QUICK GUIDE – PROGRESS DAILY PLANNING



• 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**.

| Plan date | | * Plan name | |
|-------------------------------|---|-----------------------------|---------------|
| Wed,30 Aug 2023 | ÷ | Concrete Work Area B2 | |
| Shift | | Work plan/package ID - Name | Planner notes |
| Day Shift | • | | |
| location | | | |
| | | | |
| North Area B | | | |
| * Approvers (1 Required) | | Hint type "123" or "Site" | |
| Admin InEight | • | Superintendant | • O |
| (+) Add approver | | | |

• FROM A COPY

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

| 9 | • • | 6 | 🗿 🕞 🕼 Edit n | nultiple More 🗸 |
|---|-------------|---|------------------|-----------------------|
| | Plan ID | - | Plan date 🚦 👘 | Plan name |
| | <u>1380</u> | | 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.



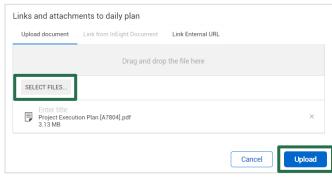
4. Click Create plan.

• ADD LINKS AND ATTACHMENTS

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

| | Œ | U | | | | |
|------|-----------|-------------|----------|-----------|---------|-----|
| | Overvie | W | | | | |
| | Planne | ed tasks | Quantity | Time (MHR | | |
| | Task ID | Description | Planned | UoM | Planned | Bud |
| 2. S | elect the | e Add 🕂 ic | on. | | | |

- 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**.

| Discipline | Discipline | | | Status | | |
|-----------------|------------|---------------|---|------------|---|--|
| All disciplines | • | All revisions | ۳ | All status | • | |

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

| ID = | Title |
|----------|-------------------|
| (00)A001 | Ground Floor Plan |
| (00)A004 | Third Floor Plan |
| 0004(00) | 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.

| Jpload document | Link from InEight Document | Link Enternal URL | |
|--------------------|----------------------------|-------------------|--|
| * Title | | | |
| InEight University | | | |
| * Link Document | | | |
| | | | |

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PREPARING A DAILY PLAN

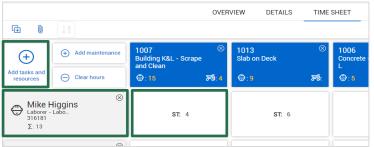
1. Click on a Daily Plan.

| (| Ð 🗹 | \otimes |) 🕀 | 🖸 Edit m | nultiple Mo | re 🔻 | |
|---|-------------|-----------|-----------------|----------|--------------------|---------|-----------|
| | Plan ID | | Plan date 🔋 | - | Plan name | | Shift |
| | <u>1380</u> | | Tue, 29 Mar 202 | 2 | WP - 4th day o | 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.

| Safety | | | | | | | | |
|--------|---|------------|---|---|--|--|--|--|
| | Safety concern | Mitigation | | | | | | |
| × | Traffic at site will be increasing because of truckload arriving | | * | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | - | 4 | | | | |
| | | | | | | | | |

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



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

| - | • | ~ | | | | | | | | _ | |
|------|----------|-------------|------|-----------|--------|-------------------|--------------------|--------------------|---------------------------|---------|-----------------|
| Ē | 0 | • | | | | | | | | | Submit 🔋 🔍 |
| Task | | | | | 1005 - | Erect Steel - Lig | ht | | | | |
| 1005 | Erect St | eel - Light | ↗ 88 | \otimes | | ↗ Module 0 | 01 - A23: Cross Br | ace Assembly Modu | le 1 - A23: Cross Brace A | ssembly | ☆ 🖽 ⊝ |
| | | | | | | Complete | Claim % | Step | Quan | tity | Planned quantit |
| | | | | | | 2 | 15 | Shakeout/Transport | | 0.15000 | 0.15000 |
| | | | | | | 2 | 45 | Erect/Bolt Up | | 0.15000 | 0.15000 |
| | | | | | | | 30 | Final Torque | | 0.15000 | 0 |
| | | | | | | | 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.

| ETAILS | TIME SHEET | QUANTITIES | NOTES / ISSUES | PRODUCTIVITY |
|-----------|-----------------------|------------|--------------------|--------------|
| | | | Tuesday Apr 12 09: | 01 AM |
| Equipm | nent is late arrival. | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| Tags: | | | | |
| Add 1 | tags | | | |
| Associati | ions: | | | |
| MC-10 | 0000000 Grove-RT880 | E Crane 🗙 | | |

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

| | | OVERVIEW | DETAILS | TIME SHEET | QUANTITI | ES NOTE | S / ISSUES | PRODUCTIVI | ΤY | | |
|---------|---|---------------------|---------|------------|----------|---------|------------|----------------|--------|-------------|------|
| Œ | Û | | | | | | | | | Submit | |
| Task ID | | | | Planned | | | ≓ MHRs | per Qty | | Planned G/L | |
| | | Description | | QTY | UoM | MHRs | Planned | Current Budget | • | Cost | MHRs |
| 1005 | | Erect Steel - Light | | 0.090 | Ton | 0.00 | 0.000 | | 20.000 | 90 | 1 |

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