

PLAN USER GUIDE
Work Packaging

FIELD EXECUTION MANAGEMENT

INEIGHT 

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LESSON 1 – WORK PACKAGING OVERVIEW

Lesson Duration: 45 minutes

Lesson Objectives

After completing this lesson, you will be able to:

- Summarize the purpose of Project Suite
- Describe the two modules of Plan
- Explain the high-level work flow of Plan – Work Packaging

Lesson Topics

1.1 InEight Cloud Platform Overview	10
1.1.1 Project Management and Lifecycle	10
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1.1 INEIGHT CLOUD PLATFORM OVERVIEW

1.1.1 Project Management and Lifecycle

Most projects that you are working on will follow a typical lifecycle. It is broken down into different roles and the people involved. We will break those roles and people down into four locations:

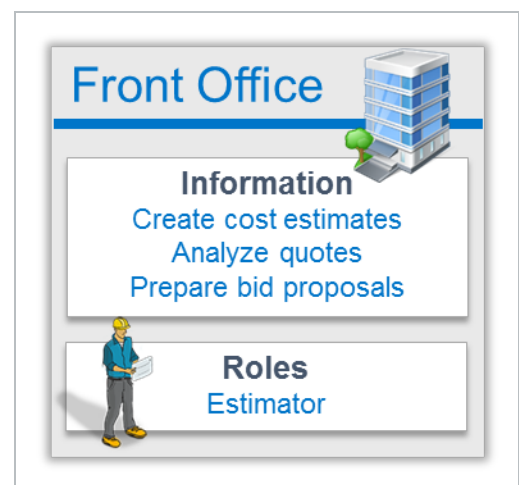
- Front office
- Field office
- Jobsite
- Back office

1.1.1.1 Front Office

What are the essential functions of the front office? What roles are involved?

The front office focuses on getting work and typically houses estimators who, during the *bidding phase* of the project, start out by estimating its value. This is done by calculating cost estimates, analyzing quotes, and capturing all the data necessary to submit a bid to the client.

Once complete, they prepare the bid proposal, submit it to the client, and find out if they are the preferred contractor to do the work. If they have the winning bid, they can start the *planning phase* and preparing to build the project.



1.1.1.2 Field Office

What work roles are typically found in the field office? What are their primary tasks?

Budgeting and Forecasting

During the *execution phase* of a project, the field office manages the budget and forecasting for the project. The

Field office relays this information to the other field personnel, so they understand what the budgets for the work are, how they should build the job, who the suppliers of materials are, and if there are any subcontractors, etc.

Contract Procurement

Project engineers and managers procure contracts for materials and with subcontractors.

Work Planning and Quantity Tracking

The field office is where the field engineers and superintendents responsible for the work prepare work plans for the foremen and their crews, breaking down the work into manageable pieces. They then create quantity-tracking plans, formulate inspections and create daily plans to send to the foremen on the jobsite.

Change Management

As issues arise, project engineers record and submit issues, get them approved through the client, and execute change orders.

Inspections Management

Inspections, as well as actual time and quantities from the jobsite, come back to the field office where they are review and approval before going to the back office.

1.1.1.3 Jobsite

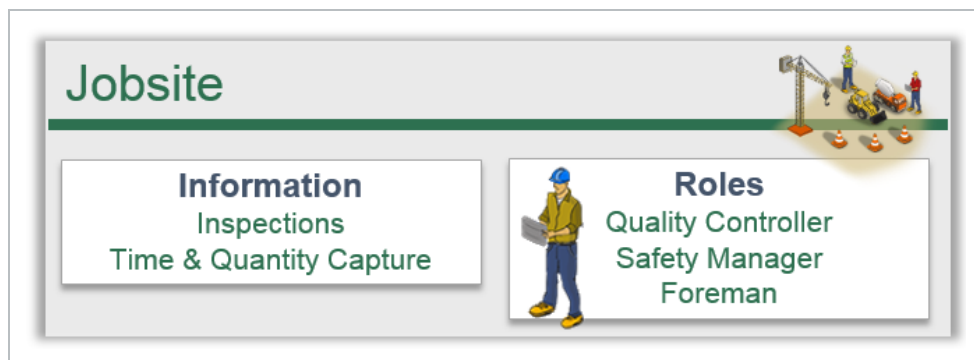
What types of employees work at the jobsite? What type of information do they capture as they build the work? Where does that information need to go and why?

The jobsite is where you find the quality controller, safety manager and foreman. It is where the work is completed. The safety managers, superintendents and foremen are involved in safety inspections,



while the quality controller and field engineers perform inspections before and after the work is complete. The foreman also captures the time of each of the craft workers and the quantity completed each day, based on the plan provided from the superintendent and field engineer.

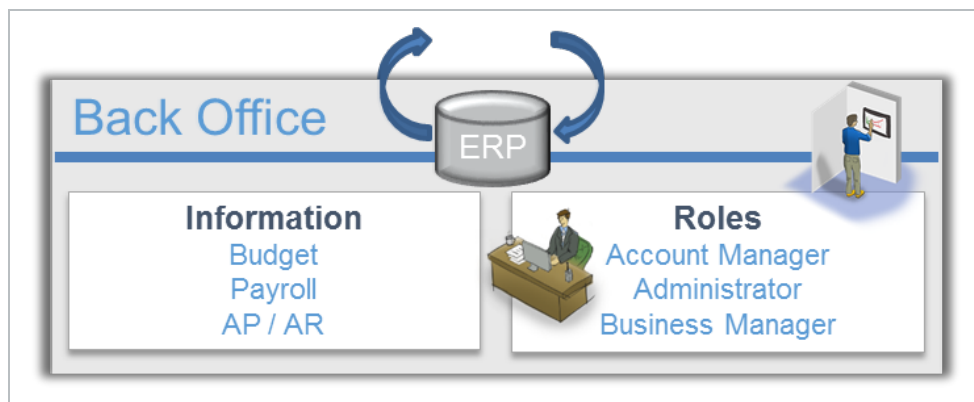
All this information is relayed back to the field office where it can be verified and approved.



1.1.1.4 Back Office

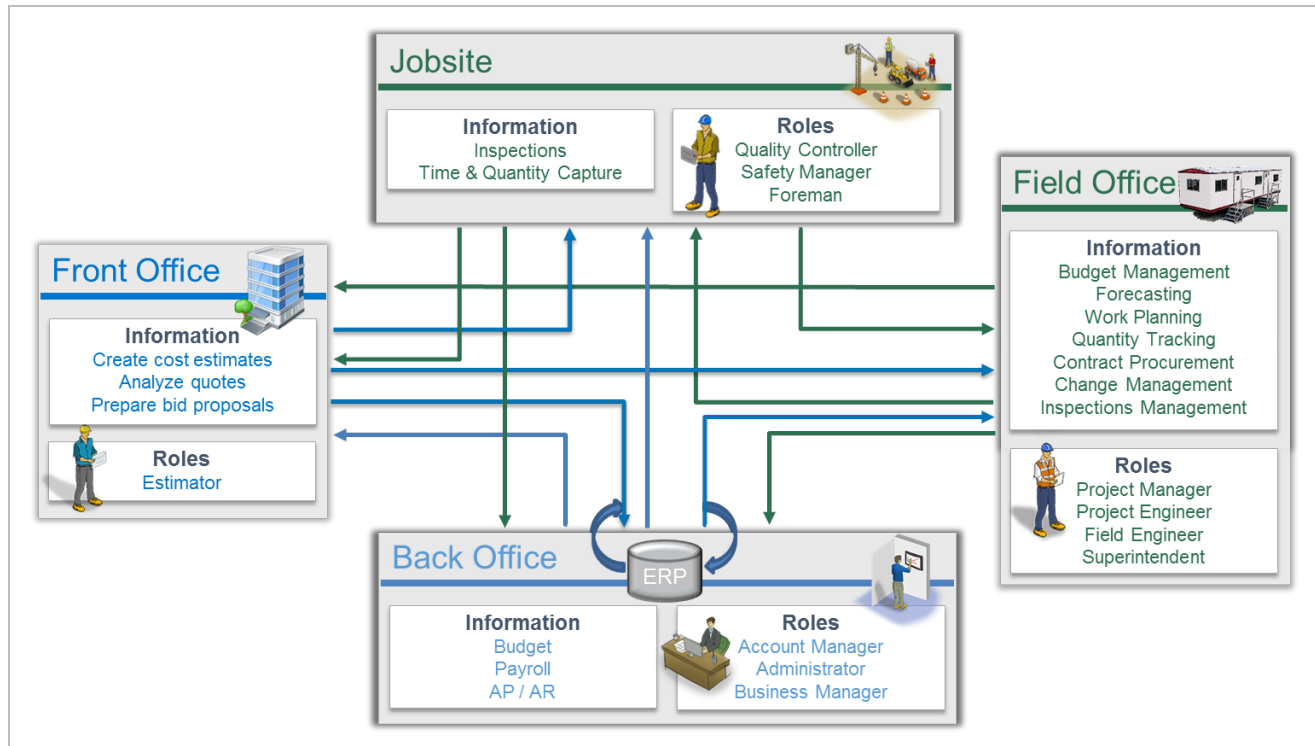
What functions take place in the back office, related to the project? Why is the back office a critical element of managing the project?

The back office is where the account managers and administration staff keep track of budgets, make sure the payroll is correct and completed in a timely manner, keep track of all the accounts payable and receivable, and take care of revenue. After a contract is created, the business manager verifies purchase orders are generated. All the “actual” data, whether it be time or dollars then is communicated back to all the other areas of the job.



1.1.1.5 Problems with Existing Systems

Often issues arise when it comes to communication between all the different areas of a project. Information must flow quickly and accurately between the different areas, but often it is lost, miscommunicated, or slowly received. In some cases, information must be re-entered in a new system and is duplicated. This can cause all sorts of issues when it comes to managing a project.



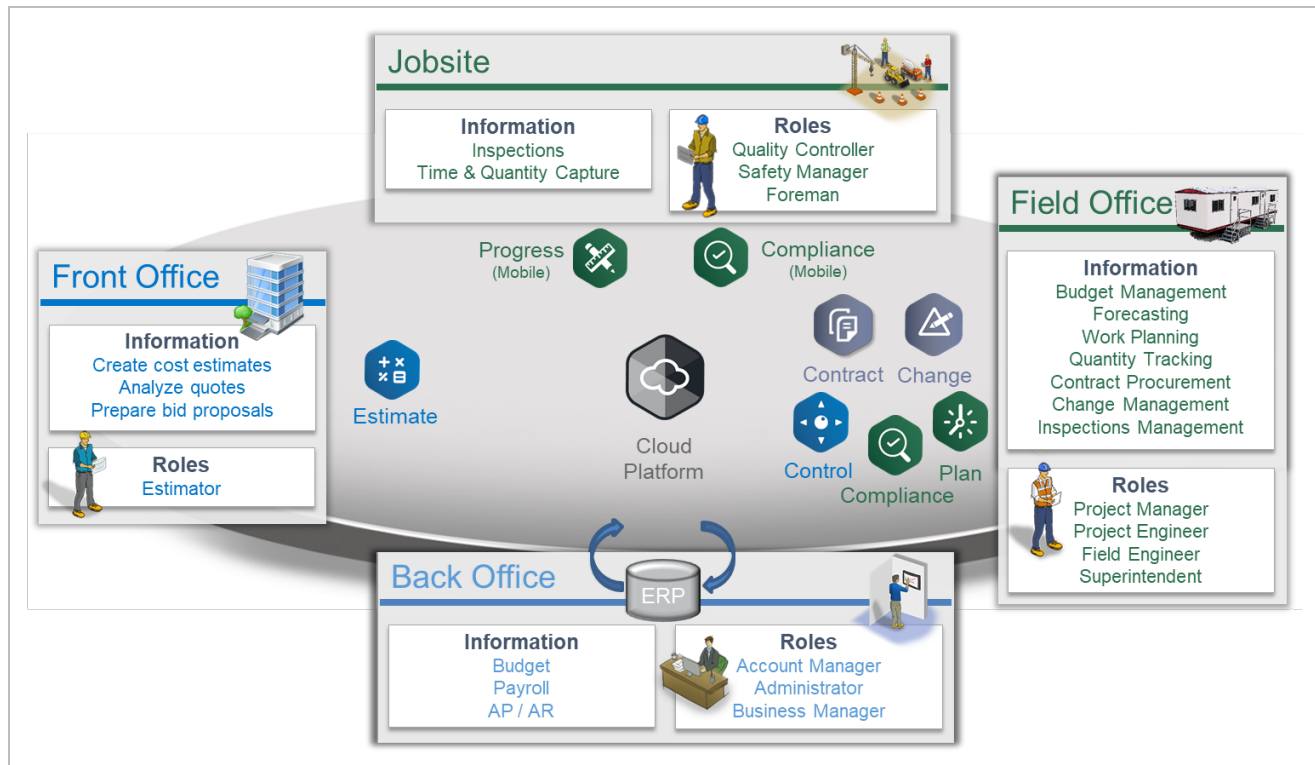
Employing too many systems to transmit information on a project can result in duplication, which is not efficient. Here are a few examples of such inefficiencies:

- Inspections that are completed on paper must be manually input or scanned into a computer system.
- Hand-written time cards that are misplaced or get wet must be reproduced and then entered into a computer system so that the crew can be paid.
- Quantities established in the daily plan do not coincide with the quantity claiming system.

What issues can you think of that you have experienced on your projects?

1.1.2 What is InEight Cloud Platform?

The InEight cloud platform was designed and is continually updated to address these issues. The cloud platform of software applications designed to help companies visualize, estimate, manage, control, and connect all aspects of capital and maintenance projects. The cloud platform is built so all the different applications can communicate with each other. It is also designed to communicate with multiple different **ERP systems** such as SAP or Oracle to share key information with the back office.



1.1.3 How Does InEight cloud platform Integrate in to a Project?

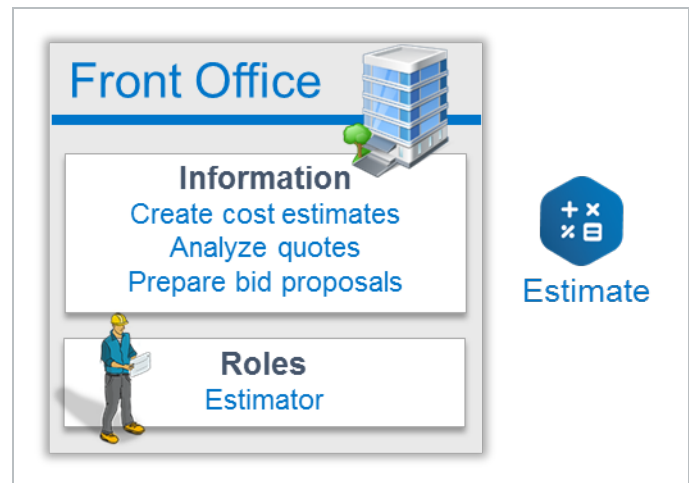
Scenario: Step 1

Skyline Construction Company decides to bid on a project to build a concrete foundation.

Upon submittal, the client informs them that they are the preferred contractor for the work. They now need to take the project from the estimate to the project execution phase.

Using the **InEight Estimate** application, the estimating team in the front office builds the cost estimate and submits the bid proposal, including awarded quotes and all bid documents.

Once awarded the contract, the project team then transfers all the information from the estimate to **InEight Control** where the project can be managed. This includes the cost item estimates, awarded quotes, bid and proposal documents, and the estimate budget structure. During this transition, the project management team can modify the estimate easily to conform to how the project will be built and tracked.



Scenario: Step 2

The field engineers and superintendents in the field office are ready to begin planning the work. They break the work plans down into work packages that contain the specific quantities, materials, labor, equipment, and budgets associated with each portion of work.

The project manager and engineers procure contracts for material and subcontracted work.

Then, inspections are created for quality of the work to ensure it meets the specifications as well as safety.

The field engineers in the field office can now go into **InEight Plan** to break down the work into work areas, work plans within those areas, and then work packages where the work is broken down into components. There, all the components are assigned a WBS code from **InEight Control** as well as other important information and claiming schemes.

Project Engineers use **InEight Contract** to create bid packages and submit them to vendors and subs and solicit contracts.

Engineers also utilize **InEight Compliance** to create the forms necessary for both the quality and safety

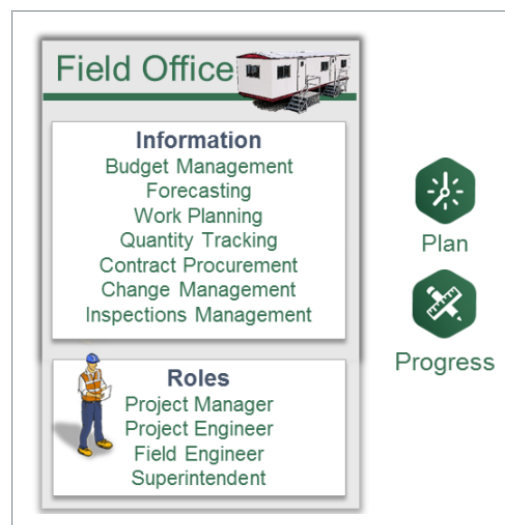


inspections. They can then send these to **InEight Compliance Mobile** for the responsible person to complete them in the field.

Scenario: Step 3

Joe, the concrete superintendent, now has all the work planned for a concrete foundation and is ready to communicate all the details to his foreman Jill, so construction can begin tomorrow.

The superintendent can go into **InEight Plan** and create a daily plan for his crew to erect the formwork needed for the foundation. He brings in all the quantities, budgets and claiming schemes from the work package his field engineer created and breaks it down into what Jill's crew needs to complete tomorrow. He adds production goals for the day and safety notes related to the formwork installation. He communicates this to his foreman by syncing it to her, where the foreman can open the **InEight Progress** app on her iPad.



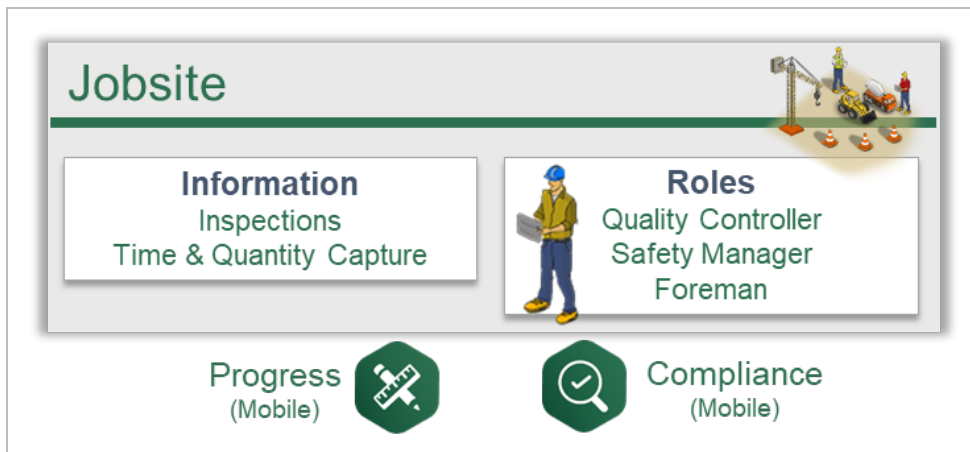
Scenario: Step 4

In the morning, Jill reviews the plan for the day and determines if any changes are necessary due to one of the crewmembers calling in sick.

John, the quality controller on the project reviews the quality inspections that he needs to perform that day and creates a plan with Jill to schedule the proper times.

The foreman reviews the plan in the **InEight Progress** app on her iPad and adjusts as necessary to the plan (e.g., sick crewmember, unforeseen issues).

The quality controller speaks with the foreman and determines when they can complete the inspection for the day. The quality controller uses the **InEight Compliance** app on his iPad to perform the inspection.

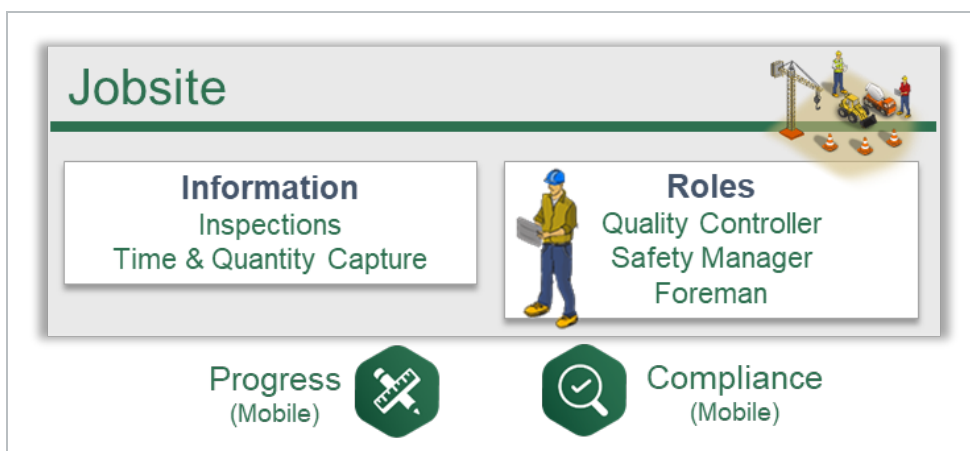


Scenario: Step 5

Throughout the day, Jill has kept track of the quantities completed on the formwork but had to adjust the plan to send her crew to build a quick access ramp for an earthworks crew. This was not in the plan and she needs to account for it before signing out the crew.

In the **InEight Progress** app, the foreman can keep a log of notes on the day's progress and any unforeseen construction needs that come up. She can quickly add extra tasks to accommodate adjustments to the plan, review each crewmembers' hours, and sign them out at the end of the shift. She enters in the quantities completed and can see her crew's productivity for the day. She will be able to communicate this to the crew in the morning.

Once complete, she approves the daily plan and synchronizes it, so it can be reviewed by the superintendent in the field office.



Scenario: Step 6

Joe and his field engineer have received the quantities, hours, and inspections completed during the day and now want to review and approve them.

Upon review, they discover there was an issue with the foundation specifications that may result in a change order. They log this issue to communicate with the client.

The superintendent can open **InEight Plan** and review the hours for each crewmember, any new tasks created, and the quantities completed for each of the tasks. He is also able to review the daily costs and see how the crew performed in both man-hours and cost. He can approve the plan and can make any necessary changes to the plan tomorrow based on the productivity information he received.

The field engineer is can also verify the inspections were completed in the **InEight Compliance** application.

One of the project engineers records the concrete foundation issue in **InEight Contract** and will track it, converting it into a change order if necessary.

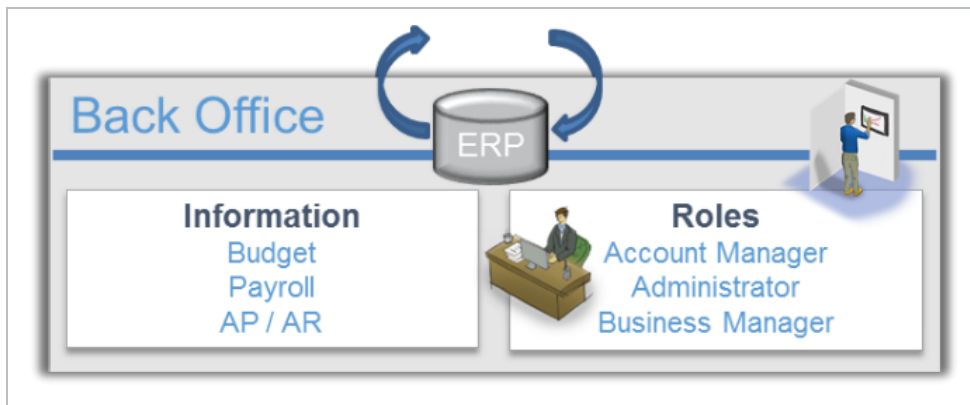


Scenario: Step 7

The account manager in the back office will now verify all the time for each crewmember and ensure they are paid correctly according to the union guidelines.

This information is then communicated to the front office, so the project manager can analyze the job costs and update forecasting.

Within the **ERP system**, the account manager and administrators review all the time that has come in, adjust where necessary, and submit the payroll to ensure everyone is paid accurately and on time. They then synchronize this information into the **ERP system**, where it can be sent to **InEight Control** so project management in the front office can review the information.

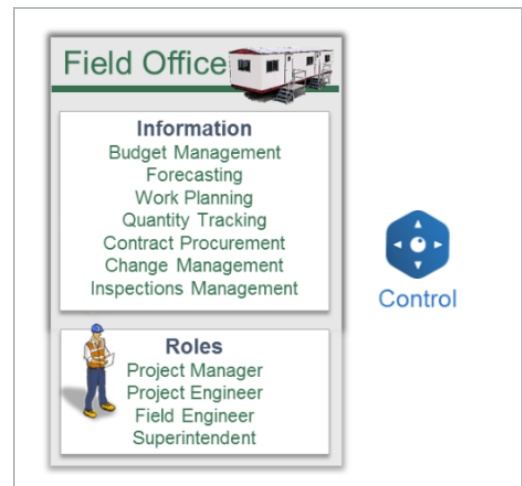


Scenario: Step 8

At the end of the month, the project management in the front office views all the actual quantity and cost information, compares it to the budget, and projects the final cost of each operation. Forecasts are then finalized for the project.

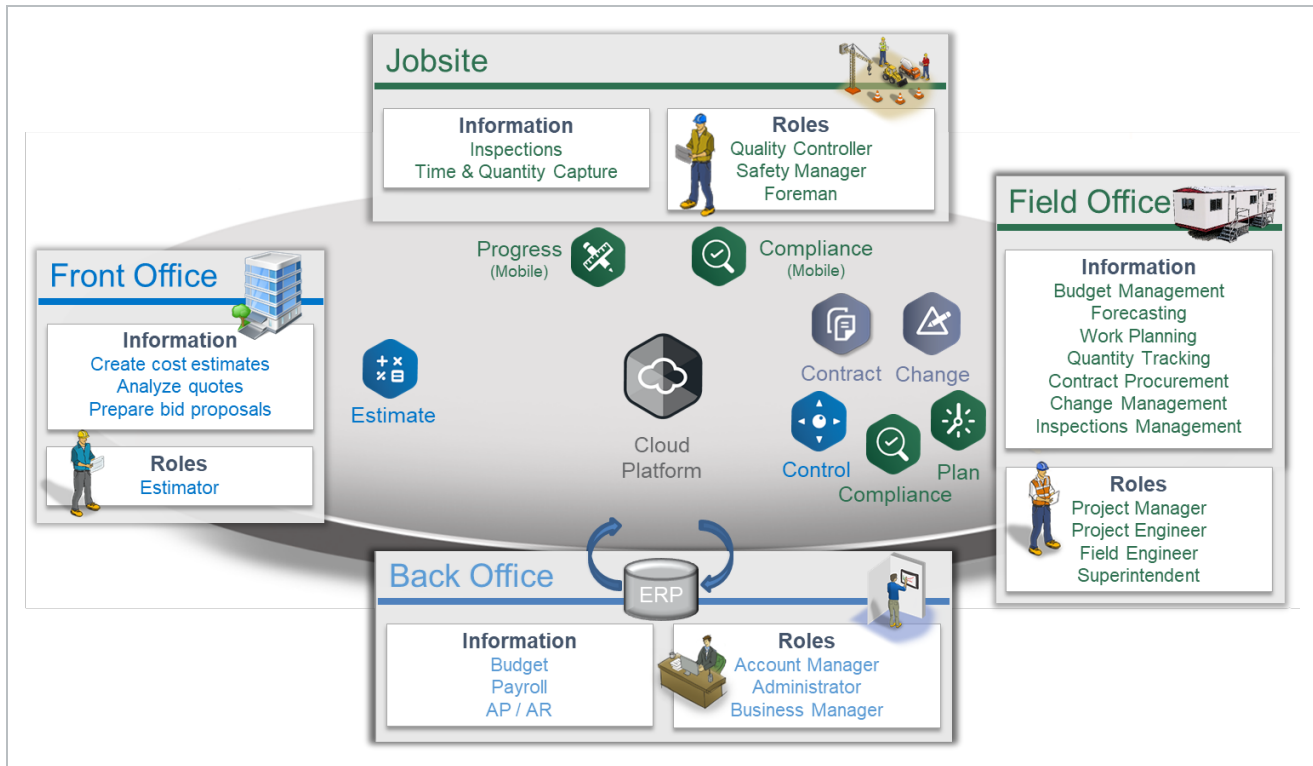
In **InEight Control**, project engineers and managers can view all the actual quantities and costs from the jobsite and analyze the information to determine if they are going to meet their budgets. If, after review, they see that a few operations are spending more time and money due to weather delays, they can decide to update the forecasts for those operations accordingly.

They also look at the total quantities for the month to determine how much of the scope can be billed to the client.



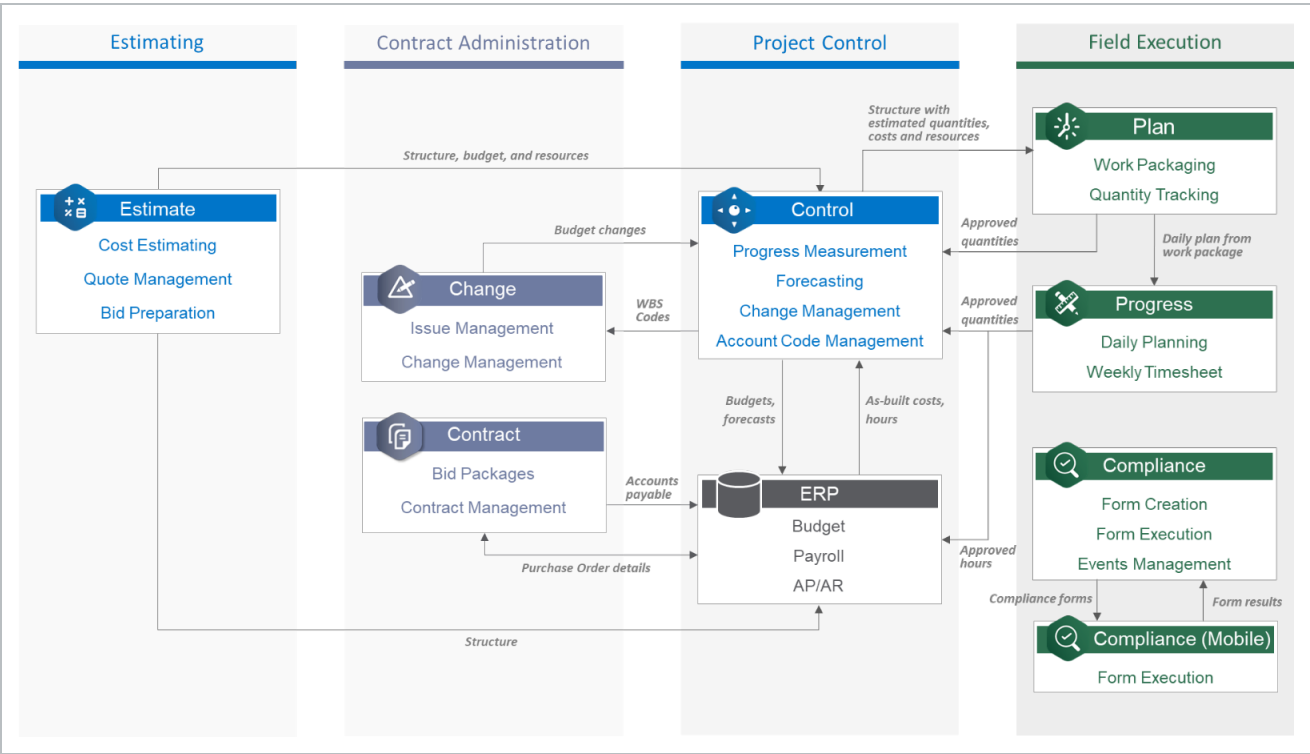
1.1.4 Summary

No matter what location you are in or what role you have, the information created for your project is communicated to all the InEight cloud platform applications and shared through the Cloud Platform. The **InEight Cloud Platform** is also able connect and communicate to your **ERP system** and other 3rd party applications to utilize the same information, eliminating the need to re-enter data. All this information can then be archived for future reference, and selected information can easily be turned over to the client.



1.1.5 InEight cloud platform Workflow

The following workflow diagram illustrates in greater detail what information travels between the InEight cloud platform applications and the **ERP system** and direction in which it flows.



1.2 PLAN WORK PACKAGING OVERVIEW

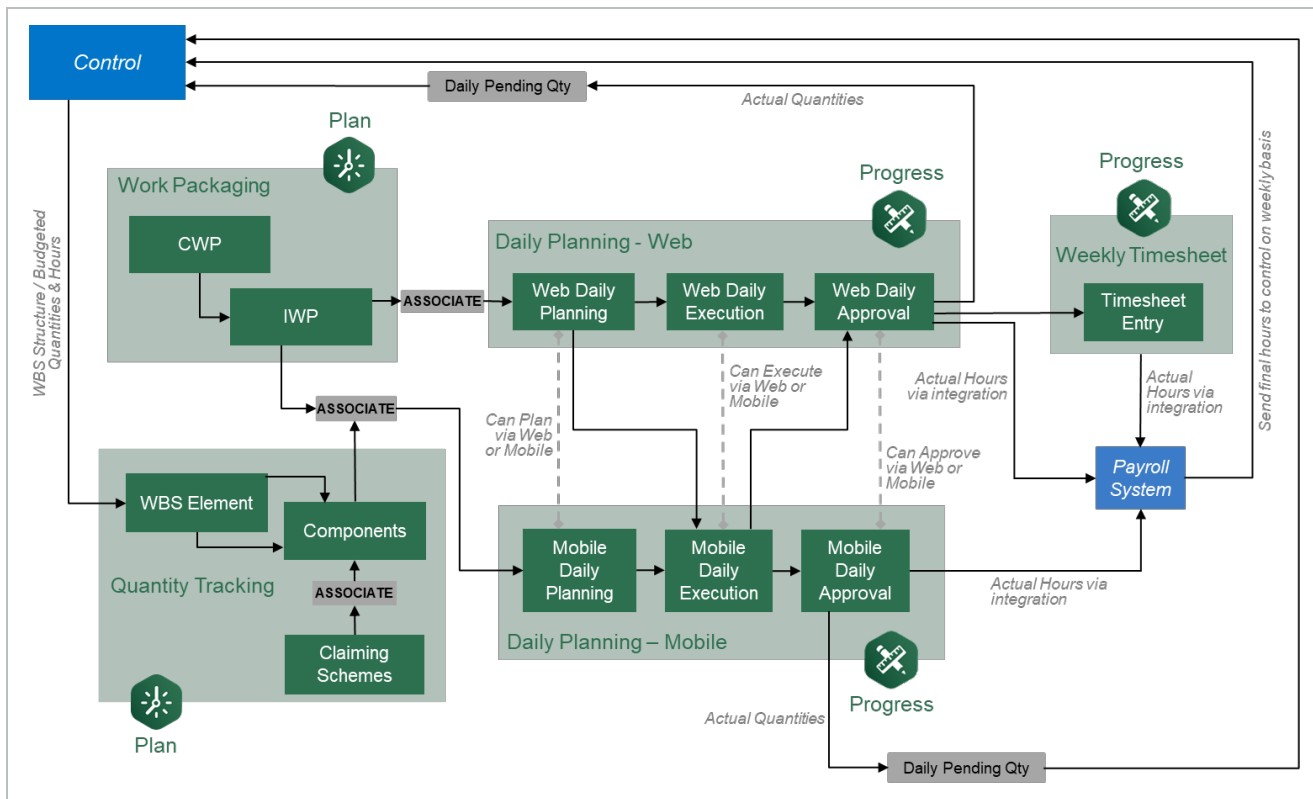
InEight Plan is an application within the InEight portfolio of products. It is a tool for engineers and superintendents to plan their work and track quantities during the construction of the project.

InEight Plan is organized into two modules:

Plan Modules	
Work Packaging	Creating and managing work packages.
Quantity Tracking	Creating and managing components and claiming schemes. Claiming completed quantities.

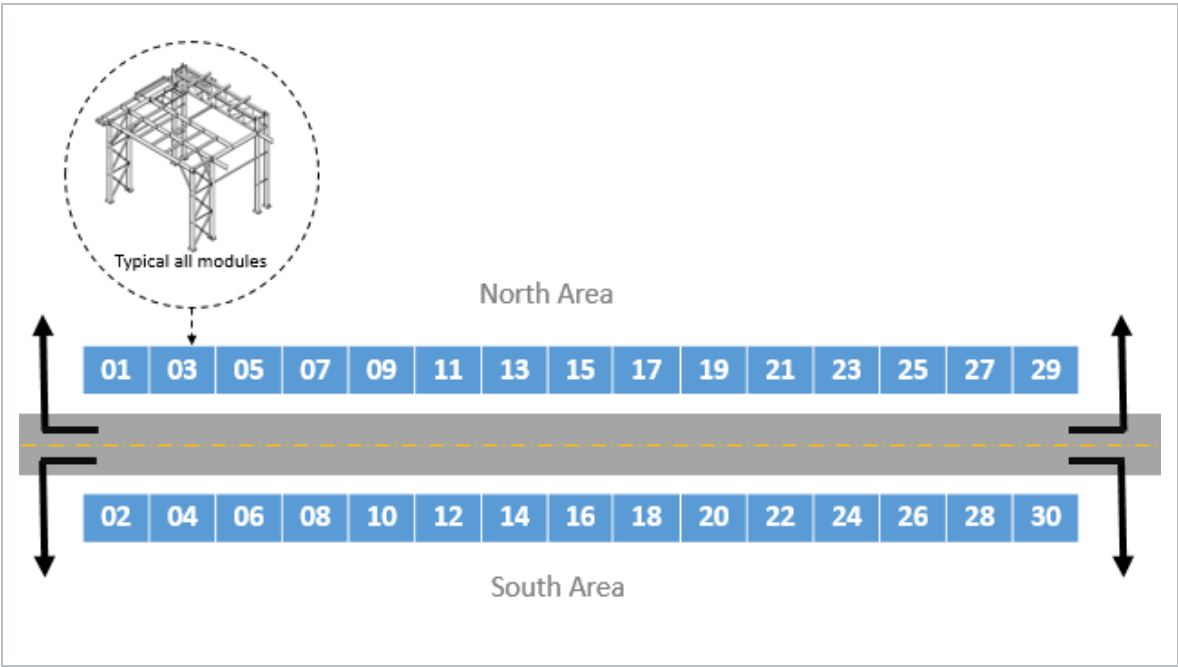
1.2.1 InEight Plan Work Flow

The below workflow illustrates the functions of both InEight Plan and InEight Progress, and how data flows between the two applications.

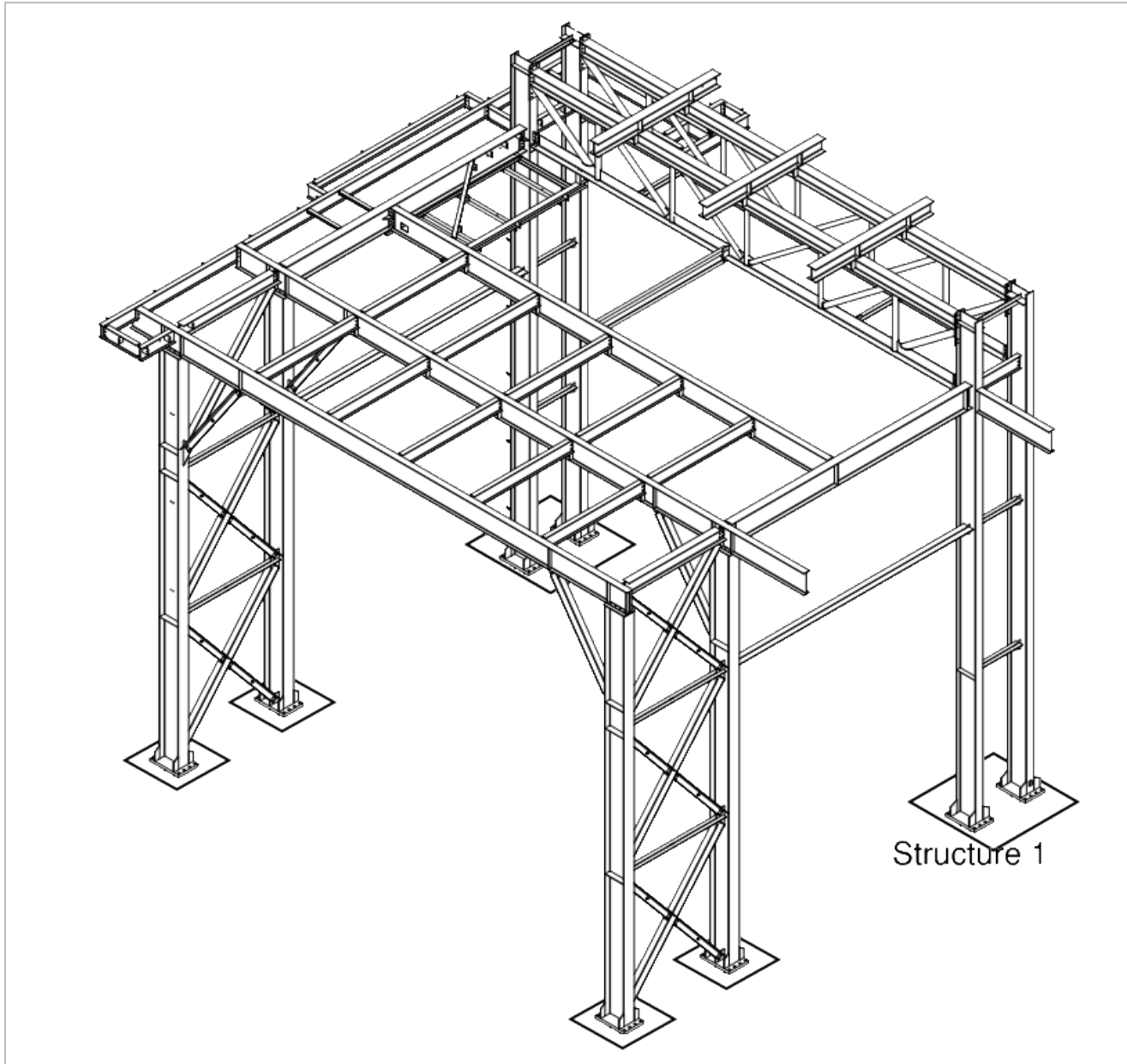


Scenario

You are a Project Manager about to start construction of a Steel Structure project. Your first step before starting construction is to break the project down into pieces that are more manageable.

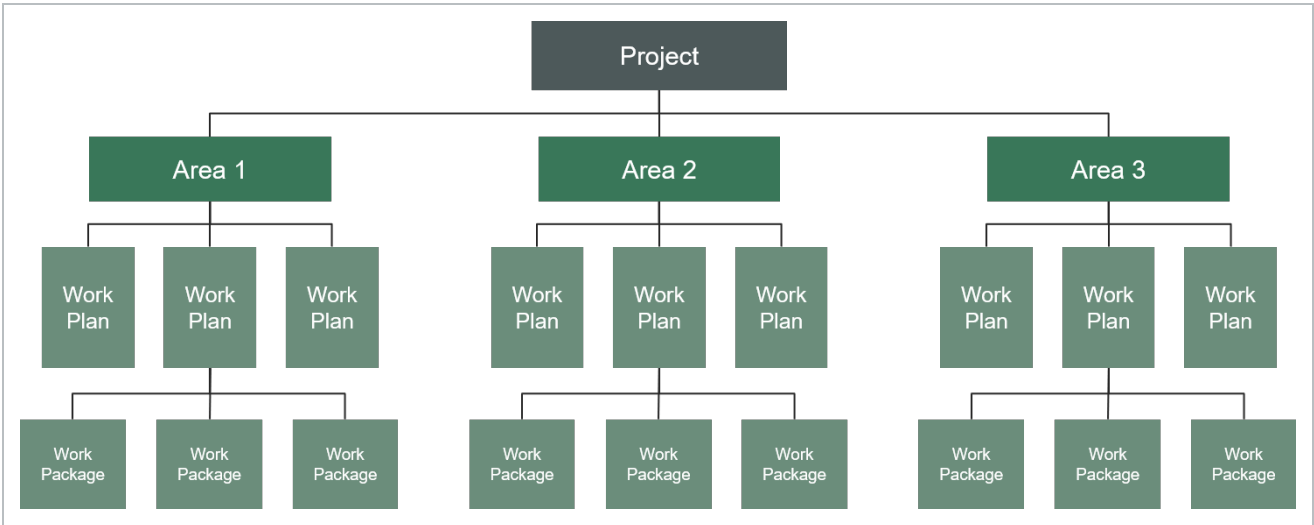


The image below depicts a layout for a steel structure project. The project consists of erecting 30 separate steel structures on opposite sides of a road. Each structure or module has been assigned a number 1-30.

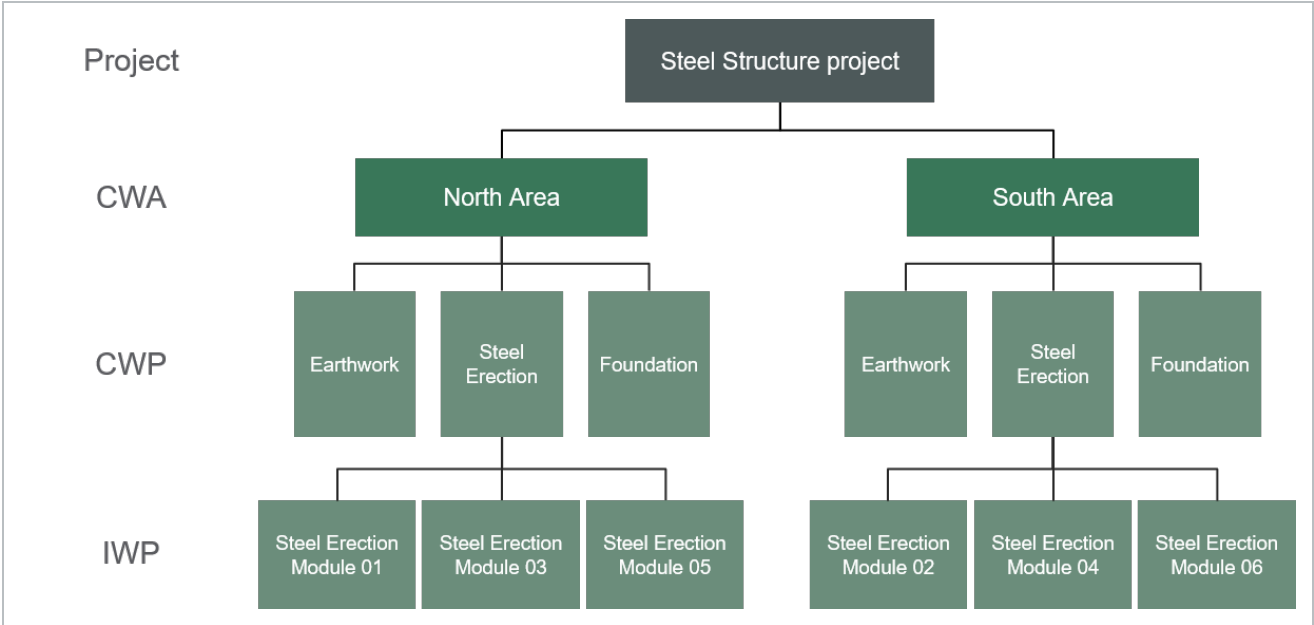


1.2.2 Work Packaging

Work Packaging helps break down the project into small, manageable pieces so that the work can be built and tracked effectively. In InEight Plan, you can break the work of your project into construction work areas (CWAs), construction work packages (CWPs) and installation work packages (IWPs).



As mentioned in the scenario above, the scope of Steel Structure project was too big to manage without segmenting it down to work packages representing one to four weeks’ worth of work. In Plan, this breakdown of the project could look like this:



1.2.2.1 Work Package Details

Work package details include the following information:

- Work sequence
- Budget

- Resources required
- Components and quantities
- Safety, quality, and environmental concerns



The image below shows what some of the details of an installation work package looks like in Plan:

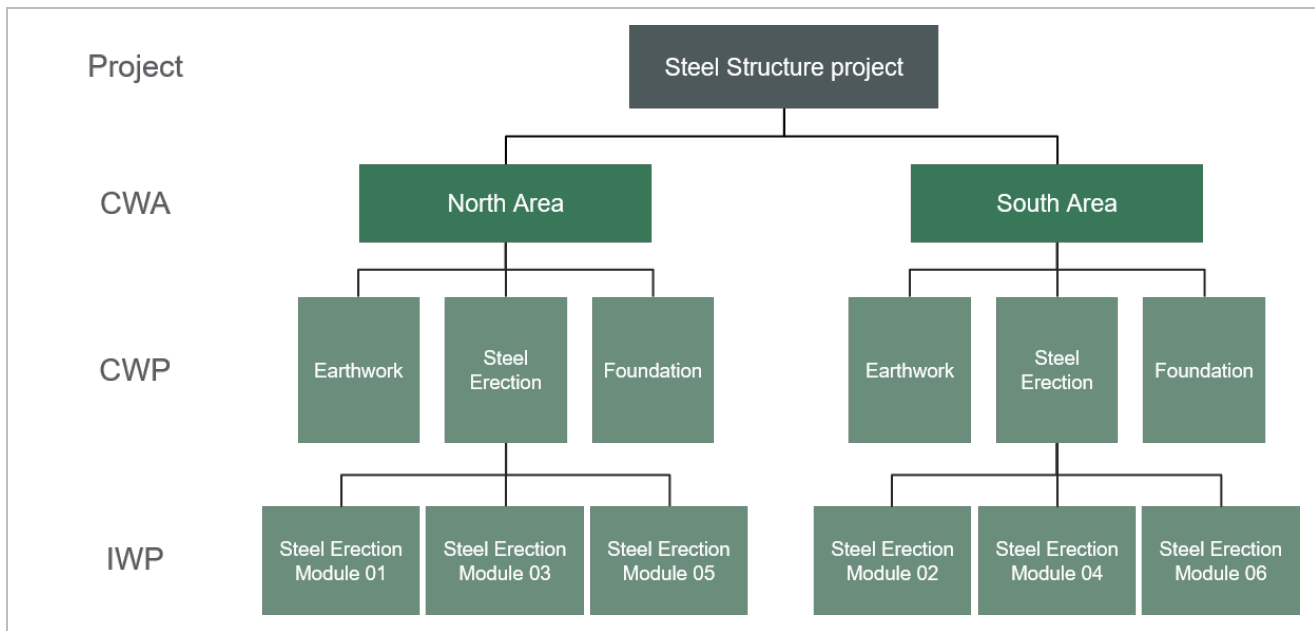
Budget

WBS	Description	Quantity	UoM	CB-MH/unit	CB-Man hours	CE-MH/unit	CE-Man hours
1005	Erect Steel - Light	0.80216	Ton	20	16.043	20	16.043
1006	Bolted Connections	2	Ea	0.5	1	0.5	1
Totals					17.043		17.043

Components

Component ID	Description	Quantity	UoM	WBS	CE-MH/unit	Estimated hours
Add components by WBS						

For your Steel Erection work plan, you can create a work package for each module.

**NOTE**

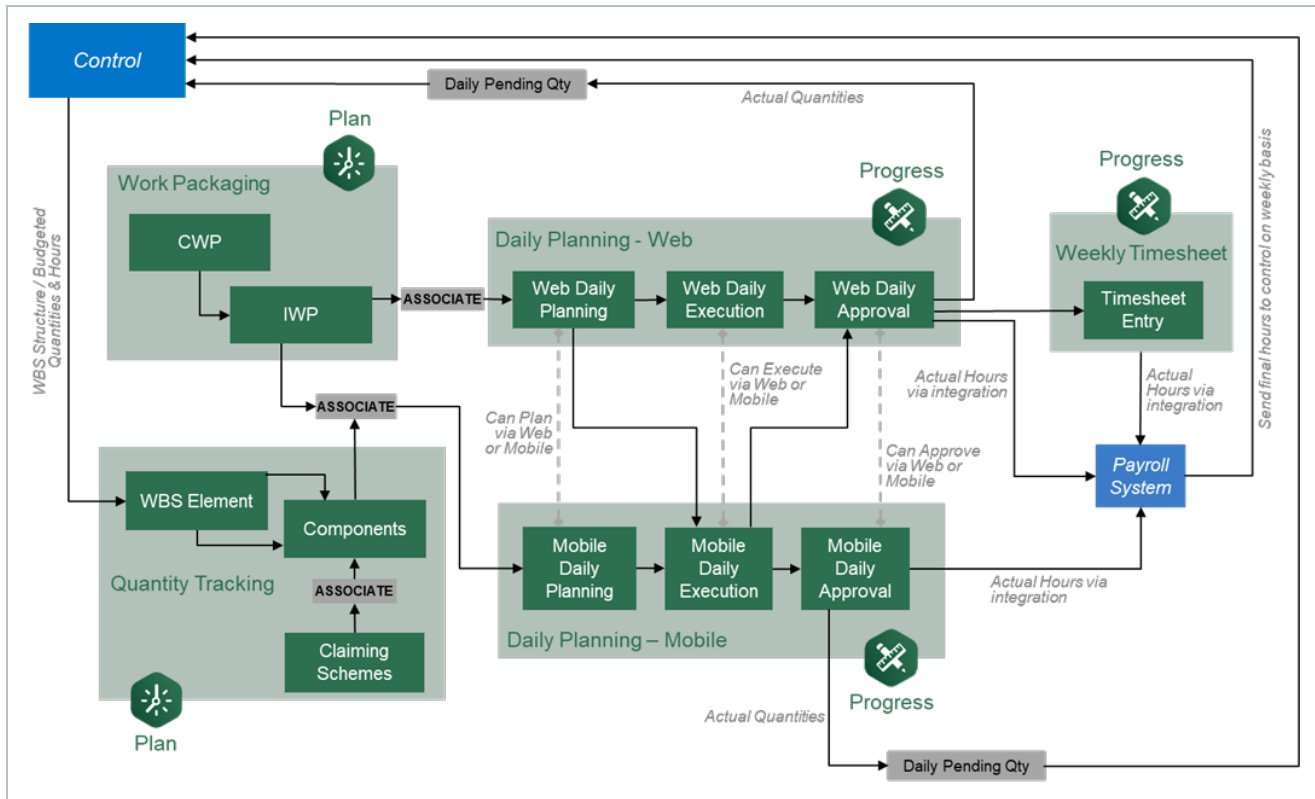
In Work Package Management, you will learn about work plans and work packages in detail, including how to create them and define plan details.

1.2.2.2 Comprehensive Workflow

The diagram below displays both sections of Plan and how they interrelate with Progress, Control and the Payroll system.

You will notice the areas where you create associations between work packages and daily plans, work packages and components, and components and claiming schemes.

The details of this workflow and the step by step functions within it will be covered in the remaining lessons of this and the Plan Quantity Tracking module and the Progress module.



Lesson 1 Review

1. Which two of the following are modules in Plan?
 - a. Quantity tracking
 - b. Benchmarking
 - c. Work packaging
 - d. Control
 - e. Reporting
 - f. Daily planning
2. Which one of the following represents the order for breaking down your project scope from larger to smaller pieces within InEight Plan?
 - a. Project > CWA > CWP > IWP
 - b. CWA > IWP > Project > CWP
 - c. Project > Work plan > CWA > CWP
 - d. Project > CWA > IWP > CWP
3. According to the InEight Plan workflow diagram, installation work packages (IWPs) associate with which of the following? (Select all that apply)
 - a. Inspections
 - b. Components
 - c. Web daily planning
 - d. Estimating
 - e. Mobile daily planning
 - f. Payroll

Lesson 1 Summary

As a result of this lesson, you can:

- Summarize the purpose of Project Suite
- Describe the two modules of Plan

- Explain the high-level work flow of Plan – Work Packaging

LESSON 2 – GENERAL NAVIGATION

Lesson Duration: 30 minutes

Lesson Objectives

After completing this lesson, you will be able to:

- Navigate the InEight Plan Work plans page
- Manage columns
- Manage data blocks
- Create viewsets

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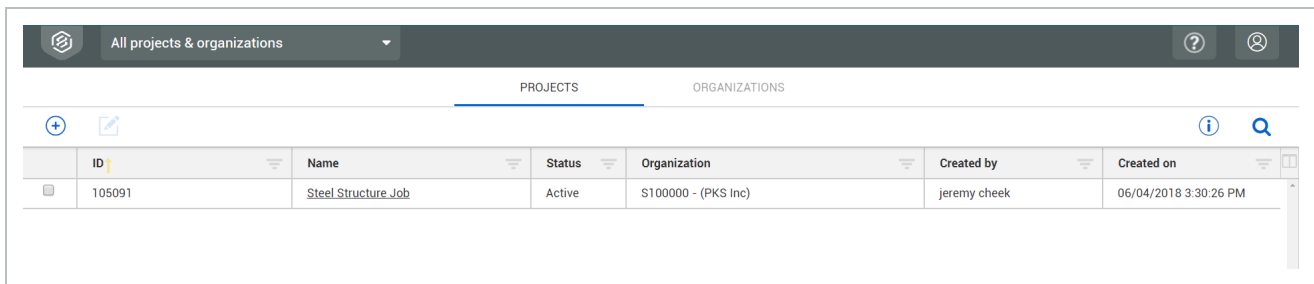
2.1 PAGE NAVIGATION

In this lesson, you will explore the layout and start to navigate around the application.

Scenario

You are an engineer who has recently been assigned to a Steel Structure Project, taking over the role from another field engineer who recently left the project. You are responsible for creating and managing all work packages on the project. You are informed that you will use the InEight Plan application to accomplish this, however, you have never used InEight Plan. You would like to take some time to familiarize yourself with the application and see what work packages have already been created.

You access InEight Plan through your web browser. When you first log in, you will be taken to the **All projects & organizations** page within the InEight project platform. Here you can select any project you are associated with.

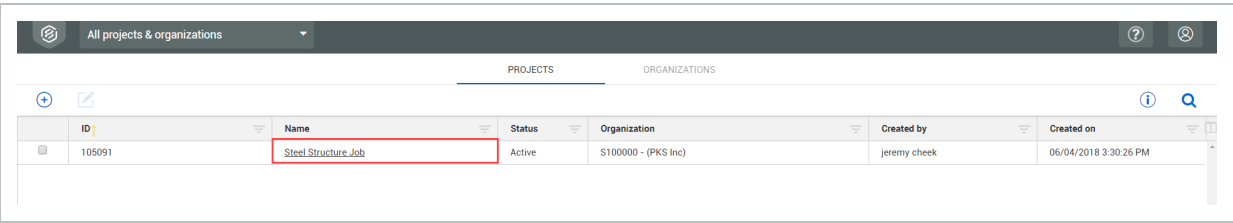


ID	Name	Status	Organization	Created by	Created on
105091	Steel Structure Job	Active	S100000 - (PKS Inc)	jeremy cheek	06/04/2018 3:30:26 PM

Selecting a project takes you to the Project home landing page for that project. From the home page, there are two different ways to access the Plan Work packaging module. The following Step by Step shows you both ways.

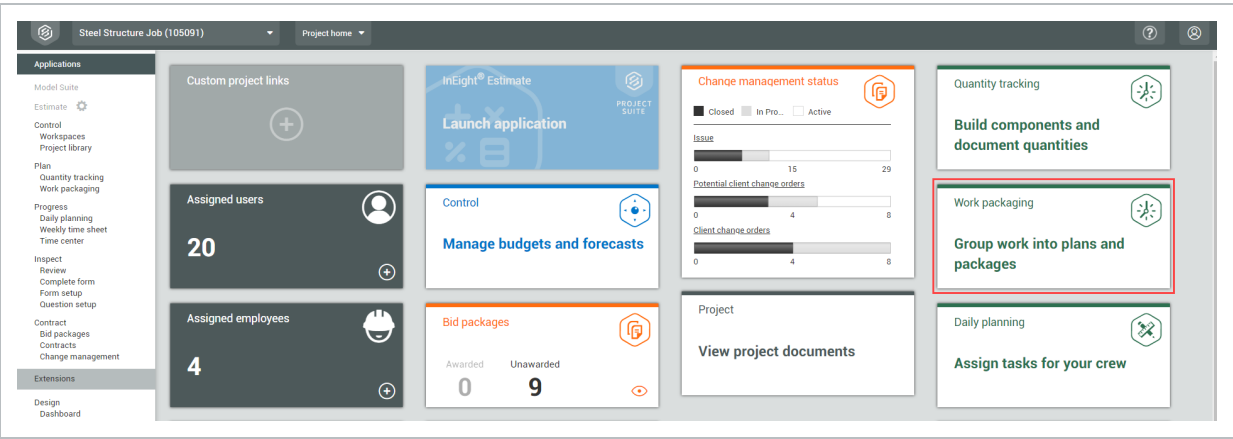
2.1 Step by Step 1 — Navigate to the Work Plans Page via the Project Dashboard

1. From the All projects & organizations page, select the project name **Steel Structure Job**.



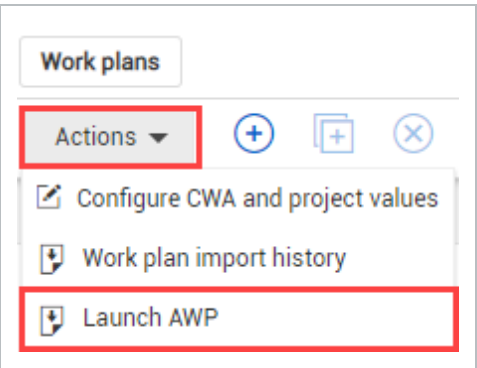
All projects & organizations						
PROJECTS				ORGANIZATIONS		
ID	Name	Status	Organization	Created by	Created on	
105091	Steel Structure Job	Active	S100000 - (PKS Inc)	jeremy cheek	06/04/2018 3:30 26 PM	

- This opens the project’s home page
2. Select the Work Packaging module by clicking on the **Work packaging** tile on the right or selecting **Work packaging** from the side bar menu on the left.



The screenshot shows the project home page for 'Steel Structure Job (105091)'. The left sidebar has a 'Plan' section with 'Work packaging' selected. The main area contains several tiles: 'Custom project links', 'Assigned users' (20), 'Assigned employees' (4), 'InEight® Estimate' (Launch application), 'Control' (Manage budgets and forecasts), 'Change management status' (Issue, Potential client change orders, Client change orders), 'Bid packages' (Awarded: 0, Unawarded: 9), 'Project' (View project documents), 'Quantity tracking' (Build components and document quantities), 'Work packaging' (Group work into plans and packages), and 'Daily planning' (Assign tasks for your crew). The 'Work packaging' tile is highlighted with a red box.

3. Click the **Actions** drop-down, then select **Launch AWP**.

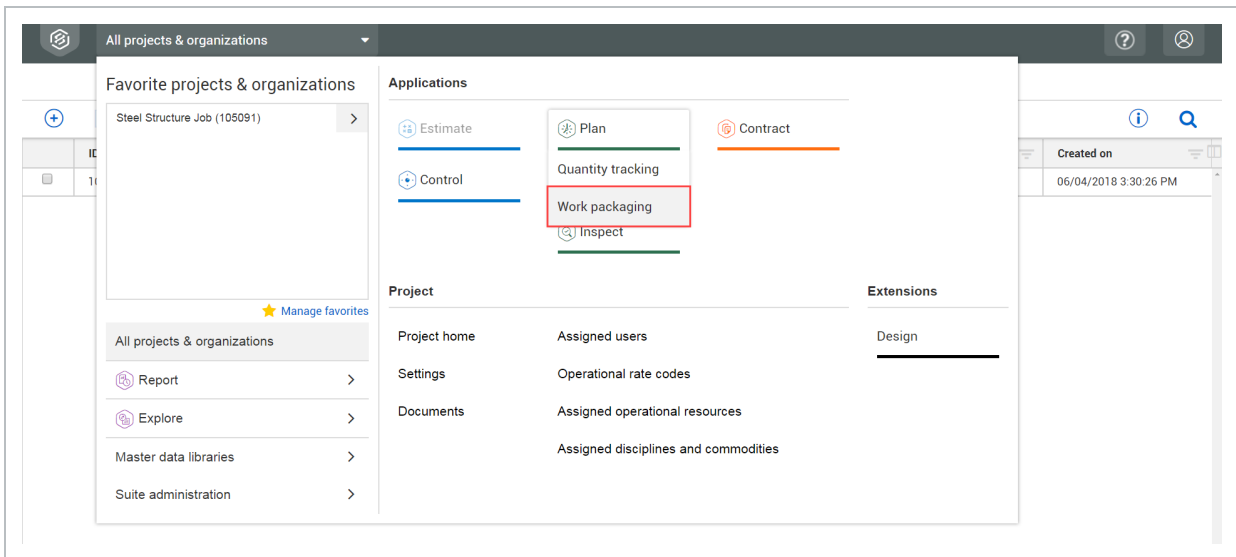


The screenshot shows the 'Work plans' page. The 'Actions' drop-down menu is open, showing options: 'Configure CWA and project values', 'Work plan import history', and 'Launch AWP'. The 'Launch AWP' option is highlighted with a red box.

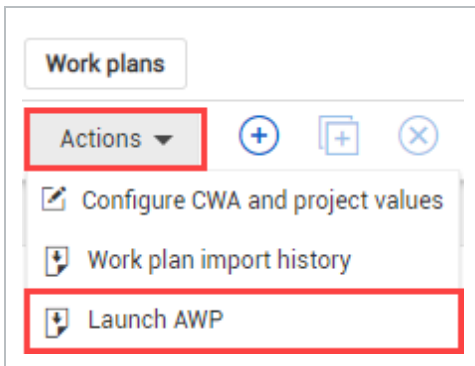
4. This opens the Work plans page.

2.1 Step by Step 2 — Navigate to the Work Plans Page via the Menu Button

1. From the Projects page, select the **1st level drop-down menu**, hover over **Plan** and select **Work packaging**.



2. Click **Actions** drop-down, then select **Launch AWP**.



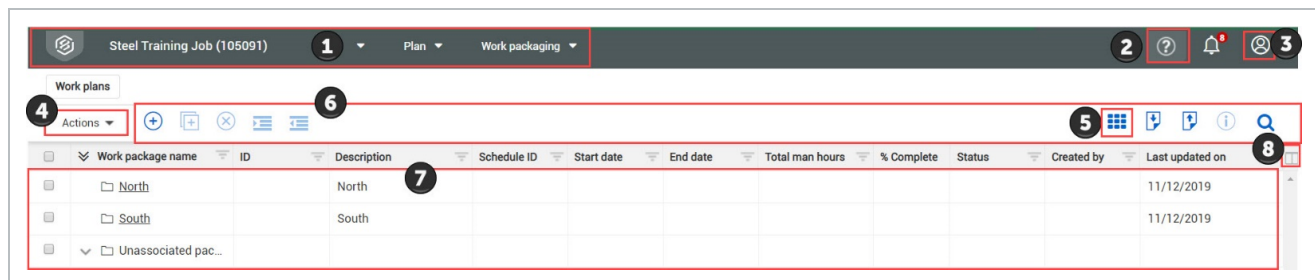
3. This opens the Work plans/packages page.

TIP

This is how you will navigate to the Quantity Tracking module as well.
You will go over quantity tracking in the InEight Plan – Quantity Tracking *course*.

Overview – Work Plans/Packages Page

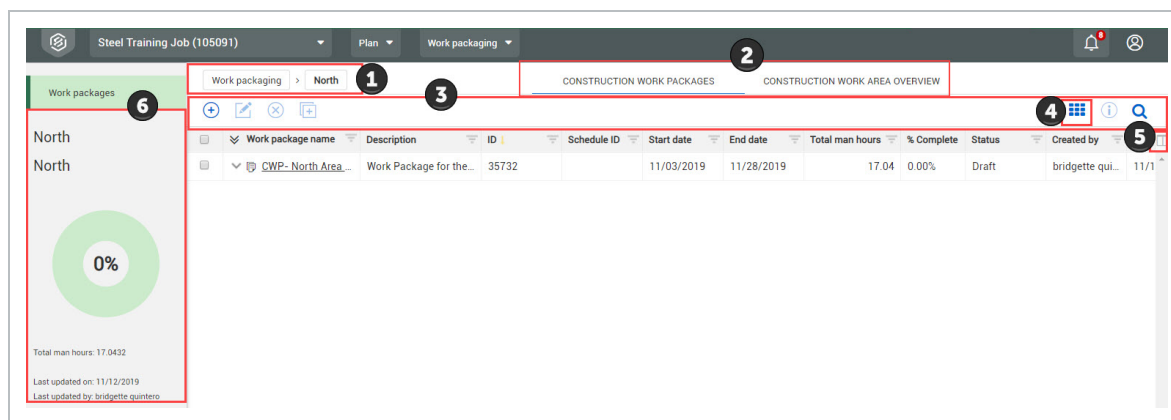
Title	Description
1 Navigation Bar	Contains First, Second, and Third-Level menus to access organizational settings, project settings, and applications.
2 Help Menu	Contains Walkthrus to walk you step by step through processes within the module.
3 Notifications and User Profile	View notifications, user profile and log out.
4 Actions Menu	Select available actions for the current register tab you are viewing.
5 Block View	View the Work Plans/Work packaging page in a card view layout, the page displays the most recent saved work package, as well as a card for each work package associated with the CWA or CWP in the same order and data as the default grid view.
6 Toolbar	Contains functions for the page you are on: add, edit, delete, export, import, show details, and search.
7 Work Plans/Packages Register	List of all work plans and packages.
8 Column Chooser	Allows you to add or hide columns to make the plans/packages list user specific.



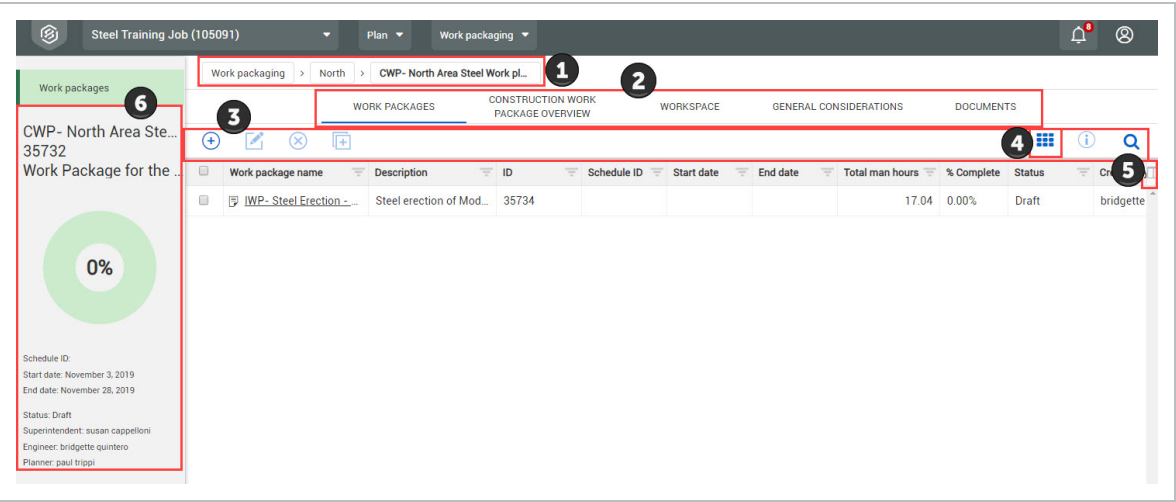
Overview – Area/Construction/Installation Work Packages Pages

Title	Description
1 Breadcrumbs	Navigational links that allow you to track your path from the page you are currently viewing back to the work plans/packages page. Furthermore, identifies what and where you are within a work package.
2 Tabs	Navigate between different functions on a page. The blue line indicates what tab you are currently on.
3 Toolbar	Contains functions for the page you are on: add, edit, delete, export, import, show details, and search.
4 Block View	View the Work packages page in a card view layout, the page displays the most recent saved work package, as well as a card for each work package associated with the CWA or CWP in the same order and data as the default grid view.
5 Column Chooser	Add or hide columns to make the plans/packages list user specific.
6 Side Panel	Contains a brief summary of your CWA, CWP, or IWP, fed from their overview and workspace tabs as well as associated components. The percent complete displayed relates to the associated components' percent complete.

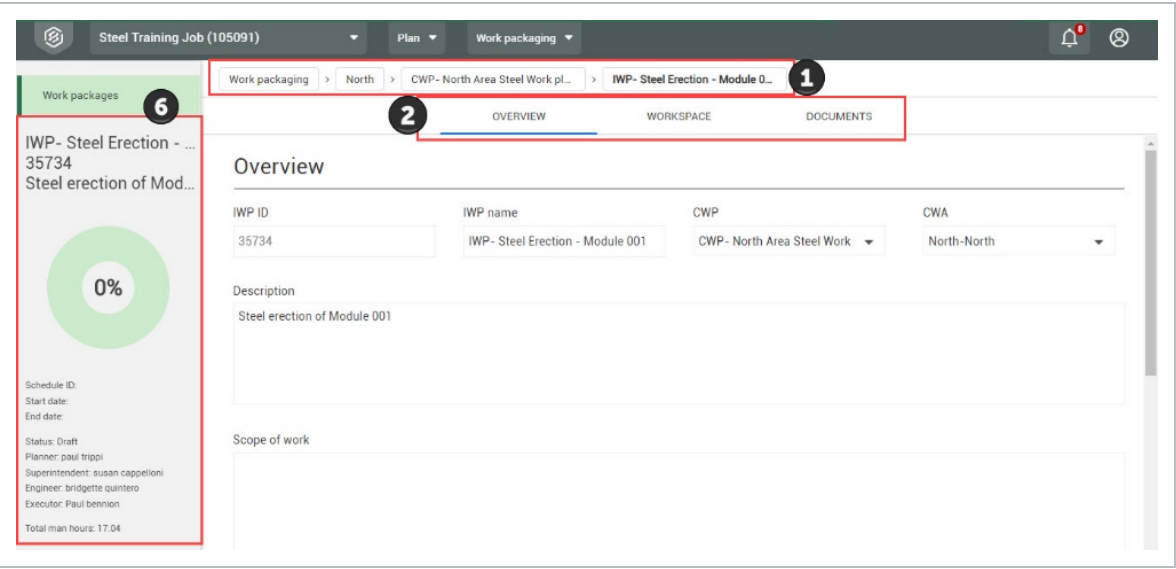
2.1.1 CWA



2.1.1.2 CWP



2.1.1.3 IWP



TIP The **Construction Work Packages/Work Packages** tab displays all the work plans that *you* have created or are assigned to as the Superintendent, Engineer, or Foreman.

2.2 COLUMNS

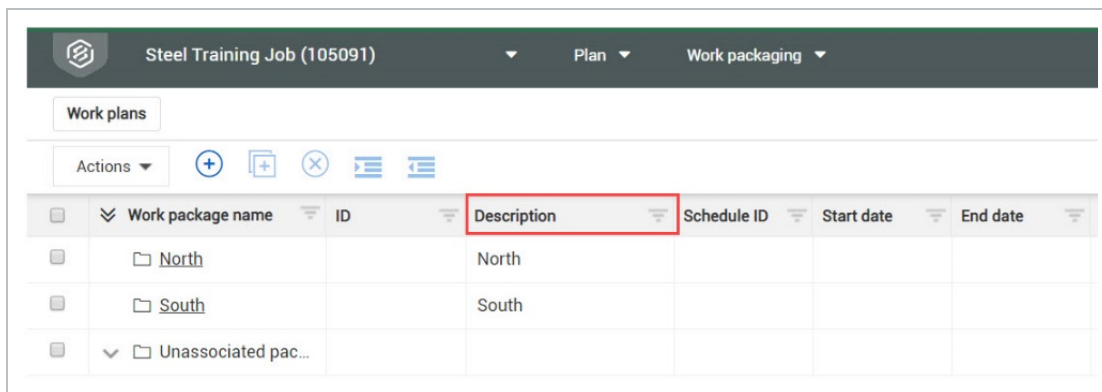
Within the InEight Plan Work plans page, you can customize columns according to your preferences. Changes made to the placement of your columns will be retained the next time you access the page.

2.2.1 Move Columns

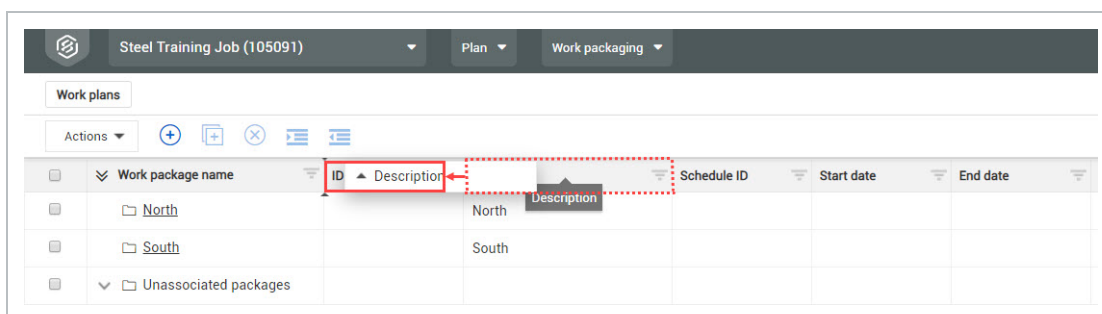
You can move a column from one place to another to customize your view using drag and drop.

2.2 Step by Step 1 — Move Columns

1. On the All tab of the Work plans page, click on the **Description** column header.



2. Drag the column to the left and drop it to the right of the ID column.
 - Two black arrows appear and guide you to the location the column will be dropped



2.2.2 Sort Columns

You can sort any column in ascending or descending order (both for alpha and numeric fields) by clicking once on the column header.

2.2 Step by Step 2 — Sort Columns

1. On the All tab of the Work plans page, click on the **Scheduled start** column to sort the column in ascending order.
 - Notice the yellow “up” arrow designating you are sorting in ascending order

Description	Name	Scheduled start ↑
-------------	------	-------------------

2. Click the **Scheduled start** column again and the column will filter in descending order.
 - Notice the yellow arrow is now pointing down

2.2.3 Filter Columns

You can filter columns as a way to see relevant information pertaining to your specific needs.

2.2 Step by Step 3 — Filter Columns

1. On the All tab of the Work plans page, click the **filter pyramid** of the Scheduled start column.

Description	Name	Scheduled start ↑
-------------	------	-------------------

2. In the resulting drop-down list, select **Is equal to**.

The screenshot shows a filter dropdown menu for the 'Scheduled start' column. The menu is titled 'Show items with value that:' and contains a list of comparison operators: 'Is equal to', 'Is not equal to', 'Is after or equal to', 'Is after', 'Is before or equal to', and 'Is Before'. The 'Is equal to' option is currently selected and highlighted. Below the list are two buttons: 'Clear' and 'Filter'.

3. In the first search box, type **6/18/2018**.

The screenshot shows the filter interface with the date '6/18/2018' entered in the first search box. The dropdown menu is open, showing the 'Is equal to' operator selected. Below the operator is a text input field containing '6/18/2018' and a calendar icon. The 'Clear' and 'Filter' buttons are visible at the bottom.

4. Click on the **Filter** button.

- The table now only shows items that have a Scheduled start date of 6/18/2018.
- Notice that the Filter Pyramid is now in yellow indicating that this column is filtered.

Steel Structure Job (105091)PlanWork packaging

Work plansMY WORK PLANSALL

Actions

ID	Description	Name	Scheduled start	Scheduled finish
4972	Work plan for the structural steel of the North area	North Area Steel Erection Work Plan - 001	06/18/2018	06/29/2018
3996		South Area Steel Erection Work Plan - 001	06/18/2018	06/29/2018
4758		Structural Steel Mobilization	06/18/2018	06/19/2018

5. Select the inverted **yellow pyramid**.

Description	Name	Scheduled start
-------------	------	-----------------

6. Click **Clear** to clear your filter.

Scheduled startScheduled finish

06/18/201806/18/201806/18/2018

Show items with value that:

Is equal to

6/18/2018

And

Is equal to

ClearFilter

TIP

You can apply multiple rules to your filter. For example, setting a “Contains” or “is equal to” filter for your column allows you to bring in two distinct results at once.

Exercise 2.1 — Filter Columns

In this exercise, you will practice filtering columns from the All tab on the Work plans page.

1. Find a discipline by using the column sort function.

2. Remove the columns you do not need in your view.

3. Apply a filter you would use to make the data more relevant.

Congratulations, you have completed this exercise!

2.3 DATA BLOCKS

On the Workspace tab of an opened installation work package, the work package details are contained within data blocks. Data blocks are sets of columns grouped together based on categories of information. Using data blocks helps you to organize and manage all of the columns on a page. Data blocks are fully customizable, can be viewed side by side, and can be moved around in the register. The information in each data block is displayed in a grid-like format to maintain the look and feel of a spreadsheet.

Work packaging > North > CWP- North Area Steel Work pl... > IWP- Steel Erection - Module 0...

OVERVIEW

WORKSPACE

DOCUMENTS

View: Current viewset

Quality

< . . >

+ Add quality step

Step	Description	Hold point	Quality risk	Mitigation	Type of inspec...	Inspector	Spec	I&TP
------	-------------	------------	--------------	------------	-------------------	-----------	------	------

Safety

< . . >

+ Add safety step

Step	Description	Safety risk	Mitigation	Required safety items
------	-------------	-------------	------------	-----------------------

Some data block fields allow you to fill in key work package information.

2.3.1 Add Data Blocks

2.3 Step by Step 1 — Add Data Blocks

- 1. From the Work plans/packages page, select a **hyperlink** under the ID Column for an installation work package (IWP).

Work package name	Description	ID
North	North	
CWP- North ...	Work Package for the...	35732
IWP- Stee...	Steel erection of Mod...	35734
South	South	
Unassociated pa...		

- 2. Once you are in an individual work plan, select the **Workspace** tab.
- 3. On the Manage workspace slide out panel on the left, select **Work sequence**.

Steel Training Job (105091)

Work packages

IWP- Steel Erection ...
35734
Steel erection of Module 001

Manage workspace

- Equipment
- Materials
- Budget
- Components
- Constraint management
- Lessons learned
- Quality forms
- Work sequence**
- Tools
- Temporary structures
- Labor
- Goals
- Quality
- Safety**
- Environmental

Work packaging > Nor

Work sequence

Work step ... Description

Save workspace as view

Safety

- 4. Also select the **Labor, Equipment, Components, Budget, Quality, and Safety** data blocks.

NOTE

- You can scroll up and down between the data blocks to view your selections
- You can sort and filter columns whether they are in a data block or in a register page

2.3.2 Navigate Data Blocks

You can utilize the arrows  to view more columns associated with each data block that are not in the current pane.

Work sequence

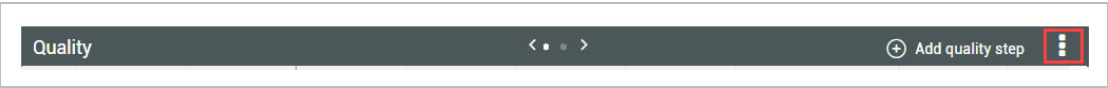
The number of dots between the arrows represent how many panes are in that data block.

2.3.3 Context Menu

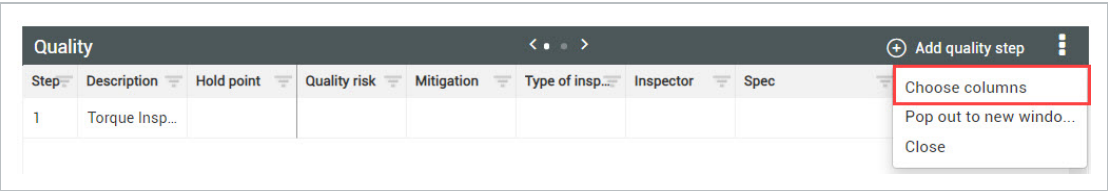
The Context Menu  allows you to customize the order of columns in each data block. You can also use the Context Menu to add or remove columns from a data block.

2.3 Step by Step 2 — Utilize the Context Menu

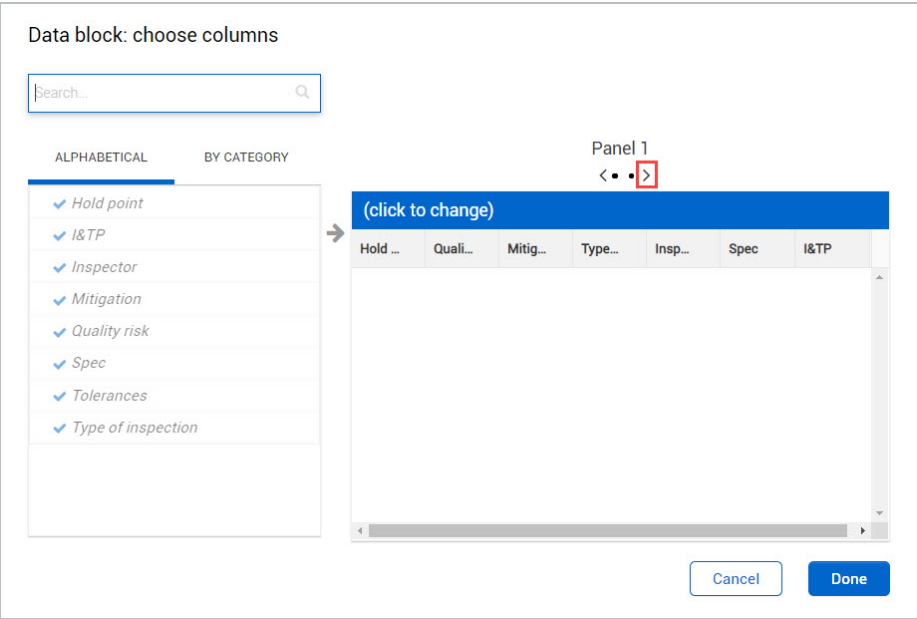
- 1. On the Details tab of the Work plans page, select the **Context Menu** for the Work sequence data block.



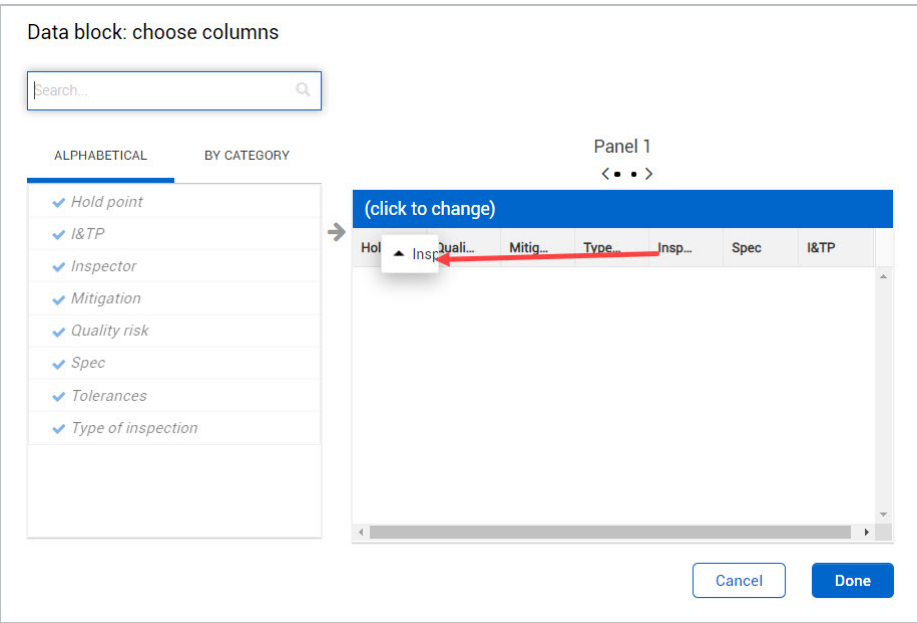
- 2. Select **Choose columns** from the drop-down menu.



- 3. On the resulting slide out panel, click the **right arrow** to navigate to Panel 2 of the data block, then click back to Panel 1.



4. Within the data block, click and drag the **Inspector** column to move it to the far left side of the data block columns.



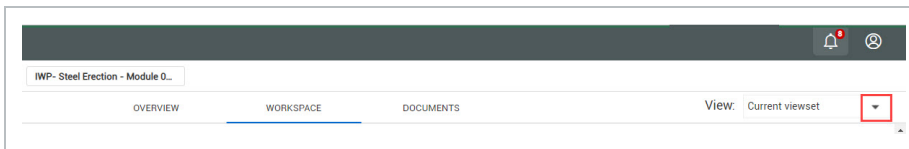
NOTE Each type of data block has its own unique default settings. Default settings include specific locked columns and total number of columns and panels.

2.4 VIEWSETS

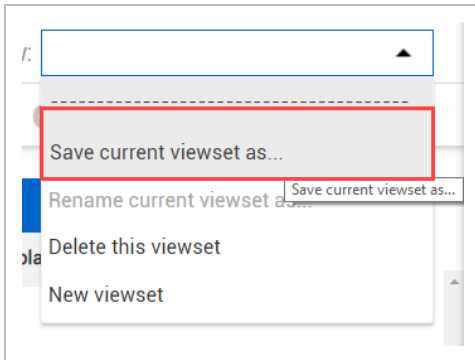
Once you have all desired data blocks organized to your liking, you can create a saved view of your page so that you can always revert back to it. This saved view is called a viewset.

2.4 Step by Step 1 — Create a Viewset

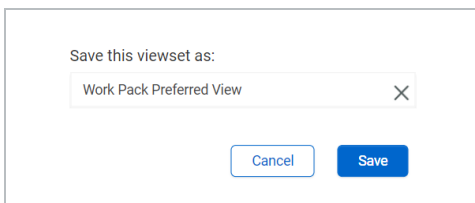
1. On the Workspace tab of your selected installation work package, Select the **View** drop-down arrow to save the data block setup you created in Step by Step 2.3.1.



2. Select **Save current viewset as** from the viewset drop-down list.



3. In the resulting window, type **Work Pack Preferred View**.



4. Select **Save**.
 - You now have a saved view.

NOTE Each viewset is user-specific and can be used from plan to plan.

Exercise 2.2 — Create a Viewset

Now that you have learned some of the basics of navigating in InEight Plan, from the Work plans/packages page, create an installation work package viewset that you would use.

1. Select the data blocks you might need. (e.g., Labor Equip, and Budget).

2. Select the desired columns you want to see in each data block.

3. Save your view.

Congratulations, you have completed this exercise!

Lesson 2 Review

1. How do you know which project you are working in?
 - a. Breadcrumbs
 - b. Navigation bar – First level menu
 - c. Notifications and User profile

2. You CANNOT sort and filter columns if they are in a data block. Only on a register page.
 - a. True
 - b. False

3. From where can you customize the order of columns in each data block?
 - a. Context menu
 - b. Customization page
 - c. Data block navigation
 - d. Settings menu

4. On the Workspace tab of an installation work package, to save the data blocks you have selected to display on the page, you can create a:
 - a. Viewset
 - b. Snapshot
 - c. Backup
 - d. Carbon copy

Lesson 2 Summary

As a result of this lesson, you can:

- Navigate the InEight Plan Work plans page
- Manage columns

- Manage data blocks
- Create viewsets

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LESSON 3 – WORK PACKAGE MANAGEMENT

Lesson Duration: 60 minutes

Lesson Objectives

After completing this lesson, you will be able to:

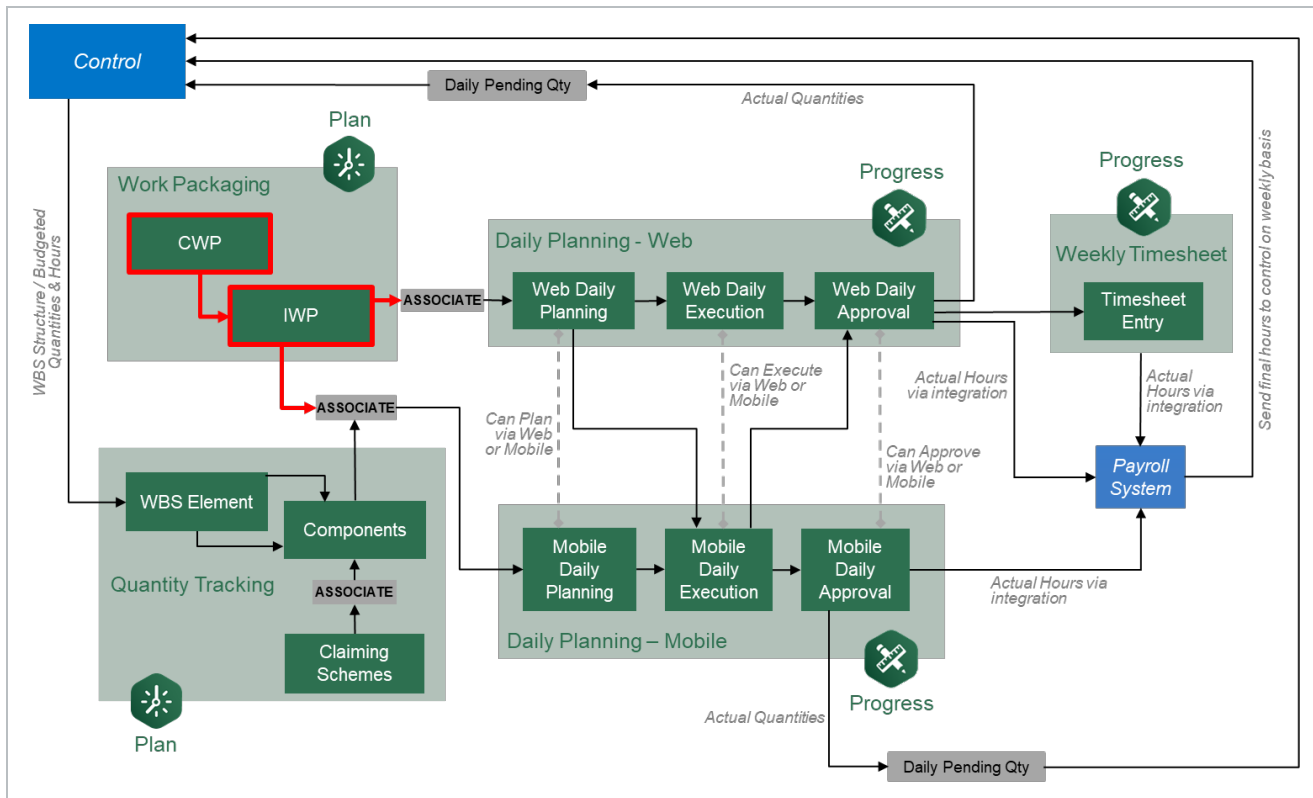
- Explain how to manage work packages
- Create a construction work package
- Create an installation work package
- Edit and review work package details
- Import work packages

Lesson Topics

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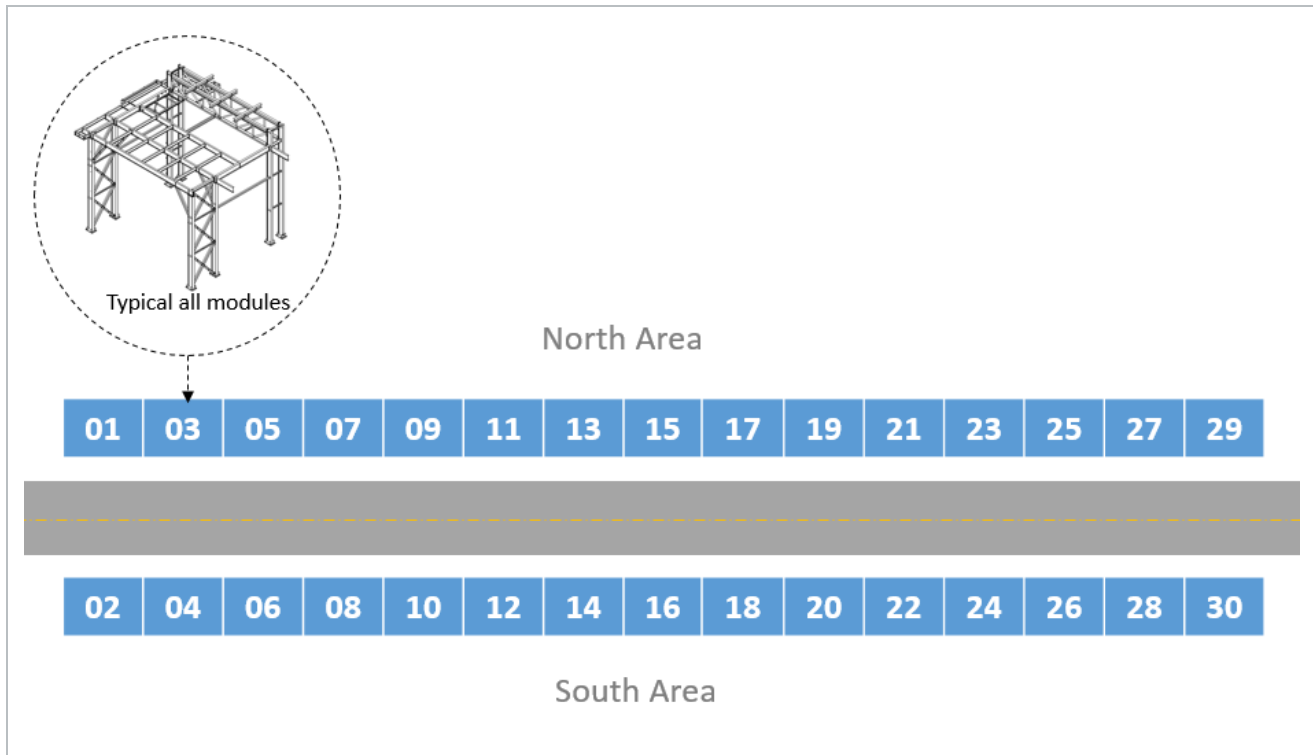
3.1 INEIGHT PLAN WORKFLOW - WORK PACKAGE MANAGEMENT



3.2 WORK PACKAGE MANAGEMENT OVERVIEW

Scenario

In today's world, projects become bigger and bigger. Sometimes, looking at the entire project scope can become overwhelming. Dividing the scope into smaller pieces allows you to more effectively plan and manage the project. Imagine you are working on a project with the following scope: 30 modules in which you need to complete earthwork, pour concrete pads, and finally erect the steel support structures. It is a large scope at first glance. In this lesson, you will discuss ways in which you can divide the work to make it more manageable.



3.2.1 What is Advanced Work Packaging (AWP)?

Advanced Work Packaging (AWP) is a standardized way to plan the execution of a construction project including design, procurement, and installation, changing the planning process to be execution driven. It is a way to approach the beginning of your construction project with the end in mind. In the past, planning was usually siloed, Engineering first, then Procurement, and finally Construction. AWP starts at the end of Construction and works backwards.

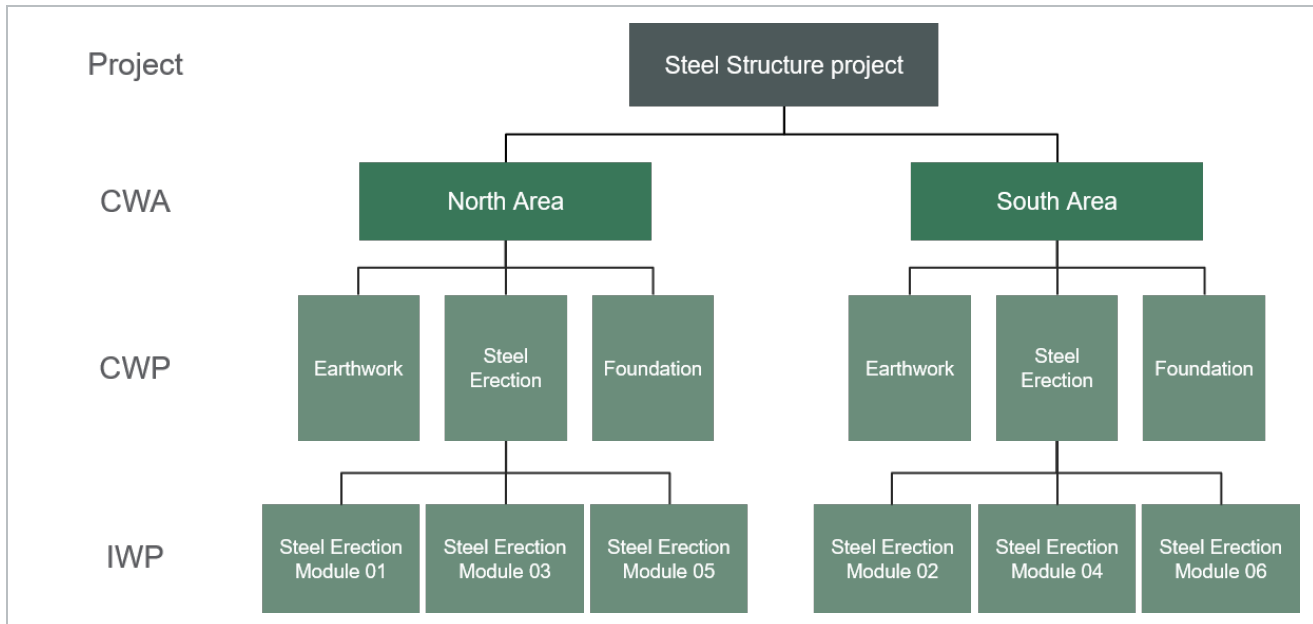
The Work Packaging module is a way for you to break down your work into manageable pieces, as well as have all items available for your crew for installation before they start the work, and track how much you have installed. In the end, it allows you to enact a detailed and well-organized plan for your work. You accomplish this by breaking work into work packages.

3.2.2 Work Packages

There are three specific work packages you can use in InEight Plan:

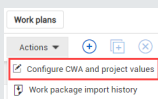
- Construction Work Area (CWA)
- Construction Work Package (CWP)
- Installation Work Package (IWP)

Using the scenario above as an example, assume that you initially break the project into two construction work areas (CWA): North Area and South Area. You break each area of work into three different construction work packages: Earthwork, Foundation, and Steel Erection. From there, you can break each construction work package into multiple installation work packages to break the scope into smaller pieces, so you can plan at a more focused and detailed level.



TIP

Construction work areas (CWAs) are created for the project or organization in the **Configure CWA and project values** page prior to the start of your project.



3.2.2.1 Construction Work Package (CWP)

A construction work package (CWP) defines a logical and manageable division of work within the construction scope. CWPs are aligned with the project execution plan (which includes the construction plan) and the WBS. The division of work is defined such that CWPs do not overlap within a discipline. CWPs are to be measurable and in alignment with project controls. CWPs are the basis for the development of detailed installation work packages. Also, they can contain more than one EWP. A CWP is typically aligned with a bid package. A typical CWP includes the following:

- Safety requirements
- At least one EWP

- Schedule
- Budget (work hours/cost/productivity)
- Environmental requirements
- Quality requirements
- Special resource requirements

A CWP may be divided by area, system, or as otherwise determined by the project (construction) execution plan. In general, it is better to develop CWPs by discipline. A large project will likely contain multiple CWPs. CWPs can be the basis of contractual scopes of work. A contractual scope may contain more than one CWP. CWPs are developed over time, from contract through construction execution. Complete specifications of CWPs grow over time to include productivity factors, detailed cost reports, and other considerations.

3.2.2.2 Installation Work Package (IWP)

An installation work package (IWP) is the deliverable that enables a construction work crew to perform work in a safe, predictable, measurable, and efficient manner. An IWP is scoped to be manageable and “progressable”; it is typically of limited size such that a crew can complete the work in about a week. An IWP contains the necessary documentation supporting workforce execution. IWP should be approved by the responsible stakeholders, and any constraints should be mitigated before issuance to the field. A typical IWP includes the following:

- Work package summary – inclusive of description of work, location, system or facility code, originator, contact information, sequenced work steps, reference documents, estimate of work hours and quantities, cost codes, witness or hold points, and special comments quantity work sheet
- Safety hazard analysis, specific to tasks in work package
- Material Safety Data Sheet
- Drawings (engineering and vendor design)
- Specifications (engineering and vendor design)
- Change documents (i.e., field change request, deficiency report/non-conformance report and design change notice)
- Manufacturer’s installation instructions model shots
 - Bills of Materials
 - Required tools

- Installation test results forms
- As-built documentation
- Inspection checklists
- Completion verification signatures

All elements necessary to complete the scope of the IWP should be organized and delivered before work is started. As the originator, you should cover the work with the responsible safety, quality, superintendent, and craft personnel in a preparatory meeting, with special focus on anticipated constraints.

Generally, the scope of work associated with the IWP should be small enough that it could be completed by a single foreman and crew within a pre-defined block of work hours. Work hour blocks should be between 500 and 1,000 hours. An IWP contains all applicable and pertinent documents in support of safe and efficient installation of a specific portion of a system by a given trade. These documents are written specifically for the crew performing the activity. In general, each IWP should require a level of effort for one crew for approximately one week (i.e., 500–1,000 work hours).

The IWP should include a scope for the work, work constraints, design documents, materials, quality records, construction equipment requirements and budget for the work. Even though IWPs are generally developed by area and do not cross CWP boundaries, they may be broken down by commissioning system later in a project. In such instances, an IWP may cross CWP boundaries.

3.3 WORK PACKAGE CREATION

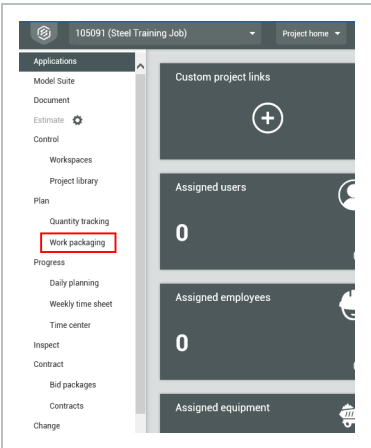
The first step in utilizing the Work Packaging module is to set up your work package structure.

3.3.1 Create a Construction Work Package (CWP)

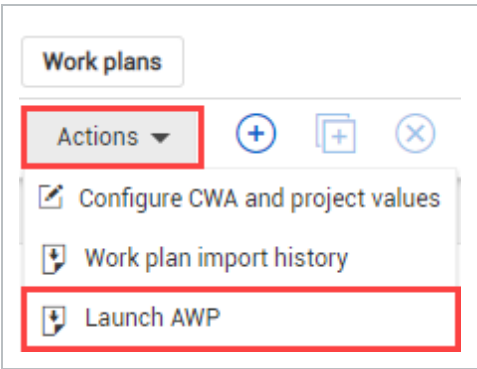
The following steps walk you through creating a construction work package.

3.3 Step by Step 1 — Create a Construction Work Package (CWP)

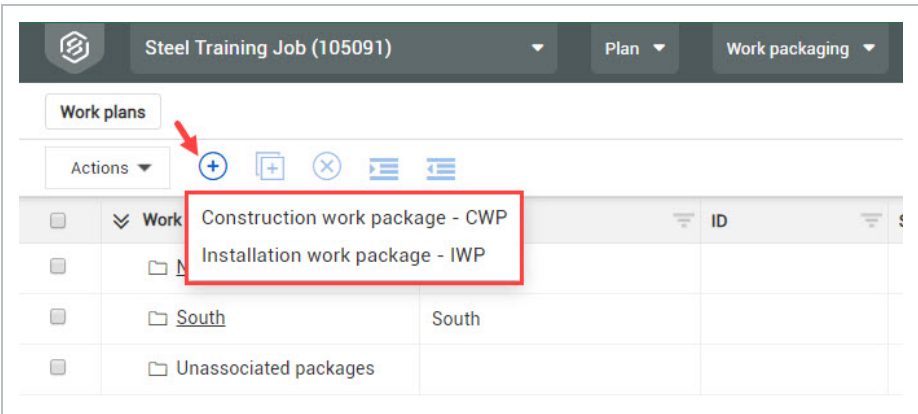
1. From the Steel Structure Training Job's Project home landing page, navigate to the **Work packaging** page.



2. Click **Actions** drop-down, then select **Launch AWP**.



3. Click the **Add** button on the left toolbar and select **Construction work package – CWP** from the drop-down list.



- This is where you can also add Installation work packages (IWPs)

TIP

Construction work packages and installation work packages can also be created within the construction work areas, for example the North construction work area, by clicking on the North construction work area folder then select the add button.

4. In the new dialog box, type **North Area - Steel Erection Work plan – [Your Initials]** after the CWP -.

- Note that the CWP name automatically begins with “CWP-“ by default

5. Click **Add** to finish creating the work package.

- Note that the CWP created will be located in the **Unassociated packages** folder by default when the CWPs or IWPs are not created within their appropriate construction work area folder

	Work package name	Description	ID
	North	North	
	South	South	
	Unassociated packages		
	CWP- North Area Stee...		35732

3.3.2 Edit Work Packages

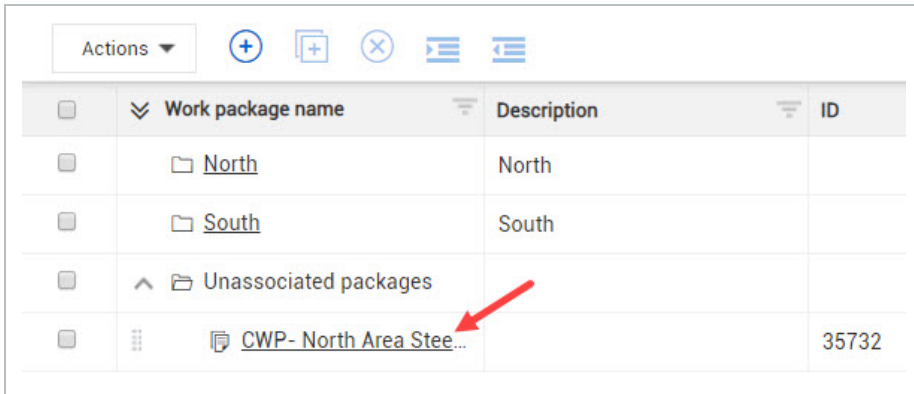
After creating the work package, you may need to go in and edit the details. This includes:

- Schedule start and finish dates
- CWP Description

- CWA description and ID
- Plan Status
- Other fields

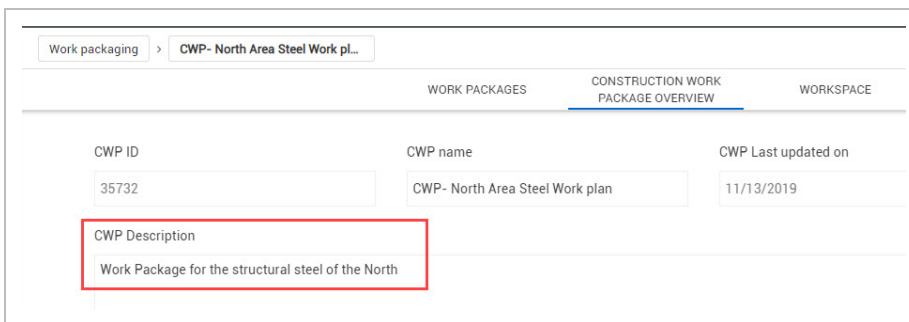
3.3 Step by Step 2 — Edit a Work Package

1. From the Work plans/packages page, select the hyperlink **ID** on your newly created package.



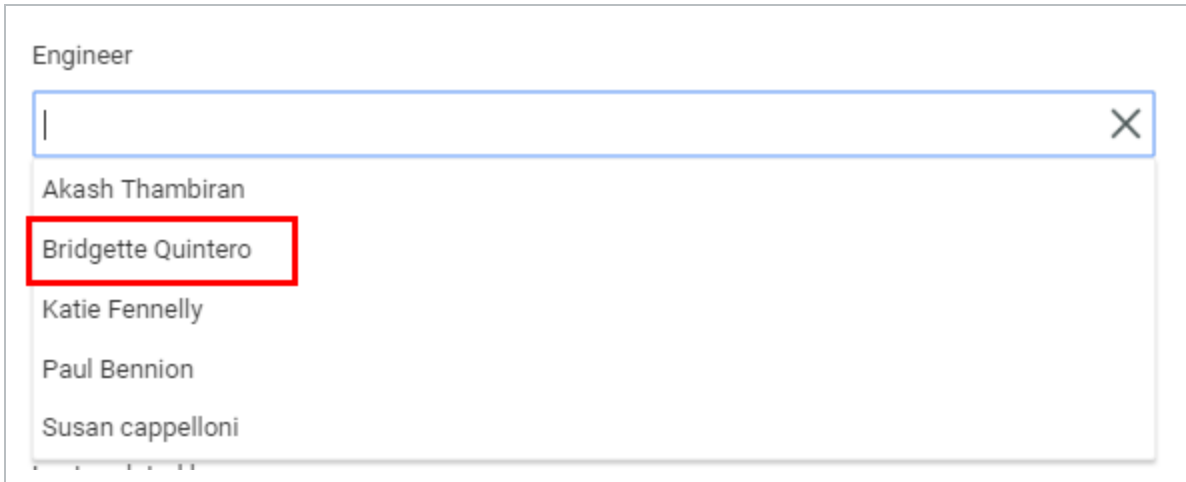
	Work package name	Description	ID
	North	North	
	South	South	
	Unassociated packages		
	CWP- North Area Steel...		35732

- This takes you into the Work packages tab of your work package
2. Select the **Construction Work Package Overview** tab.
 3. Under CWP description, type **Work Package for the structural steel of the North area**.



WORK PACKAGES	CONSTRUCTION WORK PACKAGE OVERVIEW	WORKSPACE
CWP ID	CWP name	CWP Last updated on
35732	CWP- North Area Steel Work plan	11/13/2019
CWP Description		
Work Package for the structural steel of the North		

- The CWP ID will automatically generate
4. In Schedule start, select a date.
 5. In Schedule finish, select a later date.
 6. Select **Bridgette Quintero** as the Engineer.



Engineer

|

Akash Thambiran

Bridgette Quintero

Katie Fennelly

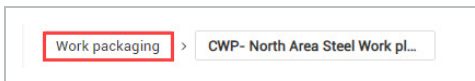
Paul Bennion

Susan cappelloni

TIP

The Engineer, Superintendent, and Planner fields are validated fields and will bring up a list of people from which to select, once you enter a character.

7. In a similar manner, type/select **Susan Cappelloni** as the Superintendent and **Paul Trippi** as the Planner.
8. Now that you have all the CWP overview details, you can go back to the Work packages page by selecting **Work packages** in the Breadcrumbs.



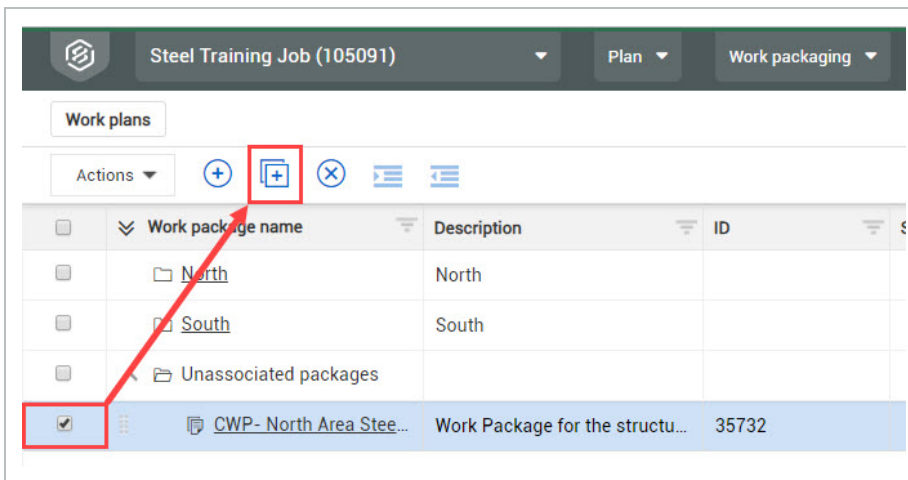
Work packaging > CWP- North Area Steel Work pl...

3.3.3 Copy Work Plans

In some cases, you may need to create the exact same work package for a new area with only a few small changes. Instead of repeating the entire process of creating a new work package, your best choice would be to create a work plan from an already existing one, making the few small changes as necessary.

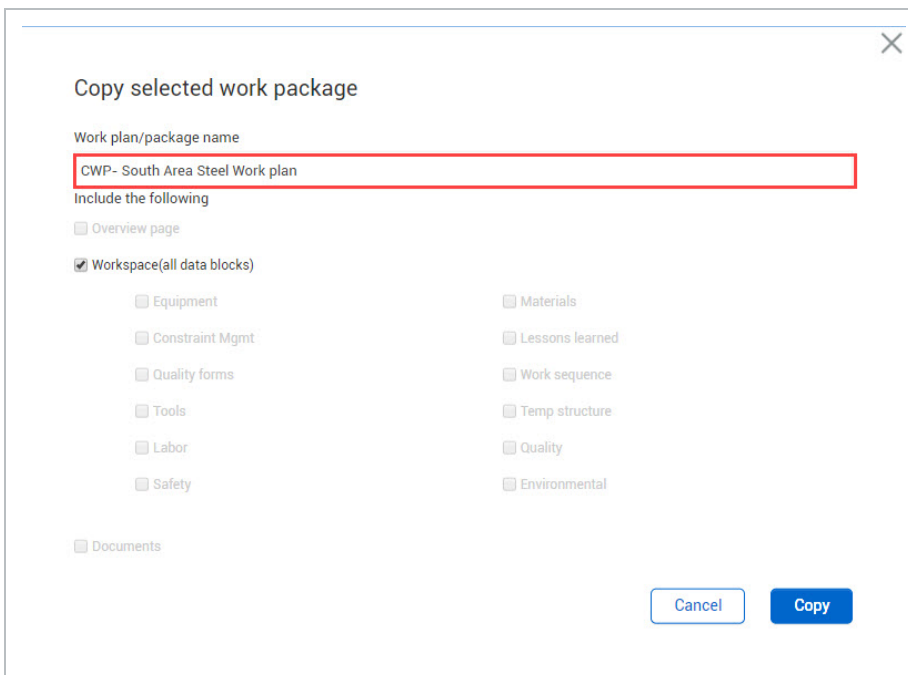
3.3 Step by Step 3 — Copy a Work Package

1. On the Work plans/packages page, select your previously created work plan, then select the **Copy** icon.

**TIP**

You can only copy one plan/package at a time.

- This brings up a new dialog box for you to select what information to carry over
2. Rename the work plan name to **South Area - Steel Erection Work plan – [Your Initials]**.



3. Uncheck **Workspace (all data blocks)**.
4. Select **Copy**.

- A new work package has been created

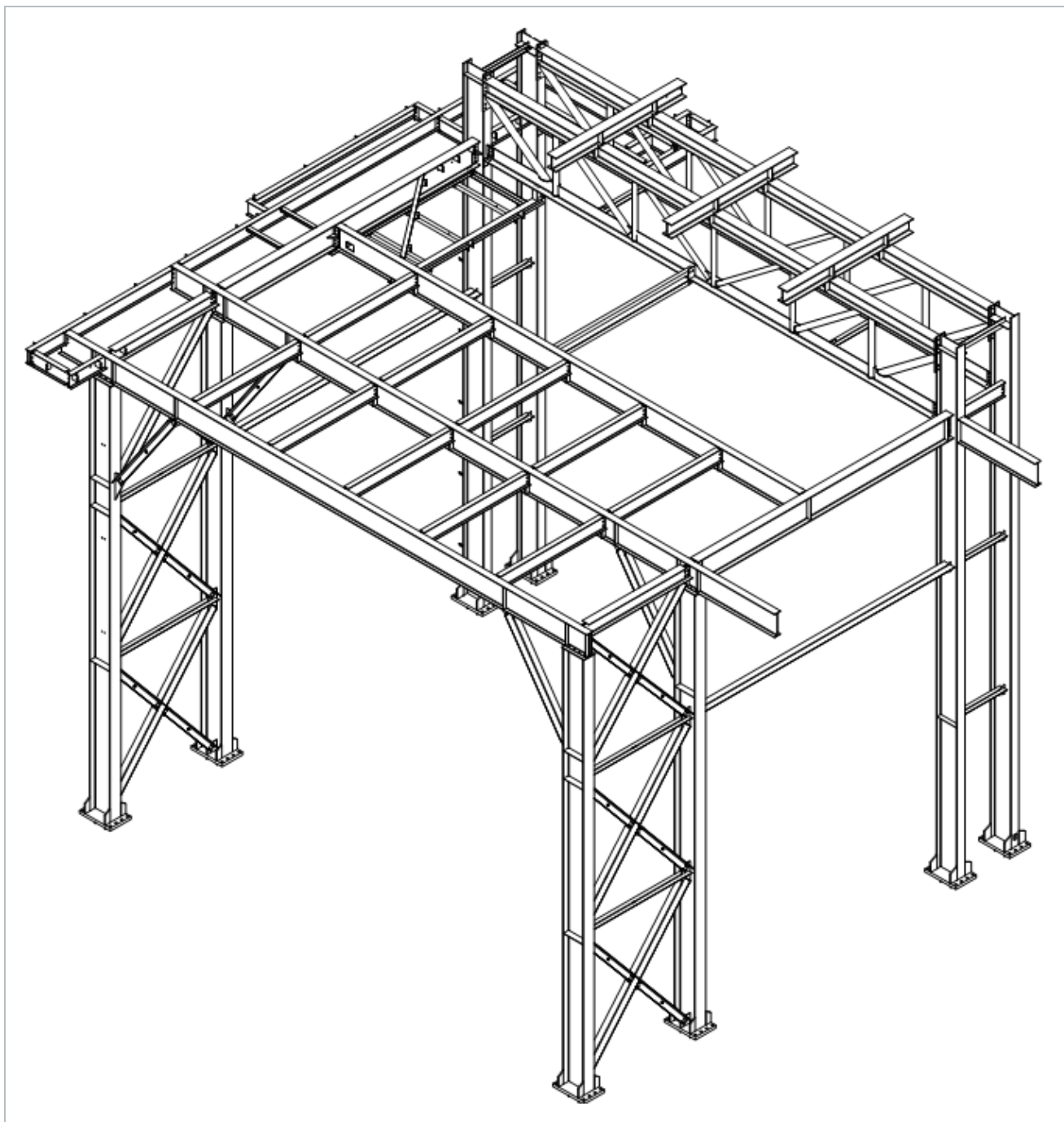
Work plans

Actions

	Work package name	Description	ID
	North	North	
	South	South	
	Unassociated packages		
	CWP- South Area Stee...	Work Package for the structu...	35733
	CWP- North Area Stee...	Work Package for the structu...	35732

3.3.4 Create an Installation Work Package (IWP)

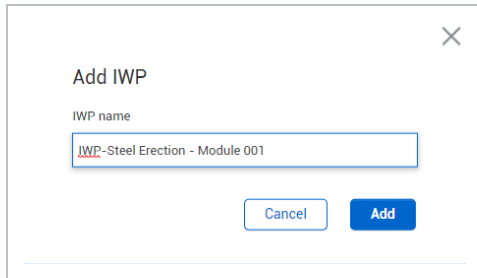
Continuing with the scenario above, you will create an installation work package for the Steel Erection of Module 01.



Within each installation work package, you can assign the labor, components, equipment, materials, and other aspects you need to complete the work.

3.3 Step by Step 4 — Create an Installation Work Package (IWP)

1. On the Work plans/packages page, select the **Add** button.
2. Select **Installation work package - IWP**.
3. In the Add IWP dialog box, type **Steel Erection - Module [your module number]**.



4. Click **Add**.

3.3.5 Group Work Packages

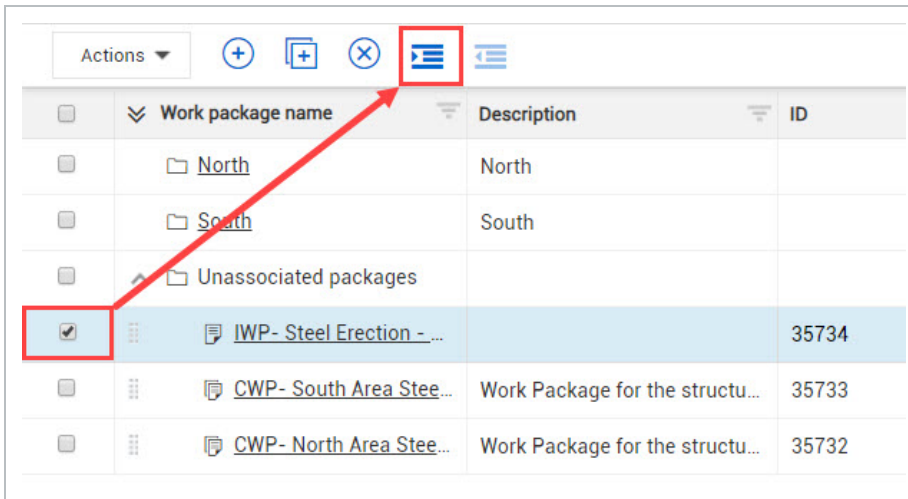
After creating work packages, you can group them underneath the plans you have created. This helps with the organization and planning of the work.

3.3 Step by Step 5 — Group a Work Package

1. On the Work plans/packages page, select the installation work package you just created.
 - Notice that CWP's and IWPs have different icons

☐	Work package name	Description	ID
☐	North	North	
☐	South	South	
☐	Unassociated packages		
☒	IWP- Steel Erection - ...		35734
☐	CWP- South Area Stee...	Work Package for the structu...	35733
☐	CWP- North Area Stee...	Work Package for the structu...	35732

2. Click the **Move into CWP button** ().

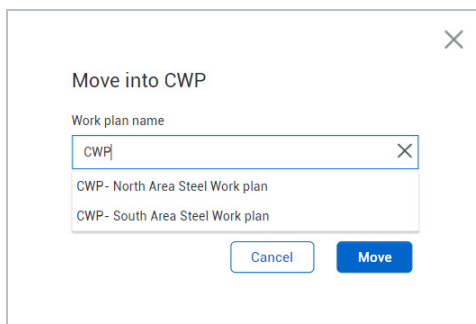


	Work package name	Description	ID
	North	North	
	South	South	
	Unassociated packages		
☒	IWP- Steel Erection - ...		35734
☐	CWP- South Area Stee...	Work Package for the structu...	35733
☐	CWP- North Area Stee...	Work Package for the structu...	35732

TIP

You can also group installation work packages into construction work packages by clicking anywhere in the row for the installation work package and dragging it over top of the desired construction work package.

3. In the Move into CWP dialog box, start typing the name of the construction work package you had created.



Move into CWP

Work plan name

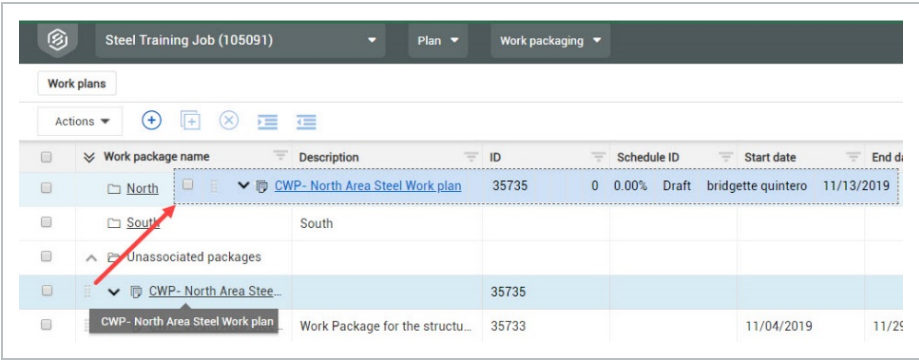
CWP

CWP- North Area Steel Work plan

CWP- South Area Steel Work plan

Cancel Move

- This is a dynamic field and will bring up a drop-down to select from as you are typing
4. Select the CWP you want to move it to, in this case select **CWP – North Area Steel Work plan**, then click **Move** to move the package.
5. Click and hold on the **CWP – North Area Steel Work Plan**, then drag and drop it over the **North Construction work area folder**.



TIP

You can also group construction work packages into construction work areas by editing the CWP in the Construction Work Package Overview tab, then selecting the appropriate CWA ID or CWA Description from the drop-down.

6. Your work packages are now grouped.

	Work package name	Description	ID
	North	North	
	CWP- North Area Steel...	Work Package for the structu...	35732
	IWP- Steel Erection...		35734
	South	South	
	CWP- South Area Steel...	Work Package for the structu...	35733
	Unassociated packages		

3.4 INSTALLATION WORK PACKAGE DETAILS

Installation work packages include the details of a group of activities. The details in the work package include installation sequence, components, labor, equipment, safety and quality concerns, and other aspects of the work package. When ready to share, you can attach external files and send to print as a PDF. Or, if you are integrated with InEight Document, you can easily send packages and documents.

3.4.1 Work Package Overview Tab

When you open an installation work package from the Work plans page, the Overview tab is similar to the construction work package Overview tab, but you can now define settings specific to the installation work package. For example:

- The engineer may be different for this particular package and might report to a different engineer than assigned at the CWP level
- The IWP's scheduled start and finish dates might also be a smaller time period than the CWP's schedule start and finish dates

3.4 Step by Step 1 — Installation Work Package Overview

1. On the Work plans/packages page, select the hyperlink **ID** of your recently created installation work package.
2. In the Overview tab of your installation work package, populate the description with **Steel erection of Module 001**



The screenshot displays the 'OVERVIEW' tab of an installation work package. The 'Overview' section contains three input fields: 'IWP ID' with the value '35734', 'IWP name' with the value 'IWP- Steel Erection - Module 001', and 'Description' with the value 'Steel erection of Module 001'. The 'Description' field is highlighted with a red border.

3. From the drop-down list in the Discipline field, select **Metals**.
4. For Type of work, input **Steel Erection**.
5. From the drop-down list in the Risk field, select **Medium**.
6. Select a Schedule start and Schedule finish date.
7. Select Paul Trippi as the Planner.
8. Select **Susan Cappelloni** as the Superintendent.
9. Select **Bridgette Quintero** as the Engineer.
10. Select **Paul Bennion** as the Executor.

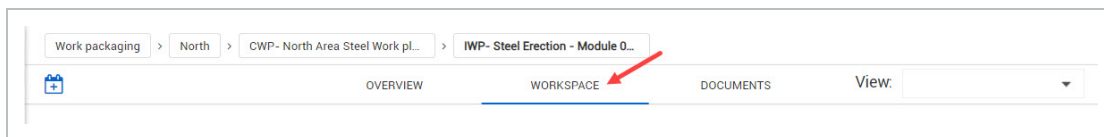
3.4.2 Installation Work Package Details Tab

The Details tab is where the majority of your planning is accomplished. Here you can enter the planned labor, materials, equipment, components, among other aspects of the plan. You enter these details

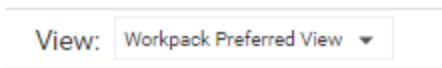
using data blocks. Some of the data blocks are open entry fields, such as safety, environmental, and work sequence. However, other data blocks use validated fields based off previously entered information. These include Labor, Budget, Component, and Equipment data blocks.

3.4 Step by Step 2 — Installation Work Package Details

1. On the My Work Plans tab of the Work plans page, select the hyperlink **ID** of your recently created installation work package.
2. Select the **Workspace** tab.



3. On the Workspace tab, change your view to your previously created viewset (see *General Navigation*).



4. In the **Work sequence** data block, add the following work sequence steps:
 - Off load steel
 - Install steel
 - Bolt and torque
 - Quality inspection
 - Turnover
5. On the work step 3 – Bolt and Torque row, click in the Hold Point field and select **Yes** to create a hold point.

Work sequence			
Work step number	Description	Attachments	Hold point
1	Off load steep		
2	Install steel		
3	Bolt and torque		None
4	Quality inspection		None
5	Turnover		No
			Yes

6. In the Labor data block, select **Add labor from project resource**.

Labor

⊕ Add labor

⊕ Add labor from project resource

Trade	Craft level	Quantity	Employee ID	Name

7. In the new dialog window, start searching for **Ulysses Castro**, then click the **add icon**.

Add labor from project resources

Available employees in project :

Ulysses

	Employee ID	Name	Trade	Craft level
	00187119	Ulysses Castro	Laborers	Laborer Journeyman

TIP

You can search based off any of the fields associated to the employee (e.g., Employee ID, Trade).

NOTE

You can add Multiple employees at a time in this dialog box. (Only employees who can be added to daily plans will show up in the drop-down selection – See your Account Administrator if you do not see an employee.)

8. Continue using the Search bar to look up and add five labor resources.

Add labor from project resources

Available employees in project : Search...

Employee ID	Name	Trade	Craft level
-------------	------	-------	-------------

Selected employees:

- ☐ Ulysses Castro-Laborer Journeyman
- ☐ Jimmy Criswell-Structural Welder Journeyman
- ☐ Brian Broome-Structural Welder Journeyman
- ☐ David Scott-Structural Welder Journeyman
- ☐ Lorenzo Morgan-Structural Welder Journeyman
- ☐ Cole Goodwin-Laborer Journeyman

Cancel Add

9. Click **Add**.

- The laborers appear in the Labor data block

10. In the Equipment data block, select **Add equipment from project resource**.

Equipment

Add equipment Add equipment by project

Equipment ID	Description	Category	EquipmentType	Ownership	Permit expires	Quantity
--------------	-------------	----------	---------------	-----------	----------------	----------

11. Look up and select the following pieces of equipment:

- 110002 - GROVE-RT880E (Crane RT 80-89 Ton)

12. Select **Add**.

- The equipment appears in the Equipment data block

13. In the Component data block, select **Add components by WBS**.

Components

Add components by WBS Add components by WBS

Component	Description	Quantity	UoM	WBS	CE-MH/unit	Estimated hours
-----------	-------------	----------	-----	-----	------------	-----------------

14. Find and select the following steel Components of your module number in the same manner you added employees and equipment:

Components							
	Component ID	Description	Quantity	UoM	WBS	CE-MH/unit	Estimated hours
1	Module 01 - B...	Module 1 - B23: Cro...	0.15	Ton	1005	20	3
1	Module 01 - B...	Module 1 - B25: Bea...	0.254	Ton	1005	20	5.08
1	Module 01 - C...	Module 1 - C23: Cro...	0.25816	Ton	1005	20	5.1632
1	Module 01 - C...	Module 1 - C24: Cro...	0.14	Ton	1005	20	2.8
1	Module 01 - A...	Module 1 - A6 Conn...	1	Ea	1006	0.5	0.5
1	Module 01 - A...	Module 1 - A7 Conn...	1	Ea	1006	0.5	0.5

NOTE

Also, a component can only live in one package at a time. It cannot live in both the CWP and its child IWP due to percent complete tracking purposes.

15. In the Quality data block, click **Add quality step**, then select **1** in the Step field.
16. In the Description field, type **Torque Inspection**.

Quality							
Step	Description	Hold point	Quality risk	Mitigation	Type of insp.	Inspector	Spec
1	Torque Insp...						

17. In the Hold Point field, expand the Hold point drop-down list and select **Yes**.

Quality							
Step	Description	Hold point	Quality risk	Mitigation	Type of insp.	Inspector	Spec
1	Torque Insp...	None					

18. In the Safety data block, click **Add safety step**, select **1** in the Step field and type **Crush Points** in the description field.

Safety				
Step	Description	Safety risk	Mitigation	Required safety items
1	Crush Points			

19. Click on **Add safety item** again.
20. In the resulting blank row, select **2** in the Step field.
21. In the Description field, type **Watch for falling objects**.

Safety				
Step	Description	Safety risk	Mitigation	Required safety items
1	Crush Points			
2	Watch for falling o...			

22. On the Breadcrumbs bar, select **Work packaging** to go back to the Work plans/packages page and view your completed work plan and work package.

3.5 WORK PACKAGE IMPORT

Scenario

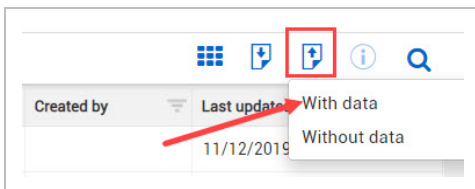
Sometimes you have multiple, similar work packages to create and a faster way to create them would make planning more efficient. By using the Import Template, the project team can input multiple work packages in an Excel document and upload it into Plan.

3.5.1 Import Template

Creating and copying work packages can be time consuming. You can use an Excel import template to upload multiple work packages with their overview information already populated.

3.5 Step by Step 1 — Create Work Packages from Excel Import

1. On the Work plans/packages page, click on the **Export** button, and select to export **With Data** and open the export file.



TIP

Excel templates “without data” are used for creating new components from scratch, usually during project setup.

Excel templates “with data” are typically used to update existing work plans/packages.

2. Open the export file.

- This opens up the Excel template to use for the import. It also contains the data from the current work packages on the Work plans page
- You may need to select **Enable editing** at the top of the spreadsheet prior to entering data

	A	B	C	D	E	F	G
1	English	User Selected Language					
2	REQUIRED	Field is required for import					
3	OPTIONAL	Field is optional for import					
4	VALIDATED	Field must match master data available in application					
5	IGNORED	Field not to be populated					
6	Name	Package Type	Description	ID	CWP ID	Schedule ID	Scheduled start
7	Alphanumeric	CWP/IWP/EWP	Alphanumeric	Numeric	Numeric	Alphanumeric	Date: MM/DD/YYYY
8	50	3	1000	200	100	20	10
9	IWP- Steel Erection - Module 001	IWP	Steel erection of Module 001	35734	35732		
10	CWP- South Area Steel Work plan	CWP	Work Package for the structural steel of the North	35733			11/4/2019
11	CWP- North Area Steel Work plan	CWP	Work Package for the structural steel of the North	35732			11/4/2019

3. Input information into your template to be uploaded. At the bottom of the list, add the following information:

- Name: **IWP-Steel Erection Upper Deck - Module [your module number]**
- Package Type: **IWP**
- Description: **Upper rack steel erection**
- Assign the proper CWP to your work package in the CWP ID field

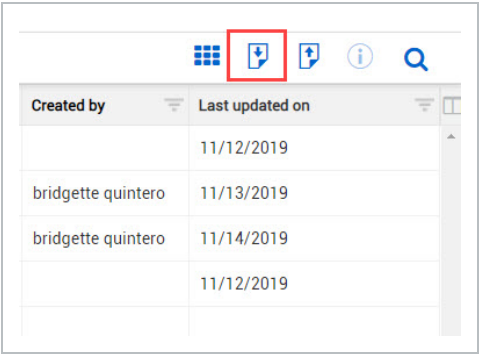
English	User Selected Language						
REQUIRED	Field is required for import						
OPTIONAL	Field is optional for import						
VALIDATED	Field must match master data available in application						
IGNORED	Field not to be populated						
Name	Package Type	Description	ID	CWP ID			
Alphanumeric	CWP/IWP/EWP	Alphanumeric	Numeric	Numeric			
50	3	1000	200	100			
IWP- Steel Erection - Module 001	IWP	Steel erection of Module 001	35734	35732			
CWP- South Area Steel Work plan	CWP	Work Package for the structural steel of the North	35733				
CWP- North Area Steel Work plan	CWP	Work Package for the structural steel of the North	35732				
IWP- Steel Erection Upper Deck - Module 001	IWP	Upper rack steel erection		35733			

4. Delete all the work packages that came with the template.

English	User Selected Language						
REQUIRED	Field is required for import						
OPTIONAL	Field is optional for import						
VALIDATED	Field must match master data available in application						
IGNORED	Field not to be populated						
Name	Package Type	Description	ID	CWP ID			
Alphanumeric	CWP/IWP/EWP	Alphanumeric	Numeric	Numeric			
50	3	1000	200	100			
IWP- Steel Erection - Module 001	IWP	Steel erection of Module 001	35734	35732			
CWP- South Area Steel Work plan	CWP	Work Package for the structural steel of the North	35733				
CWP- North Area Steel Work plan	CWP	Work Package for the structural steel of the North	35732				
IWP- Steel Erection Upper Deck - Module 001	IWP	Upper rack steel erection		35733			

5. Save this Excel file to your desktop as **[Your Initials] Plan Upload**.

6. In InEight Plan, on the Work plans/packaging page, click the **Import** button.



Created by		Last updated on
		11/12/2019
bridgette quintero		11/13/2019
bridgette quintero		11/14/2019
		11/12/2019

- An Import data from template window appears

Import data from template

The data will be imported into work plans

Drag and drop the file here or browse

Browse...

☐ Email me upon completion

CancelImport

7. Click the **Browse** button to find your saved template.

Import data from template - WORKPLAN_BQ upload.xlsx

The data will be imported into work plans

Drag and drop the file here or browse

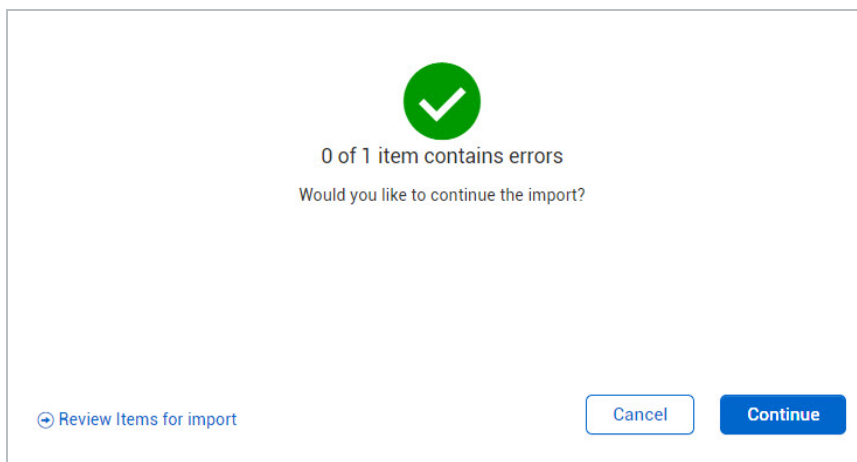
Browse...

☐ Email me upon completion

CancelImport

8. Click the **Import** button.

- Another window appears, indicating whether any errors occurred



9. Select **Continue** if no errors occurred.

10. Once the import is complete, click **Close**.

Exercise 3.1 — Enter Work Package Details

Now that you have learned to create work packages and fill out all details, create your own construction work package (CWP) and installation work package (IWP) using the method you prefer. Make sure to fill out all details for your installation work package.

1. Include at least one safety item.

2. Include at least two components.

3. Include at least two labor resources.

4. Include at least two pieces of equipment.

Congratulations, you have completed this exercise!

Lesson 3 Review

1. This type of work package allows you to manage a smaller, more detailed scope of work that is “progressable”.
 - a. Installation work package
 - b. Construction work package
 - c. Advanced work package
 - d. Discipline work package

2. You can group _____ under _____ to organize your work.
 - a. CWPs, IWPs
 - b. IWPs, CWPs
 - c. work plans, work packages

3. On the Workspace tab, what data blocks contain open entry fields? (Select all that apply)
 - a. Labor
 - b. Equipment
 - c. Safety
 - d. Budget
 - e. Component
 - f. Work sequence
 - g. Environmental

4. Utilizing the import template, you can upload which of the following?
 - a. Construction work packages
 - b. Installation work packages
 - c. a & b
 - d. None of the above

Lesson 3 Summary

As a result of this lesson, you can:

- Explain how to manage work packages
- Create a construction work package
- Create an installation work package
- Edit and review work package details
- Import work packages