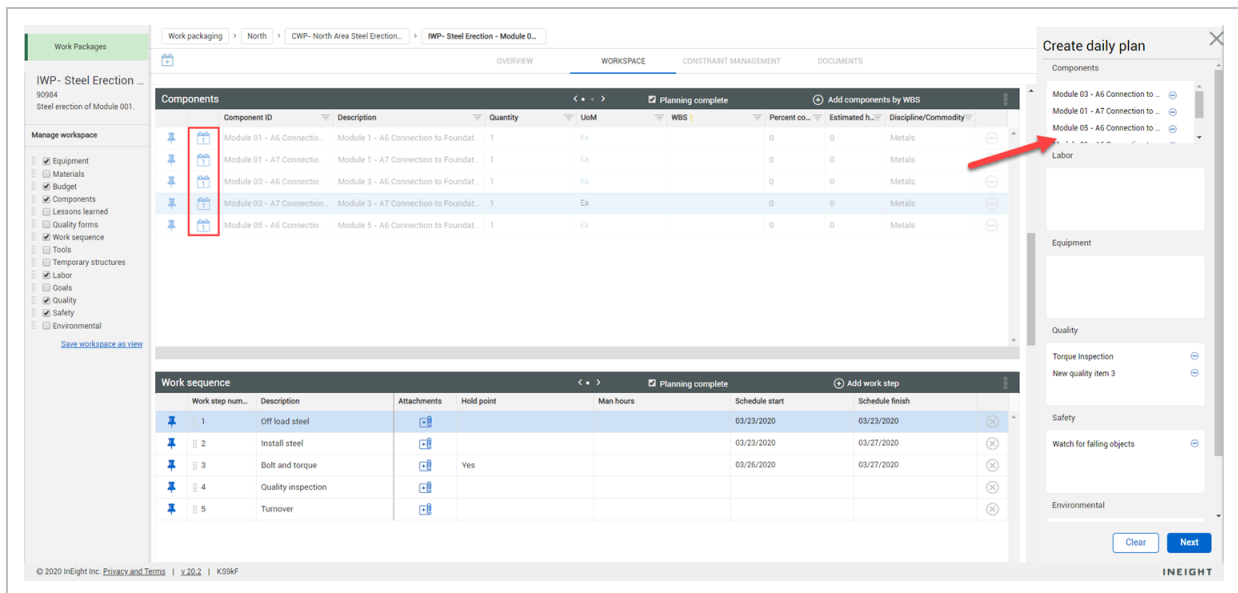


6. Click on the **Daily Plan** icon.



- This opens the Daily Plan Wizard slide-out panel

7. With the Daily Plan Wizard open, select the components, resources, etc. that you want to copy by clicking on the calendar icon from your data blocks.



- Your selections are shown in the Wizard

NOTE

Not all data blocks can be copied. If no calendar icon is shown, that data block is not available to be populated in daily planning. Activity components can only be used if they can be claimed in Plan Quantity tracking. Labor and equipment can only be used if they are active in the project date range.

8. When finished, click **Next** on the Daily Plan Wizard.

Quality

Torque Inspection

New quality item 3

Safety

Watch for falling objects

Environmental

Clear

Next

INEIGHT

9. Enter your new daily plan details.

NOTE

You can complete and edit these daily plan details at any point. Notice that only some fields are required to create a new daily plan.

×

Create daily work plan

1 Plan details

2 Confirm resource

3 Tool box talks

• Plan date

• Plan name

Shift

First Shift

Work plan/package ID - Name

90984 - IWP- Steel Erection - Module 001

Hint type "133" or "Site"

Planner notes

Location

Approvers (1 Required)

No approvers added

+ Add approver

Executors (0 Required)

No executors added

+ Add executor

Cancel

Next

10. Click **Next**.
11. Confirm that all your selected components and resources are correct for your new daily plan. Then, click **Next**.

×

Create daily work plan

1 Plan details

2 Confirm resource

3 Tool box talks

Component

	Component ID	Description	Total MHRs
⊗	Module 03 - A6 Connection to Fou...	Module 3 - A6 Connection to Foun...	0
⊗	Module 01 - A7 Connection to Fou...	Module 1 - A7 Connection to Foun...	0

Employee

Employee ID	Name	Trade
No employee topics added		

Equipment

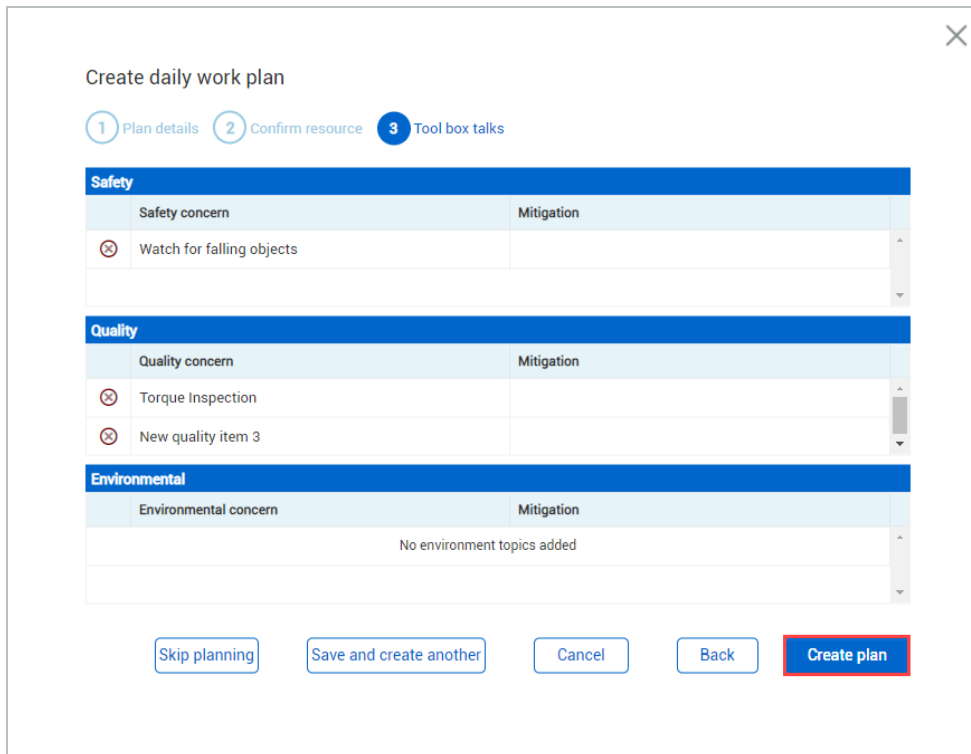
Equipment ID	Description	Category
No equipment topics added		

Cancel

Back

Next

12. Verify that everything is correct for the Tool box talks section. Then, click **Create plan**.



Create daily work plan

1 Plan details 2 Confirm resource 3 Tool box talks

Safety	
Safety concern	Mitigation
⊗ Watch for falling objects	

Quality	
Quality concern	Mitigation
⊗ Torque Inspection	
⊗ New quality item 3	

Environmental	
Environmental concern	Mitigation
No environment topics added	

Skip planning Save and create another Cancel Back Create plan

- Once created, you can edit your new daily plan by navigating to Progress > Daily Planning page > My Daily Plans Tab

3.5 INSTALLATION WORK PACKAGE DETAILS

Installation work packages include the details of a group of activities. The details in the work package include installation sequence, components, labor, equipment, safety and quality concerns, and other aspects of the work package. When ready to share, you can attach external files and send to print as a PDF. Or, if you are integrated with InEight Document, you can easily send packages and documents.

You can also create a daily plan in InEight Progress from a work package. For more information, see [Daily Plan from Work Package](#).

3.5.1 WORK PACKAGE OVERVIEW TAB

When you open an installation work package from the Work plans page, the Overview tab is like the construction work package Overview tab, but you can define settings specific to the installation work package. For example:

- The engineer may be different for this particular package and might report to a different engineer than assigned at the CWP level
- The IWP's start and end dates might also be a smaller time period than the CWP's schedule start and finish dates

TIP

You can also edit IWP fields from the grid view of the parent construction work package. From the Work packages tab of a construction work package, you can click in fields in the grid, and then type or select values instead of opening each installation work package to change values.

INSTALLATION WORK PACKAGE OVERVIEW

1. On the Work plans/packages page, select the **hyperlink ID** of your installation work package.
2. In the Overview tab of your installation work package, enter a description in the Description field.
3. From the drop-down list in the Discipline field, select a discipline.
4. For Type of work, input short description.
5. From the drop-down list in the Risk field, select a risk level.
6. Select a Start and End date.
7. Select a Planner.
8. Select a Superintendent.
9. Select an Engineer.
10. Select an Executor.

Work Packages

Work packaging > North > CWP-North Area Steel Erection > IWP-Steel Erection - Module 001

OVERVIEW WORKSPACE CONSTRAINT MANAGEMENT DOCUMENTS

Overview

IWP ID: 8 IWP name: IWP-Steel Erection - Module 001 CWP: CWP-North Area Steel Erection CWA: North-North

Description: Steel erection of Module 001

Scope of work:

Location: Discipline: Metals Type of work: Steel Erection Risk: Medium

Schedule ID: Schedule name: Scheduled start date: Mon, 3 Aug 2020 Scheduled end date: Fri, 7 Aug 2020

Status: Draft Last updated by: Last updated on: 08/03/2020

Mhr % Complete: 0% Cost % Complete: 0%

Schedule ID: Start date: August 3, 2020 End date: August 7, 2020

Status: Draft Planner: Superintendent: Field Engineer: Execution:

3.5.2 INSTALLATION WORK PACKAGE WORKSPACE TAB

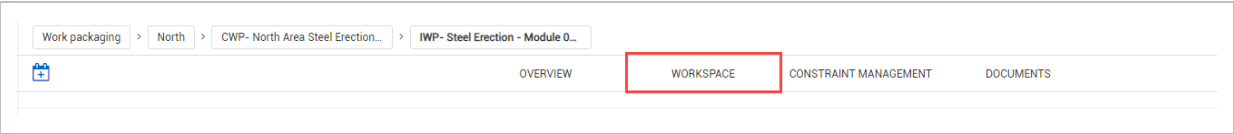
The Workspace tab is where the majority of your planning is accomplished. Here you can enter the planned labor, materials, equipment, components, among other aspects of the plan. You enter these details using data blocks. Some data blocks are open entry fields, such as safety, environmental, and work sequence. However, other data blocks use validated fields based off previously entered information. These include Budget, Component, and Equipment data blocks.

NOTE The Labor data block is an open entry field, unless you enter an actual labor resource.

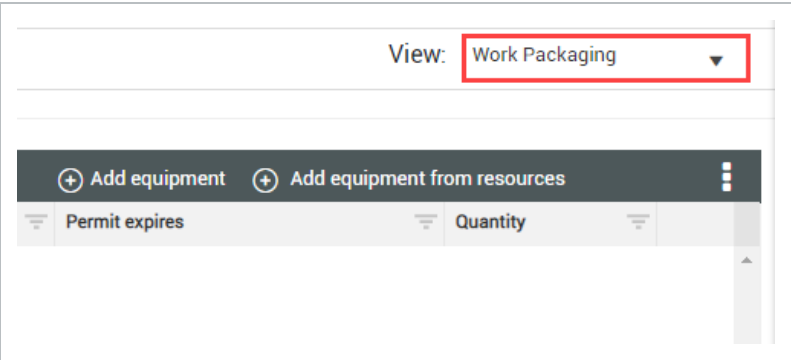
TIP You can track materials assigned as constraints in work packages by integrating with Intelliwave. See [Enable external material tracking integrations](#) for more information.

INSTALLATION WORK PACKAGE WORKSPACE

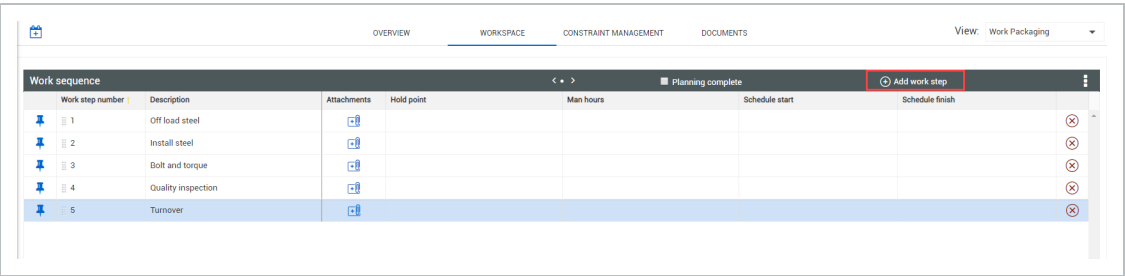
1. On the Work Packages tab of the Work plans/packages page, select the **hyperlink ID** of your installation work package.
2. From the Installation work package page, select the **Workspace** tab.



3. Select the **View menu** and change your view to your previously created viewset (see *General Navigation*).



4. In the **Work sequence** data block, add work sequence steps by clicking on the **Resource** button and enter details for your project.

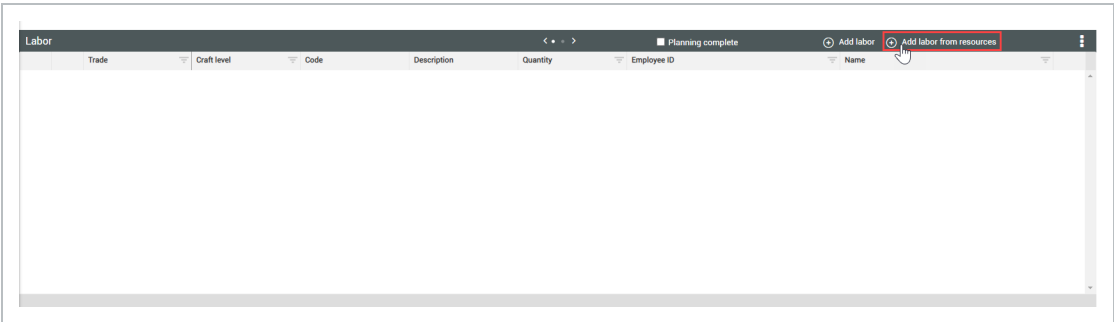


NOTE

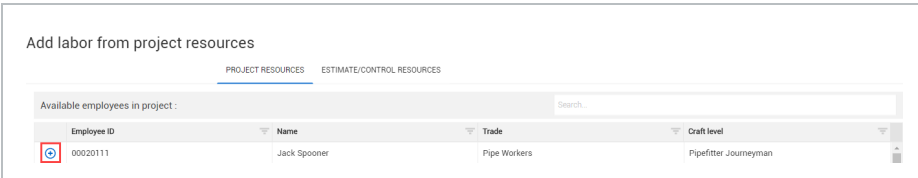
Create a hold point by clicking in the Hold Point field and select **Yes**.

Work sequence			
Work step number	Description	Attachments	Hold point
1	Off load steep		
2	Install steel		
3	Bolt and torque		None
4	Quality inspection		None
5	Turnover		No
			Yes

5. In the Labor data block, add labor by clicking **Add labor from resources** and enter details for your project.



6. In the new dialog box's Project Resources tab, search for employee names and click the **Add** icon and enter details for your project.



TIP

You can search based off any of the fields associated to the employee (e.g., Employee ID, Trade).

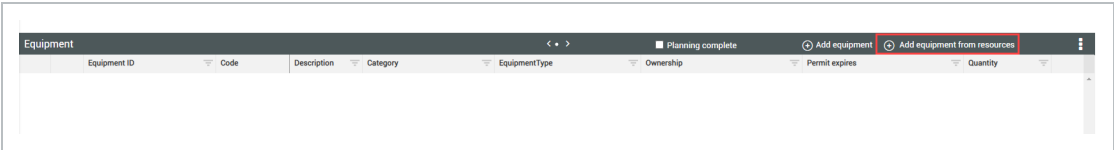
NOTE

You can add multiple employees at a time in this dialog box. Only employees who can be added to daily plans will show up in the drop-down selection – See your Account Administrator if you do not see an employee.

NOTE

You can also add generic labor from assigned WBSs in the Estimate/Control Resources tab. You must first add a component associated with the appropriate WBS to the IWP.

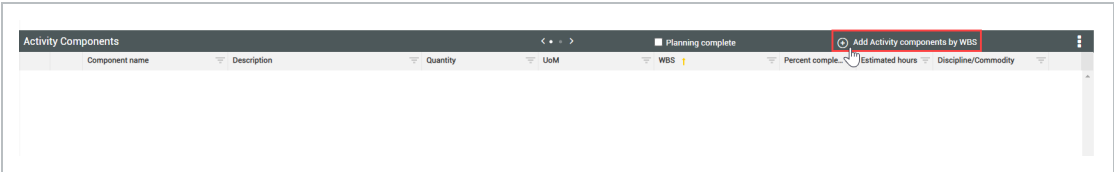
7. In the Equipment data block, add equipment by selecting **Add equipment from resources** and enter details for your project.



NOTE

You can also add generic equipment from assigned WBSs in the Estimate/Control Resources tab. You must first add a component associated with the appropriate WBS to the IWP.

8. In the Activity Components data block, add equipment by clicking **Add Activity components by WBS** and then entering details for your project.



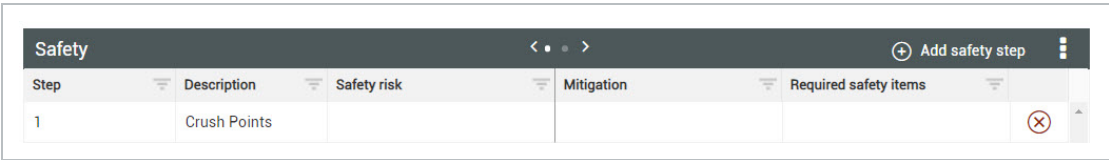
NOTE

A component can only be present in one package at a time. It cannot be in both the CWP and its child IWP due to percent complete tracking purposes.

NOTE

If the work package is assigned to a work area, the activity component's location is updated to the work area in Quantity tracking and can no longer be changed in that module.

9. In the Safety data block, add steps by clicking **Add safety step** and enter details for your project.



10. On the Breadcrumbs bar, select **Work packaging** to go back to the Work plans/packages page and view your completed work plan and work package.

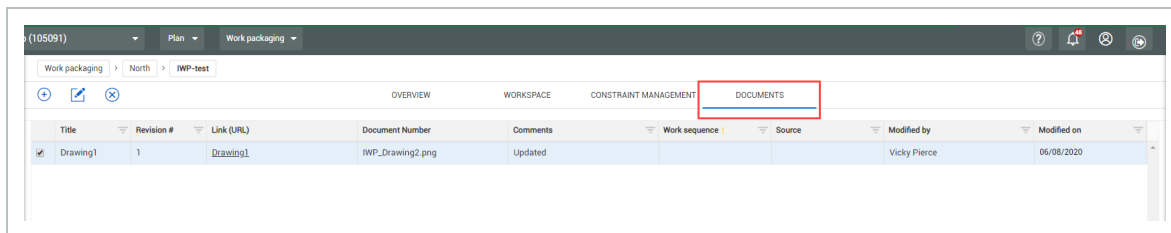
3.5.3 INSTALLATION WORK PACKAGE CONSTRAINT MANAGEMENT TAB

In the Constraint Management tab, you can review items pinned in the Workspace tab or manually add new constraints. For more information, see [Constraint Management](#).

3.5.4 INSTALLATION WORK PACKAGE DOCUMENTS TAB

Add, edit, and share IWP documents from the Documents tab. As documents are updated, get the latest information by looking for the revision number, modifier, and date of modification.

You can add attachments to the Lesson learned, Quality forms, Temporary structures, and Work sequence data blocks from the Workspace tab. These additions show in the Documents tab.



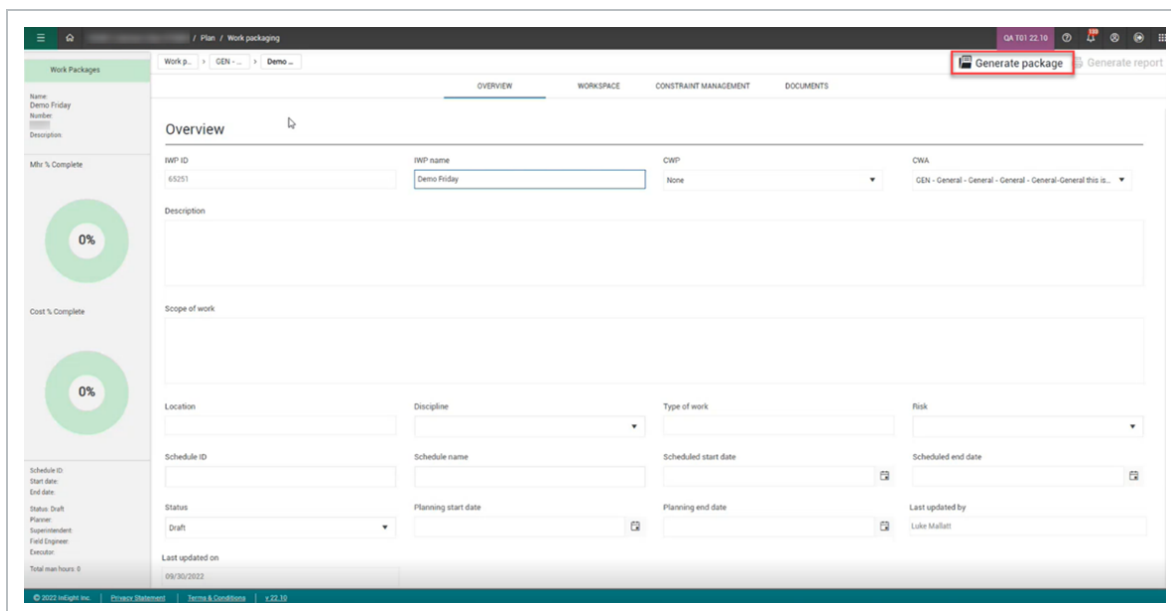
Title	Revision #	Link (URL)	Document Number	Comments	Work sequence	Source	Modified by	Modified on
Drawing1	1	Drawing1	IWP_Drawing2.png	Updated			Vicky Pierce	06/08/2020

NOTE

The document number is randomly generated to integrate with Document. Any changes made to the title updates the revision.

3.5.4.1 GENERATE PACKAGE

When you click the Generate package icon, it sends a request to Document that enables the Generate report button and disables the Generate package button.



Generate package Generate report

Overview

IWP ID: 65051 IWP name: Demo Friday CWP: None CWA: GEN - General - General - General - General - General this is...

Description:

Scope of work:

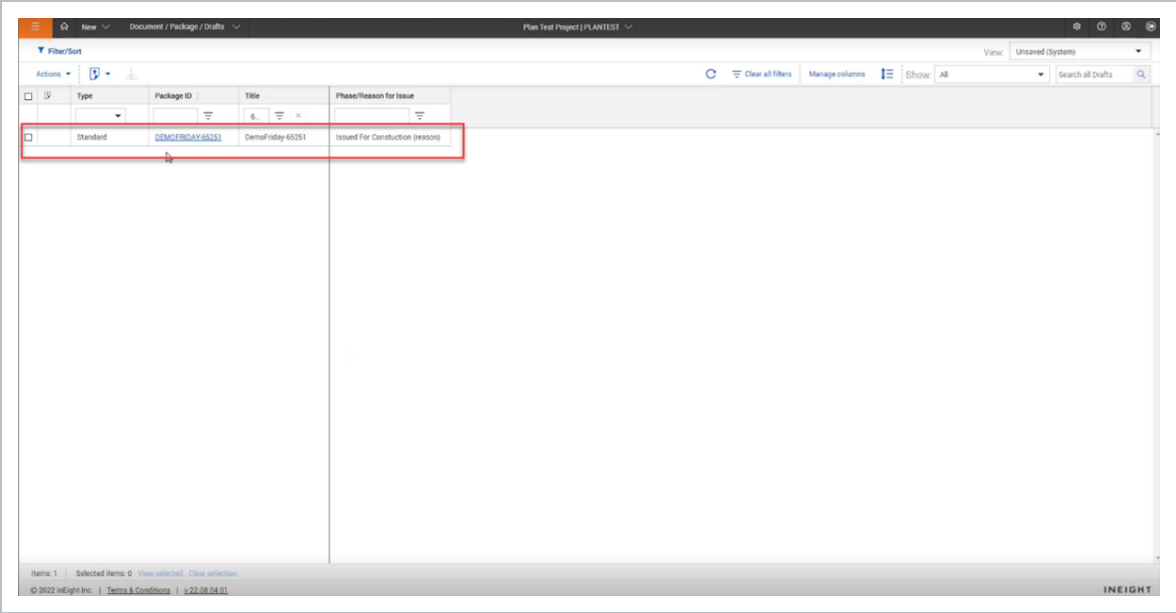
Location: Discipline: Type of work: Risk:

Schedule ID: Schedule name: Scheduled start date: Scheduled end date:

Status: Draft Planning start date: Planning end date: Last updated by: Luke Mallatt

Last updated on: 09/10/2022

In Document, the package will show after you click the Refresh icon.



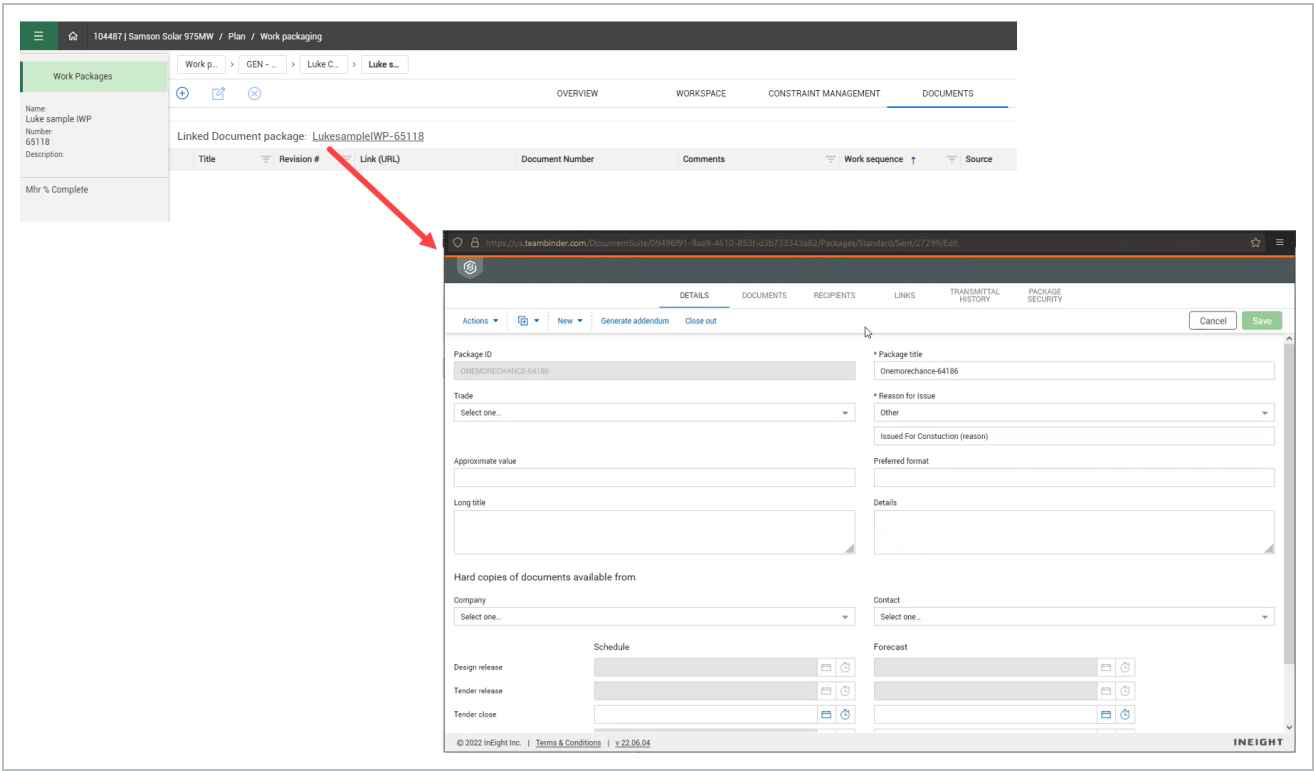
Type	Package ID	Title	Phase/Reason for Issue
Standard	DEMOTEDAY55251	DemoFriday-65251	Issued For Construction (person)

NOTE You must click Generate package for the package to show in Document . When you delete the package in Document, the Generate package button is enabled in Plan.

3.5.4.2 LINKED DOCUMENT PACKAGE

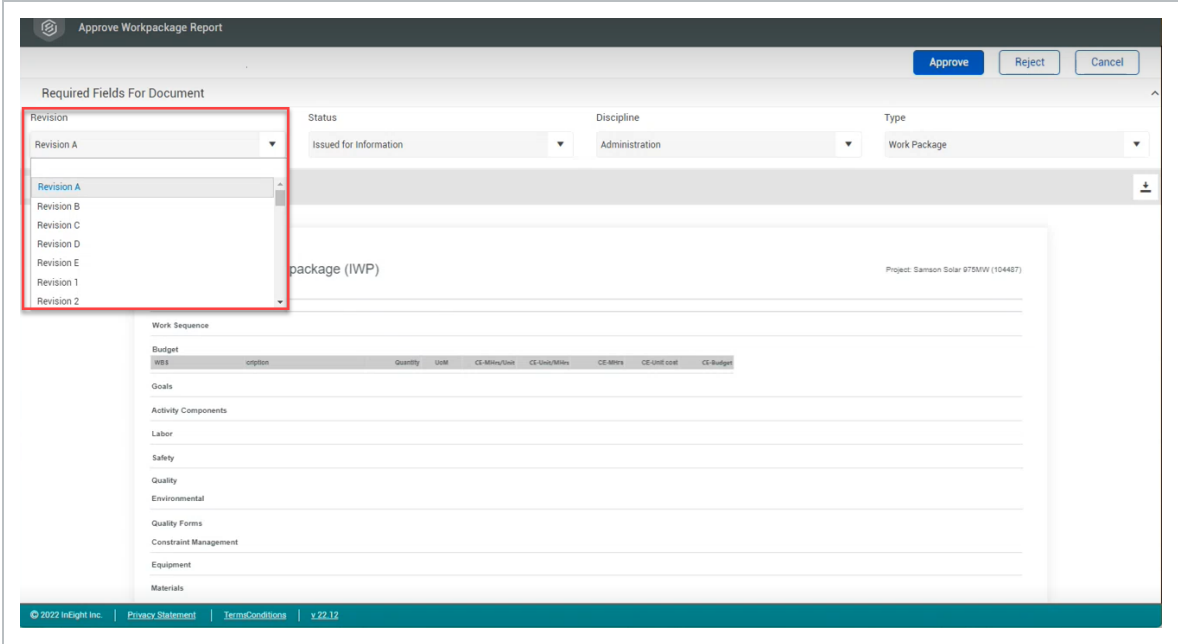
If a work package is integrated with an InEight Document package, a link is now provided to the Document package.

On the Documents tab of a work package, a link to the associated Document package is shown at the top of the page. Click the link to open Document to the associated package.



3.5.4.3 DEFINE REVISION FOR IWP REPORT

The Revision option in the Work package report lets you select the revision. This automatically updates to the next revision if the one selected is not available. You can also manage revisions in InEight Document. The Revisions shown in the drop-down list are the ones available from the project.



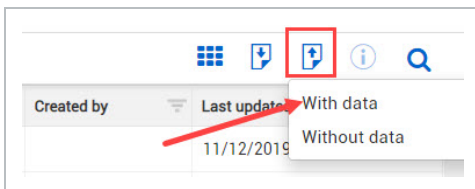
3.6 WORK PACKAGE IMPORT AND EXPORT

3.6.1 IMPORT TEMPLATE

Creating and copying work packages can be time consuming. You can use an Excel import template to upload multiple work packages with their overview information already populated.

CREATE WORK PACKAGES FROM EXCEL IMPORT

1. On the Work plans/packages page, click on the **Export** icon, and select to export **With Data** and open the export file.



TIP

Excel templates without data are used for creating new components from scratch, usually during project setup.

Excel templates with data are typically used to update existing work plans/packages.

2. Open the export file.
 - This opens up the Excel template to use for the import. It also contains the data from the current work packages on the Work plans page
 - You may need to select **Enable editing** at the top of the spreadsheet prior to entering data

	A	B	C	D	E	F	G
1	English	User Selected Language					
2	REQUIRED	Field is required for import					
3	OPTIONAL	Field is optional for import					
4	VALIDATED	Field must match master data available in application					
5	IGNORED	Field not to be populated					
6	Name	Package Type	Description	ID	CWP ID	Schedule ID	Scheduled start
7	Alphanumeric	CWP/Work Package	Alphanumeric	Numeric	Numeric	Alphanumeric	Date: MM/DD/YYYY
8	50	1000	200	100	20	10	
9	IWP- Steel Erection - Module 001	IWP	Steel erection of Module 001	35734	35732		
10	CWP- South Area Steel Work plan	CWP	Work Package for the structural steel of the North	35733			11/4/2019
11	CWP- North Area Steel Work plan	CWP	Work Package for the structural steel of the North	35732			11/4/2019

3. Input information into your template to be uploaded. At the bottom of the list, add information for the following categories:

- Name
- Package Type
- Description
- Assign the proper CWP to your work package in the CWP ID field

English	User Selected Language			
REQUIRED	Field is required for import			
OPTIONAL	Field is optional for import			
VALIDATED	Field must match master data available in application			
IGNORED	Field not to be populated			
Name	Package Type	Description	ID	CWP ID
Alphanumeric	CWP/IWP/EWP	Alphanumeric	Numeric	Numeric
50	3	1000	200	100
IWP- Steel Erection - Module 001	IWP	Steel erection of Module 001	35734	35732
CWP- South Area Steel Work plan	CWP	Work Package for the structural steel of the North	35733	
CWP- North Area Steel Work plan	CWP	Work Package for the structural steel of the North	35732	
IWP- Steel Erection Upper Deck - Module 001	IWP	Upper rack steel erection		35733

NOTE

Drop-down lists show for fields that are validated in the import templates for line items.

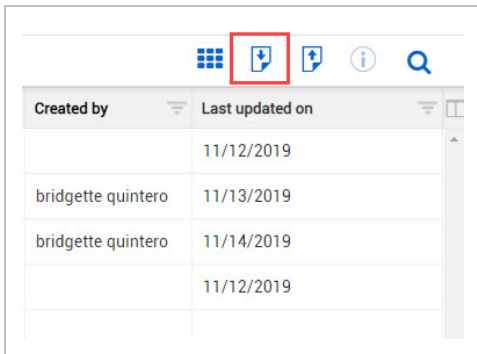
4. Delete all the work packages that came with the template.

English	User Selected Language			
REQUIRED	Field is required for import			
OPTIONAL	Field is optional for import			
VALIDATED	Field must match master data available in application			
IGNORED	Field not to be populated			
Name	Package Type	Description		
Alphanumeric	CWP/IWP/EWP	Alphanumeric		
50	3	1000		
IWP- Steel Erection - Module 001	IWP	Steel erection of Module 001		
CWP- South Area Steel Work plan	CWP	Work Package for the structural steel of the North		
CWP- North Area Steel Work plan	CWP	Work Package for the structural steel of the North		
IWP- Steel Erection Upper Deck - Module 001	IWP	Upper rack steel erection		

NOTE

When you import a template to Work packing with a blank value in a field, the previous value is not deleted. If want to delete a value when importing, you must type null in the field.

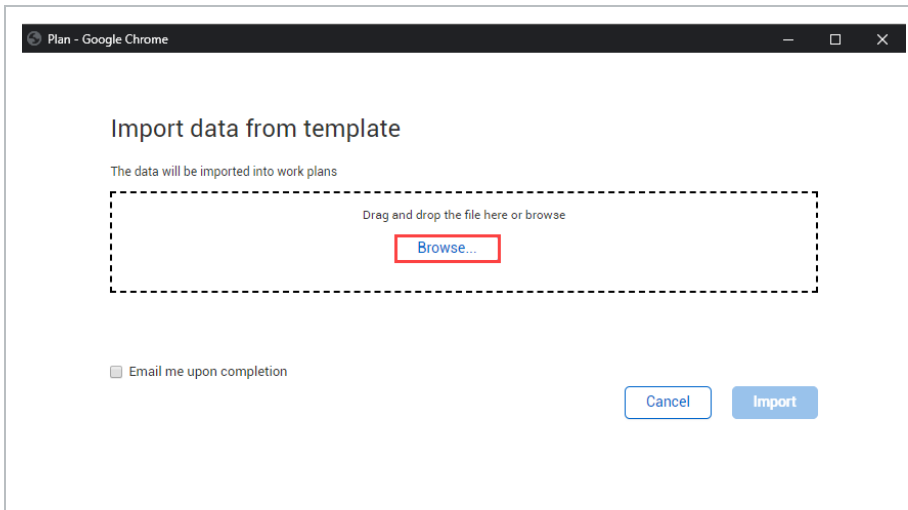
5. Save this Excel file to your desktop.
6. In InEight Plan, on the Work plans/packaging page, click the **Import icon**.



Created by	Last updated on
	11/12/2019
bridgette quintero	11/13/2019
bridgette quintero	11/14/2019
	11/12/2019

- An Import data from template window appears

7. Click **Browse** to find your saved template.



Plan - Google Chrome

Import data from template

The data will be imported into work plans

Drag and drop the file here or browse

Browse...

☐ Email me upon completion

Cancel Import

8. Click **Import**.

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

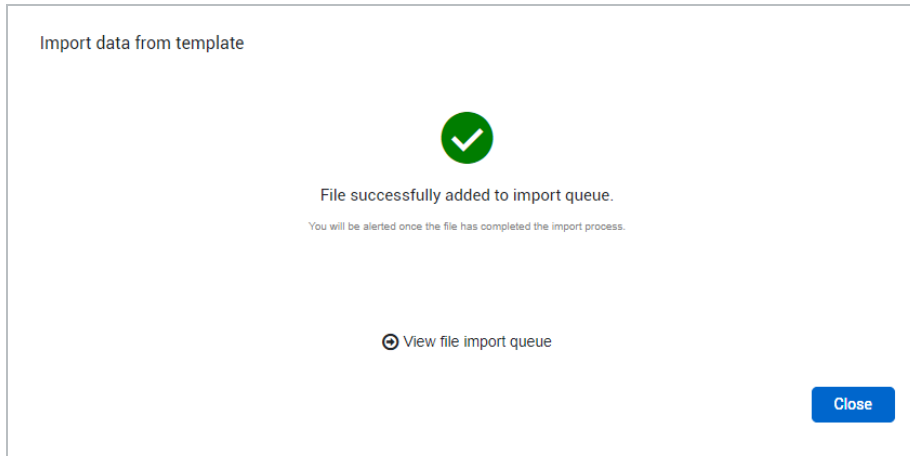
NOTE

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

TIP

If you have an error, check that the name of your work package is not the same as an existing work package.

9. Click **Close**.



3.6.2 EXPORT TO ANOTHER PROJECT

The following Step by Step shows you how to export some or all of a work package to another project.

3.6 STEP BY STEP 1 – EXPORT WORK PACKAGE TO ANOTHER PROJECT

1. Select a work package.
2. Click the **Export** icon, and then select **To other project** from the drop-down list.
 - The Export work packages dialog box opens
3. Select a destination project, and then click **Next**.

NOTE

You must have permission to create work packages in the destination project to export to that project.

4. Select the pages and individual data blocks you want to export.

NOTE

The Documents page is shown in the dialog box but cannot be selected to copy.

NOTE

You can only export data that is entered as free text. You cannot export project-specific data such as components.

5. Click **Export**.

3.6.3 IMPORT FROM ANOTHER PROJECT

The following Step by Step shows you how to import some or all of a work package from another project.

3.6 STEP BY STEP 2 – IMPORT WORK PACKAGE FROM ANOTHER PROJECT

1. Select a work package.

NOTE

You must have permission to create work packages in the destination project to import into that project.

2. Click the **Import** icon, and then select **From other project** from the drop-down list.

- The Import work packages dialog box shows

3. Select an origin project, and then click **Next**.

4. Select origin work packages, and then click **Next**.

NOTE

You can import from multiple work packages at the same time.

5. Select the pages and individual data blocks you want to import.

NOTE

The Documents page is shown in the dialog box but cannot be selected to copy.

NOTE

You can only import data that is entered as free text. You cannot import project-specific data such as components.

6. Click **Import**.

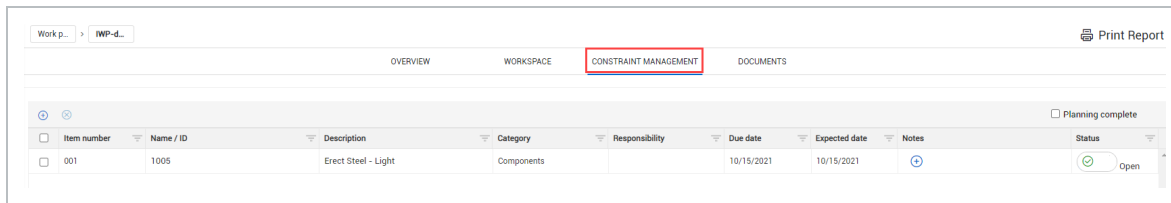
3.7 CONSTRAINT MANAGEMENT

This topic describes the Constraint Management tab of an installation work package (IWP).

3.7.1 SUMMARY

You can define constraints on a work package's completion in several ways and manage all of them on the Constraint Management tab. Constraints can be added manually or by pinning items from the IWP

Workspace tab.



The screenshot shows the 'CONSTRAINT MANAGEMENT' tab selected within the 'WORKSPACE' section. The interface includes a top navigation bar with 'OVERVIEW', 'WORKSPACE', 'CONSTRAINT MANAGEMENT', and 'DOCUMENTS'. Below this is a table with columns: Item number, Name / ID, Description, Category, Responsibility, Due date, Expected date, Notes, and Status. A single row is visible with the following data: Item number 001, Name / ID 1005, Description Erect Steel - Light, Category Components, Due date 10/15/2021, Expected date 10/15/2021, Notes (empty), and Status Open. A 'Print Report' button is located in the top right corner.

Item number	Name / ID	Description	Category	Responsibility	Due date	Expected date	Notes	Status
001	1005	Erect Steel - Light	Components		10/15/2021	10/15/2021		Open

Constraints are organized into categories, most of which correspond to the data blocks of the Workspace tab:

- Equipment
- Materials
- Budget
- Components (activities)
- Lessons Learned
- Quality Forms
- Work Sequence
- Tools
- Temporary Structures
- Labor
- Quality
- Safety
- Environmental
- Contract Components
- Work packages

Each constraint can be assigned to a responsible party and given due dates, expected dates, and notes. Constraints have a status of either Open or Closed and can be changed to show whether they are resolved or not.

3.7.2 CONSIDERATIONS

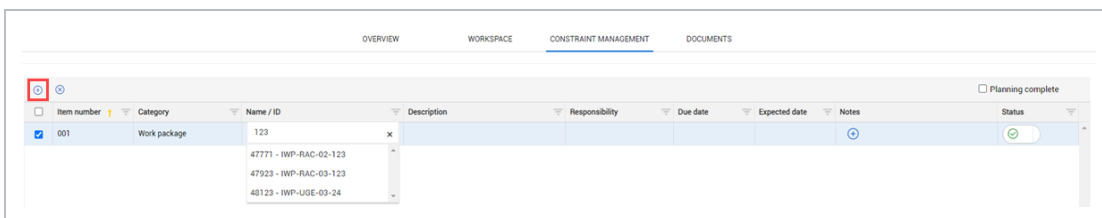
- Some constraints, such as work packages, can have their status automatically updated. When a work package tagged as a constraint has a status of Construction complete, its related constraint's status changes to *Closed*.
- You can track materials assigned as constraints in work packages by integrating with Intelliwave. See [Enable external material tracking integrations](#) for more information.
- If you pin a material component as a constraint, associated notes on the Constraint management tab can contain notes sent from Intelliwave.
- Each note is limited to 500 characters and does not support any special formatting.

3.7.3 ADD A CONSTRAINT

You can add constraints manually in the Constraint Management tab or by pinning them in the Workspace tab.

3.7 STEP BY STEP 1 – MANUALLY ADD A CONSTRAINT

1. Open an IWP.
2. Click **Constraint Management** at the top of the page.
3. Click the **Add** icon in the upper left of the table. A new constraint is added with the Item number column automatically filled in.



4. Click in the blank field under the Category column, and then select a category from the drop-down list.
5. Type a name under the Name / ID column.

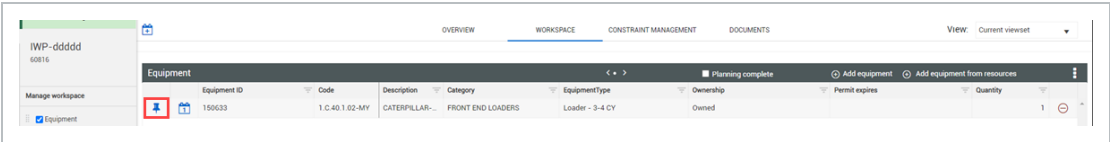
NOTE

If you select Work package as the category, the Name / ID field searches for work packages with matching names or IDs in your project.

- 6. Enter additional information in the remaining fields, as necessary.

3.7 STEP BY STEP 2 – PIN A CONSTRAINT FROM WORKSPACE

- 1. Open an IWP.
- 2. Click **Workspace** at the top of the page.
- 3. Select the check box next to the data block that you want to open.
- 4. Click the **Send as Constraint** icon on the left side of the data block for the record you want to pin as a constraint. The record is added to Constraint Management as a constraint.



- 5. Open the **Constraint Management** tab, and then fill out additional fields for the new constraint, as necessary.

EXERCISE 3.1 – ENTER WORK PACKAGE DETAILS

Now that you have learned to create work packages and fill out all details, create your own construction work package (CWP) and installation work package (IWP) using the method you prefer. Make sure to fill out all details for your installation work package.

1. Include at least one safety item.

2. Include at least two components.

3. Include at least two labor resources.

4. Include at least two pieces of equipment.

Congratulations, you have completed this exercise!