PLAN USER GUIDE

Work Packaging

FIELD EXECUTION MANAGEMENT

INEIGHT

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STEP-BY-STEP PROCEDURES

EXERCISES

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LESSON 1 – WORK PACKAGING OVERVIEW

Lesson Duration: 45 minutes

Lesson Objectives

After completing this lesson, you will be able to:

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

Lesson Topics

1.1 PLAN WORK PACKAGING OVERVIEW

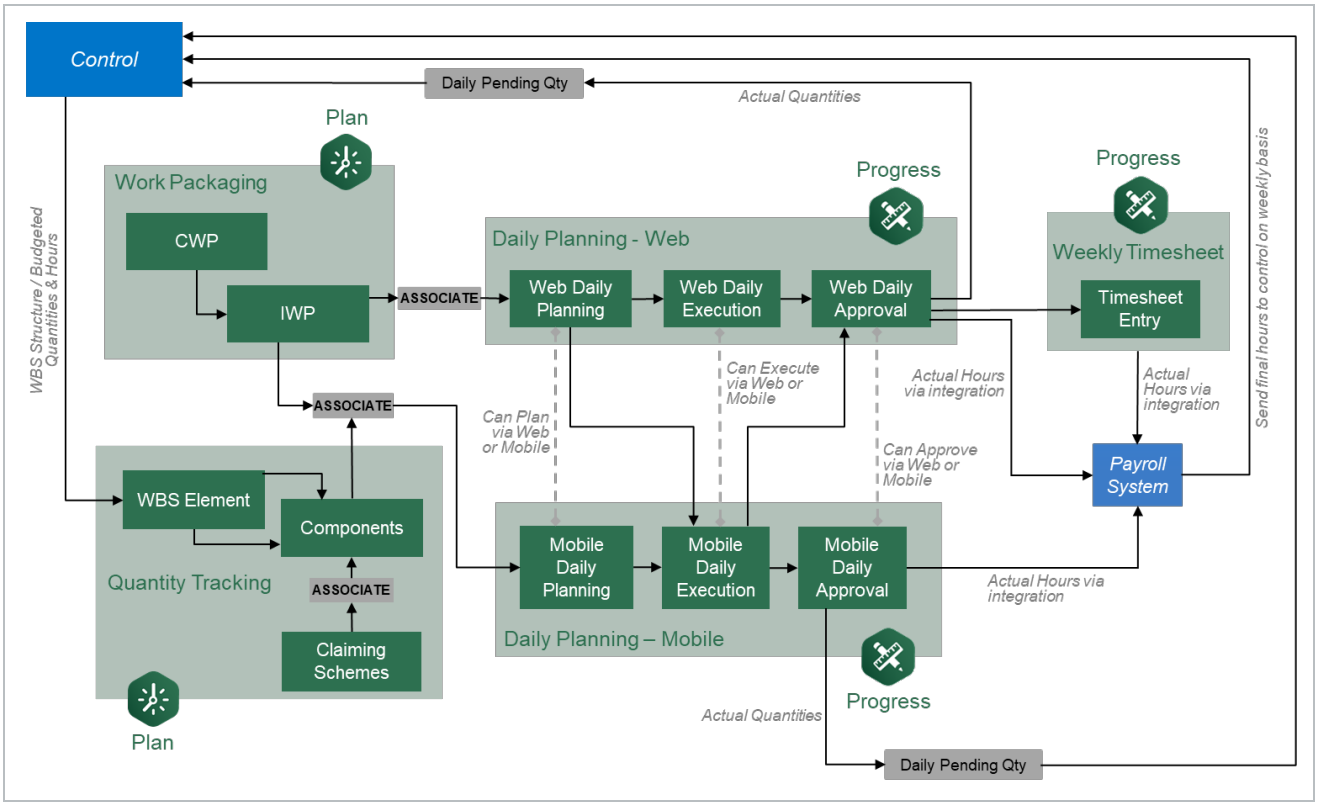
InEight Plan is an application within the InEight portfolio of products. It is a tool for engineers and superintendents to plan their work and track quantities during the construction of the project.

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.

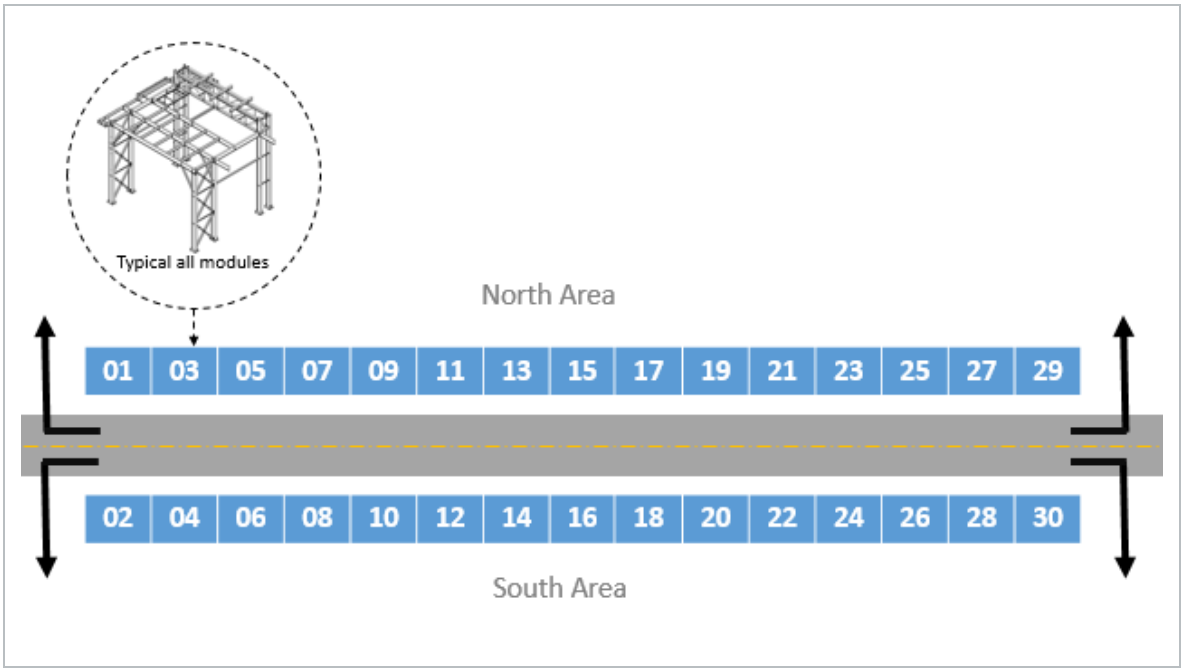
1.1.1 InEight Plan Work Flow

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

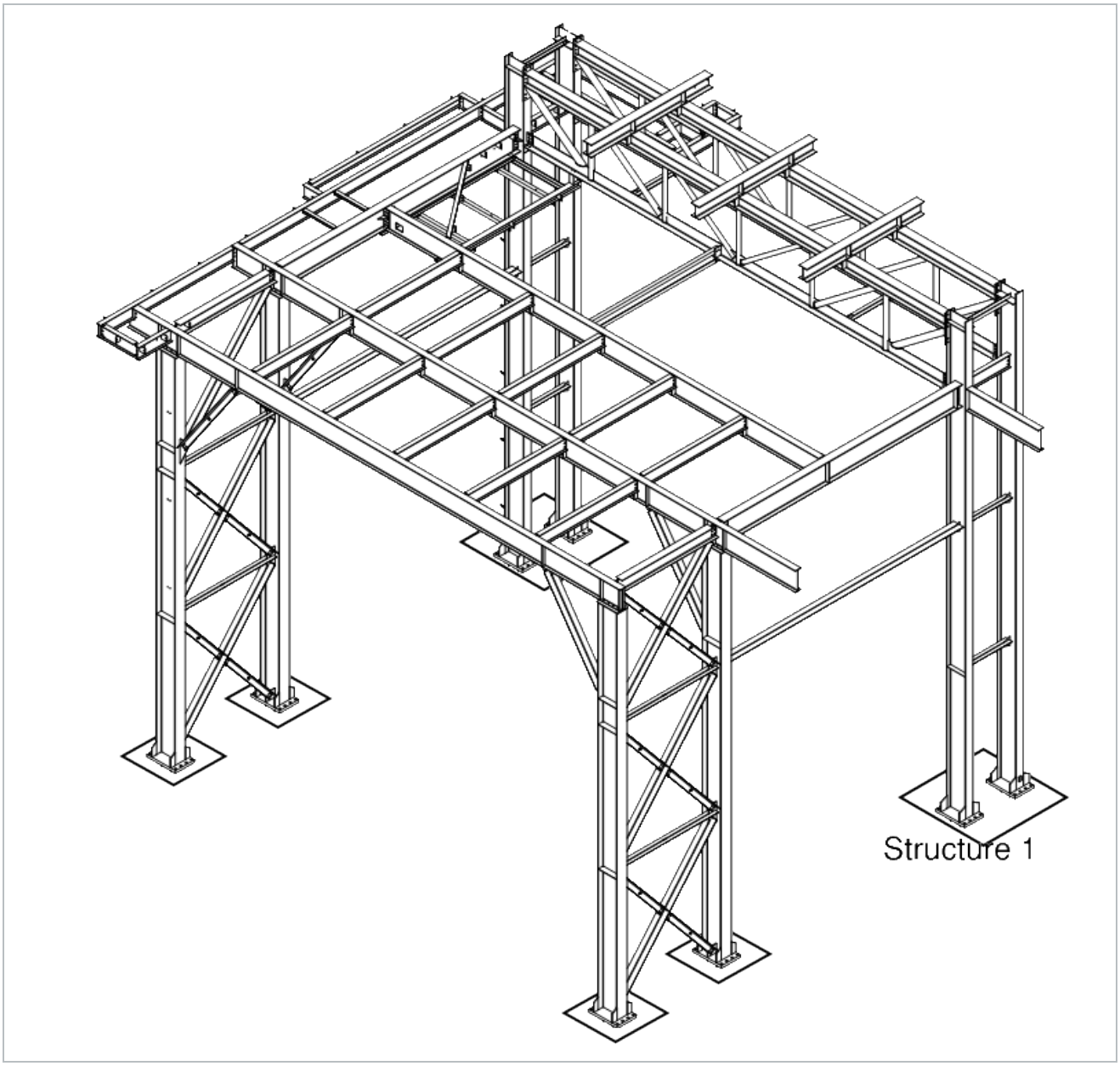


Scenario

> 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.

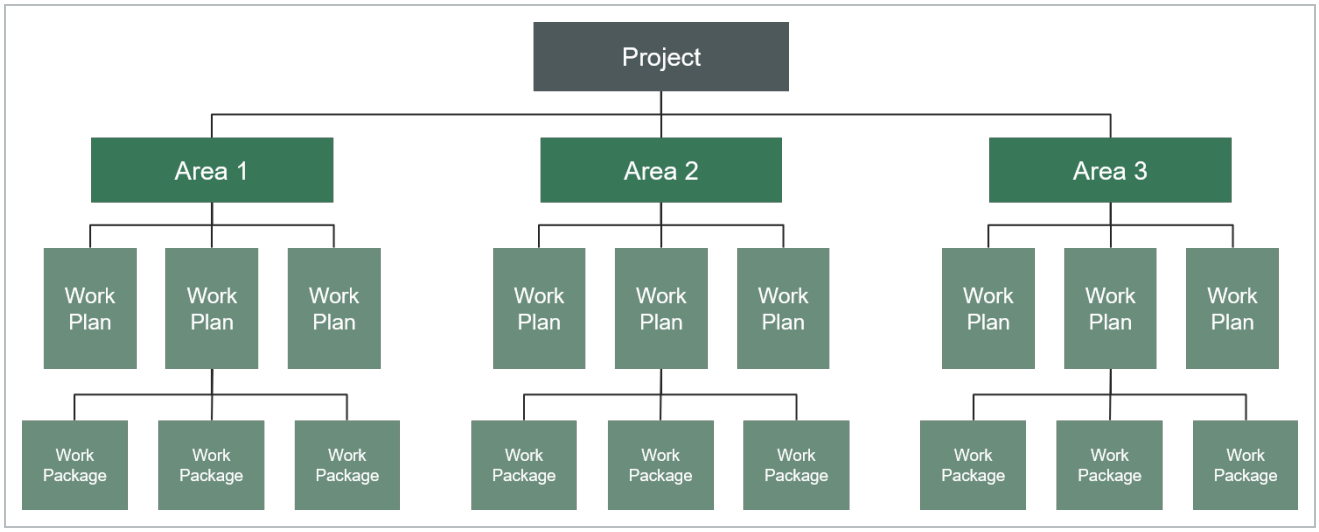


The image below depicts a layout for a steel structure project. The project consists of erecting 30 separate steel structures on opposite sides of a road. Each structure or module has been assigned a number 1-30.

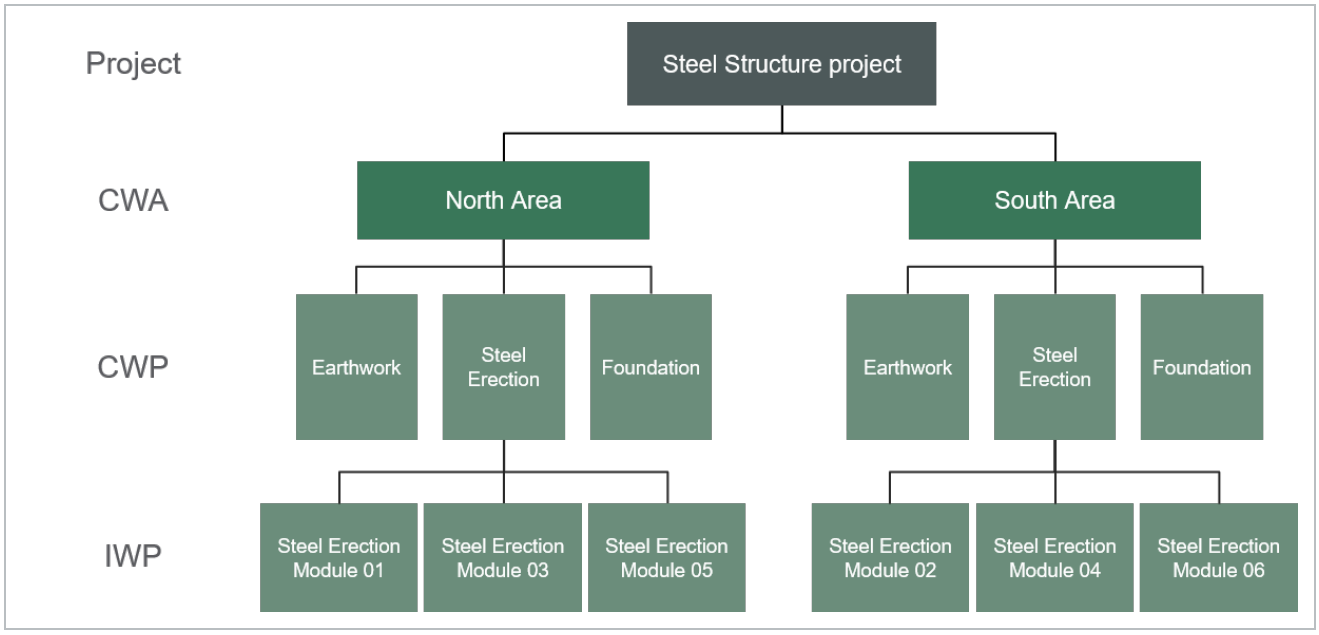


1.1.2 Work Packaging

Work Packaging breaks down projects into small, manageable scopes of work so that operations can be assigned to responsible supervision, executed, 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 the 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:

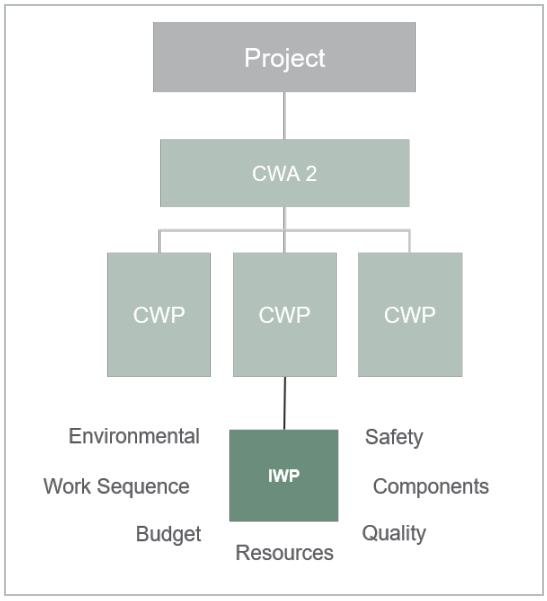


1.1.2.1 Work Package Details

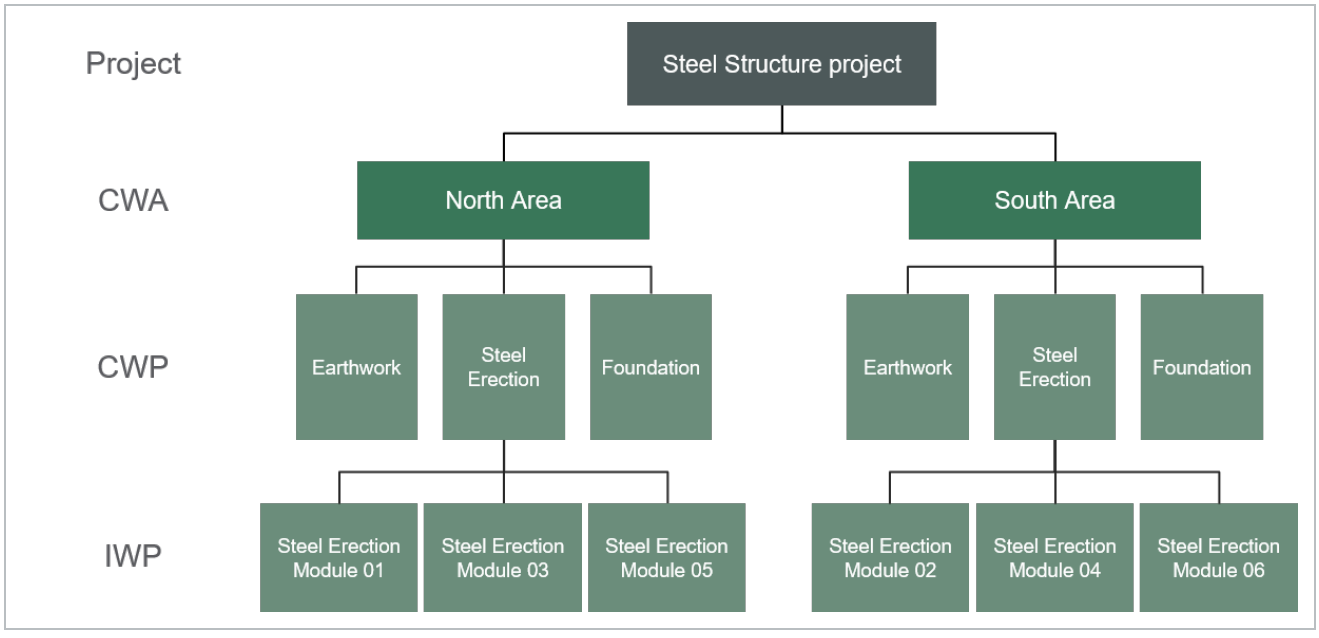
Work package details include the following information:

- Work sequence
- Budget

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



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



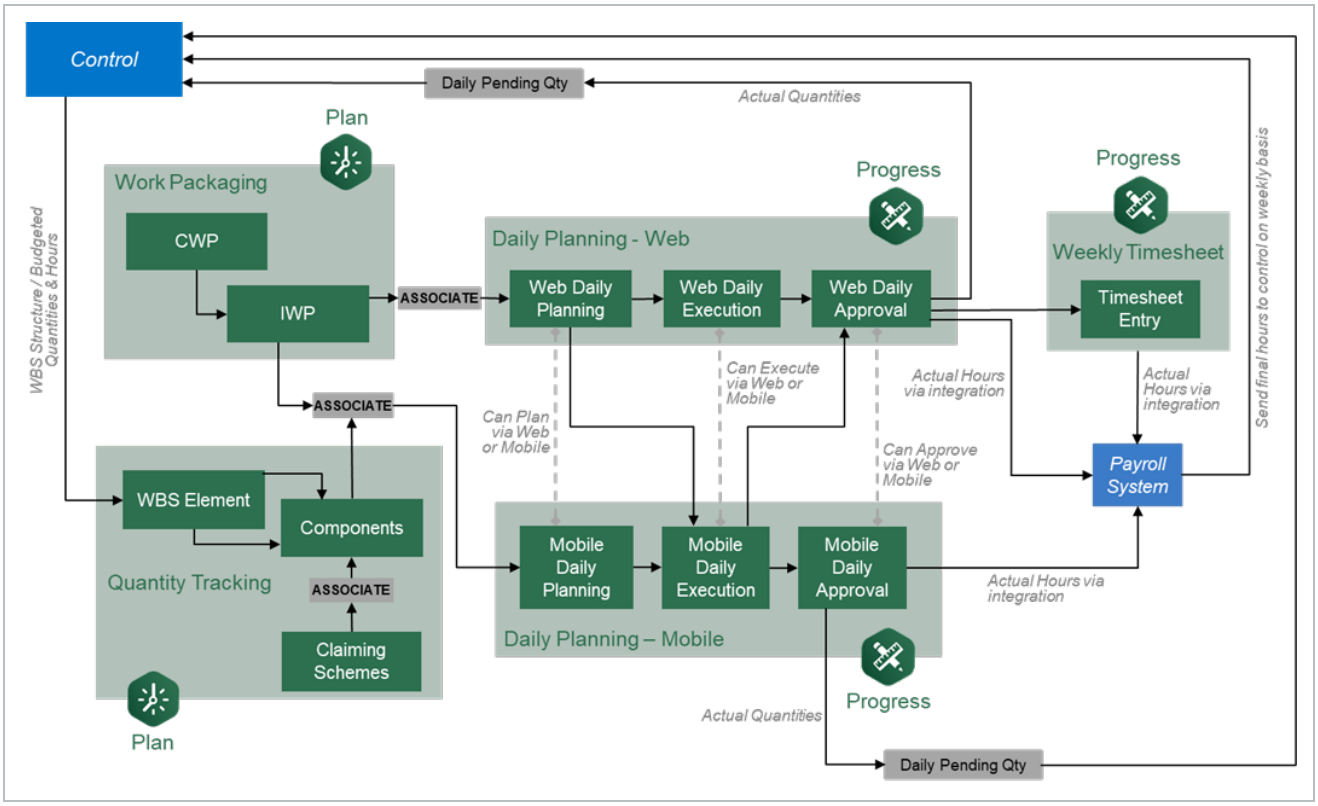
NOTE In Work Package Management, you will learn about work plans and work packages in detail, including how to create them and define plan details.

1.1.2.2 Comprehensive Workflow

The diagram below displays both sections of Plan and how they integrate with InEight Progress, InEight Control and your 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

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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

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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:

- Describe the two modules of Plan

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

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LESSON 2 – GENERAL NAVIGATION

Lesson Duration: 30 minutes

Lesson Objectives

After completing this lesson, you will be able to:

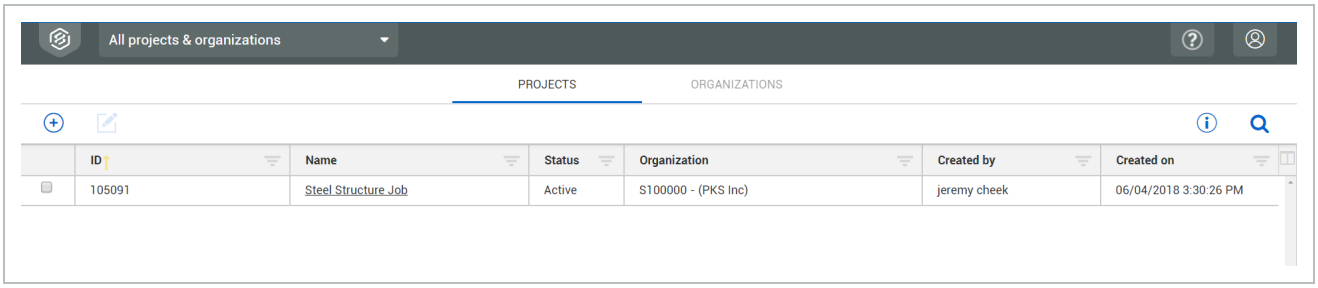
- Navigate the InEight Plan Work plans page
- Manage columns
- Manage data blocks
- Create viewsets

Lesson Topics

2.1 PAGE NAVIGATION

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

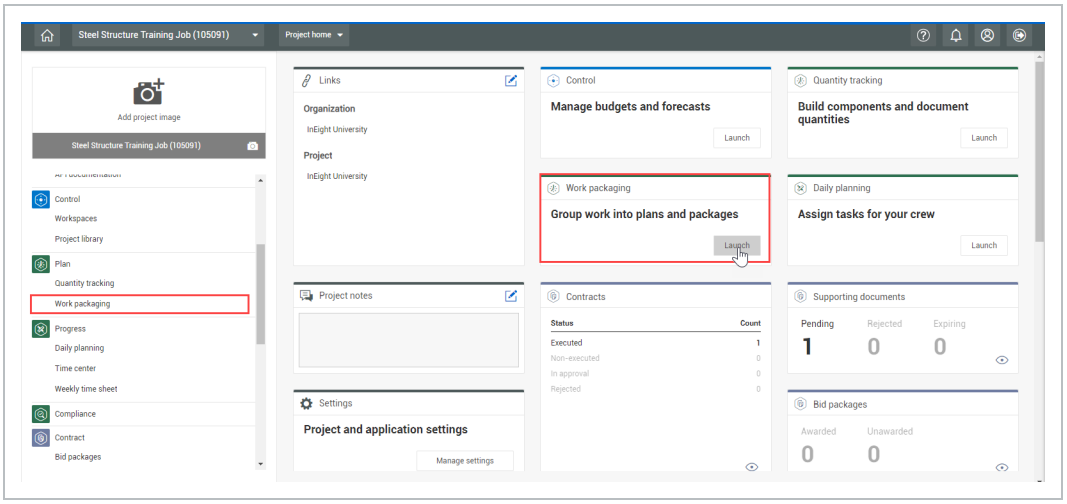
You access InEight Plan through your web browser. When you first log in, you will land on the **All projects & organizations page** within the **InEight project platform**. Here you can select any your projects.



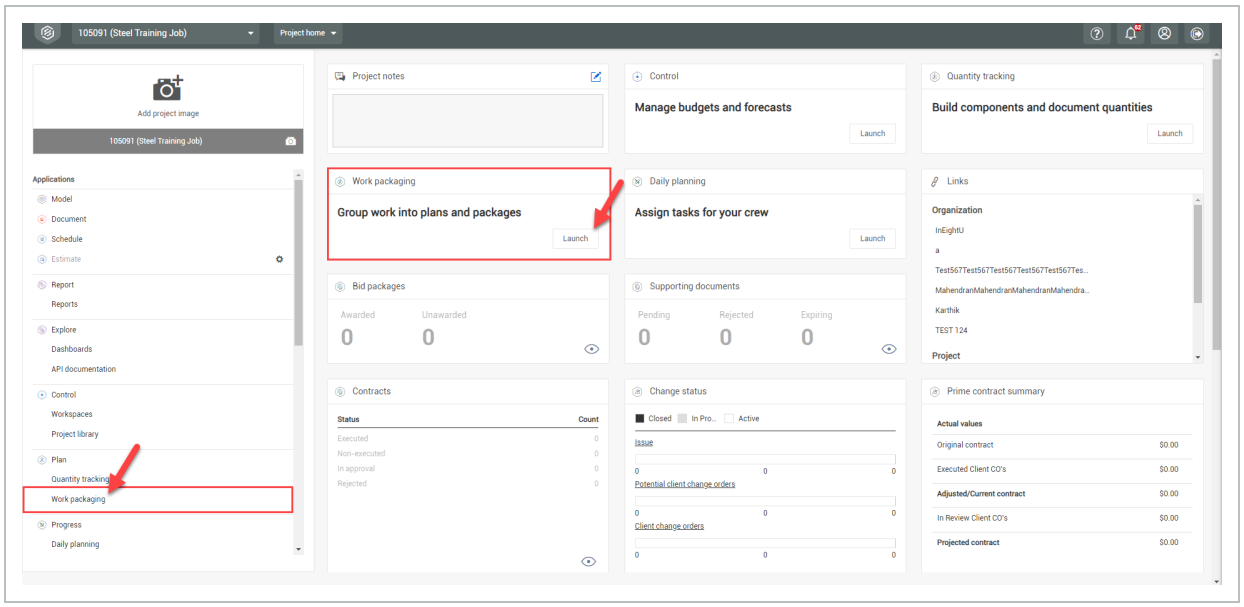
From the All projects & organizations page, selecting a project navigates you to the home page for that project. From your project home page, there are two different ways to access the **Work Packaging module** of Plan.

Navigate to the Work Plans Module via the Project Home Page

1. From the All projects & organizations page, select your project.

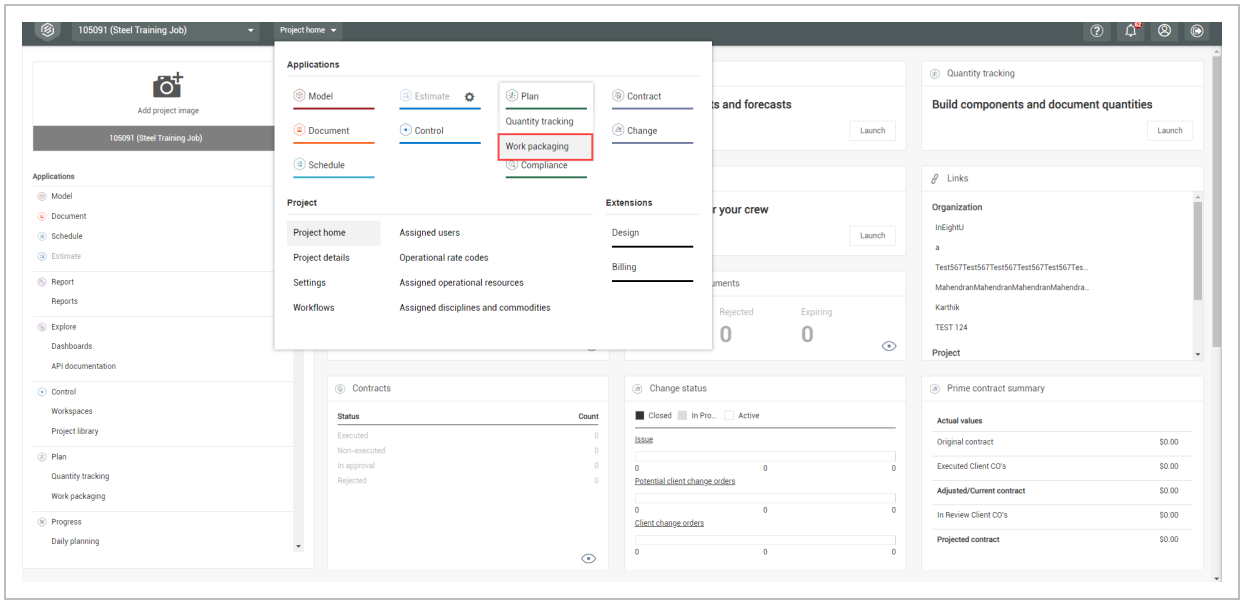


2. Select the Work Packaging module by clicking on the **Work packaging tile** on the right or selecting **Work packaging** from the side bar menu on the left.



Navigate to the Work Plans Module via the Navigation Bar

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

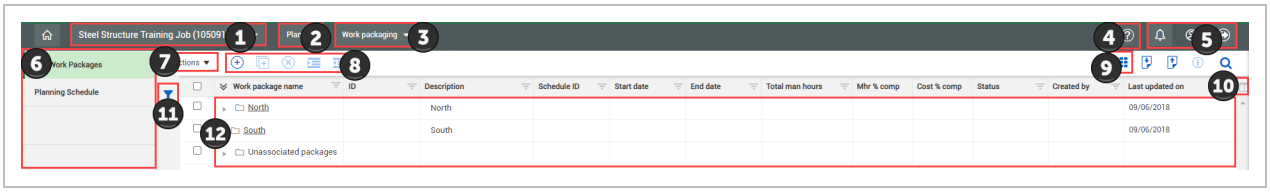


Overview – Work Plans/Packages Page

	Title	Description
1	First Level Menu	Shows the selected project and provides access to favorites, All projects and organizations, reports, master data libraries, and suite administration.
2	Second Level Menu	Displays the list of applications (Control, Plan, etc.), and navigates you to other project settings.
3	Third Level Menu	Navigates to individual modules inside each application (e.g., Contract > Bid packages, Plan > Quantity tracking). Options in this menu are dependent upon the application you are currently using.
4	Help Menu	Contains Walkthroughs to walk you step by step through processes within the module.
5	Notifications and User Profile	View notifications, user profile and log out.
6	AWP Panel	Allows you to access work plans (Work Packaging tab) or see planning progress (Planning Schedule tab).
7	Actions Menu	Select available actions for the current register tab you are viewing.
8	Toolbar	Contains functions for the page you are on: add, edit, delete, export, import, show details, and search.

Overview – Work Plans/Packages Page (continued)

Title		Description
9	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.
10	Column Chooser	Allows you to add or hide columns to make the plans/packages list user specific.
11	Query builder	Lets you add, edit, delete, copy, and share queries to search for work areas and packages.
12	Work Plans/Packages Register	List of all work plans and packages in your project.



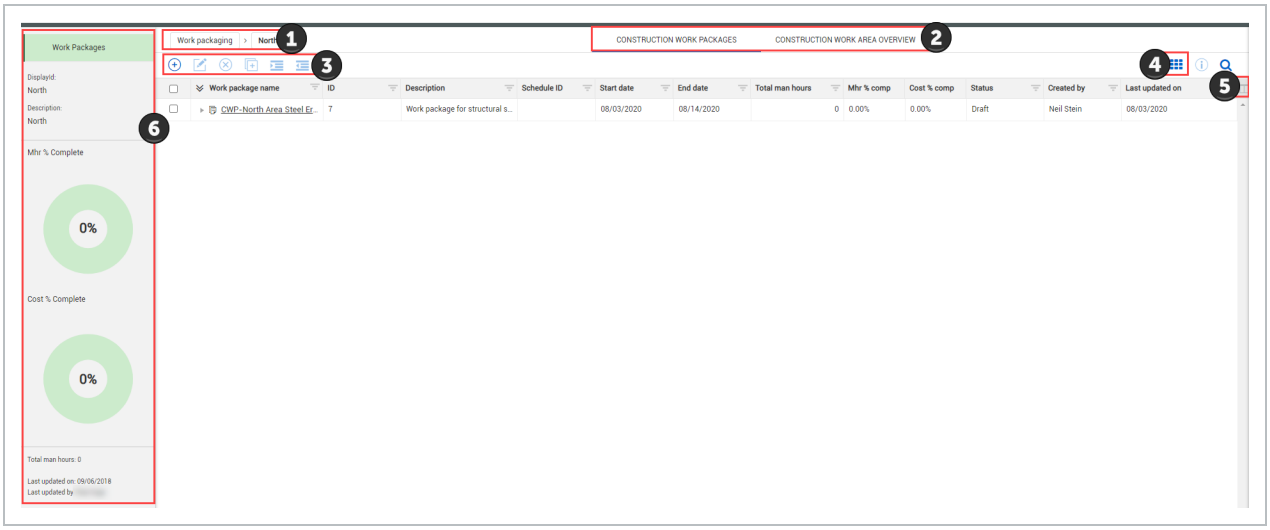
Overview – Area/Construction/Installation Work Packages Pages

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.

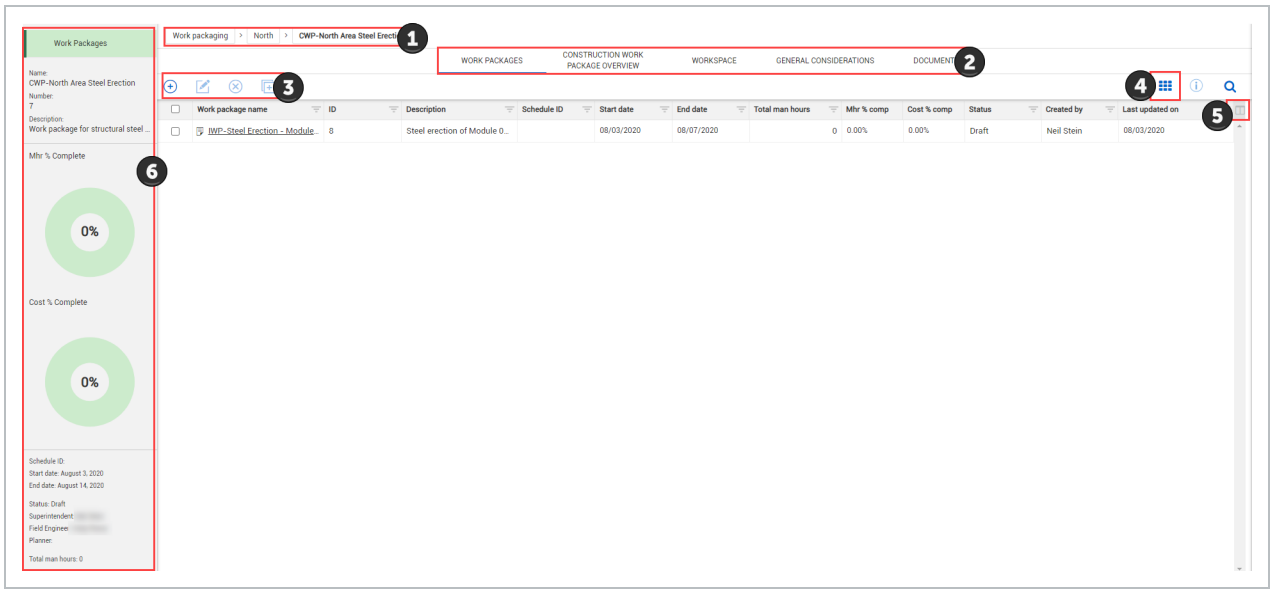
Overview – Area/Construction/Installation Work Packages Pages (continued)

Title		Description
		Not pictured: When in block view, you can use a toggle to switch between viewing calculations in Cost % Complete and Mhr % Complete.
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. Percent complete charts are shown for man-hours and cost in dollars.

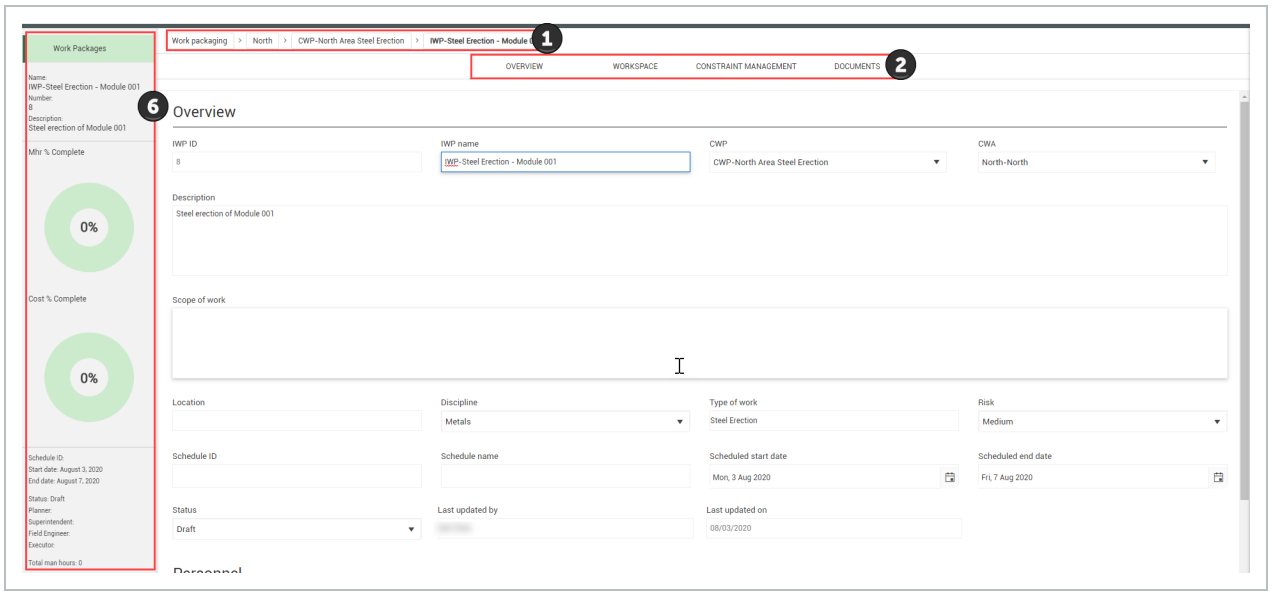
2.1.1 Construction Work Areas (CWA) Page



2.1.2 Construction Work Packages (CWP) Page



2.1.3 Installation Work Packages (IWP) Page



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

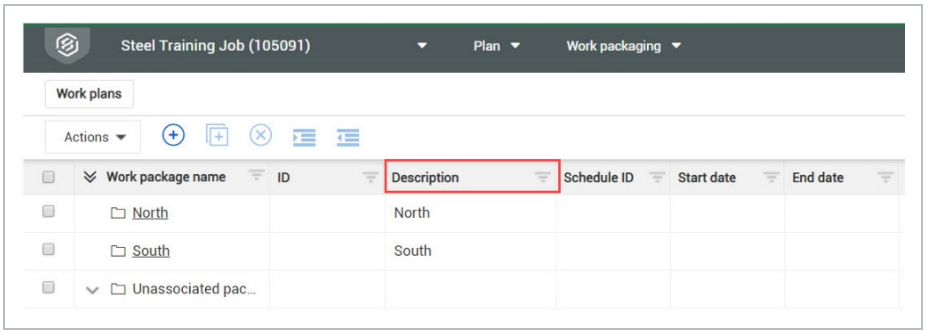
Customize columns according to your preferences from the Work plans/packages page. Changes you make to the placement of your columns will be retained the next time you access any page you have customized.

2.2.1 Move Columns

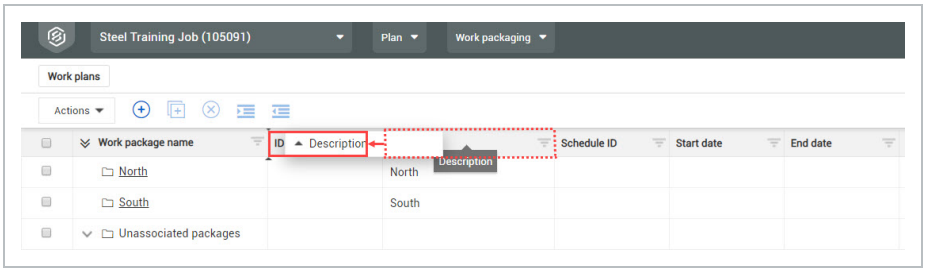
Drag and drop to move a column from one place to another to customize your view.

Move Columns

1. On the Work plans/packages page, click on and hold a **column header**.



2. Drag and drop the column in a new location.

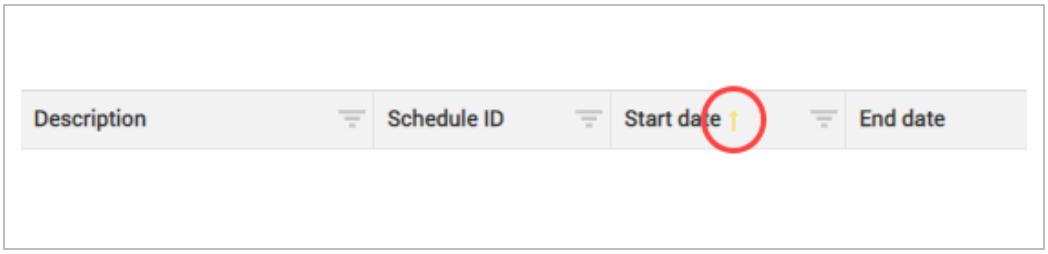


2.2.2 Sort Columns

Sort in ascending or descending (both for alpha and numeric fields) order on any column by clicking one time on the column header.

Sort Columns

1. On the Work plans/packages page, click on any column header to sort the column in ascending order.
    - Notice the yellow “up arrow" designating you are sorting in ascending order



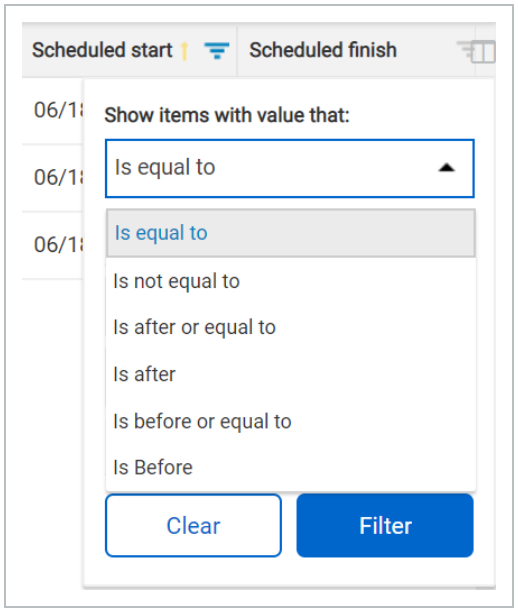
2. Click on a column header again (a second time) and the column will filter in descending order.
    - Notice the yellow arrow is now pointing down

2.2.3 Filter Columns

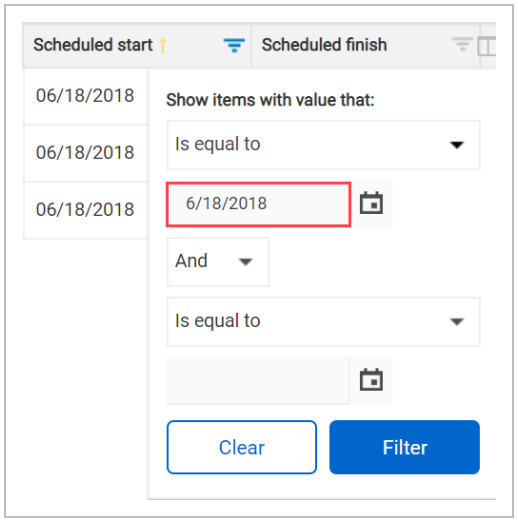
Filter columns as a way to see relevant information pertaining to your specific needs.

Filter Columns

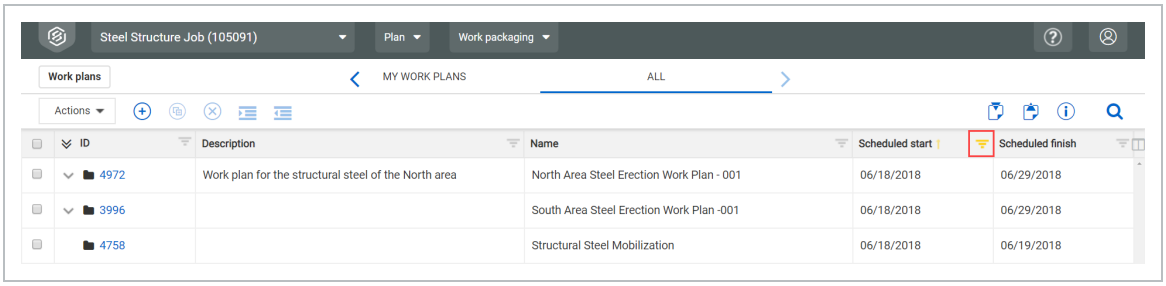
1. On the Work plans page, click the **filter pyramid** of any column header.
2. In the resulting drop-down list, select an **operator**.



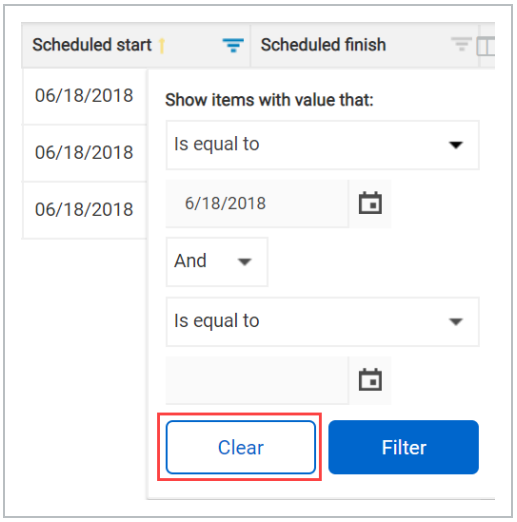
3. In the first search box, enter a **date**.



4. Click **Filter**.
    - The table now only shows items that qualify for your filter
    - Notice that the filter pyramid is now in yellow indicating that this column is filtered



5. Select the **filter pyramid** again. Hover over **Filter**, then click **Clear** to remove your filter.



TIP Apply multiple rules to your filter. For example, setting a "Contains" **or** "Is equal to" filter for your column would allow 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.

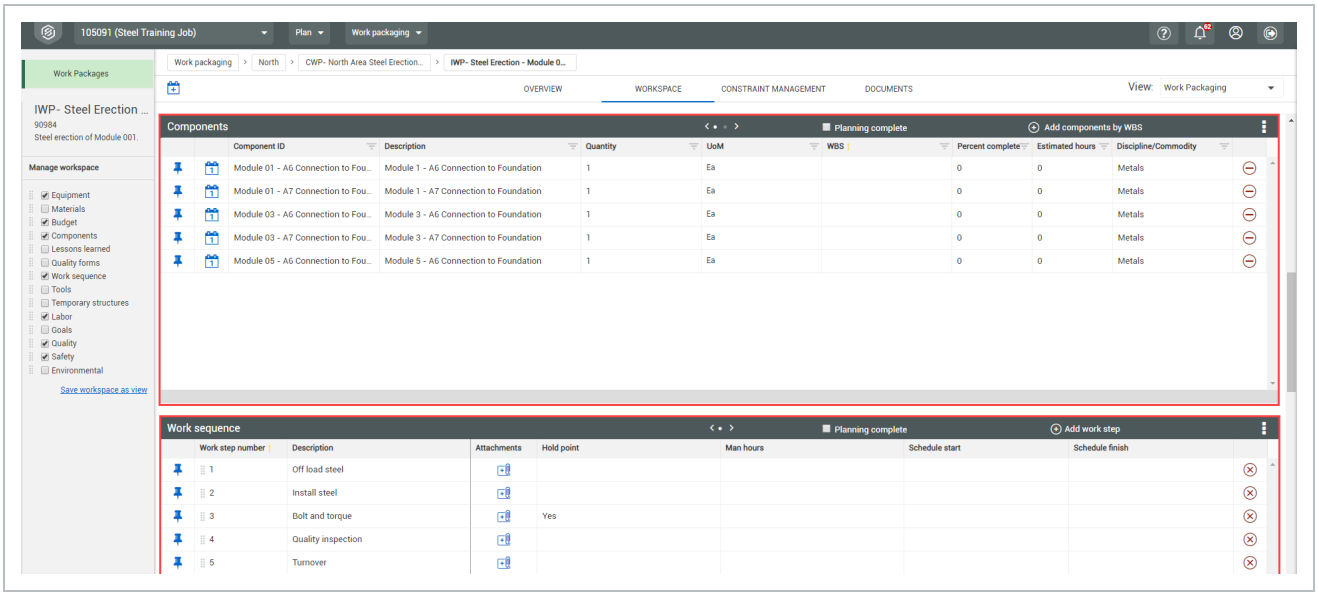
3. Apply a filter you would use to make the data more relevant.

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. Each data block is a set of columns grouped together based on categories of information. Data blocks help you to organize and manage all the columns on a page.

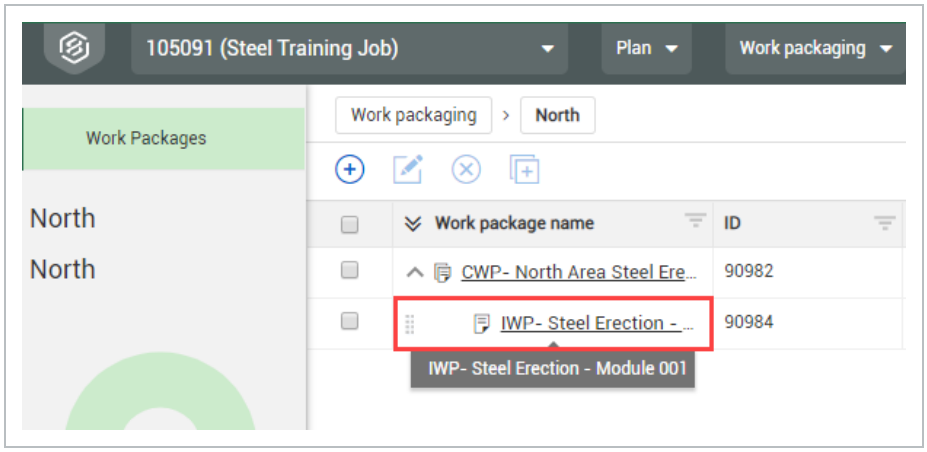
Data blocks are customizable, and can be viewed moved up or down in the register. Sort and filter data block information to organize your view. The information in each data block is displayed in a grid like format, maintaining a spreadsheet look and feel.



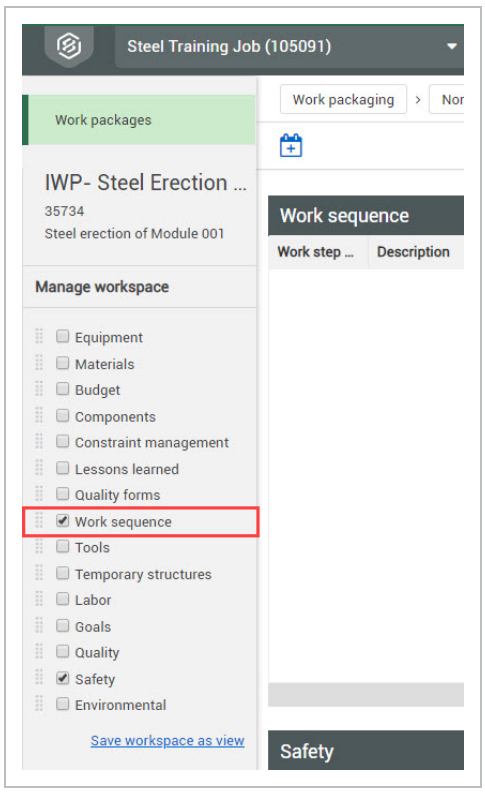
2.3.1 Add Data Blocks

Add Data Blocks

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



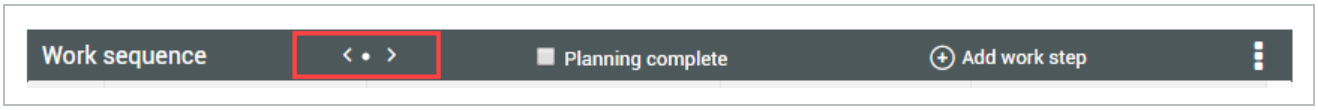
2. Once you are in an individual work plan, select the **Workspace** tab.
3. From the **Manage workspace slide out panel** on the left, select data blocks to include in your workspace.



NOTE Scroll up and down between the data blocks to view all your data blocks.

2.3.2 Navigate Data Blocks

Use the arrows at the top of your data block to view more columns associated with each data block that are not in the current pane.

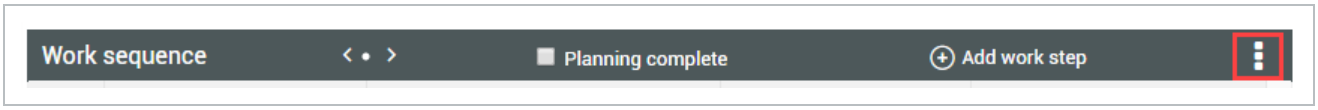


The number of dots between the arrows represent how many panes are in that data block.

2.3.3 Manage Data Blocks

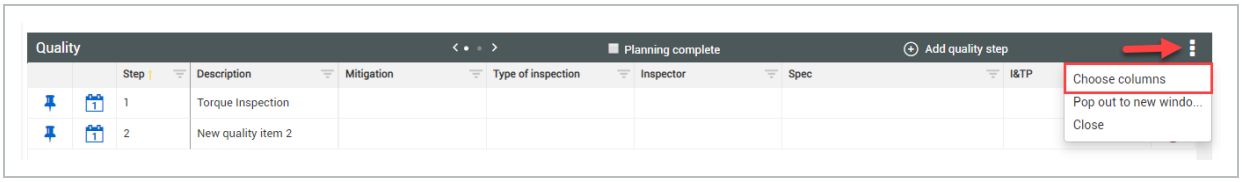
2.3.3.1 Context Menu

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.

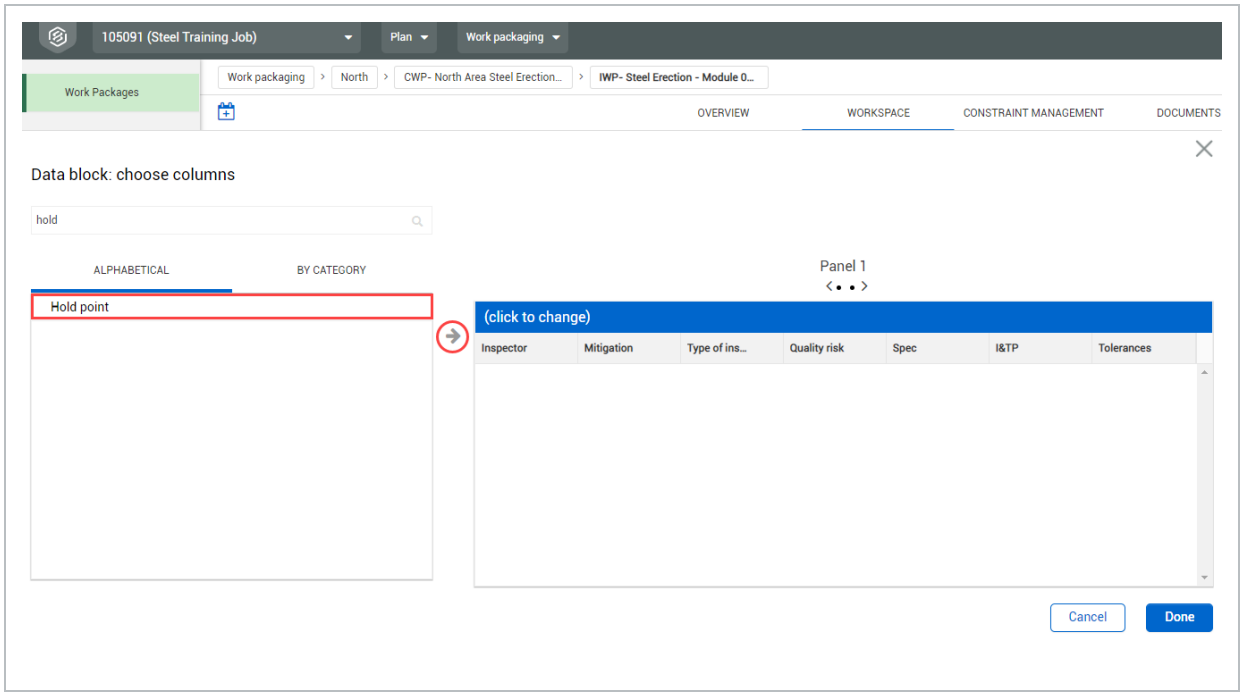


Use the Context Menu

1. On your data block, click on the **Context Menu** icon.
2. Select **Choose columns** from the drop-down menu.



3. On the resulting slide out panel, search by name or category for a column. Then, select your **column** from the list and click on the **right arrow** to add that column to your data block on the right.



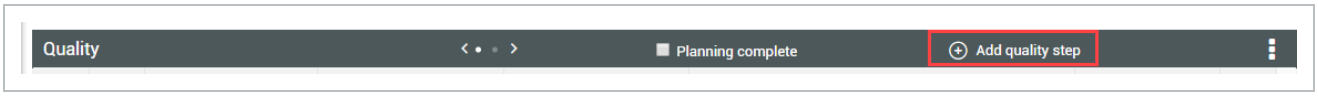
TIP You can also drag and drop columns into your data block. Once in your data block, you can reorder columns by dragging and dropping.

4. Repeat step three as needed. When finished, click **Done**.

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.

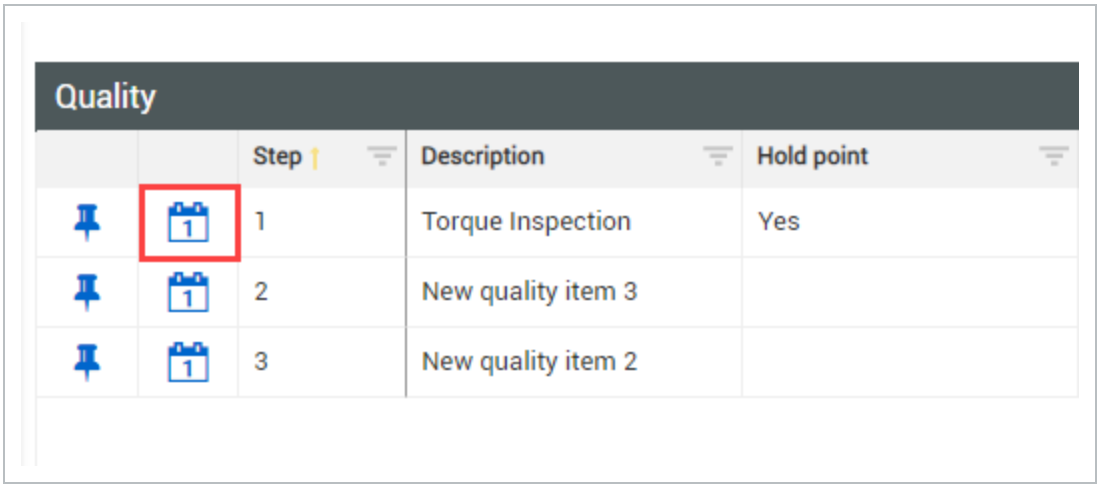
2.3.3.2 Resource Button

Uniquely named for each data block, the Resource Button allows you to add information or resources to your data block.

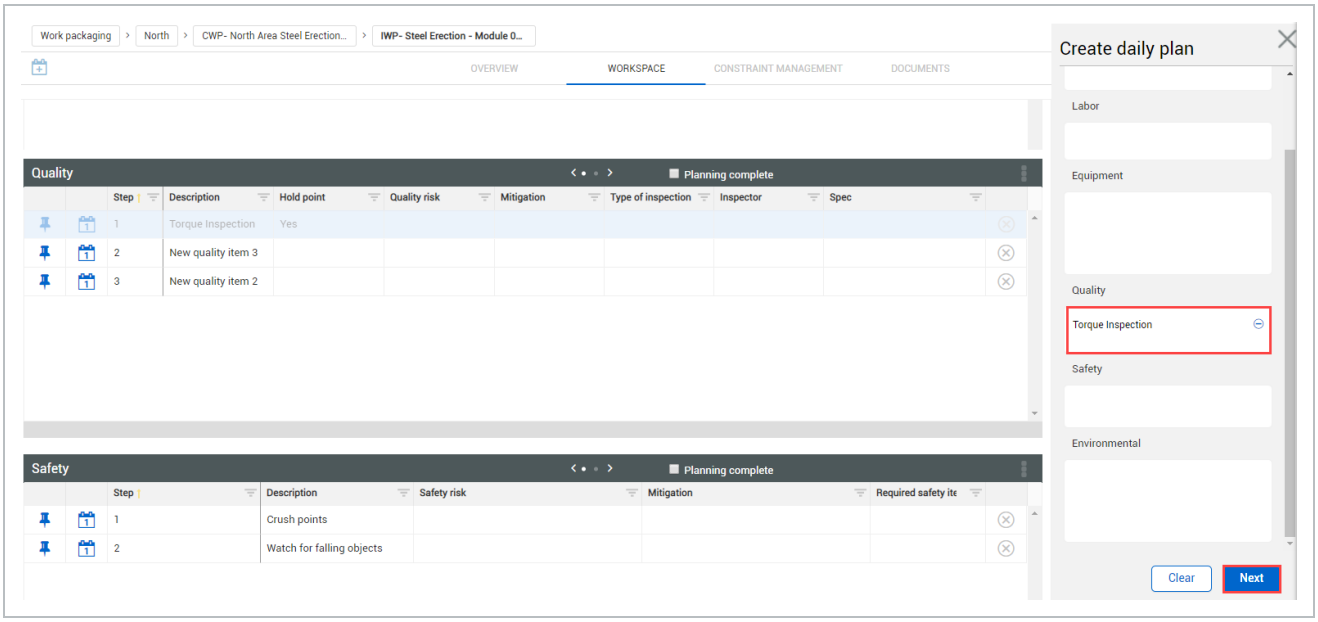


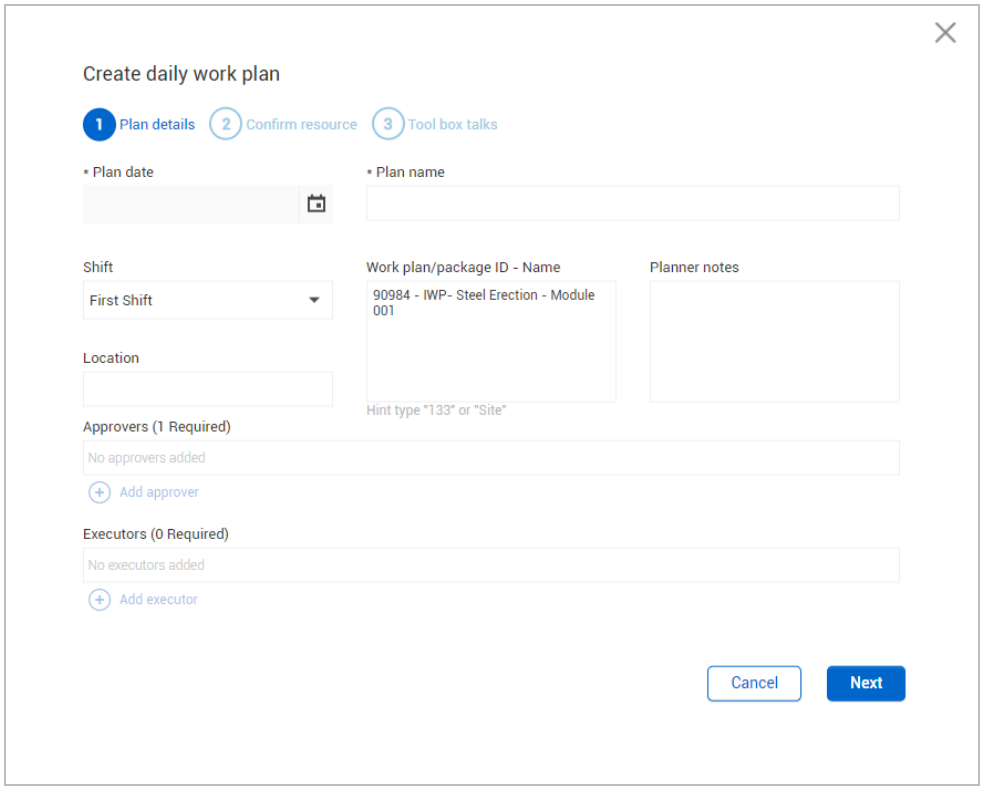
2.3.3.3 Daily Plan Icon

The Daily Plan icon is a shortcut that allows you to create daily plans directly from an IWP by selecting which details to include in a daily plan.



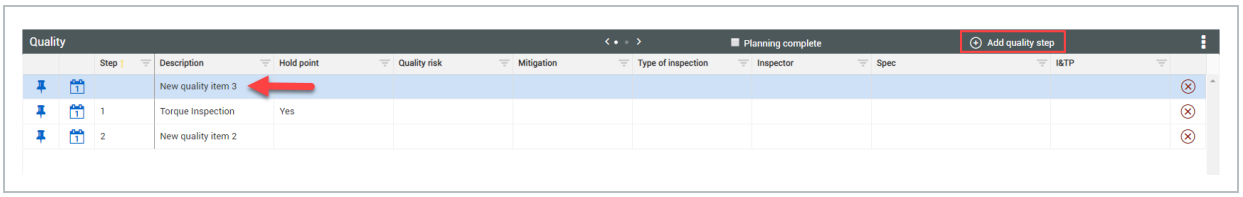
Clicking on this icon will open a slide out panel to the right where you can view the items you've selected to include in your daily plan and continue onto the creation window.



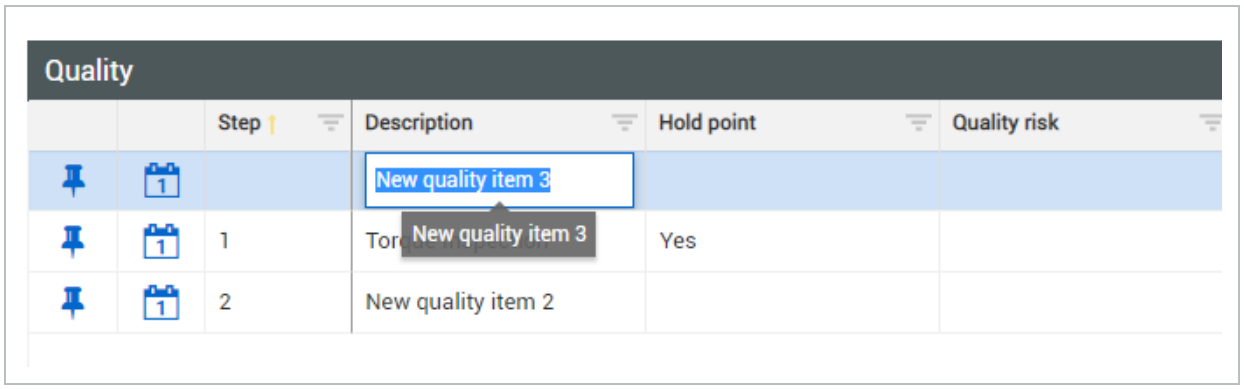


Add and Manage Data Block Contents

1. On your data block, click on the **Resource** button to add an item.

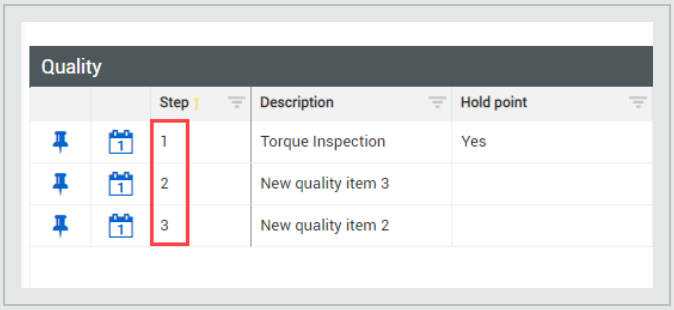


2. Rename your items by clicking on the item **Description** cell and entering a new name.

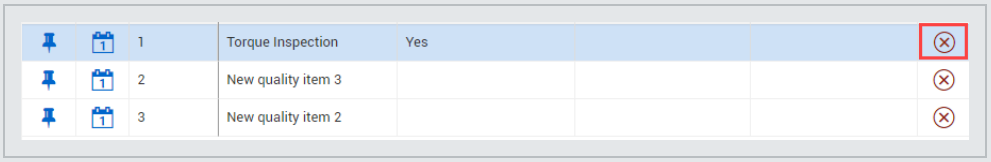


3. Reorder your items by click on the item **Step** cell and adding or changing the order number.

TIP You can sort and filter your data block columns.

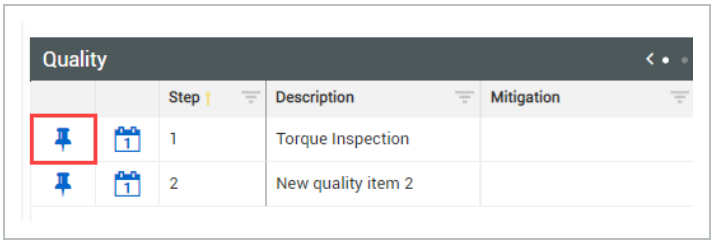


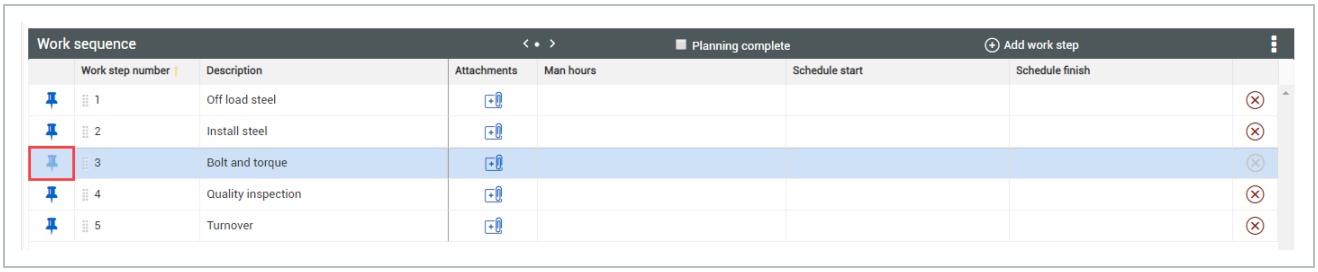
NOTE Delete an item by selecting it then clicking on the red "x" to the right.



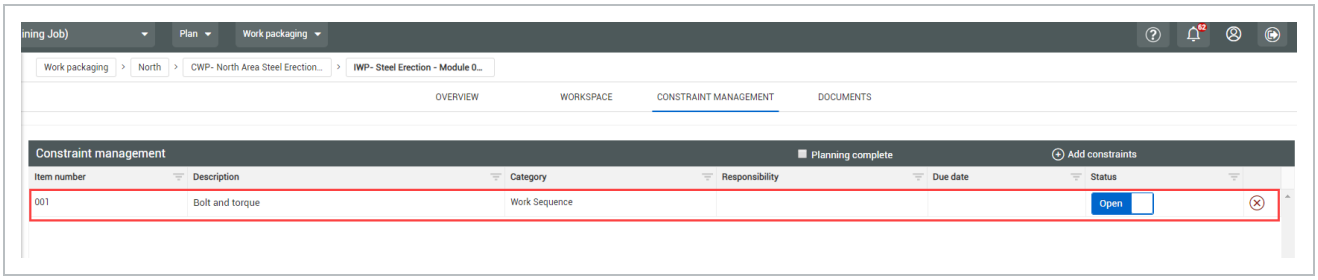
2.3.3.4 Pin Icon

The Pin icon allows to flag critical components that will hold up the start of the operation if not addressed. When pinned, an item will automatically appear under the Constraint Management tab of the Work plans/packages page. There, you can review and further manage all pinned items.





- Notice that when you pin an item, the data block row turns blue

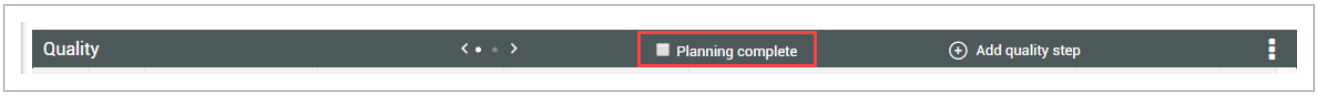


TIP To unpin an item, go to the Constraint Management tab, and delete the item. Changing the status from "open" to "closed" will not unpin or remove the item from the Constraint Management tab.

NOTE You can also manually add constraints under the Constraint Management tab.

2.3.3.5 Completion Indicator

The Completion Indicator allows you to indicate which data blocks are completely planned.



As you check off data blocks, you can track your planning progress from the Planning Schedule tab on the AWP panel (Work plans/packages page of Plan Work Packaging).

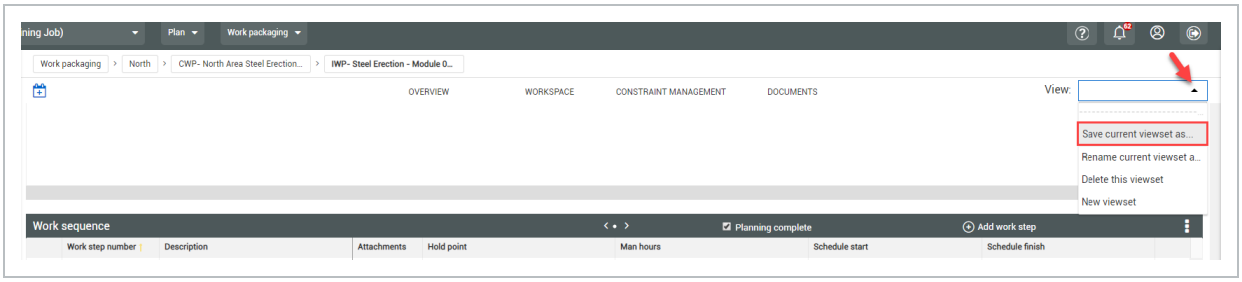
2.4 VIEWSETS

Create a viewset, or saved view, of your data block workspace to quickly revert back to.

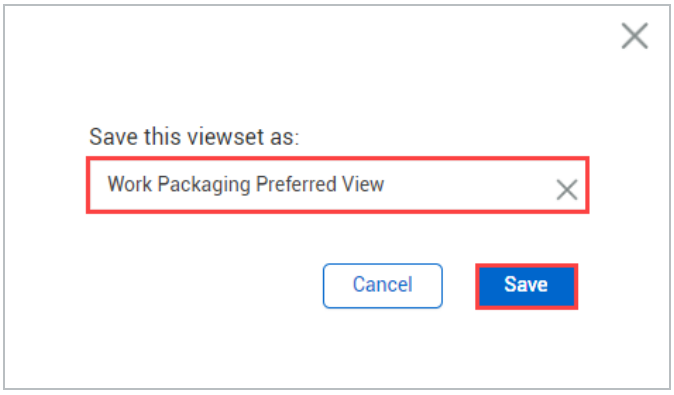
NOTE Follow these same steps to save a viewset in Plan Quantity Tracking.

Create a Viewset

1. On the Workspace tab of your installation work package, select the **View** arrow.
2. Select **Save current viewset as** from the drop-down list.



3. In the resulting window, enter a name and click **Save**.



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:

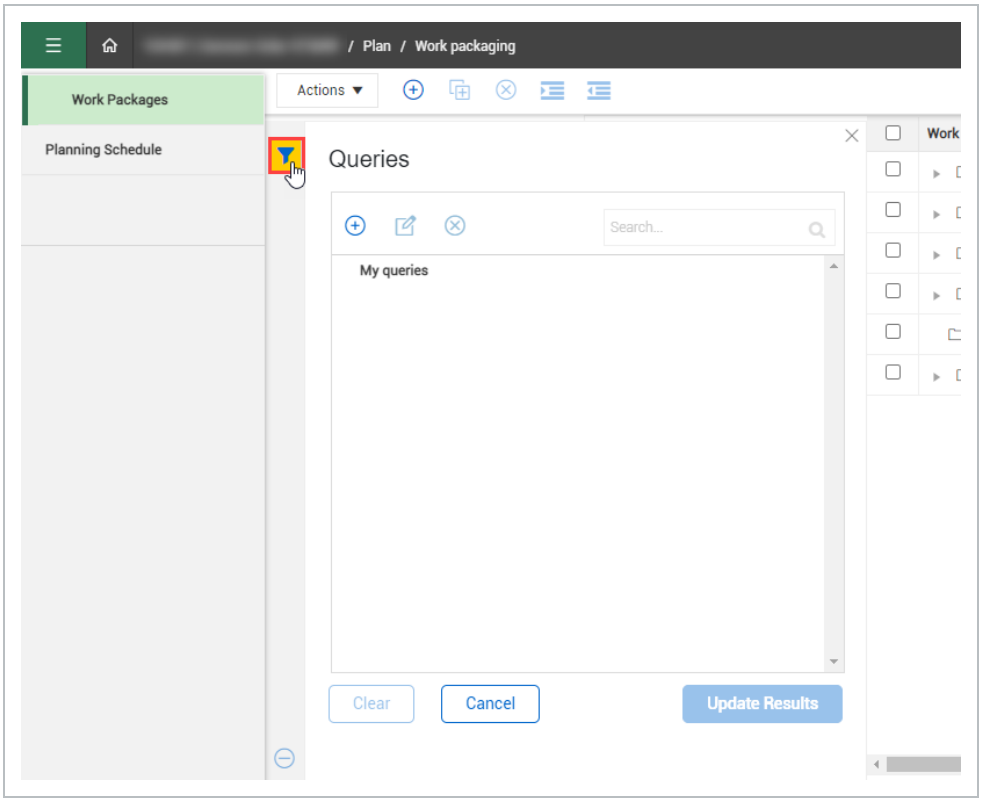
- Navigate the InEight Plan Work plans page
- Manage columns

- Manage data blocks
- Create viewsets

2.5 QUERY BUILDER

The Query builder lets you build queries with multiple conditions to filter the entire table of work packages. You can add, edit, delete, and share queries with others.

To open the Queries slide-out panel, click the **Query** icon on the left side of the page.



2.5.1 Add a Query

A query is made up of conditions that are made up of columns, values, and operators that connect the columns and operators. Multiple conditions can be grouped as And or Or statements.

The following step by step shows you how to add a query, apply it, and then save it for future use.

Add a Query

1. Click the **Query** icon on the left side of the page to open the Queries slide-out panel.
2. Click the **Add** icon. The Query builder opens.
3. Select a column and operator from the drop-down lists.
4. Enter a value that you want to filter the column for.
5. Optionally, click the **Add** icon to add more conditions, and then click **And** or **Or** to change how the conditions are grouped.
6. Click **Apply** to update results immediately.
7. Click **Save query**.

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LESSON 3 – WORK PACKAGE MANAGEMENT

Lesson Duration: 60 minutes

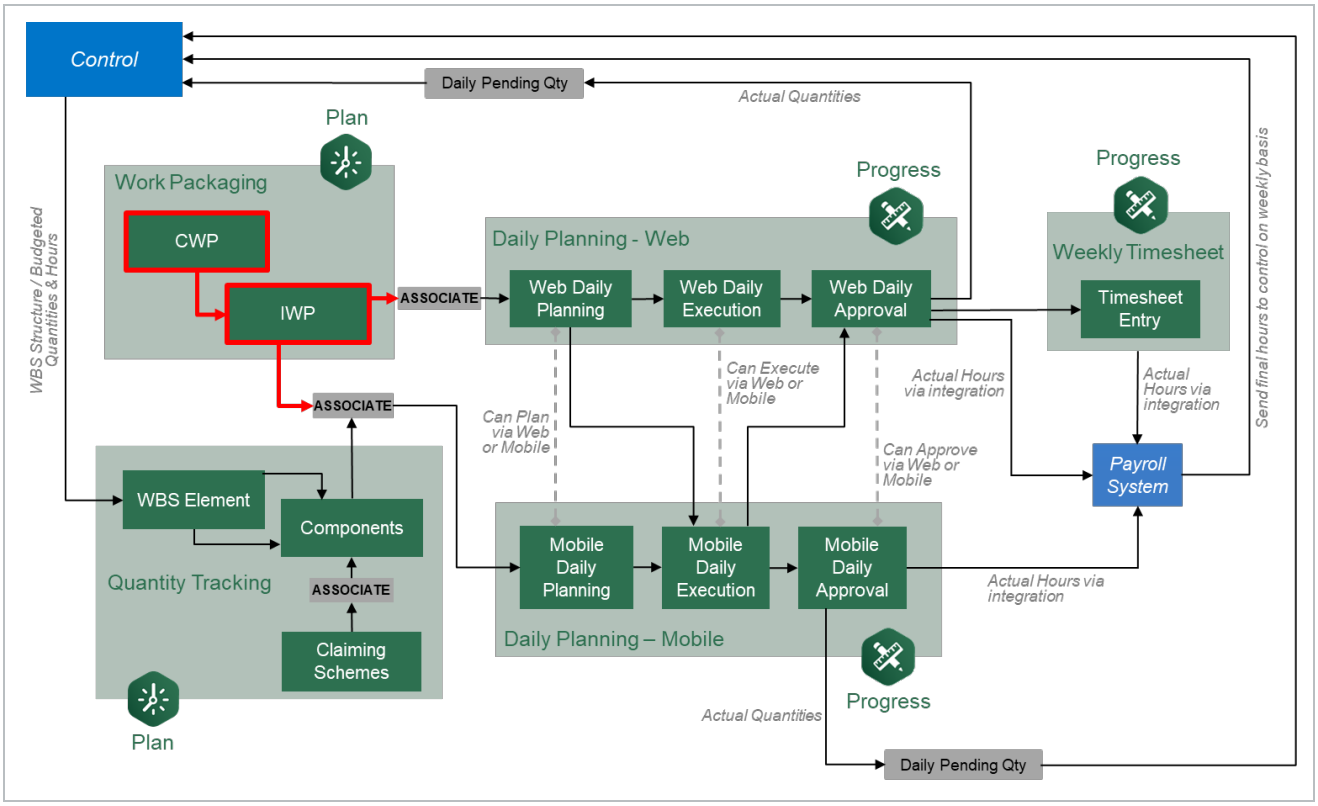
Lesson Objectives

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

3.1 INEIGHT PLAN WORKFLOW - WORK PACKAGE MANAGEMENT



3.2 WORK PACKAGE MANAGEMENT OVERVIEW

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. AWP aims to change the planning process to be execution driven: approaching the beginning of your construction project with the end in mind. In the past, planning was siloed, Engineering first, then Procurement, and finally Construction. AWP starts with the priorities of Construction and or commissioning and works backwards.

The Work Packaging module of InEight Plan provides an organized platform to break down your project into manageable scopes of work. Work packages can be developed to include all items necessary to complete the scope as well as all constraints that would impede progress.

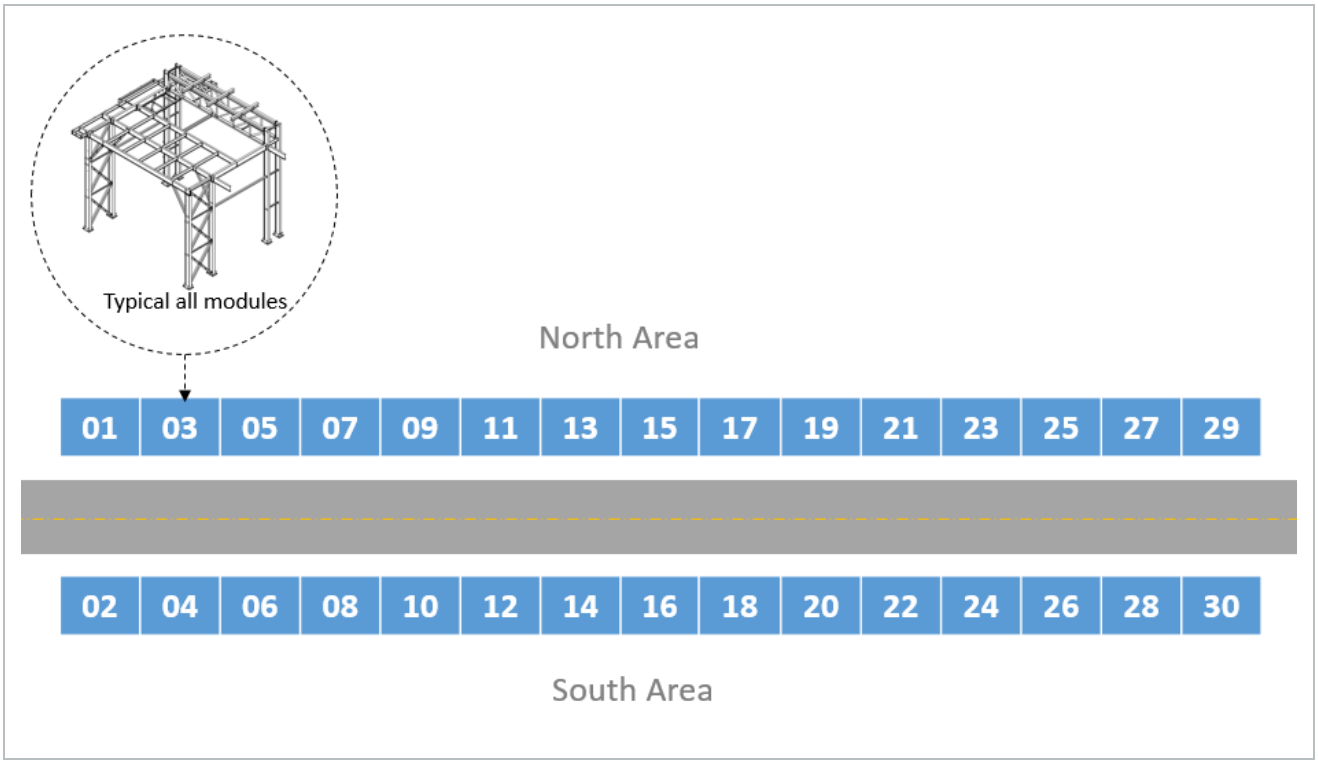
3.2.2 Work Packages

There are three levels of work package definition that can be used in InEight Plan:

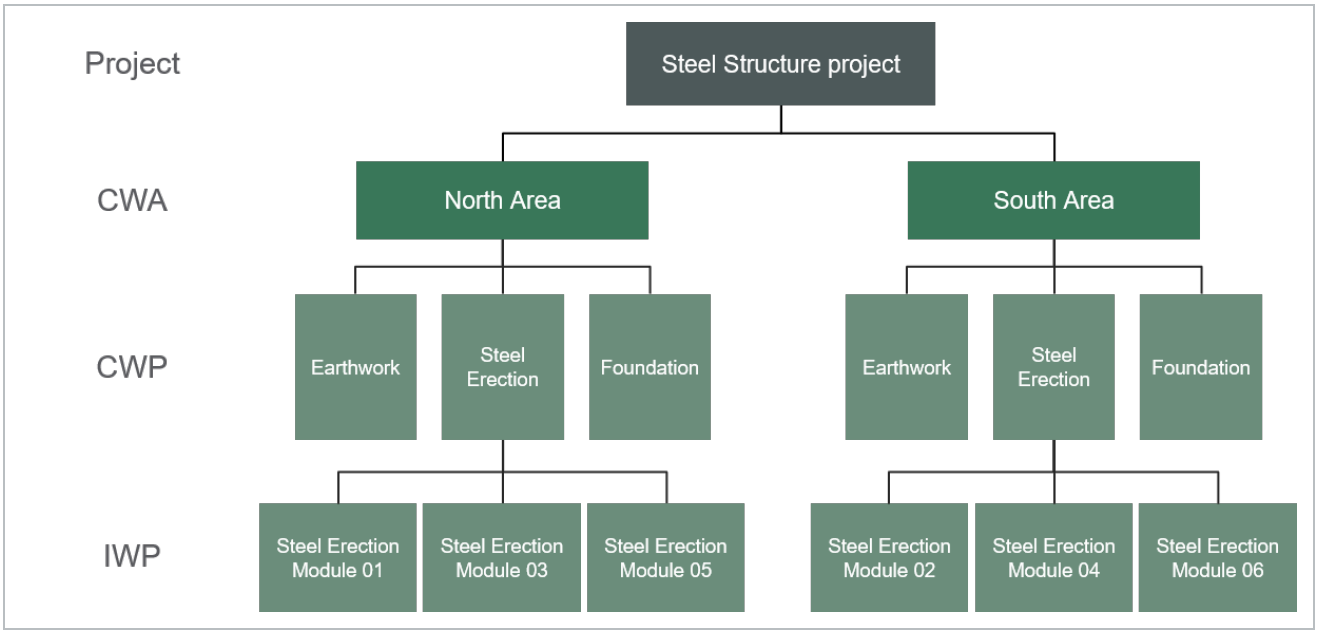
- Construction Work Area (CWA)
- Construction Work Package (CWP)
- Installation Work Package (IWP)

Scenario

> Imagine you are working on a project with the following scope: 30 modules in which you need to complete earthwork, foundations, and erect the steel support structures.



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 so you can plan at a detailed level and identify the specific constraints, components, safety and quality risks.



TIP Construction work areas (CWAs) are created for the project or organization in the Configure CWA and project values page prior to defining construction work packages.

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. They should also align with engineering and procurement work packages. 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 can also contain activity, material, and contract components.

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. 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 workface execution. IWPs should be approved by the responsible stakeholders, and all constraints should be completed 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.

3.3 WORK PACKAGE CREATION

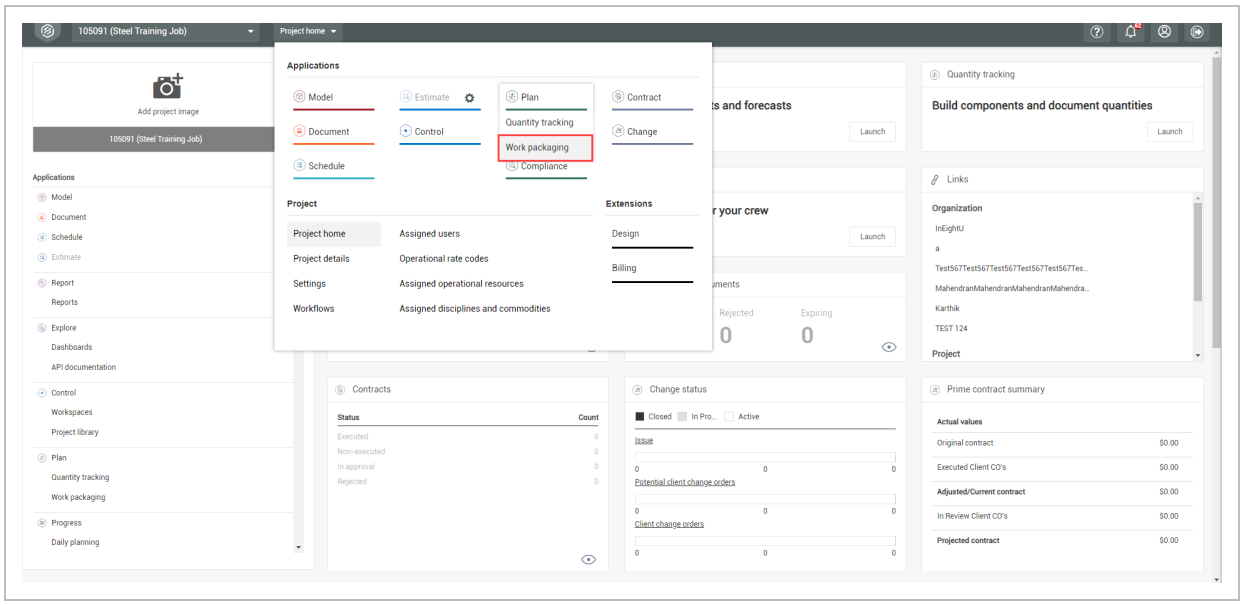
The first step in utilizing the Work Packaging module is to set up your work package structure.

3.3.1 Create a Construction Work Package (CWP)

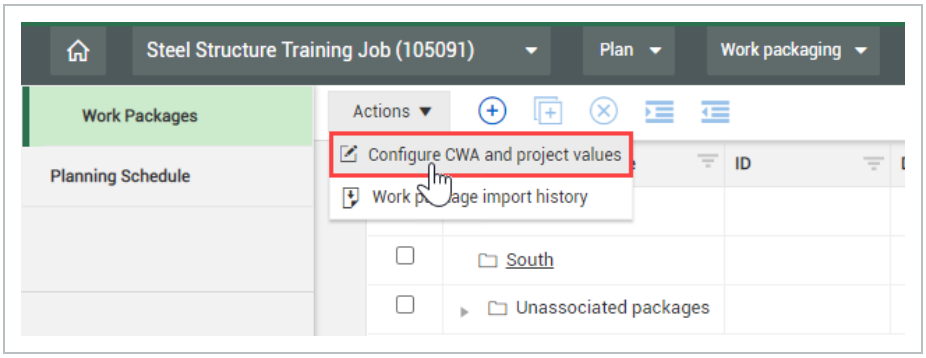
The following steps walk you through creating a construction work package.

Create a Construction Work Package (CWP)

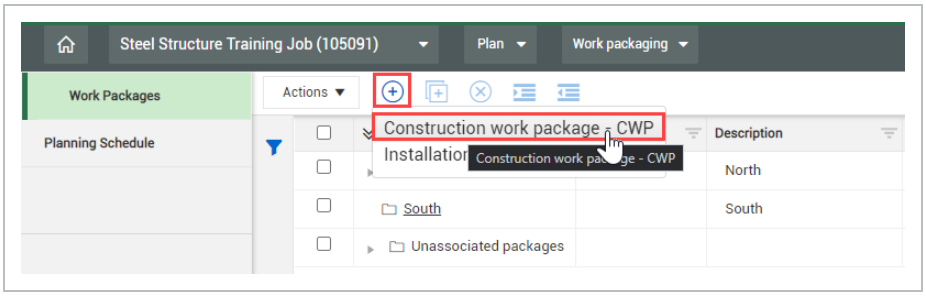
1. From your project's home page, navigate to the **Work packaging module**.



2. Click on the **Action** menu and select **Configure CWA and project values** from the drop-down list.

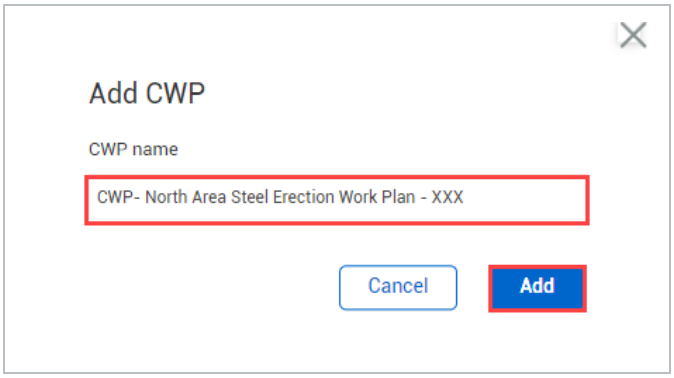


3. Click on the **Add** icon on the left toolbar and select **Construction work package – CWP** from the drop-down list.



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.

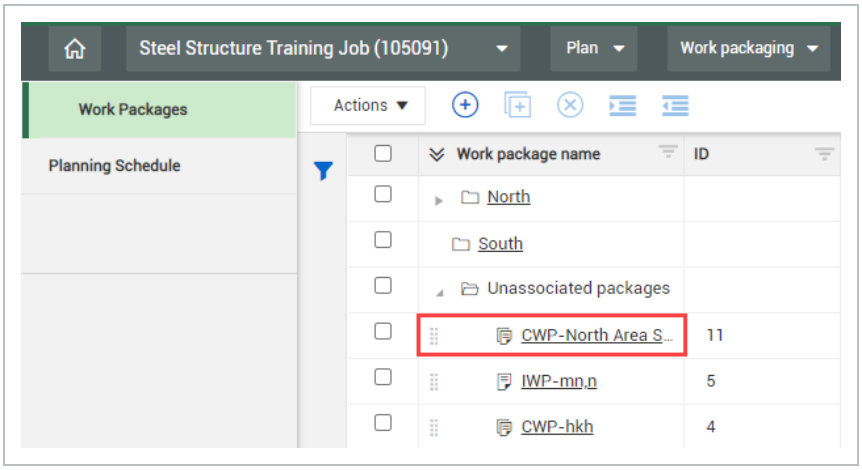
4. In the new dialog box, name your CWP. Work package names can be 100 characters in length.



> **NOTE** Note that the CWP name automatically begins with “CWP-“ by default. You can erase it.

5. Click **Add**.

> **NOTE** Your created CWP will be located in the **Unassociated packages** folder by default when you create them outside of a construction work area folder.



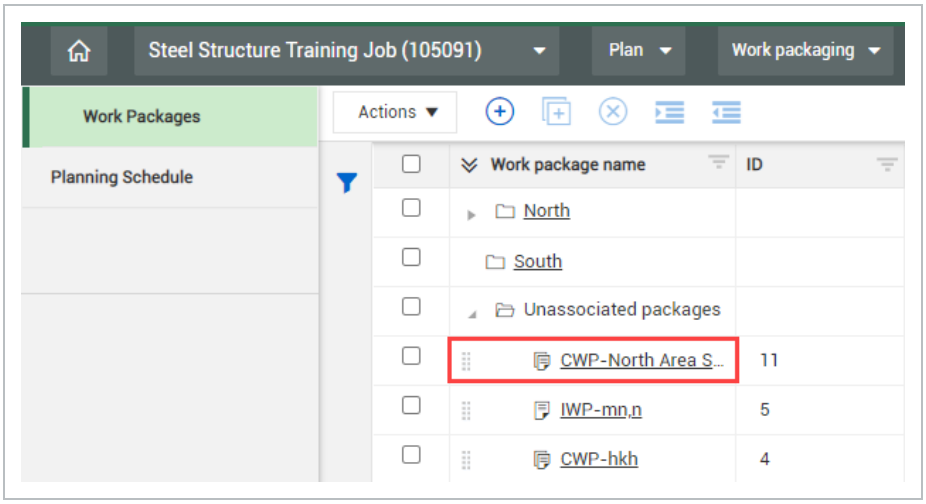
3.3.2 Edit Work Packages

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

- Schedule start and finish dates
- Planning start and end dates
- CWP Description
- CWA description and ID
- Plan Status
- Other fields

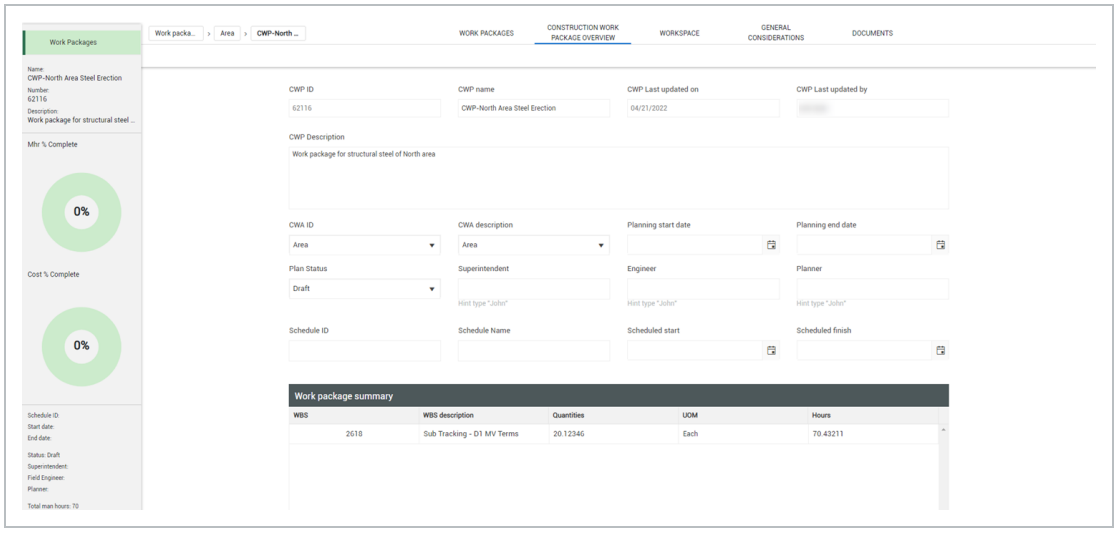
Edit a Work Package

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

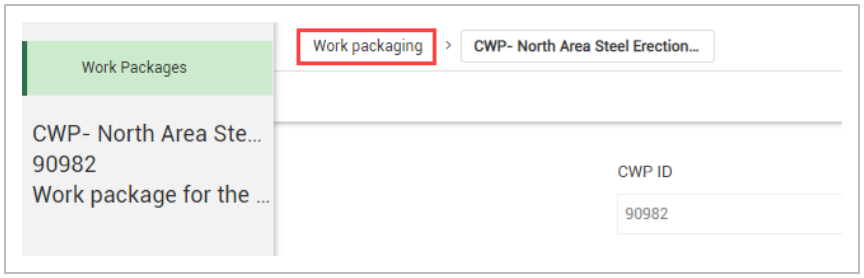


2. Select the **Construction Work Package Overview** tab.
3. Under CWP description, enter a description.
4. In Scheduled start date, select a date.
5. In Scheduled end date, select a later date.
6. Select an Engineer.
7. Select a Planner.
8. Select a Superintendent.

> **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.



9. Now that you have all the CWP overview details, you can go back to the Work plans/packages page by selecting **Work packaging** in the breadcrumbs.

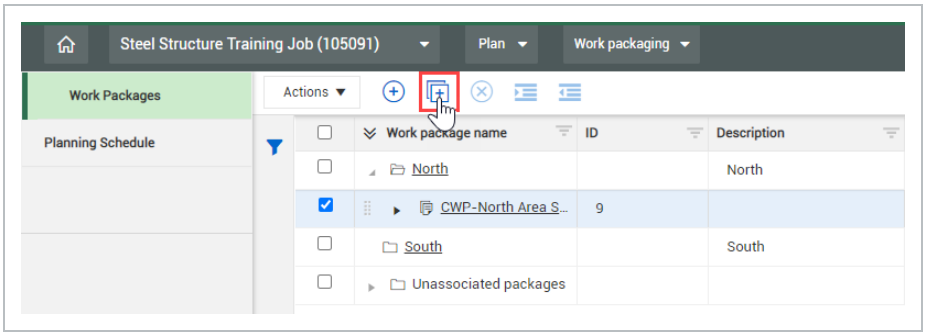


3.3.3 Copy Work Plans

You might 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.

Copy a Work Package

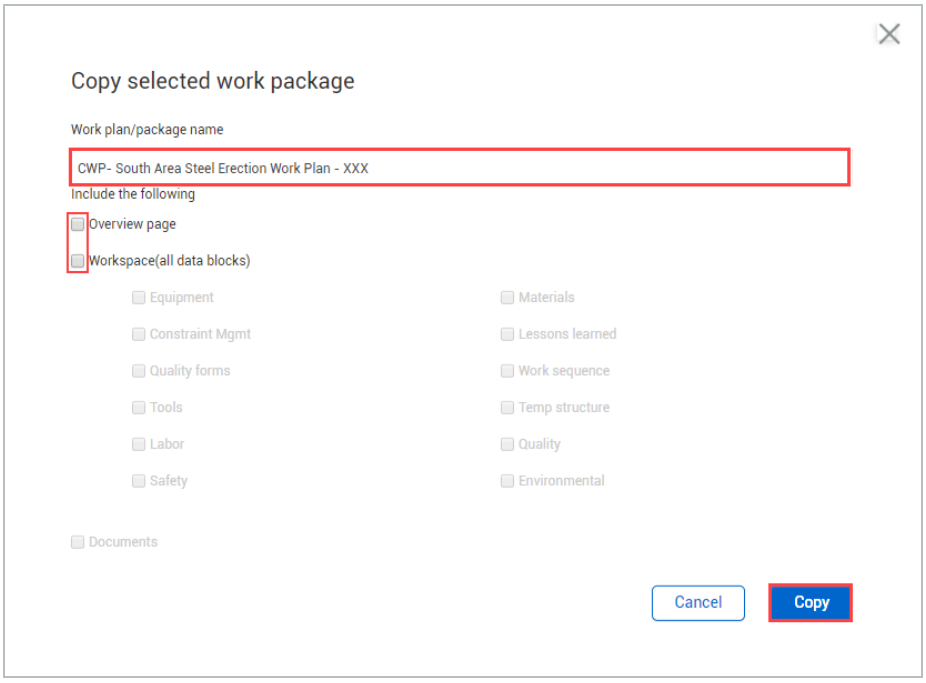
1. On the Work plans/packages page, select your previously created work plan, then select the **Copy** icon.



TIP You can copy as many as ten work packages in the same project at the same time.

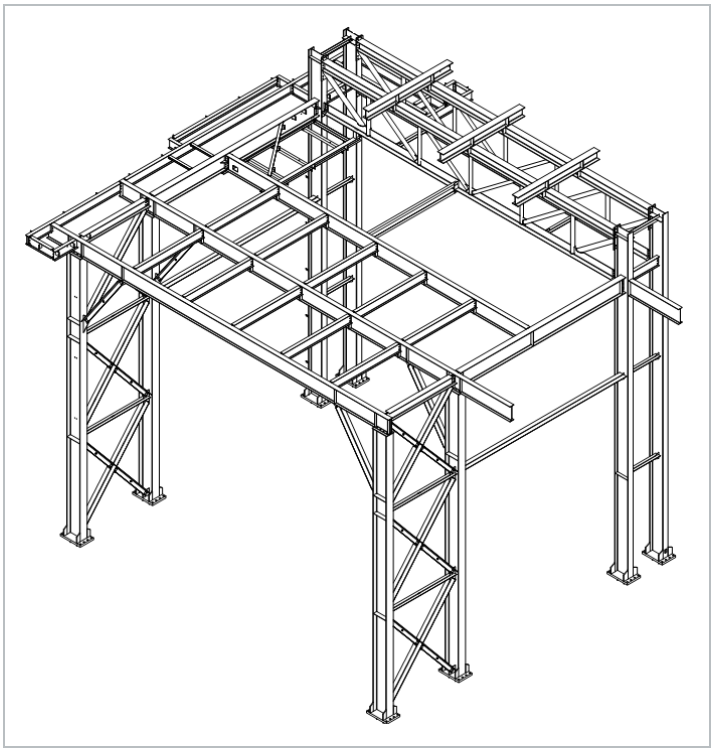
- This brings up a new dialog box for you to select what information to carry over

2. Rename the work plan.
3. Uncheck **Overview page** and **Workspace (all data blocks)**.
4. Click **Copy** to finish creating your new work plan.



3.3.4 Create an Installation Work Package (IWP)

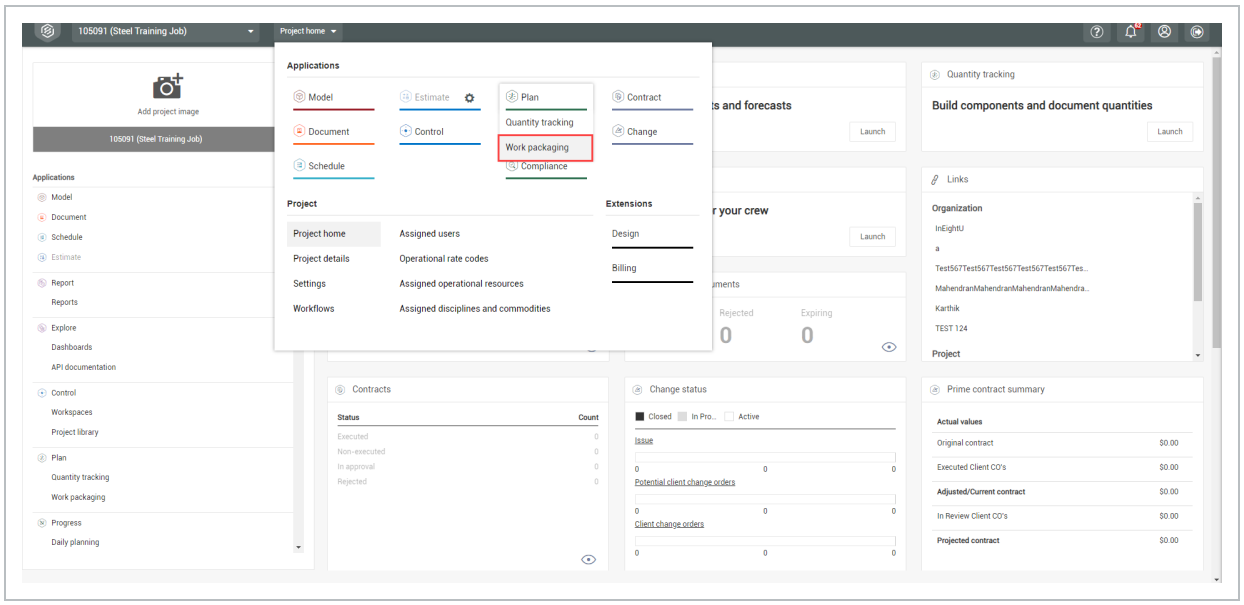
Continuing with the scenario above, you will create an installation work package.



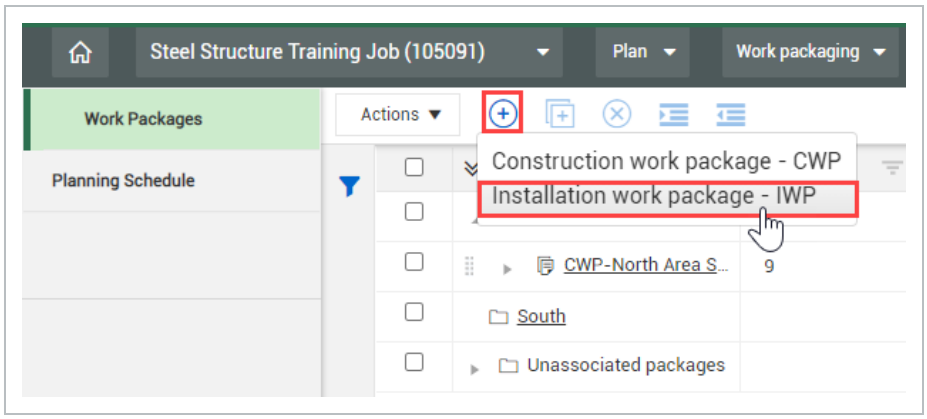
Within each installation work package, you can assign the labor, components, equipment, materials, and other aspects you need to complete the work.

Create an Installation Work Package (IWP)

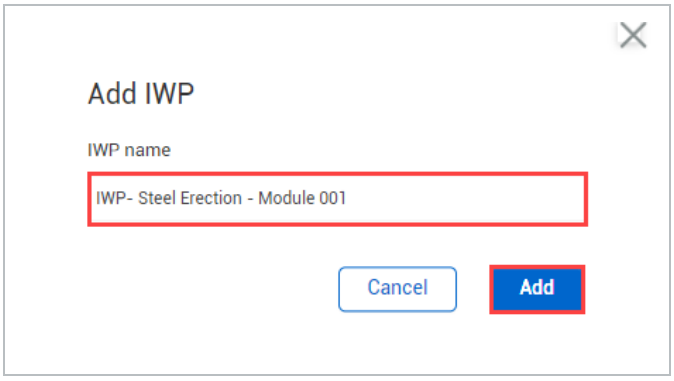
1. From your project's home page, navigate to the **Work packaging module**.



2. On the Work plans/packages page, select the **Add** icon and select **Installation work package - IWP**.



3. In the Add IWP dialog box, name your work package and click **Add**. Work package names can be 100 characters in length.



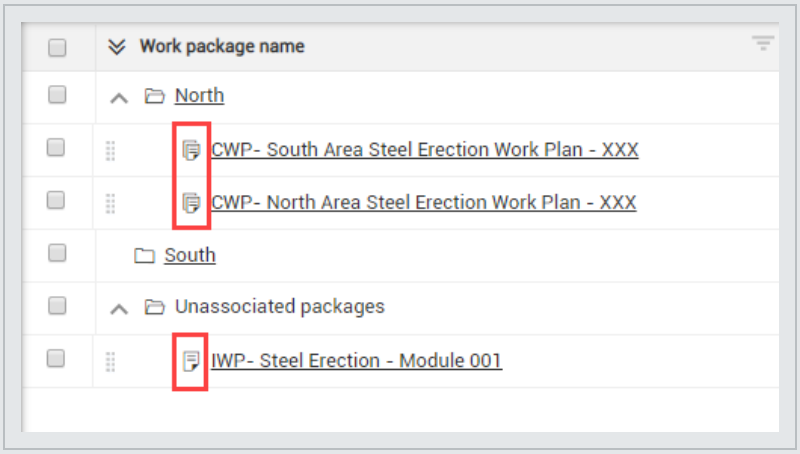
3.3.5 Group Work Packages

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

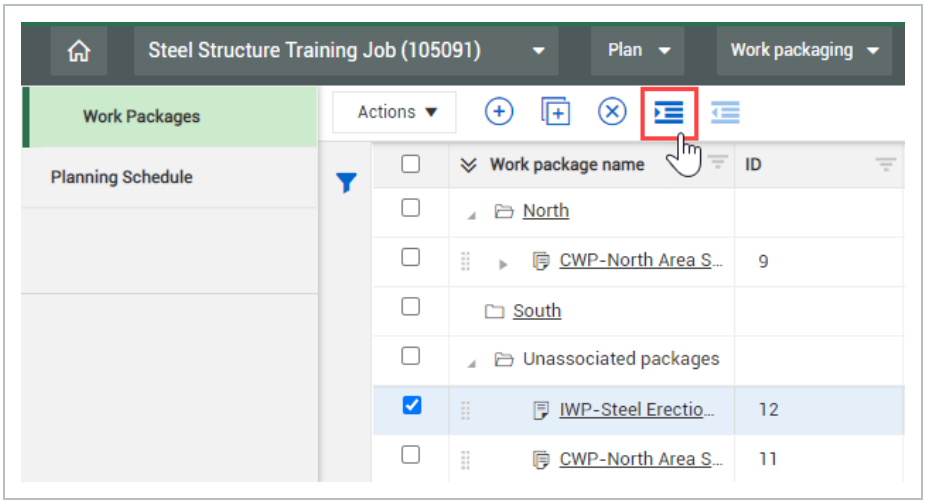
Group a Work Package

1. On the Work plans/packages page, select a work package.

NOTE Notice that CWPs and IWPs have different icons.

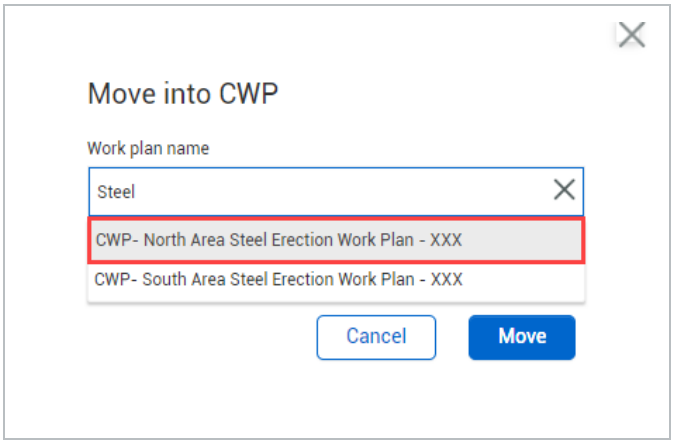


2. Click the **Move into CWP** icon.



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 your construction work package.



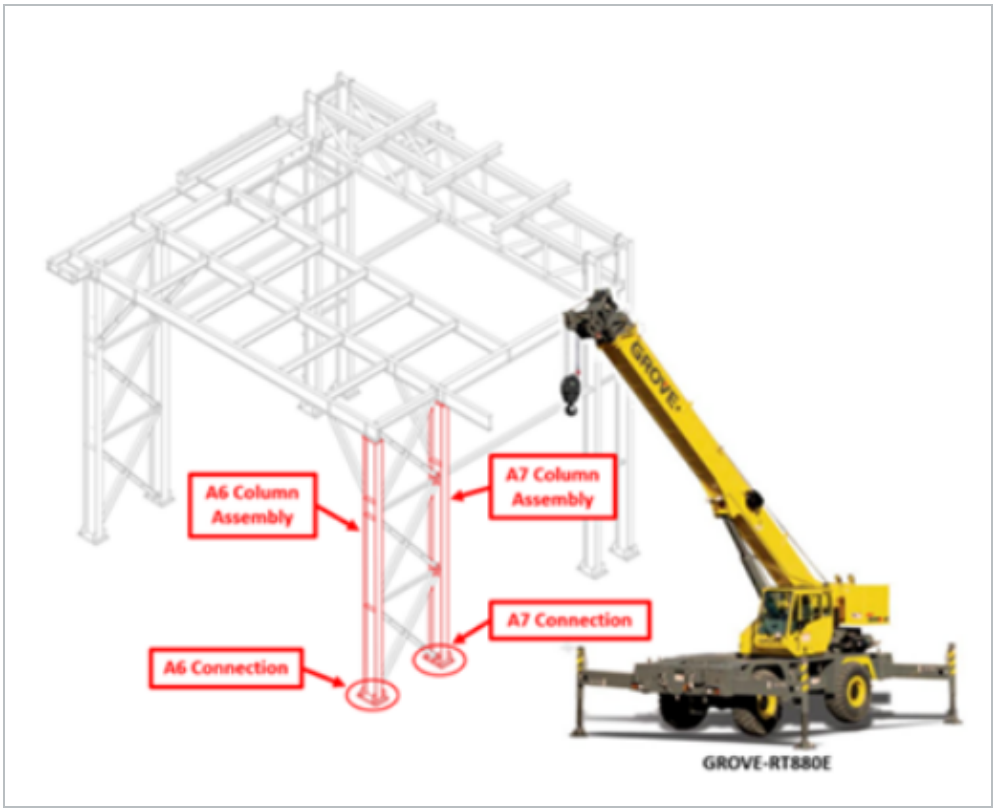
4. Select the CWP you want to move it to, then click **Move** to move the package to finish grouping your packages.

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.

3.4 DAILY PLAN FROM WORK PACKAGE (DAILY PLAN WIZARD)

Scenario

Tomorrow, your crew will be starting the steel erection work on your module. You are now ready to plan the work for your crew. During this first day, you want your crew to install the A7 connections to foundations. Your crew will consist of a Grove-RT880E crane, 3 Ironworkers and 1 Laborer. You want to make sure to communicate the work to your crew and identify safety concerns for the day.



In this topic, you will create a daily plan from an already existing work package using the Daily Plan Wizard in the InEight Plan web application.

3.4.1 What is a Daily Plan?

After you put your work package together, you break it down into daily segments, or the work you plan to accomplish in a given day.

Using the scenario above as an example, your steel erection work package for your module will take multiple days to complete. You will use daily planning to plan the work in the sequence you are looking to do it in, day by day. Daily planning is a good tool to communicate to your crew your safety concerns, quality and environmental risks, and expected productivity.

Daily planning combines:

- Components
    - Activity components
    - Material components associated with WBS
- Resources (employees, and equipment)
- Planned hours
- Planned quantities
- Notes/Issues
- Attachments (for example, safety notes, plan specifications)

3.4.2 Daily Plan Wizard

The Daily Plan Wizard is a powerful tool that can help automate the process of setting up daily plans by copying information from an already existing work package to avoid duplicate work. The Daily Plan Wizard allows you to choose which parts of the work package will be brought into the daily plan.

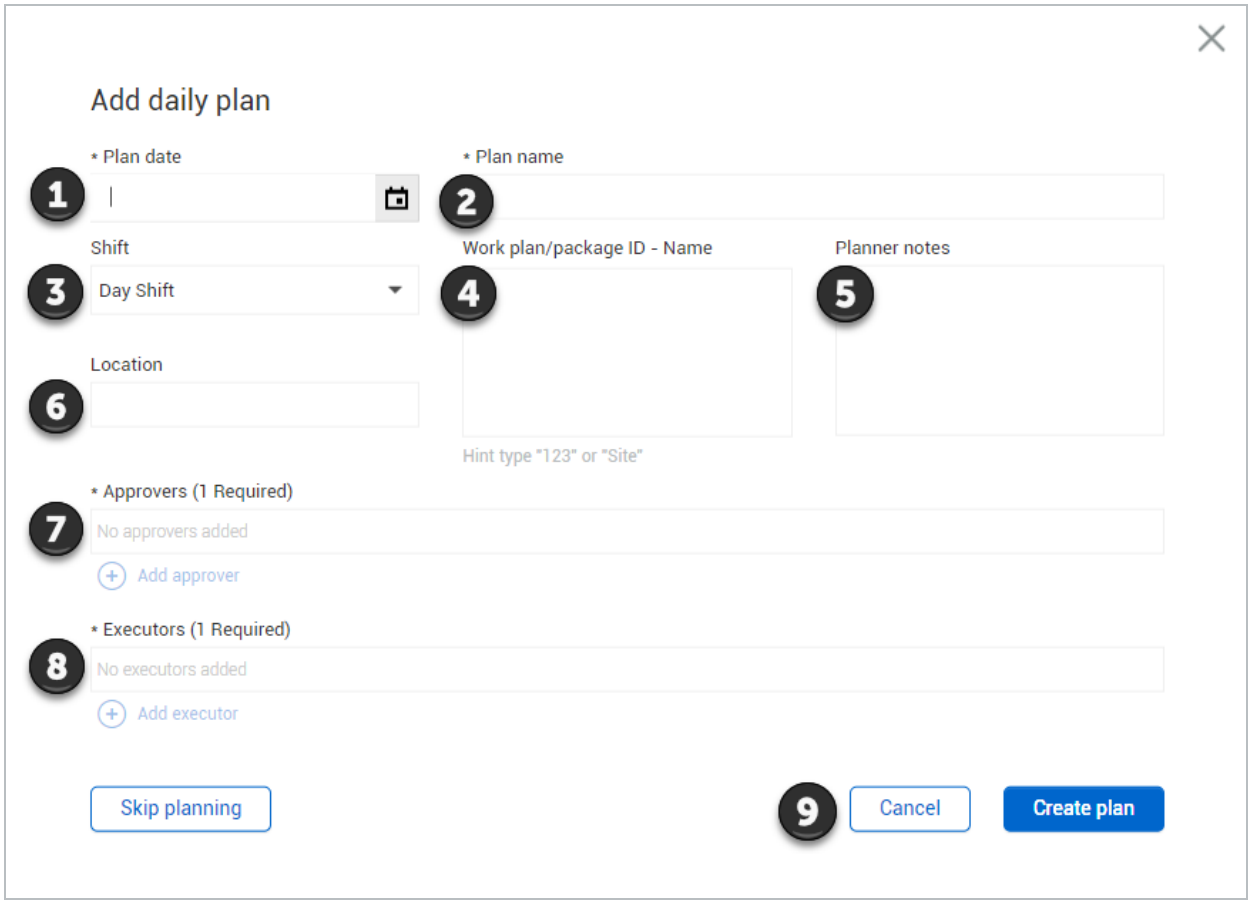
You access the Daily Plan Wizard from Plan Work packaging module.

Overview – Daily Plan Wizard

	Title	Description
1	Plan Date	The date on which the plan will be executed.
2	Plan Name	Unique name of the daily plan.
3	Shift	A drop-down field where you can select either the Day or Night Shift.
4	Work Plan/Package ID-Name	This should be auto populated with the name of the work plan/package that the current daily plan is being created from.
5	Planner Notes	A free text field where you can add any relevant notes.

Overview – Daily Plan Wizard (continued)

	Title	Description
6	Location	A free text field where you can enter the location where the work will be performed.
7	Approvers (1 required)	Responsible for the approval of the plan.
8	Executors (1 required)	Responsible for the execution of the plan.
9	Navigation Buttons	Allows you to either cancel or create the new daily plan.

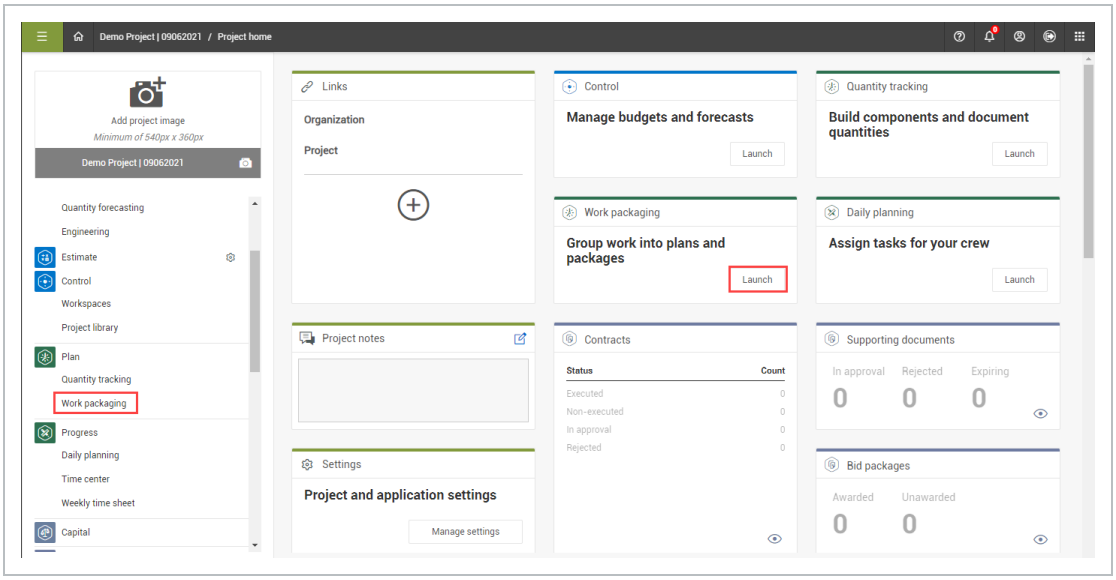


The following Step by Step walks you through how to use the Daily Plan Wizard.

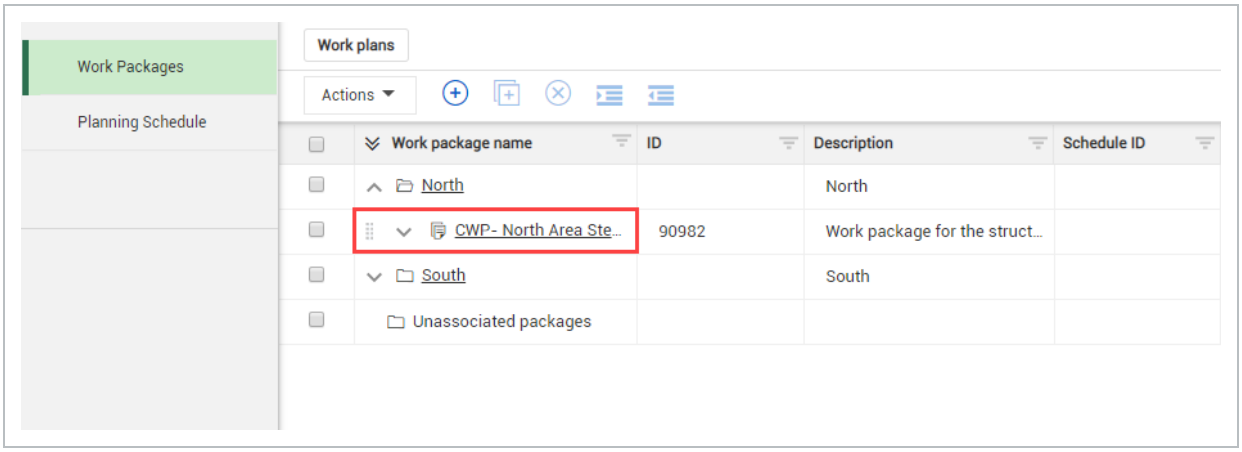
NOTE This Step by Step assumes you already have a work package (CWP or IWP) created containing work package details (e.g., labor, equipment, components, safety). See Work Package Creation for details on setting up work packages.

Create a Daily Plan Using the Daily Plan Wizard

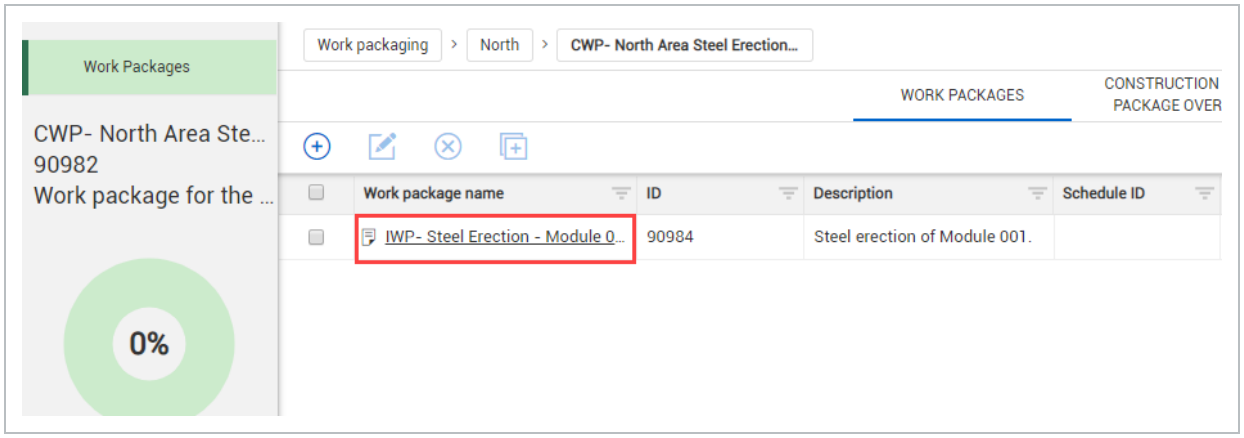
1. From your project home page, navigate to Plan > **Work packaging**.



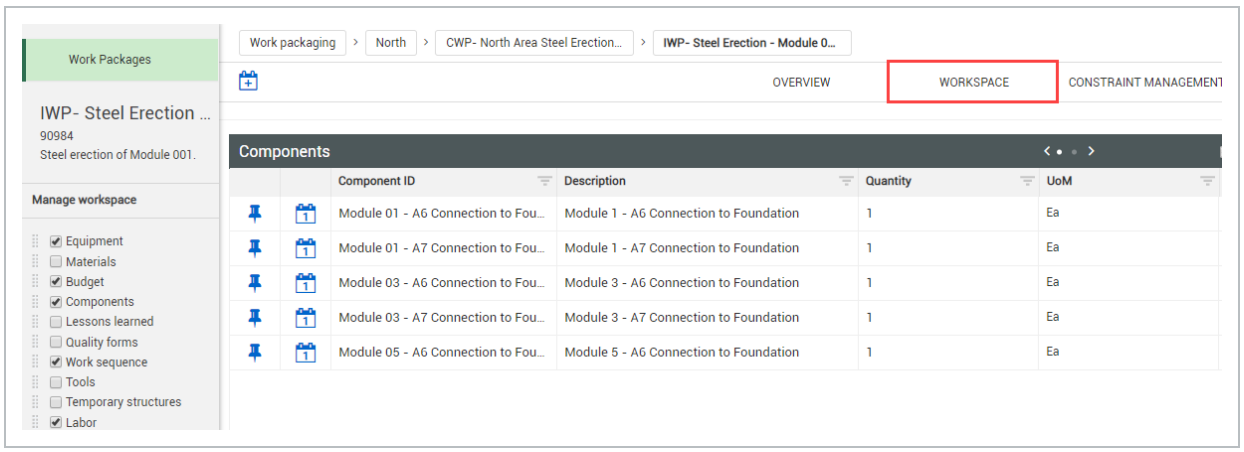
2. From the Work Packages tab, open a Construction Work Area (CWA) and click on the **arrow** in the ID column of your Construction Work Plan (CWP) to extend the work package below.
3. Select a Construction Work Package (CWP) by clicking on its **hyperlink ID**.



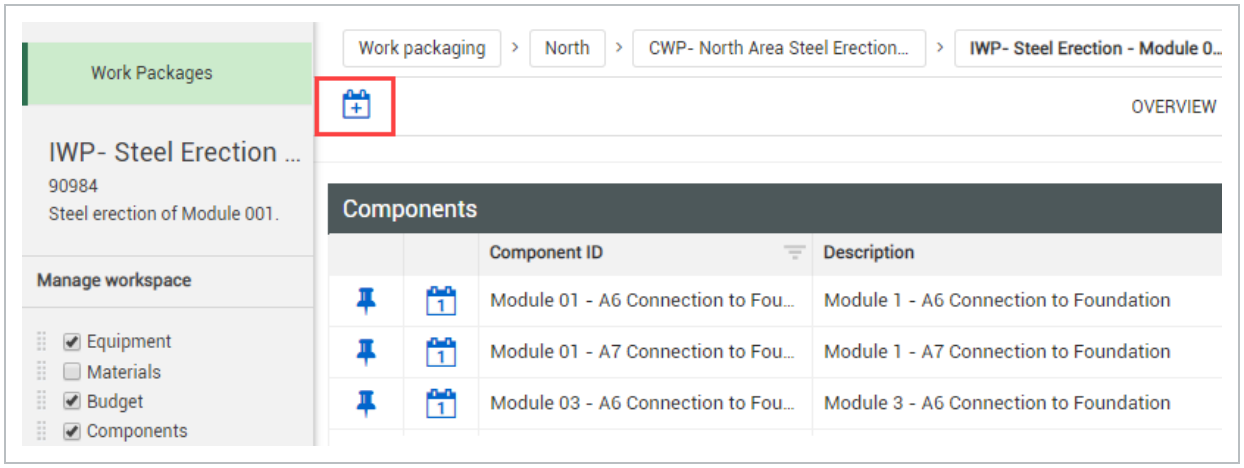
4. Open your Installation Work Package (IWP) by clicking on its **hyperlink ID**.



5. From the IWP page, click on the **Workspace** tab.

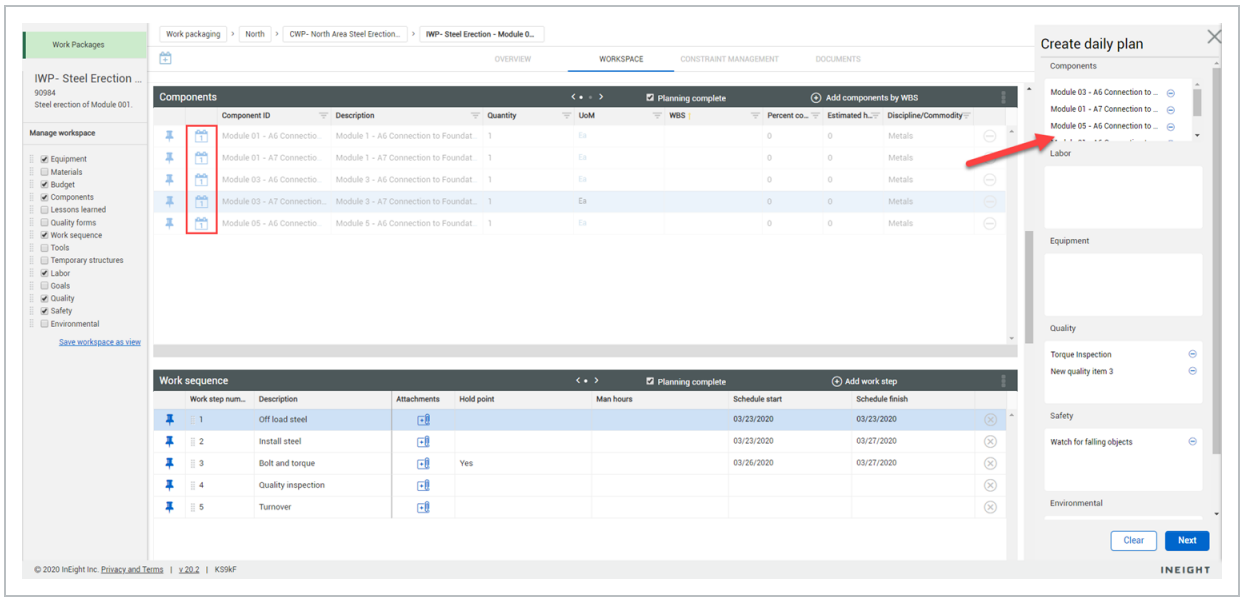


6. Click on the **Daily Plan** icon.



- This opens the Daily Plan Wizard slide-out panel

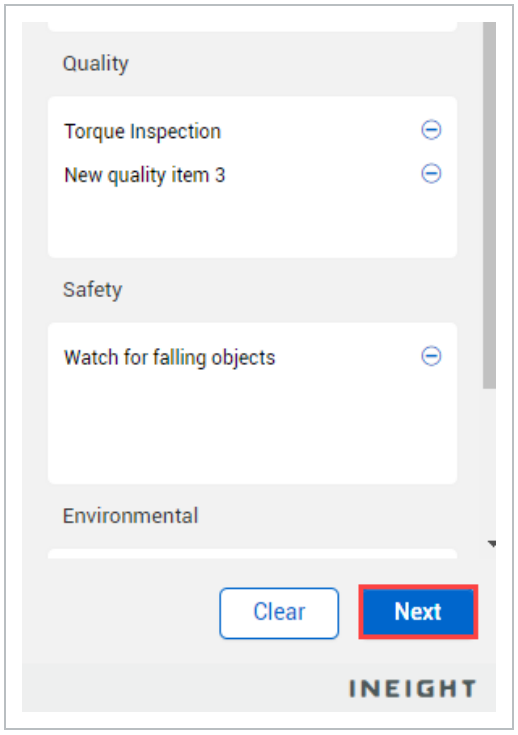
7. With the Daily Plan Wizard open, select the components, resources, etc. that you want to copy by clicking on the calendar icon from your data blocks.



- Your selections are shown in the Wizard

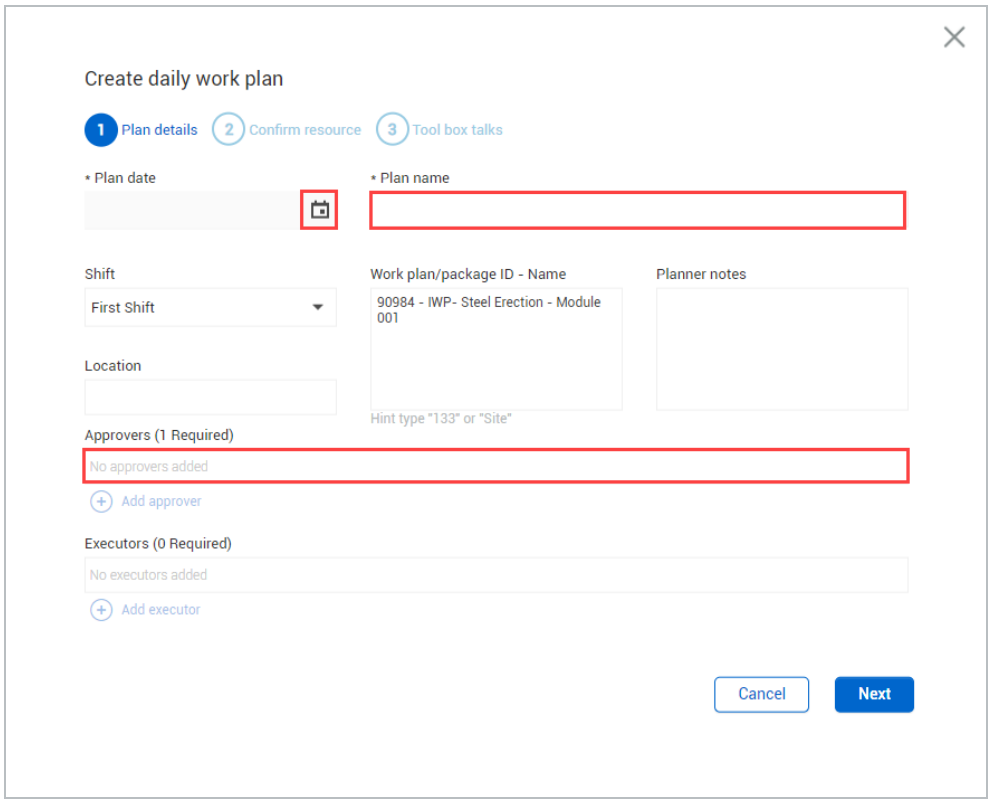
> **NOTE** Not all data blocks can be copied. If no calendar icon is shown, that data block is not available to be populated in daily planning. Activity components can only be used if they can be claimed in Plan Quantity tracking. Labor and equipment can only be used if they are active in the project date range.

8. When finished, click **Next** on the Daily Plan Wizard.

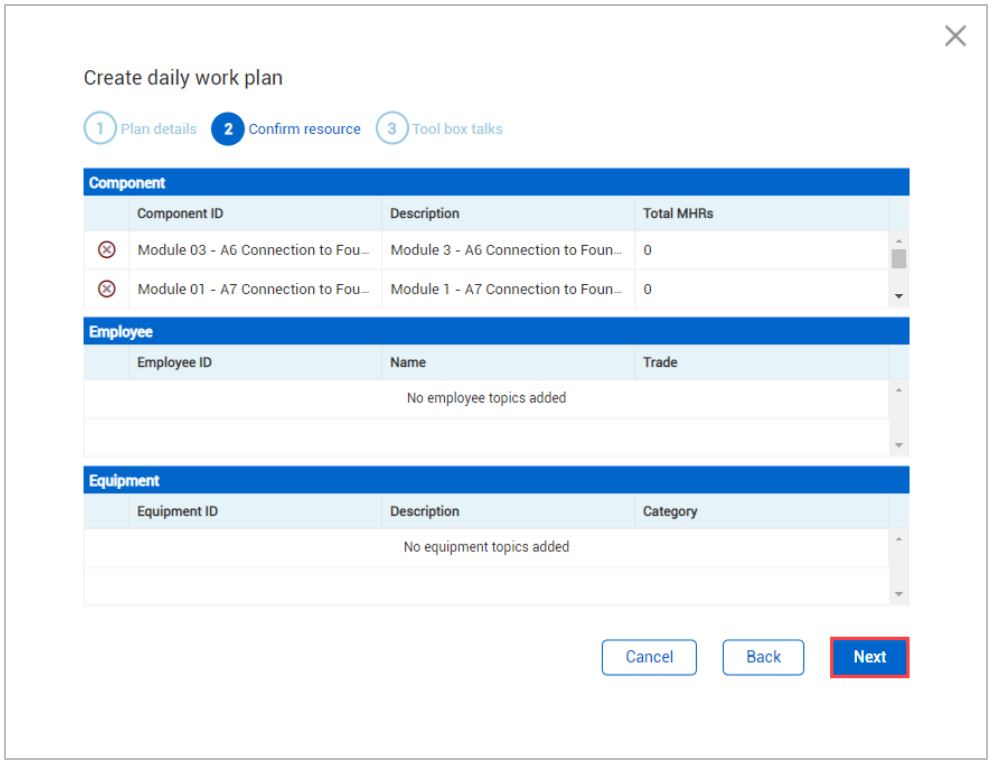


9. Enter your new daily plan details.

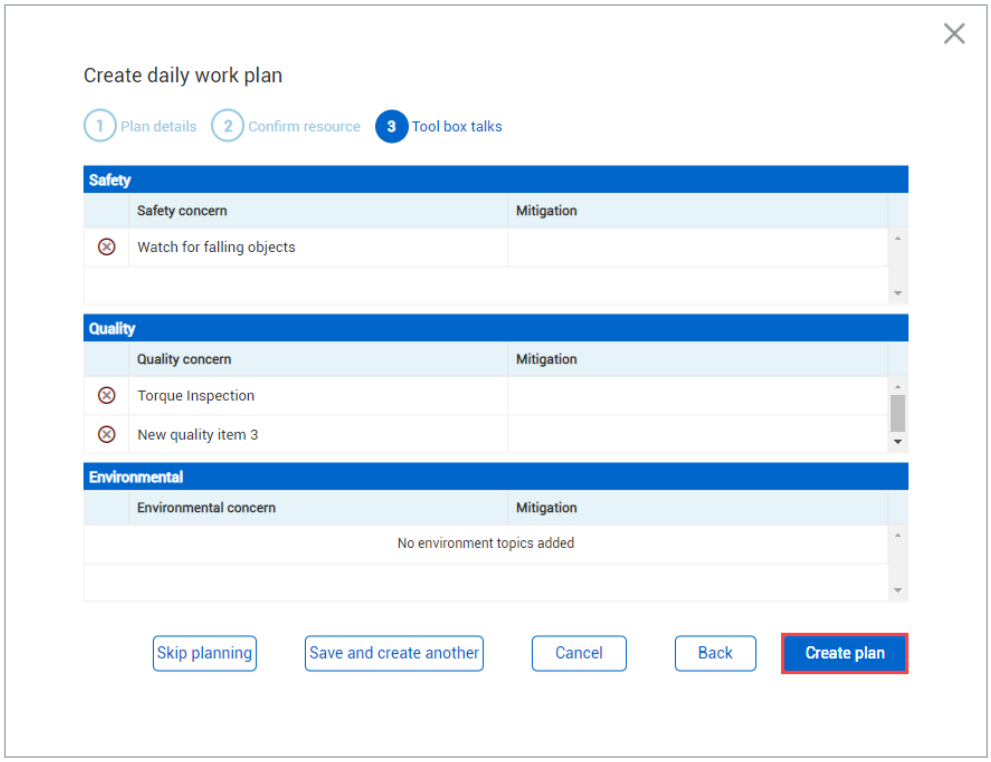
NOTE You can complete and edit these daily plan details at any point. Notice that only some fields are required to create a new daily plan.



10. Click **Next**.
11. Confirm that all your selected components and resources are correct for your new daily plan. Then, click **Next**.



12. Verify that everything is correct for the Tool box talks section. Then, click **Create plan**.



- Once created, you can edit your new daily plan by navigating to Progress > Daily Planning page > My Daily Plans Tab

3.5 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.

You can also create a daily plan in InEight Progress from a work package. For more information, see Daily Plan from Work Package.

3.5.1 Work Package Overview Tab

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

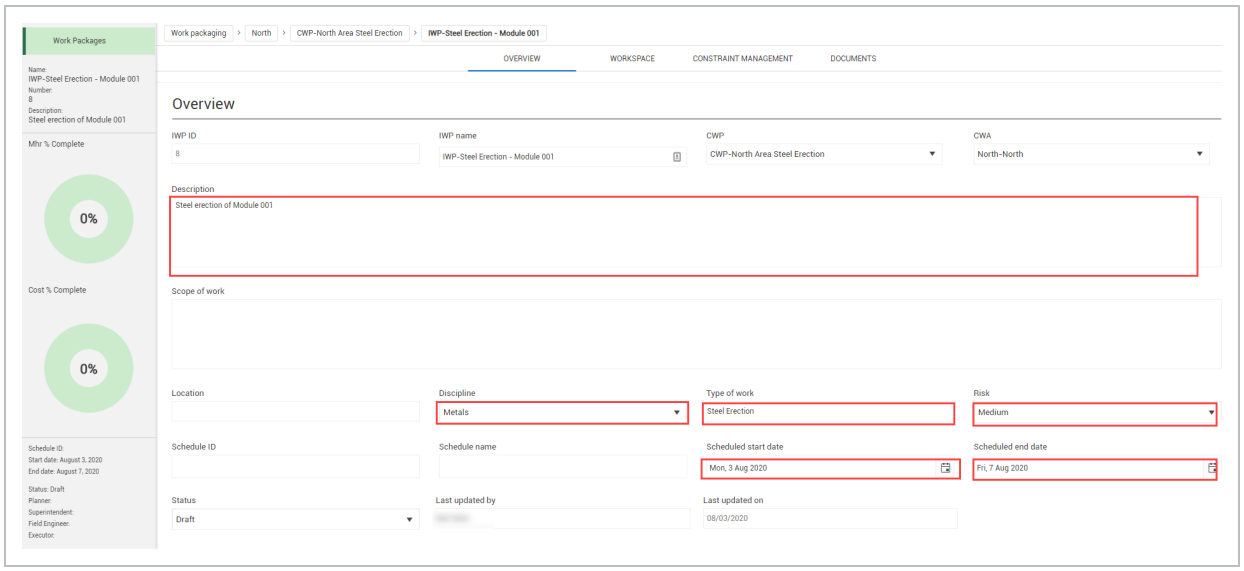
- The engineer may be different for this particular package and might report to a different engineer than assigned at the CWP level
- The IWP's start and end dates might also be a smaller time period than the CWP's schedule start and finish dates

TIP You can also edit IWP fields from the grid view of the parent construction work package. From the Work packages tab of a construction work package, you can click in fields in the grid, and then type or select values instead of opening each installation work package to change values.

Installation Work Package Overview

1. On the Work plans/packages page, select the **hyperlink ID** of your installation work package.
2. In the Overview tab of your installation work package, enter a description in the Description field.

3. From the drop-down list in the Discipline field, select a discipline.
4. For Type of work, input short description.
5. From the drop-down list in the Risk field, select a risk level.
6. Select a Start and End date.
7. Select a Planner.
8. Select a Superintendent.
9. Select an Engineer.
10. Select an Executor.



3.5.2 Installation Work Package Workspace Tab

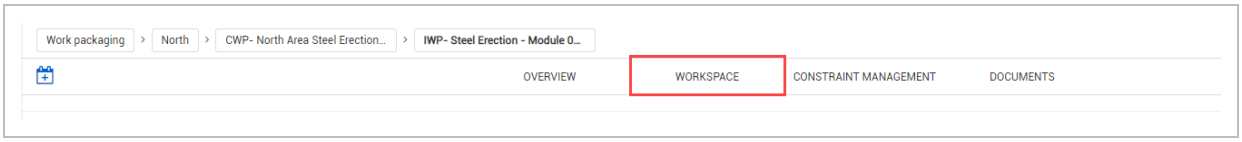
The Workspace tab is where the majority of your planning is accomplished. Here you can enter the planned labor, materials, equipment, components, among other aspects of the plan. You enter these details using data blocks. Some data blocks are open entry fields, such as safety, environmental, and work sequence. However, other data blocks use validated fields based off previously entered information. These include Budget, Component, and Equipment data blocks.

NOTE	The Labor data block is an open entry field, unless you enter an actual labor resource.

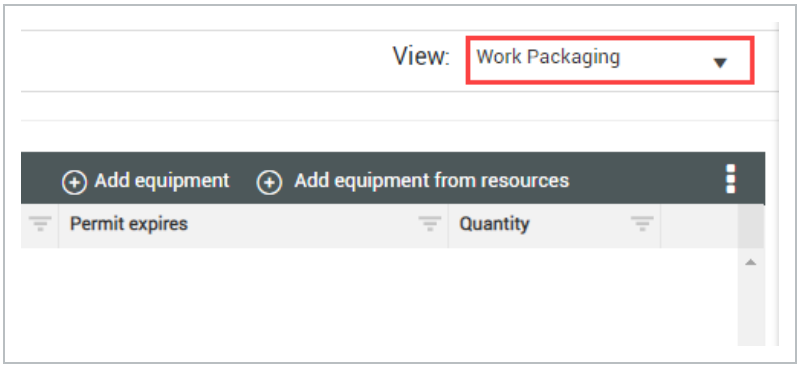
TIP	You can track materials assigned as constraints in work packages by integrating with Intelliwave. See Enable external material tracking integrations for more information.

Installation Work Package Workspace

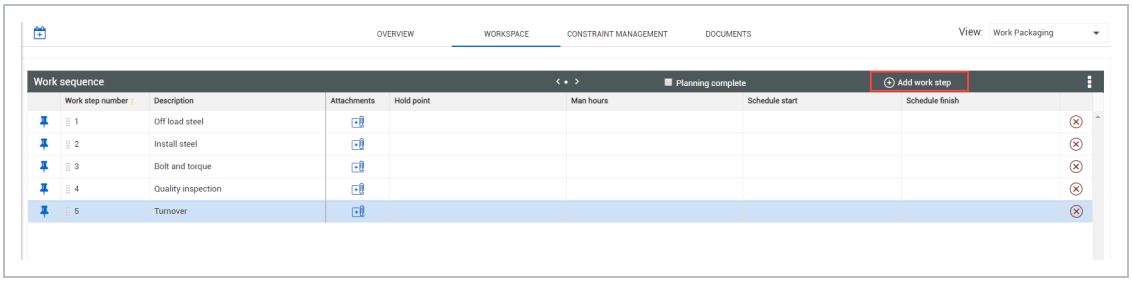
1. On the Work Packages tab of the Work plans/packages page, select the **hyperlink ID** of your installation work package.
2. From the Installation work package page, select the **Workspace** tab.



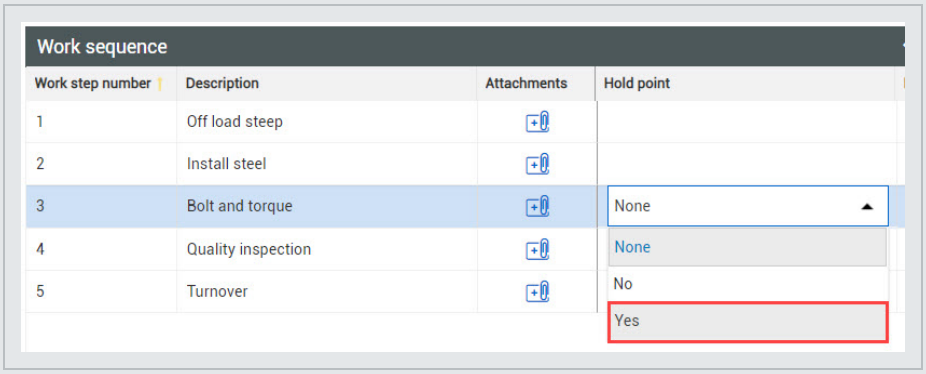
3. Select the **View menu** and change your view to your previously created viewset (see *General Navigation*).



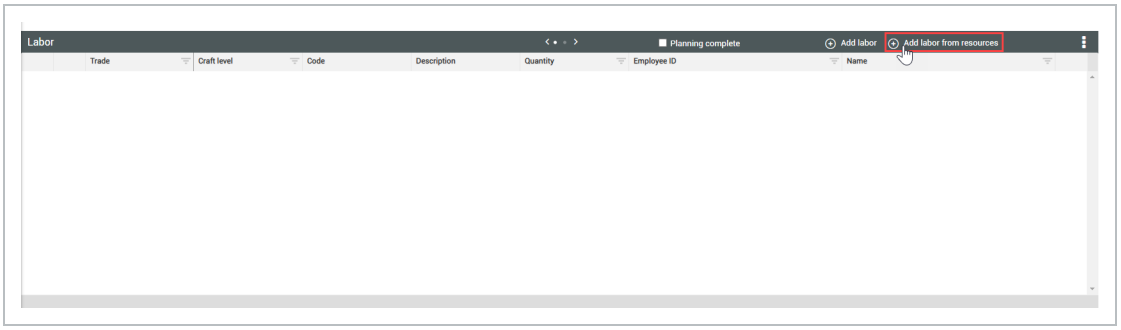
4. In the **Work sequence** data block, add work sequence steps by clicking on the **Resource** button and enter details for your project.



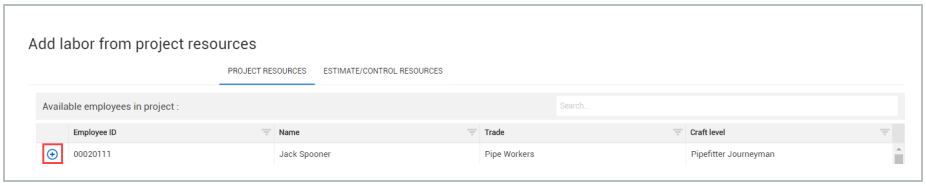
NOTE Create a hold point by clicking in the Hold Point field and select **Yes**.



5. In the Labor data block, add labor by clicking **Add labor from resources** and enter details for your project.



6. In the new dialog box's Project Resources tab, search for employee names and click the **Add** icon and enter details for your project.

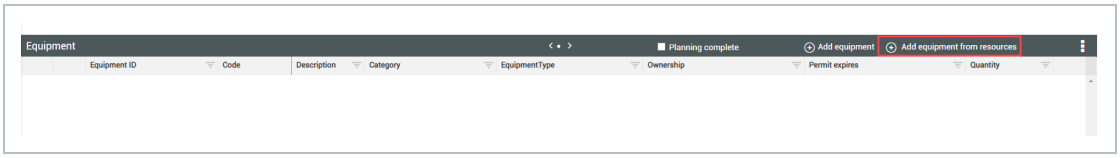


TIP You can search based off any of the fields associated to the employee (e.g., Employee ID, Trade).

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.

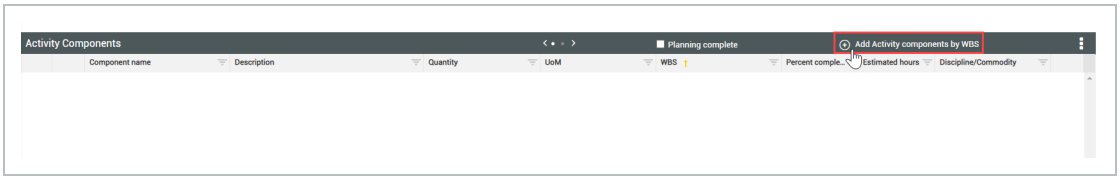
> **NOTE** You can also add generic labor from assigned WBSs in the Estimate/Control Resources tab. You must first add a component associated with the appropriate WBS to the IWP.

7. In the Equipment data block, add equipment by selecting **Add equipment from resources** and enter details for your project.



> **NOTE** You can also add generic equipment from assigned WBSs in the Estimate/Control Resources tab. You must first add a component associated with the appropriate WBS to the IWP.

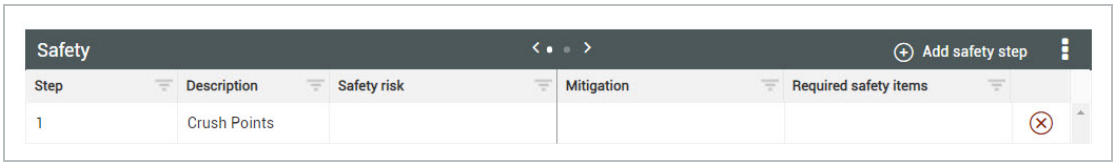
8. In the Activity Components data block, add equipment by clicking **Add Activity components by WBS** and then entering details for your project.



> **NOTE** A component can only be present in one package at a time. It cannot be in both the CWP and its child IWP due to percent complete tracking purposes.

> **NOTE** If the work package is assigned to a work area, the activity component's location is updated to the work area in Quantity tracking and can no longer be changed in that module.

9. In the Safety data block, add steps by clicking **Add safety step** and enter details for your project.



10. 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.

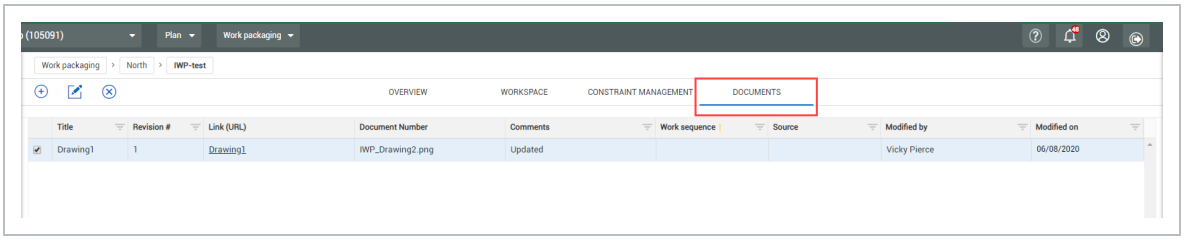
3.5.3 Installation Work Package Constraint Management Tab

In the Constraint Management tab, you can review items pinned in the Workspace tab or manually add new constraints. For more information, see Constraint Management.

3.5.4 Installation Work Package Documents Tab

Add, edit, and share IWP documents from the Documents tab. As documents are updated, get the latest information by looking for the revision number, modifier, and date of modification.

You can add attachments to the Lesson learned, Quality forms, Temporary structures, and Work sequence data blocks from the Workspace tab. These additions show in the Documents tab.



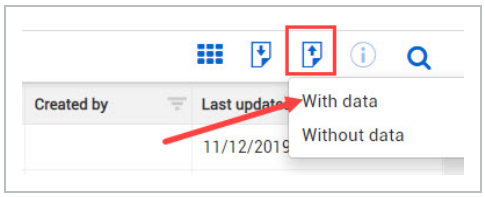
3.6 WORK PACKAGE IMPORT AND EXPORT

3.6.1 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.

Create Work Packages from Excel Import

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

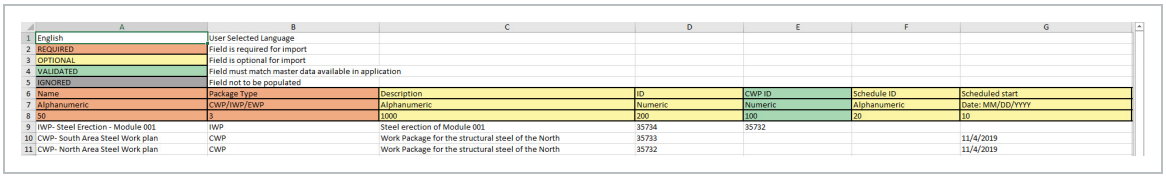


TIP

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

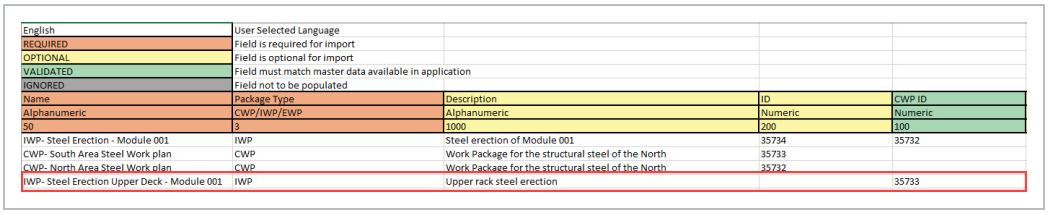
Excel templates with data are typically used to update existing work plans/packages.

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



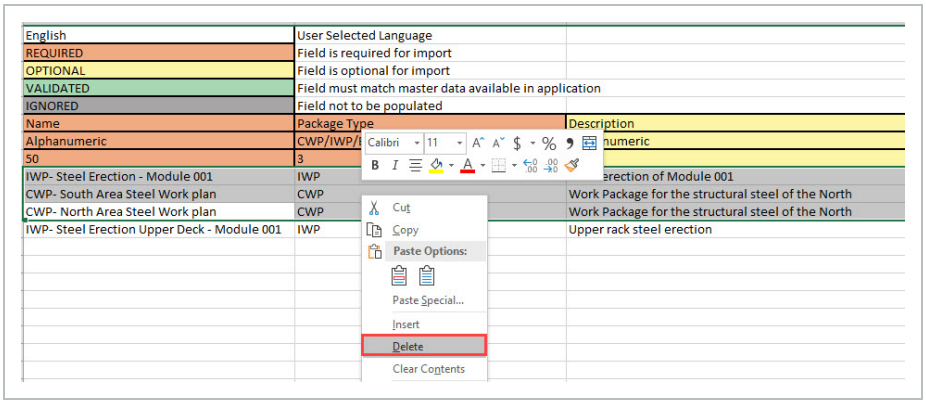
	A	B	C	D	E	F	G
1	English	User Selected Language					
2	REQUIRED	Field is required for import					
3	OPTIONAL	Field is optional for import					
4	VALIDATED	Field must match master data available in application					
5	IGNORED	Field not to be populated					
6	Name	Package Type	Description	ID	CWP ID	Schedule 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 information for the following categories:
    - Name
    - Package Type
    - Description
    - Assign the proper CWP to your work package in the CWP ID field



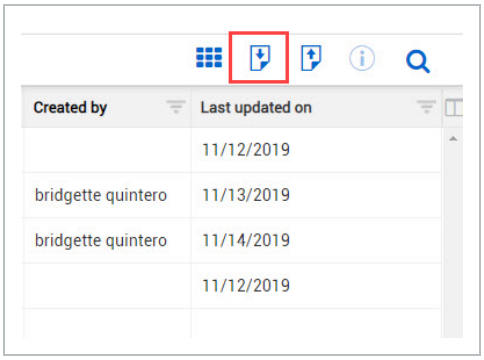
English	User Selected Language			
REQUIRED	Field is required for import			
OPTIONAL	Field is optional for import			
VALIDATED	Field must match master data available in application			
IGNORED	Field not to be populated			
Name	Package Type	Description	ID	CWP ID
Alphanumeric	CWP/IWP/EWP	Alphanumeric	Numeric	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.



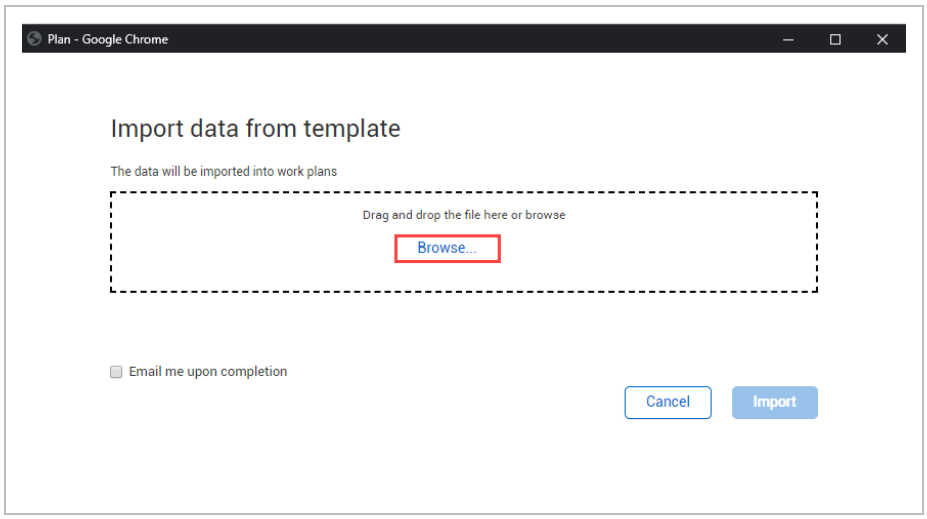
NOTE When you import a template to Work packing with a blank value in a field, the previous value is not deleted. If want to delete a value when importing, you must type null in the field.

5. Save this Excel file to your desktop.
6. In InEight Plan, on the Work plans/packaging page, click the **Import icon**.



- An Import data from template window appears

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

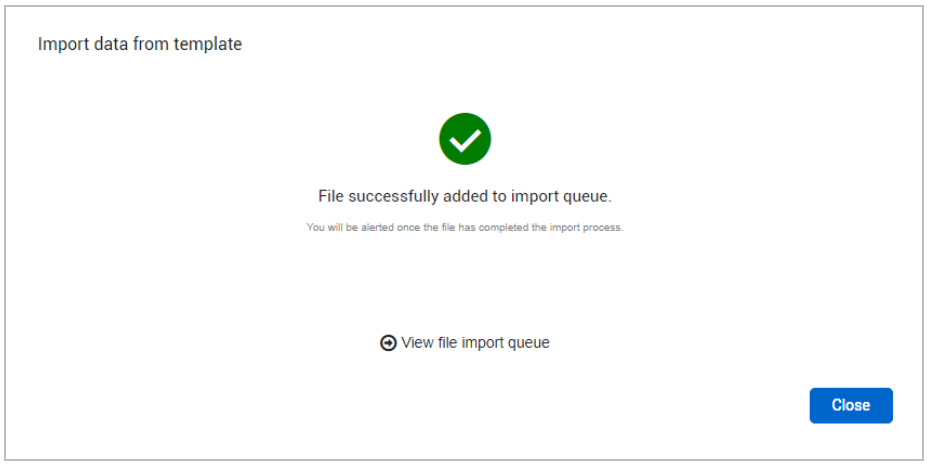


8. Click **Import**.
    - The import file is added to the import queue
    - To see all your import files and their statuses, click **View file import queue**

> **NOTE** You can continue working in the application while your imports are processed. A notification tells you if your file is imported successfully or not.

> **TIP** If you have an error, check that the name of your work package is not the same as an existing work package.

9. Click **Close**.



3.6.2 Export to Another Project

The following Step by Step shows you how to export some or all of a work package to another project.

3.6 Step by Step 1 — Export Work Package to Another Project

1. Select a work package.
2. Click the **Export** icon, and then select **To other project** from the drop-down list.
    - The Export work packages dialog box opens
3. Select a destination project, and then click **Next**.

    NOTE You must have permission to create work packages in the destination project to export to that project.

4. Select the pages and individual data blocks you want to export.

    NOTE The Documents page is shown in the dialog box but cannot be selected to copy.

    NOTE You can only export data that is entered as free text. You cannot export project-specific data such as components.

5. Click **Export**.

3.6.3 Import from Another Project

The following Step by Step shows you how to import some or all of a work package from another project.

3.6 Step by Step 2 — Import Work Package from Another Project

1. Select a work package.

    NOTE You must have permission to create work packages in the destination project to import into that project.

2. Click the **Import** icon, and then select **From other project** from the drop-down list.

- The Import work packages dialog box shows

3. Select an origin project, and then click **Next**.
4. Select origin work packages, and then click **Next**.

> NOTE You can import from multiple work packages at the same time.

5. Select the pages and individual data blocks you want to import.

> NOTE The Documents page is shown in the dialog box but cannot be selected to copy.

> NOTE You can only import data that is entered as free text. You cannot import project-specific data such as components.

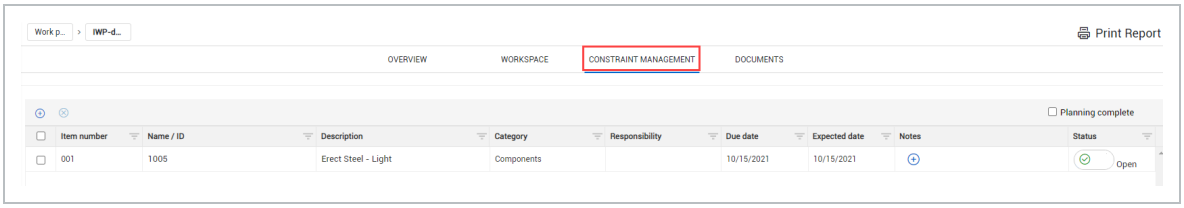
6. Click **Import**.

3.7 CONSTRAINT MANAGEMENT

This topic describes the Constraint Management tab of an installation work package (IWP).

3.7.1 Summary

You can define constraints on a work package's completion in several ways and manage all of them on the Constraint Management tab. Constraints can be added manually or by pinning items from the IWP Workspace tab.



Constraints are organized into categories, most of which correspond to the data blocks of the Workspace tab:

- Equipment
- Materials
- Budget
- Components (activities)

- Lessons Learned
- Quality Forms
- Work Sequence
- Tools
- Temporary Structures
- Labor
- Quality
- Safety
- Environmental
- Contract Components
- Work packages

Each constraint can be assigned to a responsible party and given due dates, expected dates, and notes. Constraints have a status of either Open or Closed and can be changed to show whether they are resolved or not.

3.7.2 Considerations

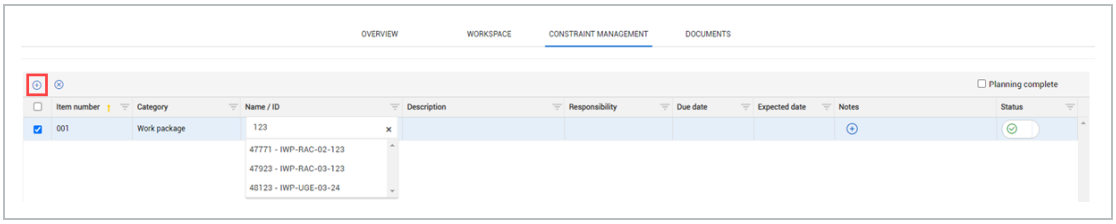
- Some constraints, such as work packages, can have their status automatically updated. When a work package tagged as a constraint has a status of Construction complete, its related constraint's status changes to *Closed*.
- You can track materials assigned as constraints in work packages by integrating with Intelliwave. See Enable external material tracking integrations for more information.
- If you pin a material component as a constraint, associated notes on the Constraint management tab can contain notes sent from Intelliwave.
- Each note is limited to 500 characters and does not support any special formatting.

3.7.3 Add a constraint

You can add constraints manually in the Constraint Management tab or by pinning them in the Workspace tab.

3.7 Step by Step 1 — Manually add a constraint

1. Open an IWP.
2. Click **Constraint Management** at the top of the page.
3. Click the **Add** icon in the upper left of the table. A new constraint is added with the Item number column automatically filled in.



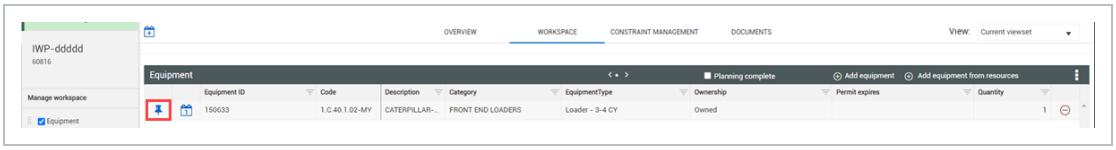
4. Click in the blank field under the Category column, and then select a category from the drop-down list.
5. Type a name under the Name / ID column.

> **NOTE** If you select Work package as the category, the Name / ID field searches for work packages with matching names or IDs in your project.

6. Enter additional information in the remaining fields, as necessary.

3.7 Step by Step 2 — Pin a constraint from Workspace

1. Open an IWP.
2. Click **Workspace** at the top of the page.
3. Select the check box next to the data block that you want to open.
4. Click the **Send as Constraint** icon on the left side of the data block for the record you want to pin as a constraint. The record is added to Constraint Management as a constraint.



5. Open the **Constraint Management** tab, and then fill out additional fields for the new constraint, as necessary.

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