# 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**.

<ul> <li>Plan date</li> </ul>		* 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	• <b>O</b>
(+) 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.



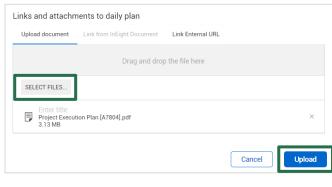
4. Click Create plan.

#### • 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

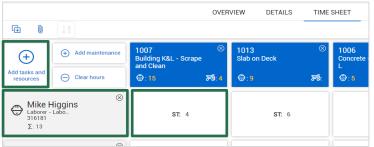
1. Click on a Daily Plan.

(	Ð 🗹	$\otimes$	) 🕀	🖸 Edit m	nultiple <b>Mo</b>	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.