


QUICK GUIDE – PROGRESS DAILY PLANNING

CREATE A DAILY PLAN



FROM SCRATCH

1. From the project home page, select Progress > **Daily Planning**.
2. Select the **Add**  icon to create a new plan.
3. Complete the form and click **Create plan**.

FROM A COPY

1. Select a **Daily Plan** then, click the **Copy** icon.

<input type="checkbox"/>	Plan ID	Plan date	Plan name
<input checked="" type="checkbox"/>	1380	Tue, 29 Mar 2022	WP - 4th day of frame...

2. Complete the form.
3. Select the items you want to copy to the new plan.


Include the following

- Tasks
- Components
- Resources
- Extra pay
- Resource hours
- Notes and tags
- Toolbox talks
- Attachments

4. Click **Create plan**.

ADD LINKS AND ATTACHMENTS

1. Open a daily plan during any phase, then click **Links and attachments**.

2. Select the **Add**  icon.
3. **To upload a document from your computer**, click the **Upload document** tab.
4. Click **Select Files** to upload or drag and drop into the gray box. Click **Upload**.

5. **To link from InEight Document**, click **Link from InEight Document**.
6. Filter options and select **Apply**.

7. Select files to link, then click **Link from InEight Document**.

ID	Title
<input checked="" type="checkbox"/> (00)A001	Ground Floor Plan
<input checked="" type="checkbox"/> (00)A004	Third Floor Plan
<input type="checkbox"/> (00)A006	Fourth Floor Plan

8. Click **Close**.
9. **To add a link to an external URL**, click the **Link External URL** tab.
10. In the Title field, input a name for the link.
11. In the Link Document field, input the URL. Click **Link**.

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PREPARING A DAILY PLAN

1. Click on a **Daily Plan**.

Plan ID	Plan date	Plan name	Shift
1380	Tue, 29 Mar 2022	WP - 4th day of fram...	Day Shift

2. Click on the **Details** tab.
3. Click on the **Add** icon to add planner notes and toolbox talks for safety, quality, environmental and general discussion.

Tool box talks

Safety concern	Mitigation
Traffic at site will be increasing because of truckload arriving	

4. Click the **Time Sheet** tab.
5. Add the tasks, employees and equipment for that day's work and allocate planned hours.

Task ID	Description	Planned	UoM	MHRs
1007	Building K&L - Scrape and Clean	15		4
1013	Slab on Deck	9		6
1006	Concrete L	5		5

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6. Open the **Quantities** tab, add tasks and components to be installed and enter their planned quantities.

Task	Complete	Claim %	Step	Quantity	Planned quantity
1005 Erect Steel - Light	<input checked="" type="checkbox"/>		15 Shakeout/Transport	0.15000	0.15000
	<input checked="" type="checkbox"/>		45 Erect/Bolt Up	0.15000	0.15000
	<input type="checkbox"/>		30 Final Torque	0.15000	0
	<input type="checkbox"/>		10 QC Verification	0.15000	0
			Component total	0.15000	0.09000

7. Click on the **Notes/Issues** tab to include a note for the crew, pictures, add any associations, and document issues.

Equipment is late arrival.

Tags:

Associations:

8. Click on the **Productivity** tab to review your Planned G/L. Make adjustments on the Quantities and Time Sheet tabs if needed.

Task ID	Description	Planned			MHRs per Qty		Planned G/L	
		QTY	UoM	MHRs	Planned	Current Budget	Cost	MHRs
1005	Erect Steel - Light	0.090	Ton	0.00	0.000	20.000	90	1.8

9. After reviewing the plan hours, continue by clicking the **Submit** button.