

Quick Reference Card

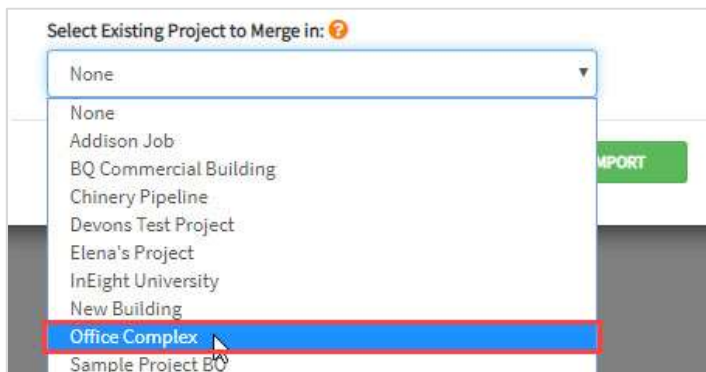
PROJECT PLANNER: SETUP



STEP 1: PROJECT PLANNER SETUP

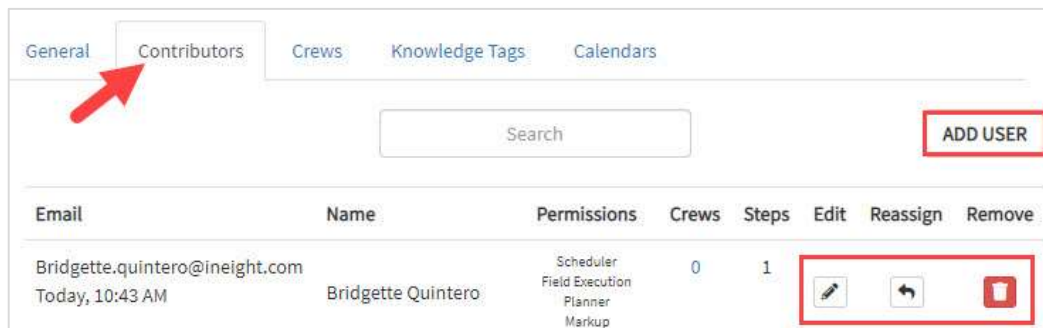
1. IMPORT/UPDATING A PROJECT

- When importing a new or updated project, simply click **Import** on the **Projects page**. Name the project appropriately (*Ex. Office Complex_UPDATED*) and choose your new/updated XER file, then select **Import**.
- Fill in all necessary fields in the import dialog box. To update an existing project that already has interval planning steps within InEight Schedule, then you must choose your existing project from the **Select Existing Project to Merge in** drop down list. Click **IMPORT**. Your project will be imported along with your existing interval planning steps in the **Execute Plan view**.



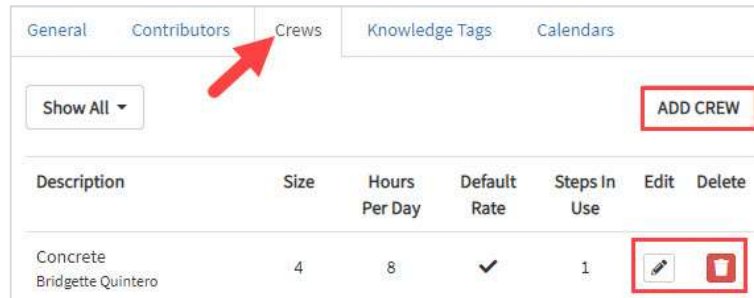
2. ASSIGN CONTRIBUTORS TO A PROJECT

- For a selected project, from the first level drop-down menu, select **Project Configuration** under the Project Settings section.
- On the **contributors tab**, both external and internal users can be added to the project. Existing users can be removed or have their access level altered.



3. CREATE CREWS FOR CONTRIBUTORS

- a. On the **crews tab**, you can create, edit or view a crew.



- b. To add a crew, click **Add Crew**, then assign their planner and define their description, size, hours per day manual or use InEight Schedules knowledge library productivity metrics.

The 'Add Crew' form is shown. It includes fields for Planner (Bridgette Quintero), Description (Piping), Size (3), and Hours Per Day (8). There are also sections for selecting productivity metrics from the InEight Schedules knowledge library, such as Excavation and Foundations. The 'ADD' button is at the bottom.

4. ASSIGN CONTRIBUTORS TO CPM WBS/ACTIVITIES

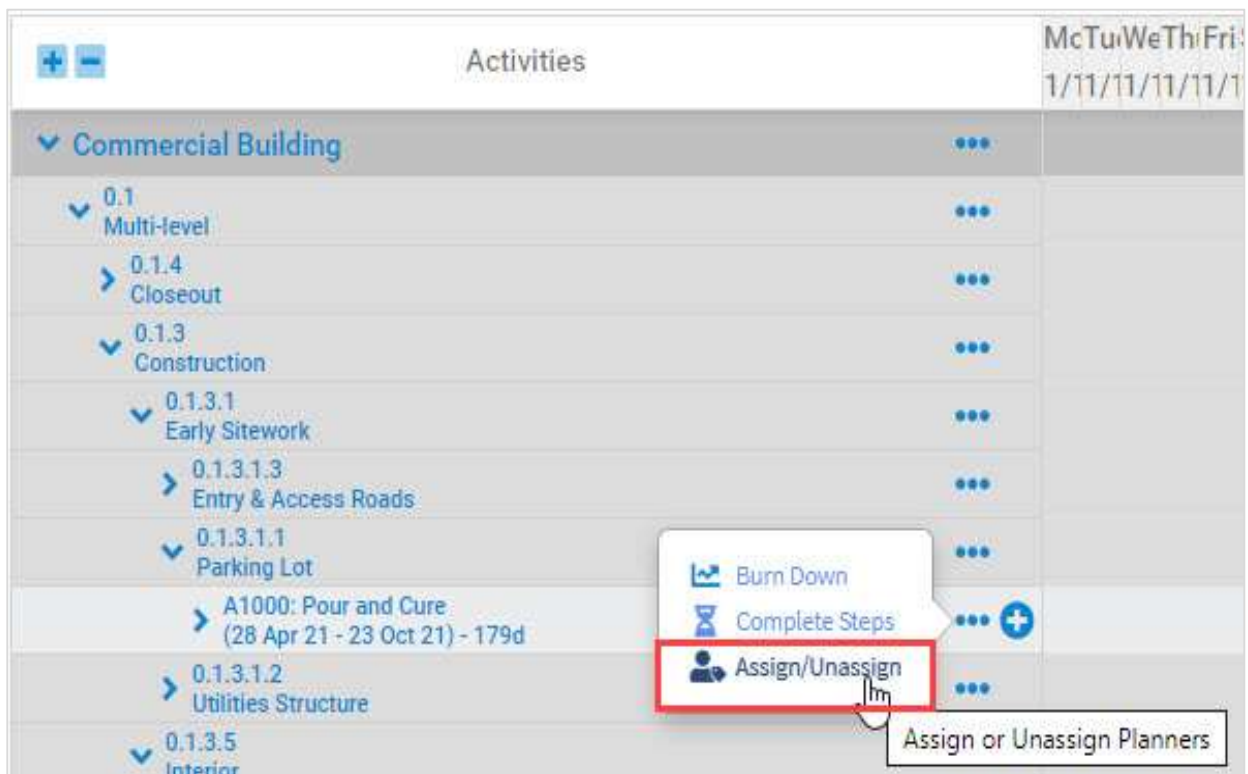
You can assign interval planning to various areas of the CPM schedule by a flow down approach.

- a. From the first level drop-down menu, In the **Plan view** or **Execute view**, select a CPM ID, ex. Parking lot, you have 2 options to assign a FEP.
- **Gantt View:** For the Plan view, ensure you have Field execution assignee column displayed. Select the field execution assignee(s) icon.

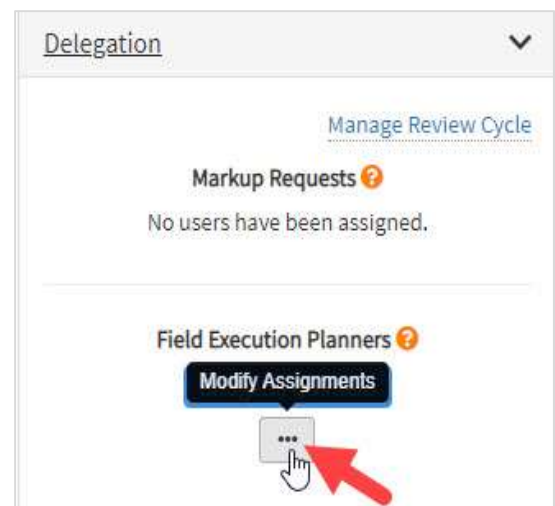
The screenshot shows the Gantt View table. The 'Field Execution Assignee(s)' column is highlighted with a red box, and the 'Rem Dur' column is also highlighted with a red box.

ID - Description	Dates	Total Dur	...	Field Execution Assignee(s)	Rem Dur
Commercial Building	21 Oct 19 28 Jun 22	982	...		
Multi-level	21 Oct 19 28 Jun 22	982	...		982
Closeout	20 Apr 22 28 Jun 22	70	...		70
Construction	28 Apr 21 25 May 22	393	...		393
Early Sitework	28 Apr 21 23 Oct 21	179	...		179
Entry & Access Roads	28 Apr 21 23 Oct 21	179	...		179
Parking Lot	28 Apr 21 23 Oct 21	179	...		179
Pour and Cure	28 Apr 21 23 Oct 21	179	...		179

4 CONTINUED: ASSIGN CONTRIBUTORS...



- *Iris Panel of the Plan view:*
Select the delegation drop-down panel and go to the **Field Execution Planners** section. Assign Field Execution Planners by selecting the **context menu/modify assignments** then select a Project Contributor(s) name. (Ex. Forman name for the pour & cure of the parking lot)



5. PLAN FOR OTHER CONTRIBUTORS

As a planner you can plan for the interval planners.

- a. Find the interval planner and activity you would like to plan.

5 CONTINUED: PLAN FOR OTHER CONTRIBUTORS

Activities			Mon 1/13
▼ Commercial Building	...		
▼ 0.1 Multi-level	...		
▶ 0.1.4 Closeout	...		
▼ 0.1.3 Construction	...		
▼ 0.1.3.1 Early Sitework	...		
▼ 0.1.3.1.3 Entry & Access Roads	...		
▼ A1010: Excavation (3 Nov 20 - 30 Apr 21) - 179d	... +		
▶ Paul Bennion	... +		

- b. Create a new step/deliverable, by selecting the plus icon for your activity and add a description, qty, crew, UOM, and subsequent step details. You will have the ability to assign crews that are assigned to your selected interval planner and adjust fields as needed.

×

Add a Step

⛶

Description*

Activity

Crew

Step

A1010

Simple Mode

+ ADD CREW

Quantity

UoM ?

Deliverable

Start ?

Duration*

Finish

179

03 Nov 2020

179

30 Apr 2021

Step Creation Details

▼

# of Steps	Description*	Start	Duration	Quantity	Finish
1	Step	03 Nov 2020	179	179	30 Apr 2021

1 unit per day

CREATE

NOTE: Some crews have productivity rates assigned to them and can be adjusted if needed or helps you understand how much qty the crew can produce in a certain amount of time you have indicated within the steps options.