

Quick Reference Card

INTERVAL PLANNER



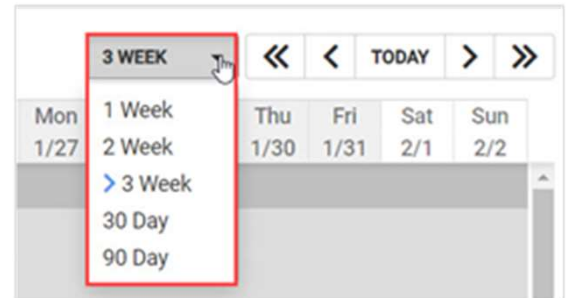
PLANNING

1: EXECUTE VIEW ORIENTATION

Navigate to the first level drop-down menu and select the **Execute** project view.

- Calendar

In the calendar/timescale definition menu allows you toggle the interval period displayed.



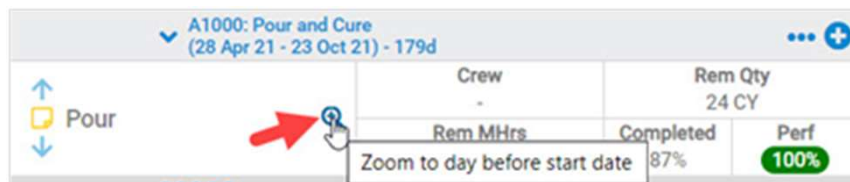
- Search

You have the ability to search by id, description, deliverable, planner name, or crew.



- Zoom

You can easily navigate to the day before an activity by clicking the magnifying glass of a specific activity.



- Schedule Activities

You will plan against schedule activities, the pinched part of the scheduled activity bar is known as the non-working days in the project schedule. By default, you will not schedule steps on non-working days but these can be overridden if needed.



2: CREATE NEW STEPS

a. Create without productivity rate

- Choose an **activity** you are assigned to, then select the **plus icon** to add a step.



- Select and **assign a crew** from the drop-down list that does not contain a productivity rate. Then define the **description, quantity, UOM, start date, and duration**. When selecting a crew without a productivity rate it acts the same as Simple Mode from the crew drop down list.

A screenshot of a form titled 'Add a Step'. The form has several sections. The top section has fields for 'Description*' (containing 'Excavation'), 'Activity' (a dropdown menu showing 'A1000'), 'Crew' (a dropdown menu showing 'Excavation (1x8h)'), 'Size' (a text box with '1'), and 'Daily mHrs' (a text box with '8'). Below this is a section with 'Quantity' (a text box with '100'), 'UoM' (a dropdown menu showing 'SY'), 'Deliverable' (a text box with 'dirt'), 'Start' (a date picker showing '28 Apr 2021'), 'Duration*' (a text box with '5'), 'Total Mhrs' (a text box with '40'), and 'Finish' (a date picker showing '02 May 2021'). Below this is a section for 'Productivity Rate - Duration Driven' with a dropdown menu. Under this section, there is a 'Rate Driven' toggle switch which is currently turned off. To the right of the toggle are fields for 'Output', 'Duration', and 'Duration Unit' (a dropdown menu showing 'mHrs'). At the bottom of the form, there is a section titled 'Step Creation Details' with a right arrow. Below this section, it says '20 SY of dirt per day'. At the very bottom, there is a green 'CREATE' button.

*Note: you can additionally change the crew size and daily mhrs and enable a productivity rate by selecting the **rate driven toggle** and define its parameters.*

b. Create with productivity rate

- Choose an **activity** you are assigned to, then select the **plus icon** to add a step.



2 CONTINUED: CREATE NEW STEPS

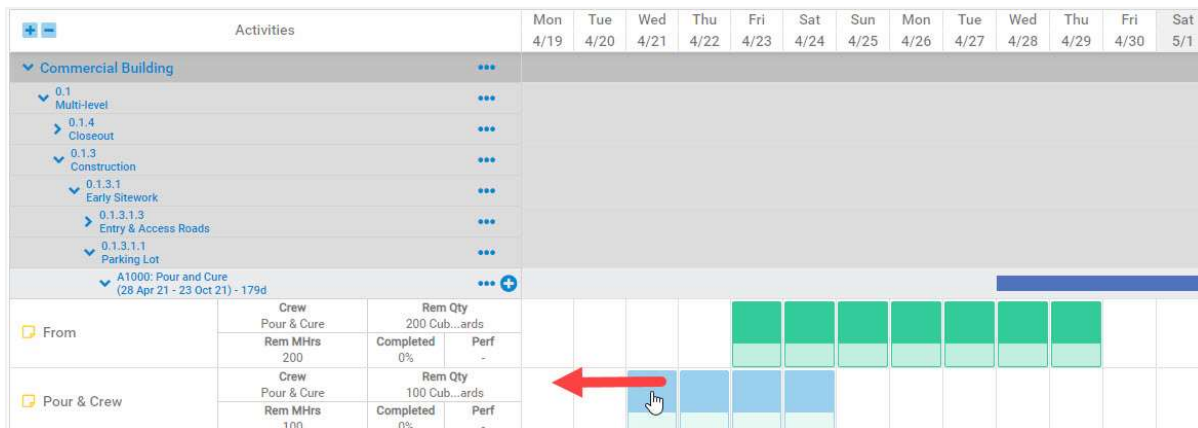
- Select and **assign a crew** from the drop-down list that does contain a productivity rate. Since the crew has a productivity rate assigned then all the fields will be prepopulated. You will define the **description** of the step. In addition, you can adjust the quantity or crew size and/or daily mHrs as needed then the output fields will adjust accordingly based on your inputs.

c. Create a new crew on the fly

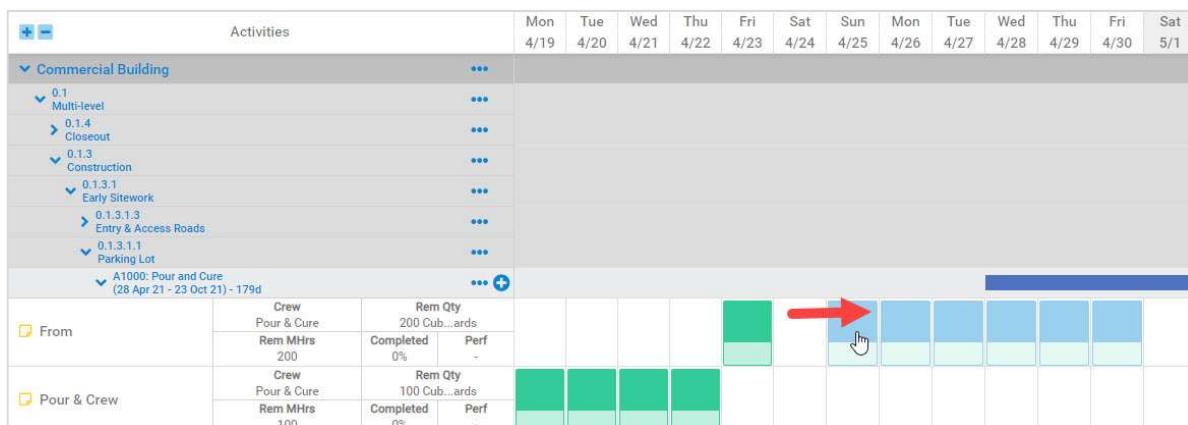
- When creating a new step for an activity, select **Simple Mode** from the crew drop-down list. Then select **Add Crew** to add a new crew on the fly for your step.
- Define the planner for the crew, description, size, and daily mHrs. You can also select and utilize the productivity rates listed that best fits your crew's parameters or define the productivity rate within the step. Then click **Save**.

3: DRAG AND DROP, SPLITTING, NON-WORKING DAYS OVERRIDE

- a. Once your step is created you can drag and drop all the duration steps by selecting the first dark green tile and moving it either to the left or right.



- b. To split the duration steps, click on the dark green tile and move to the right.



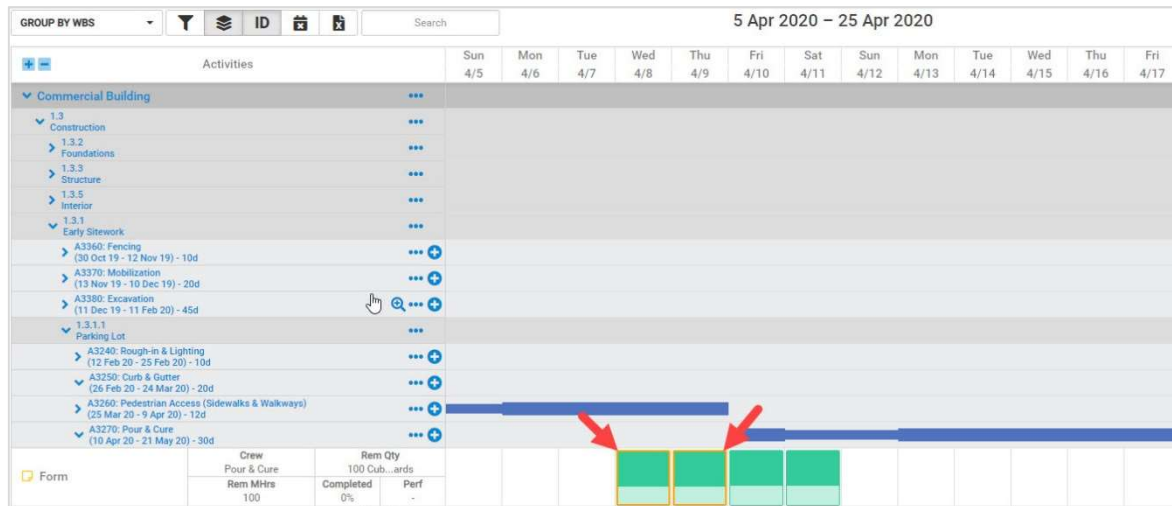
- c. Non-working days can be overridden by going selecting the **working calendar icon**.



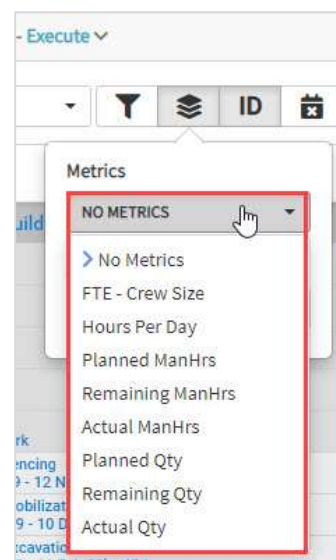
4: MORE VIEW ORIENTATION

a. Layers

- The layering menu enables a visual guide within the project view. Annotations provide visual aids within the Execute project view that indicate if planned step(s) trigger predefined warnings within the system. From the annotations drop-down list, select **CPM Breach** to display where your steps are breached. Tiles highlighted in an orange outline are outside of the CPM schedule.

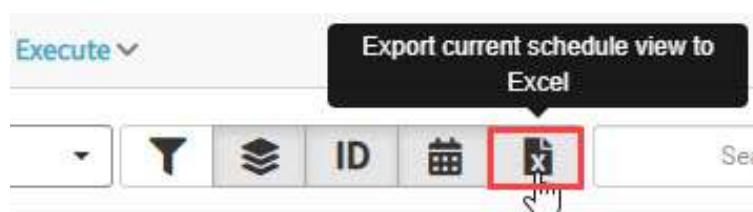


- Layering metrics give a visual overlay of pertinent metadata for your existing planned steps.



b. Excel print

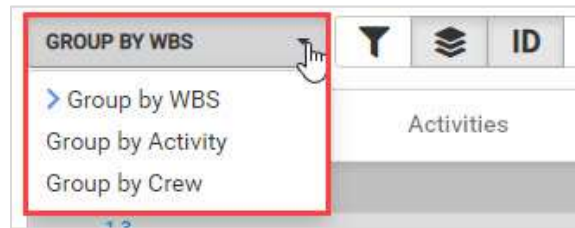
- All planned step(s) can be exported to Excel for coordination/collaboration with other Project Stakeholder and/or Field Personnel.



4 CONTINUED: MORE VIEW ORIENTATION

c. Group By

- Grouping is a useful functionality to easily arrange your planned steps by WBS, Activity, or Crew.



d. Weather

- You can also utilize the weather indicated in the timeline to determine when steps should be completed based on weather constraints. Ex. Raining and pouring concrete do not correlate therefore leverage the info given.



PROGRESSING

Input daily/weekly progress for each activity's steps

1. QUICK PROGRESS

If a step is completed you can quick progress the step and its previous step tiles by selecting the **tiles lighter color** which indicates "Complete this and previous", then select **Complete**.



2. DAILY PROGRESS USING QTY

- a. You can dive into the details of a step and progress daily using quantity by **double clicking a step** and input the actual data in the Days tab, then click **update**. Schedule will calculate the ending date, quantity, and manhours, and productivity rate so you can plan the remaining work based on the progressed data.

Pour									
Ending On: 23 Apr 2020									
Man Hours					Quantity				
Date	Planned	Remaining	Actual	Forecast/Delta	Planned	Remaining	Actual	Forecast/Delta	
21 Apr 2020	24	24	0	24 +0	24	24	0	24 +0	
22 Apr 2020	24	24	0	24 +0	24	24	0	24 +0	
23 Apr 2020	2	2	0	2 +0	2	2	0	2 +0	
Total	50	50	0	50 +0	50	50	0	50 +0	

- b. A summary of the step will be displayed in the activities breakdown where you can view your steps' current stats.

Pour		Crew Pour		Rem Qty 2 Cub...ards	
		Rem MHrs 2	Completed 96%	Perf 100%	

3. REPLANNING

When double clicking on a step, select the **replan** button and choose how you would like to replan your remaining work by the choices of **Planned, Actual, or Redistribution**. Based on your choice InEight Schedule will recalculate your data appropriately, select **update** once you have confirmed your replanning.

Step	Days	Charts	Comments	100%				
REPLAN				ENDING ON: 23 APR 2020				↑ ↓
Planned				Actual				Redistribution
Man Hours (16.67 per day over days)				Quantity (16.67 per day over days)				
Date	Planned	Remaining	Actual	Forecast/ Delta	Planned	Remaining	Actual	Forecast/ Delta
21 Apr 2020	24	0	24	24 +0	24	0	24	24 +0
22 Apr 2020	24	0	24	24 +0	24	0	24	24 +0
23 Apr 2020	2	2	0	2 +0	2	2	0	2 +0
Total	50	2	48	50 +0	50	2	48	50 +0

4. BURN DOWN CHART

When double clicking on a step, select the burn down chart to view.

