PLAN USER GUIDE WORK PACKAGING



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# CONTENTS

LESSON 1 – WORK PACKAGING OVERVIEW	9
1.1 Plan Work Packaging Overview	. 10
1.1.1 InEight Plan Work Flow	
1.1.2 Work Packaging	
1.1.2.1 Work Package Details	
1.1.2.2 Comprehensive Workflow	
LESSON 2 – GENERAL NAVIGATION	. 17
2.1 Page Navigation	18
Navigate to the Work Plans Module via the Project Home Page	19
Navigate to the Work Plans Module via the Navigation Bar	20
2.1.1 Construction Work Areas (CWA) Page	22
2.1.2 Construction Work Packages (CWP) Page	23
2.1.3 Installation Work Packages (IWP) Page	23
2.2 Columns	24
2.2.1 Move Columns	24
Move Columns	24
2.2.2 Sort Columns	24
Sort Columns	
2.2.3 Column Chooser layout	
2.2.4 Filter Columns	
Filter Columns	
2.3 Data Blocks	
2.3.1 Add Data Blocks	
Add Data Blocks	
2.3.2 Navigate Data Blocks	
2.3.3 Manage Data Blocks	
2.3.3.1 Context Menu	31

Use the Context Menu	31
2.3.3.2 Resource Button	32
2.3.3.3 Daily Plan Icon	32
Add and Manage Data Block Contents	34
2.3.3.4 Pin Icon	35
2.3.3.5 Completion Indicator	36
2.4 Viewsets	37
Create a Viewset	37
2.4.1 Send a viewset	37
Send a viewset	38
2.5 Query Builder	41
2.5.1 Add a Query	41
Add a Query	42
	40
LESSON 3 – WORK PACKAGE MANAGEMENT	<b>43</b> 44
3.1 InEight Plan Workflow - Work Package Management	
3.2 Work Package Management Overview	
3.2.1 What is Advanced Work Packaging (AWP)?	
3.2.2 Work Packages	
3.2.2.1 Construction Work Package (CWP)	
3.2.2.2 Installation Work Package (IWP)	
3.3 Work Package Creation	
3.3.1 Create a Construction Work Package (CWP)	
Create a Construction Work Package (CWP)	
3.3.2 Edit Work Packages	51
Edit a Work Package	
3.3.3 Copy Work Plans	
Copy a Work Package	53
3.3.4 Create an Installation Work Package (IWP)	
Create an Installation Work Package (IWP)	
3.3.5 Engineering work package (EWP)	
3.3.6 Group Work Packages	
Group a Work Package	
3.3.7 Link activity components	
3.3.7.1 Daily plan creation with all linked project values	
3.4 Daily Plan from Work Package (Daily Plan Wizard)	
3.4.1 What is a Daily Plan?	67
3.4.2 Daily Plan Wizard	67
Create a Daily Plan Using the Daily Plan Wizard	69

3.5 Installation Work Package Details	75
3.5.1 Work Package Overview Tab	75
Installation Work Package Overview	76
3.5.2 Installation Work Package Workspace Tab	77
Installation Work Package Workspace	77
3.5.3 Installation Work Package Constraint Management Tab	80
3.5.4 Installation Work Package Documents Tab	81
3.5.4.1 Generate Package	81
3.5.4.2 Linked Document Package	82
3.5.4.3 Define Revision for IWP report	
3.6 Work Package Import and Export	84
3.6.1 Import Template	84
Create Work Packages from Excel Import	84
3.6.2 Export to Another Project	87
3.6 Step by Step 1 – Export Work Package to Another Project	87
3.6.3 Import from Another Project	88
3.6 Step by Step 2 – Import Work Package from Another Project	88
3.7 Constraint Management	88
3.7.1 Summary	88
3.7.2 Considerations	89
3.7.3 Add a constraint	90
3.7 Step by Step 1 – Manually add a constraint	90
3.7 Step by Step 2 – Pin a constraint from Workspace	91
Exercise 3.1 – Enter Work Package Details	92

# **STEP-BY-STEP PROCEDURES**

Navigate to the Work Plans Module via the Project Home Page	19					
Navigate to the Work Plans Module via the Navigation Bar	20					
Move Columns	24					
Sort Columns	25					
Filter Columns	26					
Add Data Blocks	29					
Use the Context Menu	31					
Add and Manage Data Block Contents	34					
Create a Viewset	37					
Send a viewset	38					
Add a Query	42					
Create a Construction Work Package (CWP)	49					
Edit a Work Package	52					
Copy a Work Package	53					
Create an Installation Work Package (IWP)	56					
Group a Work Package						
Create a Daily Plan Using the Daily Plan Wizard	69					
Installation Work Package Overview	76					
Installation Work Package Workspace	77					
Create Work Packages from Excel Import	84					
3.6 Step by Step 1 – Export Work Package to Another Project	87					
3.6 Step by Step 2 – Import Work Package from Another Project	88					
3.7 Step by Step 1 – Manually add a constraint	90					
3.7 Step by Step 2 – Pin a constraint from Workspace	91					

# **EXERCISES**

Exercise 3.1 – Enter Work Package Details	92

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# LESSON 1 – WORK PACKAGING OVERVIEW

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# 1.1 PLAN WORK PACKAGING OVERVIEW

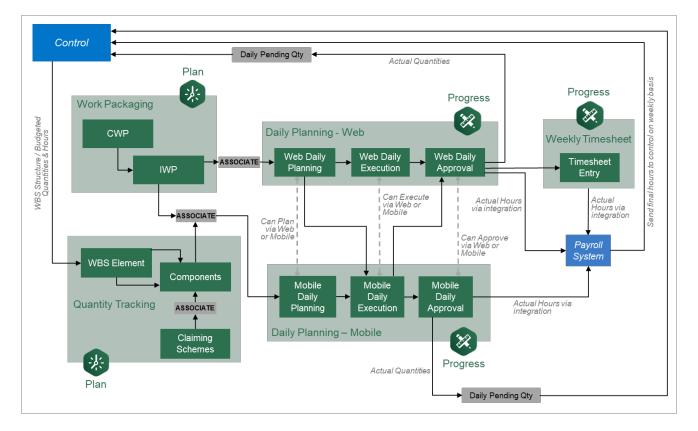
InEight Plan is an application within the InEight portfolio of products. It is a tool for engineers and superintendents to plan their work and track quantities during the construction of the project.

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.					

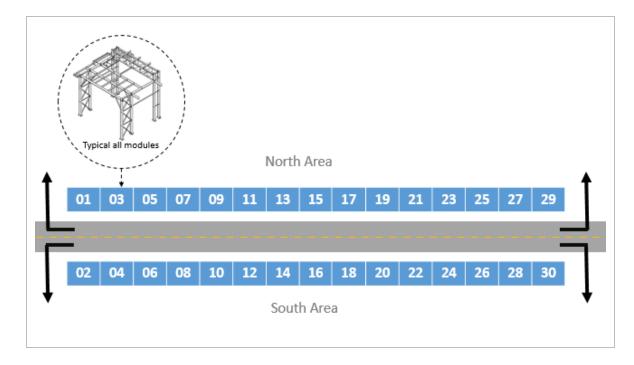
### 1.1.1 INEIGHT PLAN WORK FLOW

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

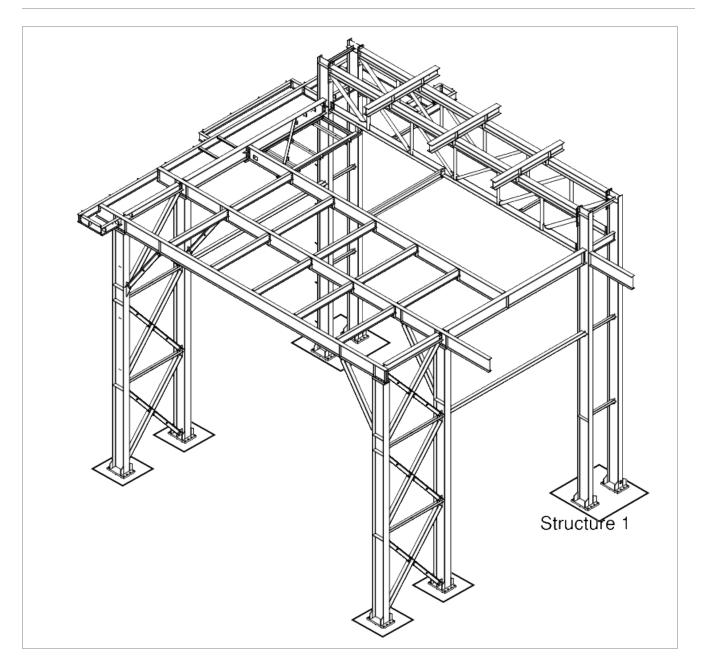


#### Scenario

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.

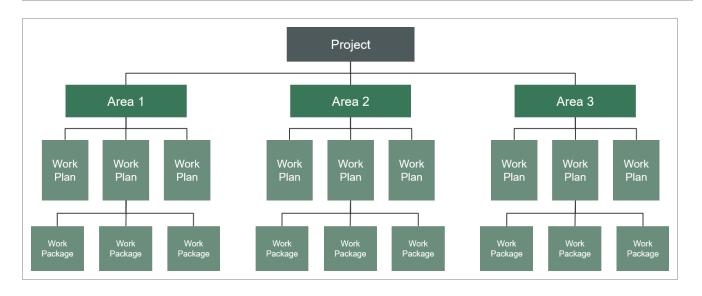


The image below depicts a layout for a steel structure project. The project consists of erecting 30 separate steel structures on opposite sides of a road. Each structure or module has been assigned a number 1-30.

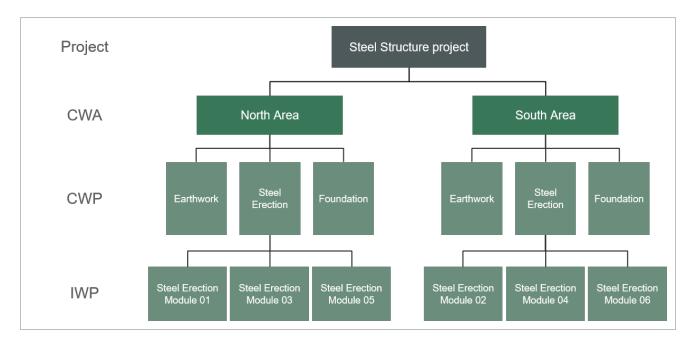


## **1.1.2 WORK PACKAGING**

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:

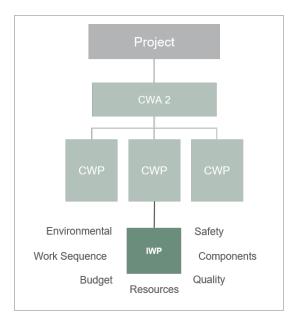


#### **1.1.2.1 WORK PACKAGE DETAILS**

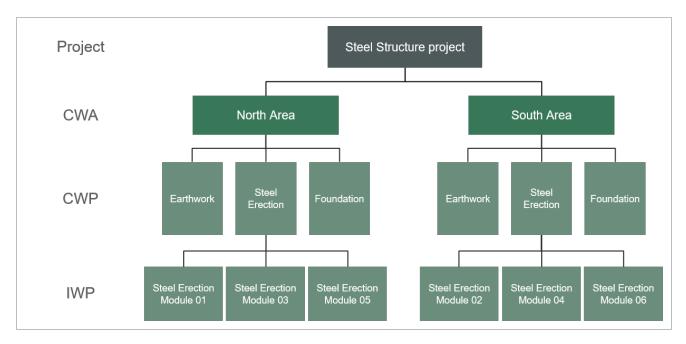
Work package details include the following information:

- 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.



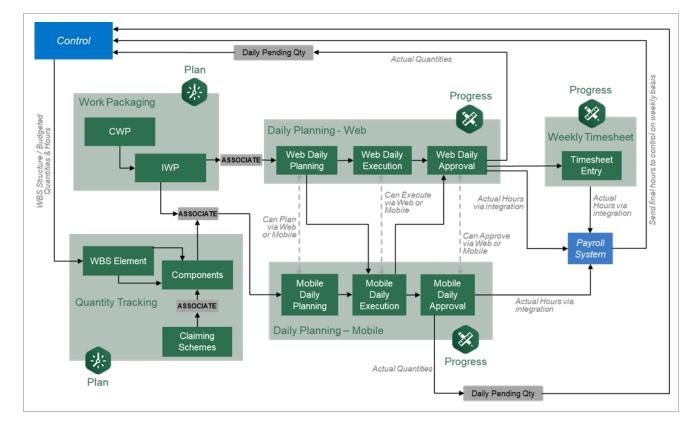
NOTE In Work Package Management, you will learn about work plans and work packages in detail, including how to create them and define plan details.

#### 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.



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# LESSON 2 – GENERAL NAVIGATION

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## 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.

			PF	ROJECTS	ORGANIZATIONS			
•							i	Q
	ID↑	Name		Status 📃	Organization	Created by	Created on	
	105091	Steel Structure Job		Active	S100000 - (PKS Inc)	jeremy cheek	06/04/2018 3:30:2	6 PM

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.

io <sup>+</sup>	8 Links	Control		② Quantity	tracking		
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Ar r documentation	InEight University	() Work packaging		🛞 Daily plan	nning		
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Project library			Launch			L	Launch
Plan							
Quantity tracking Work packaging	📮 Project notes	Contracts		③ Supporting	ng documents		_
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	Project and application settings			Awarded	Unawarded		
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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.

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Add project image			Manage budgets and forecasts	Build components and document quantities
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Daily planning		•	0 0 0	Projected contract \$0.00

### 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**.

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#### 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	View notifications, user profile and log out.

#### Overview - Work Plans/Packages Page (continued)

	Title	Description
	User Profile	
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.
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.

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	-	<b>1</b> 1	2 D South		South										09/06/2018	
			Unassociated packages													

### 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.

### Overview - Area/Construction/Installation Work Packages Pages (continued)

	Title	Description
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. 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

Work Packages	Work packa	ging > North					c	ONSTRUCTIO	ON WORK PACKAGES	CONSTRUC	TION WORK AREA OVER	VIEW 2					_	
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th	□ <b>×</b> w	ork package name		-	Description	Schedule ID	👻 Start o	late 📑	End date	\Xi Total man hours	\Xi Mhr % comp	Cost % comp	Status	-	Created by	ΞL	ast updated on	E
cription: th		CWP-North Area Ste	el Er 7		Work package for structural s.		08/03	/2020	08/14/2020		0 0.00%	0.00%	Draft		Neil Stein	0	18/03/2020	
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# 2.1.2 CONSTRUCTION WORK PACKAGES (CWP) PAGE

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cription:		Work package name	ID T	Description		Schedule ID	-	Start date	\Xi End da	ite 👘	Total man hours	-	Mhr % comp	Cost % comp	Status	-	Created by	-	Last updated on	5
rk package for structural steel		F IWP-Steel Erection - Module	8	Steel erect	ion of Module 0			08/03/2020	08/07	2020		0	0.00%	0.00%	Draft		Neil Stein		08/03/2020	
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d Engineer																				
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## 2.1.3 INSTALLATION WORK PACKAGES (IWP) PAGE

		OVERVIEW WORKSPACE	CONSTRAINT MANAGEMENT DOCUMENTS	2		
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6 Overv	view					
f Module 001		IWP name	CWP		CWA	
8		IWP-Steel Erection - Module 001	CWP-North Area Steel Erection	•	North-North	
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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.

We	ork plans					
A	ctions - (+) (+) (×					
	℅ Work package name	ID T	Description	Schedule ID	Start date	End date
	D North		North			

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

Worl	plans					
Act	ions ▼ (+) (+) ⊗ ΣΞ CΞ	► Descriptior	-	Schedule ID 📃	Start date	End date
	□ North	North	Description		Start date	End date
	🗅 South	South				
	V 🗅 Unassociated packages					

### 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

Description	Schedule ID	= Start date	e

- 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 COLUMN CHOOSER LAYOUT

In quantity tracking, the Lock icon shows to the right of each column's name in the Selected columns section of the dialog box. To lock a column's position, click the unlocked icon next to the column name. The unlocked icon changes to solid blue, and the column position cannot be moved.

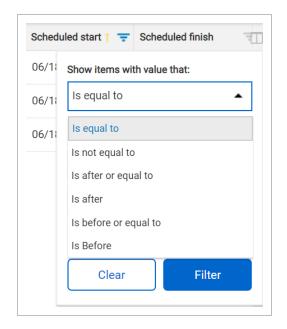
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		Name	Parent record	Assembly	Туре	Discipline /	Commodity	Claiming sche	me WBS			Quantity	Т	o date quant	ity L	Mol		% Complete	WBS forecast Q	TY I	WBS planned QTY	WBS to date
		T	T		T	T	* <u>7</u>	v	T		T		T		T	v	T	T		T	T	
		7300006803-1-2			Contract	Contract		Contract				2	00000		2.00000 E	a		100.00000				
		7300006803-1-1			Contract	Cont					_				×	-		100.00000				
		7300006803-1			Contract	Cont												0.00000				
		7300008924-1-1			Contract	Cont										are Meter		0.00000				
		7300008924-1			Contract	Cont	Mana	ge columns								are Meter		0.00000				
		A1040-copy-1			Activity	Grad												0.00000	11,239.34400		11,981.43894	11,215.09269
		A1040-copy			Activity	Grad	Available	columns			Selecti	ed columns						100.00000	11,239.34400		11,981.43894	11,215.09269
		Luke Nov 14.033-c			Activity	Over												0.00000				
		Luke Nov 14.001-2			Activity	Over	Search							Q.				150.00000 📐				
		Luke Nov 14.001-2	Defect testing 2	Defect testing 2	Activity	Over		Column Name	i i	ì		Parent record		•				0.00000				
		Luke Nov 14.001-1			Activity	Over		11jul-test		>		Assembly		4 T	r			0.00000				
		Luke Nov 14.001			Activity	Over	0	Account code		*	0	Claiming sch	eme	÷ .	₽			30.00000				
		Updated name usin			Activity	Over	-	Account Code Des	cription		0	WBS						100.00000				
		Luke Nov 14.033			Activity	Over	-	Account Code Num										0.00000				
		Luke Nov 14.032			Activity	Over	-					Discipline / Commodity		4				0.00000				
		Luke Nov 14.031			Activity	Over	0	Account descriptio	n				_					0.00000				
		Luke Nov 14.029			Activity	Over		Actual Length			0	Type	_	6				0.00000				
		Luke Nov 14.028			<ul> <li>Activity</li> </ul>	Over								-				0.00000				
		Luke Nov 14.027			Activity	Over							ancel	Save				0.00000				
		Luke Nov 14.017			Activity	Over						Ľ		Galle				0.00000				
		Luke Nov 14.026			Activity	Overhead		Overhead			_	0.	00000	(	0.00000			0.00000				
		Luke Nov 14.016			Activity	Overhead		Overhead				0.	00000	(	0.00000			0.00000				
		Luke Nov 14.015			Activity	Overhead		Overhead				0.	00000	(	0.00000			0.00000				
		Luke Nov 14.025			Activity	Overhead		Overhead														

## 2.2.4 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**.

how items Is equal to 6/18/2018		hat:	•
6/18/2018		⊡	•
	8	⊡	
And			
Anu 🔻			
Is equal to			•
		$\Box$	
Clear	r	Filte	er
		s equal to Clear	

- 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

Ŕ	Steel Structure Jo	ob (105091) 🔹 Plan 👻 Work packagi	g 🔻		? 8
V	Vork plans	MY WORK PLANS	ALL		
	Actions 👻 ( 👘			Ć	j 🖻 (i) 🗨
	♥ ID	Description	Name	Scheduled start † 📃 \Xi	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
	<b>4758</b>		Structural Steel Mobilization	06/18/2018	06/19/2018

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

Scheduled star	Scheduled finish
06/18/2018	Show items with value that:
06/18/2018	Is equal to 🗸
06/18/2018	6/18/2018
	And 👻
	Is equal to
	Ċ
	Clear

# 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.

# 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.

Work Packages	Work	k packaging	> North > CWP- North	Area Steel Erecti	ion > IWP- Steel	Erection - Module	0						
work Packages	Ê					OVERVI	W WORK	SPACE CONSTRAINT M	ANAGEMENT DOCUMENT	S		View: Work Packa	ging
P- Steel Erection	Com	ponents						<>	Planning complete		Add component	ts by WBS	
el erection of Module 001.		C	omponent ID	\Xi Descrip	ption		- Quantity	UoM	🐨 WBS	· Percent complete	Estimated hours	Discipline/Commodity	
age workspace	<b>#</b>	11 M	lodule 01 - A6 Connection t	Fou Modul	le 1 - A6 Connection t	to Foundation	1	Ea		0	0	Metals	Θ
) Equipment	#	1 M	lodule 01 - A7 Connection t	Fou Modul	le 1 - A7 Connection t	to Foundation	1	Ea		0	0	Metals	Θ
Materials Budget	#	1 M	lodule 03 - A6 Connection t	Fou Modul	le 3 - A6 Connection t	to Foundation	1	Ea		0	0	Metals	Θ
Components Lessons learned	#	1 M	lodule 03 - A7 Connection t	Fou Modul	le 3 - A7 Connection t	to Foundation	1	Ea		0	0	Metals	Θ
Quality forms	Ŧ	1 M	odule 05 - A6 Connection t	Fou Modul	le 5 - A6 Connection t	to Foundation	1	Ea		0	0	Metals	Θ
Temporary structures Labor Goals Quality													
Temporary structures Labor Goals Quality Safety													
Temporary structures Labor Goals Quality Safety Environmental <u>Save workspace as view</u>	Work	sequence						<>	Planning complete		Add work	•	
Temporary structures ) Labor ) Goals ) Quality ) Safety ) Environmental <u>Save workspace as view</u>		Work step r	umber † Description		Atta		d point	< + > Man hours		Schedule start	Add work : Schedule	•	
Temporary structures ) Labor ) Goals ) Quality ) Safety ) Environmental <u>Save workspace as view</u>		Work step r	umber 1 Description Off load steel	_	Atta	•	d point			Schedule start	-	•	8
Temporary structures ) Labor ) Goals ) Quality ) Safety ) Environmental <u>Save workspace as view</u>	푸 푸	Work step r	Off load steel		Atta	•				Schedule start	-	•	8
		Work step r	umber 1 Description Off load steel		Atta	•				Schedule start	-	•	8

## 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).

(5) 105091 (Steel T)	raining Job) - Plan - Work packaging -
Work Packages	Work packaging > North
North	□     Work package name     □     ID     □
North	Image: CWP- North Area Steel Ere         90982           Image: CWP- Steel Erection         90984
	IWP- Steel Erection - Module 001

- 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.

Work packages	Work packaging > No
IWP- Steel Erection 35734 Steel erection of Module 001 Manage workspace	Work sequence Work step Description
<ul> <li>Equipment</li> <li>Materials</li> <li>Budget</li> <li>Components</li> <li>Constraint management</li> <li>Lessons learned</li> <li>Quality forms</li> </ul>	
Work sequence Tools Temporary structures Labor Goals Quality Safety	

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.

Work sequence	<•>	Planning complete	<ul> <li>Add work step</li> </ul>	:

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.

Work sequence	<• >	Planning complete	<ul> <li>Add work step</li> </ul>	:

#### USE THE CONTEXT MENU

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

Quali	ty				• •		P	lanning complete		🕂 Add quality ste	ep.	
		Step † 👘 😇	Description	Mitigation	-	Type of inspection		Inspector	 Spec		I&TP	Choose columns
Ŧ	1	1	Torque Inspection									Pop out to new windo
I	1	2	New quality item 2									Close

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.

(Steel Tra	aining Job) 👻 Plan 👻	Work packaging	•						
Work Packages	Work packaging > North > CWP	North Area Steel Erection	on > IWP- Steel Ere	ection - Module 0					
	Ŧ			OVERVIEW	WORI	KSPACE	CONSTRAINT MANA	GEMENT	DOCUMENT
Data block: choose colu	umns								×
hold	۹								
ALPHABETICAL	BY CATEGORY				Panel 1 〈・・〉				
Hold point		(click to c	hange)						
			Mitigation	Type of ins	Quality risk	Spec	I&TP	Tolerance	s
									*
									-
								Cancel	Done

- 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.

Qualit		Step † 📃 😇	Description -	Hold point
Ŧ	1	1	Torque Inspection	Yes
Ŧ	1	2	New quality item 3	
Ŧ	1	3	New quality item 2	

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.

							OVERVIEW	wo	RKSPACE	CONSTRAINT MA	NAGEMENT	DOCUMENTS		Create daily plan
										-				Labor
ualit	y							<>	🔳 Pla	nning complete				Equipment
		Step † 📼	Description	Hold point	👻 Qua	lity risk	- Mitigation		pe of inspection	Inspector	\Xi Spec			
F.	1	1	Torque Inspection	Yes									⊗ ^	
F.	1	2	New quality item 3										$\otimes$	
F.	1	3	New quality item 2										$\otimes$	Quality
													Ŧ	Torque Inspection 🕞
														Environmental
afety								<••>	🗖 Pla	nning complete			÷	
		Step †	-	Description	-	Safety risk			- Mitigation		-	Required safety ite		
F.	1	1		Crush points									⊗ ^	
L.	1	2		Watch for falling	objects								$\otimes$	

1 Plan details (2)	Confirm resour	rce (3) Tool box talks	
* Plan date		* Plan name	
	⊡		
Shift		Work plan/package ID - Name	Planner notes
First Shift	•	90984 - IWP- Steel Erection - Module 001	
Location			
Approvers (1 Required)		Hint type "133" or "Site"	
No approvers added			
+ Add approver			
Executors (0 Required)			
No executors added			
+ Add executor			

### ADD AND MANAGE DATA BLOCK CONTENTS

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

lualit	y									P	lanning complete		<ul> <li>Add quality step</li> </ul>	
		Step †	-	Description	Hold point	 Quality risk	\Xi Mi	tigation	 Type of inspection	-	Inspector	 Spec	👻 I&TP	
Ŧ	1		1	New quality item 3 🧹										$\otimes$
Ŧ	1	1	1	Torque Inspection	Yes									$\otimes$
Ŧ	1	2		New quality item 2										$\otimes$

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

Quali	ty						
		Step † 👘	Description	Ξŀ	Hold point	 Quality risk	
Ŧ	1		New quality item 3				
Ŧ	1	1	Tor New quality item 3	١	Yes		
Ŧ	1	2	New quality item 2				

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

Qu	ality		Description	Unidacia	
	. <u>1</u>	Step † 👻	Description = Torque Inspection	Hold point =	
		-		165	
	· ·	2	New quality item 3		
1	1	3	New quality item 2		
			selecting it then		

#### 2.3.3.4 PIN ICON

म म

1 3

New quality item 2

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.

 $\otimes$ 

Qualit	ty						<• •
		Step †	Ŧ	Description	-	Mitigation	-
Ŧ	1	1		Torque Inspection			
Ŧ	(11)	2		New quality item 2			

Nork	sequence			• > 🔳 Plan	ning complete	4 🕣	Add work step	
	Work step number †	Description	Attachments	Man hours	Schedule start		Schedule finish	
Ŧ	1	Off load steel	<b>+</b> 0					$\otimes$
Ŧ	<u>∥</u> 2	Install steel	•0					$\otimes$
Ŧ	∰ 3	Bolt and torque	FÛ					
Ŧ	ij 4	Quality inspection	ŦÛ					$\otimes$
Ŧ	5	Turnover	<b>+</b> 0					$\otimes$

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

ining Job) 🔹	Plan 👻 Work packaging 👻					?	Ų <sup>®</sup> ⊗	٢
Work packaging > North	CWP- North Area Steel Erection >	IWP- Steel Erection - Module 0						
		OVERVIEW	WORKSPACE	CONSTRAINT MANAGEMENT	DOCUMENTS			
Constraint management					Planning complete	<ul> <li>Add constraints</li> </ul>		
Item number	- Description	7	Category	- Responsibility	😇 Due date	👻 Status	-	
Item number	Description     Bolt and torque	÷	Category Work Sequence		😇 Due date	\Xi Status	-	× ^
				\Xi Responsibility	😇 Due date		-	× ^

- 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.

Quality	<ul><li></li></ul>	Planning complete	Add quality step	:

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

You can create a saved view of your page so that you can always revert to it. This saved view is called a viewset.

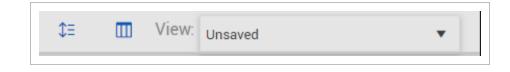
#### **CREATE A VIEWSET**

- 1. Select the **View** drop-down arrow to save your current view.
- 2. Select Save current viewset as from the viewset drop-down list.
- 3. In the dialog box, type a name.

ave this viewset a		
First Last Preferre	ed View	$\times$
	Cancel	Save
	Cancer	Save

4. Click Save.

When making changes to the quantity tracking layout, you will see an **unsaved view** option in the view menu. This lets you know changes have not been saved.



NOTE Each viewset is user-specific and can be used in any plan.

#### 2.4.1 SEND A VIEWSET

NOTE Certain permissions are needed to send viewsets to roles.

You can send views to all users that have a certain role. You can also send it to specific projects or full organizations. To send to a project, you must be a user on that project or in that organization.

#### SEND A VIEWSET

- 1. Open the viewset you want to share.
- 2. Open the View drop-down list, and then select **Send current view**.
- 3. Select **Users** or **Projects** from the drop-down list, and then search by user name or project. You can add multiple users and projects.
  - NOTE When you share a view with another project, any project-specific fields are not shown in the receiving project. You can select the Share view as global template option.

Users	
Search for a user	
Send to	
Users	
No users selected	
Projects	
No projects selected	

Click **Send**. A notification is sent to the selected users and the viewset is available in their dropdown list, along with the sender's name and the date when the viewset was sent.

## 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.

≡ ଜ	-	/ Plan / Work packaging		
Work Packages	Action			
Planning Schedule	r c	Queries		Work
	5			▶ [
		🛨 🗹 🛞 Search Q		► C
		My queries		⇒ C
				► C
				<u>C</u>
				► C
		-		
	ſ	Clear Cancel Update Results		
	$\Theta$		•	

#### 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.

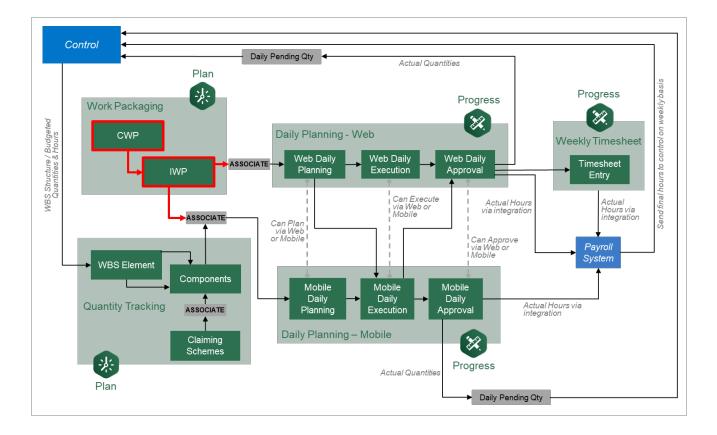




# LESSON 3 – WORK PACKAGE MANAGEMENT

InEight Inc. | Release 25.1

## 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)

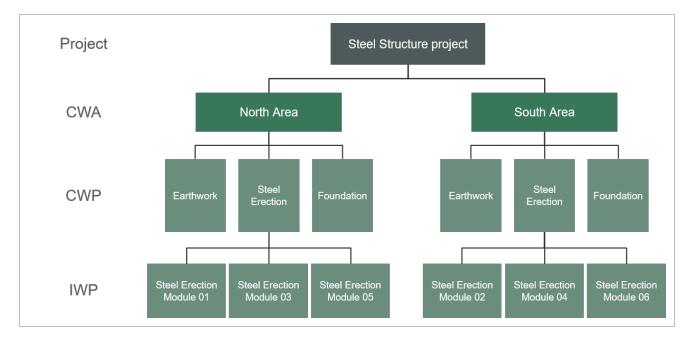
#### Scenario

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**.

	Applications						<ul> <li>Quantity tracking</li> </ul>	
Ō	Model	🙃 Estimate 🛛 🧔	Image: Plan	Contract	s and forecasts		Build components and document qua	antities
Add project image	Document	Control	Quantity tracking	🖉 Change		Launch		Launch
lications	(a) Schedule		Work packaging		-		₿ Links	
Model	Project			Extensions	r your crew		Organization	
Document Schedule	Project home	Assigned users		Design		Launch	InEightU	
) Estimate	Project details Settings	Operational rate codes Assigned operational re	POUROBE	Billing	- iments		Test567Test567Test567Test567Test567Test567Tes	
Reports	Workflows	Assigned disciplines an			Rejected Expir	ing	MahendranMahendranMahendranMahendra Karthik	
Explore Dashboards					0 0	•	TEST 124	
API documentation							Project	
Control	© Contra	cts		Change st	atus		Prime contract summary	
Workspaces	Status		Count	Closed	In Pro Active		Actual values	
Project library	Executed Non-execute			Issue			Original contract	\$0.00
Plan Quantity tracking	in approval			0	0	0	Executed Client CO's	\$0.00
Work packaging	Rejected			Potential client o			Adjusted/Current contract	\$0.00
Progress				0 Client change or	0 ders	0	In Review Client CO's	\$0.00
Daily planning	-			0	0	0	Projected contract	\$0.00

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

☆ Steel Structure Trai	ing Job (105091) 👻 Plan 👻 Work packaging 👻
Work Packages	Actions V (+) (+) 🔀 💶 💶
Planning Schedule	Configure CWA and project values = ID = Work age import history
	South
	Unassociated packages

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

Work Packages	Actions V 🕂 🕞 🖾	
Planning Schedule	Construction work package CWP	Description
	Installation Construction work pa	North
	<u>South</u>	South

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.

Add CWP CWP name CWP- North Area Steel Erection Work Plan - XXX	CWP name
CWP- North Area Steel Erection Work Plan - XXX	CWP- North Area Steel Erection Work Plan - XXX

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.

合 Steel Structure Trai	ing Job (10509	1) <del>▼</del> Plan <del>▼</del> N	Work packaging 👻
Work Packages	Actions <b>v</b>	+ + × = •	
Planning Schedule	-	℅ Work package name	ID =
		▶ □ <u>North</u>	
		🗅 South	
		🖌 🗁 Unassociated packages	
		🕞 <u>CWP-North Area S</u>	11
		🗊 IWP-mn,n	5
		Display="block-transform: compared-block-transform: block-transform: block	4

#### 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.

合 Steel Structure Tr	aining Job (10	15091) 👻 Plan 👻 Work packaging 👻
Work Packages	Actions	• • • • • • •
Planning Schedule	-	℅ Work package name
		▶ C <u>North</u>
		C South
		🖌 🗁 Unassociated packages
		II CWP-North Area S 11
		IWP-mn,n 5
		Description of the second seco

- 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.

			PACKAGE OVERVIEW	WORKSPACE	CONSIDERATIONS DOCUMENTS	
62116		CWP-North Area Steel	Erection	04/21/2022		
CWP D	escription					
Work p	ackage for structural steel of North are	18				
CWA IE		CWA description		Planning start date	Planning end date	
Area		▼ Area	•			ä
Plan St	atus	Superintendent		Engineer	Planner	
Draft						
		Hint type "John"		Hint type "John"	Hint type "John"	
Schedu	le ID	Schedule Name		Scheduled start	Scheduled finish	
					<b>G</b>	<b>G</b>
Worl	k package summary					
WBS	w	BS description	Quantities	UOM	Hours	
	2618 St	ub Tracking - D1 MV Terms	20.12346	Each	70.43211	A.
	62116 CWP-D Work p CWA. ID CWA. ID CWA. ID CWA. ID Schedu WOOD	CNA ID Area Plan Status Draft Schedule ID Schedule ID Work package summary With with with with with with with with w	62116     CMP-North Area Steel       CWP Description     Wink package for structural steel of North area       CMA DD     Area       CMA DD     Area       Files Status     Suberlotter       Dath     Suberlotter       Schedule ID     Schedule Name       Work package summary     Work Schedule Status	62115     CWP-Alorth.Avea Steed Dection       CWP Description     CWA.description       Work package for structural steel of North area     CWA.description       CWA.DD     CWA.description       Area     CWA.description       Print status     Separatoretinedent       Dark     Schedule Name       Schedule ID     Schedule Name       Work package summary     Schedule Kame	E2116     CWP-North Area Sheel Exclosin     04/21/2022       Find Natana     CWP-North Area Sheel Exclosin       Dash     CWP-North Area Sheel Exclosin       Dash     CWP-North Area Sheel Exclosin       Scheedule ID     Scheedule Name       Scheedule ID     Scheedule Name       CWP Exclose Spannarby     Dash       VM Exclose Spannarby     Dash	CMP     CMP     Planning start date     Planning start date       CMA, D     CMA description     Planning start date     Planning start date       CMA, D     CMA description     Planning start date     Planning start date       Area     V     Area     V       Data     Separatendent     Engineer     Planning       Schedule ID     Schedule Name     Schedule datat     Schedule dininh       Whrt package summary     MSS description     Market     Duartities

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.

Work Packages	Work packaging > CWP- North Area Steel Erection
CWP- North Area Ste 90982 Work package for the	CWP ID 90982

#### 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.

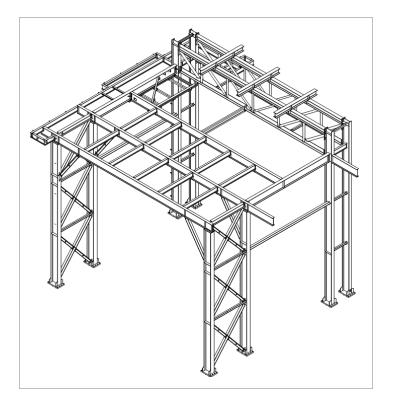
	Training .	Job (1050	91) 👻 Plan 👻 Work packaging 👻	
Work Packages	A	ctions 🔻		
Planning Schedule	•		Work package name	Description
	- Ľ		A 🔁 North	North
			Description of the second seco	
			🗅 South	South
			Unassociated packages	

- 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.

CWP- South Area Steel Erection Work Plan - XXX	
Include the following	
Workspace(all data blocks)	
Equipment	Materials
Constraint Mgmt	Lessons learned
Quality forms	Work sequence
Tools	Temp structure
Labor	Quality
Safety	Environmental
Documents	

# 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**.

105091 (Steel Training Job) •	Project home 👻						0	ф <b>"</b> ⊗ (
at the	Applications				_		② Quantity tracking	
Ö	Model	🙃 Estimate 🛛 😫	In Plan	Contract	s and forecasts		Build components and document qu	antities
Add project image 105091 (Steel Training Job)	Document	Control	Quantity tracking Work packaging	🖄 Change		Launch		Launch
oplications	3 Schedule		Compliance				₽ Links	
Model  Document	Project			Extensions	r your crew		Organization	
Schedule	Project home	Assigned users		Design		Launch	InEightU a	
<ul> <li>Estimate</li> <li>Report</li> </ul>	Project details Settings	Operational rate codes Assigned operational re	sources	Billing	ments		Test567Test567Test567Test567Test567Tes MahendranMahendranMahendranMahendra	
Reports	Workflows	Assigned disciplines and	d commodities		Rejected	Expiring	Karthik TEST 124	
Dashboards API documentation	_				0	0 💿	Project	
Control	Ontra	cts		Change st	atus		I Prime contract summary	
Workspaces	Status		Count	Closed	In Pro Active		Actual values	
Project library Plan	Executed Non-execute	rd		issue			Original contract	\$0.00
Quantity tracking	In approval Rejected			0 Potential client o	0 hange orders	0	Executed Client CO's Adjusted/Current contract	\$0.00
Work packaging Progress				0 Client change or	0 Jers	0	In Review Client CO's	\$0.00
Daily planning	-		•	0	0	0	Projected contract	\$0.00

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

命 Steel Structure Trai	g Job (105091) 🛛 🛨 Plan 👻 V	Work packaging 👻
Work Packages	Actions 🔻 🕂 🕂 🔁 🖅	
Planning Schedule	Construction work packag	-
	South     D Unassociated packages	

- TIP When in data block view, you can right-click to add and assign IWPs to a work package.
- 3. In the Add IWP dialog box, name your work package, and then click **Add**. Work package names can be 100 characters in length.

Add IWP IWP name IWP- Steel Erection - Module 001	IWP name			
	IWP- Steel Erection - Module 001	Add IWP		
IWP- Steel Erection - Module 001		IWP name		
	Connel	IWP- Steel Erection - Modu	ule 001	

#### 3.3.5 ENGINEERING WORK PACKAGE (EWP)

An engineering work package lets you link engineering schedules created in InEight Design to a CWP, so you can quickly see the schedule without exiting Plan. You can add an EWP from the Work Packages overview page. This option is enabled only when Plan is integrated with Design.

To add an EWP, select the **Add** icon in the Work packaging menu, and then select Engineering work package-EWP.

Work Packages	A	tions •	0 9 0	- La al												0.0	ΘQ
terring Schedule			wet Construction wor			Description T	Anisyst 17	Stat date	End-date	Planning stall.	Planning and C	Total mat hours?"	My's.es.	Cost % co.,	Status	Greated by 🖤	Lastupdat
	-	0	Installation work     Engineering work	package - IWA		D1-DENEMAL1											65/23/26
		0	UT BLOOM		Engineering work	peckage - DAP							•				69/23/26
		0	- 25 QL-81			D1-Area1											69/23/26
		5	B DRT-Genox-	80790	CMP								0.00%	6.00%	Draft	Luke Mailatt	06/27/28
		0	C> 01.42			01-Area 21											05/25/20
		0	C> 01.43			01-Area 31											65/23/26
		0	C 21.44			01-Area-61											69/23/26
		0	C) \$21.45			01-Area 51											65/25/26
		0	C) \$2,41			\$2-Area 1 (											05/25/20
		0	C) \$2,62			\$2-Area 21											05/23/20
		0	C> 12.43			\$2-Area 31							•				65/23/26
		0	C) 12-M			\$2-Area 41							5				65/25/26
		0	C) 12-M			\$2-Area 5-)							•				69/23/26
		0	C) \$2.46			52-Area 6.)											65/25/26
		0	<ul> <li>C) Unassociated pa.</li> </ul>														

The Add EWPs from project search dialog box opens, and you can select one or more available EWPs to associate with a construction work package (CWP).

Available EWP	s in linked projects:							
	EWPName †	v	Description	Ψ	Engineering Discipline	Ŧ	Project number	Ψ
۲	ConcColumnsArea2		Area 2 - At grade concrete	columns 10-20 vft	Structural		105582	
۲	ConcColumnsArea3		Area 3 - At grade concrete	columns 10-20 vft	Structural		105582	
۲	ConcColumnsArea4		Area 4 - At grade concrete	columns 10-20 vft	Structural		109582	
Selected EWP:	-							Clear a
JUNCTION LITT								

After they are added, the linked Engineering work package (EWP) shows in the associated work package.

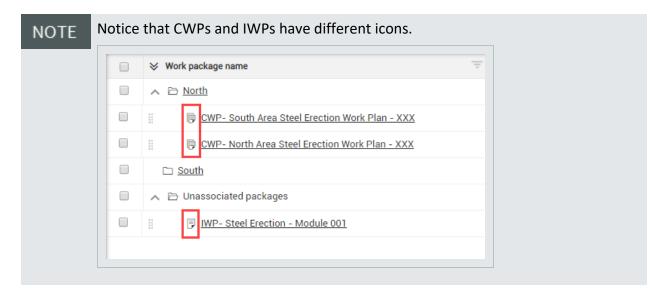
Work Packages	A.1	ions +	0 10 0	ليه ها													ΦQ
Saming Schedule	-		Work package name	0 V	Package type"	Description T	Anisyst 17	Blat date	End-ben 17	Planning stall.	Planning and C	Total man hours?"	My ten.	Cost % on	Bris= T	$Outedby ~^{\vee}$	Lestup
	-	0	<ul> <li>C) 01-003</li> </ul>			DT-GENERAL I						0					03/23/28
		0	+ C1 \$2,05%			12-0ENER4L1											69/29/2
		0	- IN \$1.41			D1-Area11											03/23/2
		0	I - B DMLGHOR-	00790	OWP							4	0.00%	0.00%	Oraft	Luke Mallatt	05/27/2
		0	× GanzGalu-	00791	DAP	Area 1 - At grade co.	1			07/01/2023	08/24/2023		0.00%	0.00%	Orah	Luke Mallatt	06/27/2
		0	C5 23.42			D1-Area 21						4					03/23/2
		0	C) 02-A3			01-Area 31						0					03/23/2
		0	C> 23_A4			01-Ama-41											09/23/2
		0	C) 02:48			D1-Area 51											03/23/2
		0	C) \$2.43			12-Ame 11						0					03/23/2
		0	C) \$2-62			52-Ares 21											63/23/2
		0	C> 52,43			\$2-Ame 31											03/23/2
		0	C) S2:M			12-Ares 41											03/23/2
		0	C> 32,45			\$2-Ama \$1											99/29/2
		0	C) \$2.45			52-Area 5-1											03/23/2
		0	. 🗅 Unassociated pa.														

#### 3.3.6 GROUP WORK PACKAGES

After creating work packages, you can group them under 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.



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

	ing Job (105091) 👻 Plan 👻 Work packaging 👻
Work Packages	Actions 🔻 (+) (+) 😣 🛌 🚍
Planning Schedule	▼ Work package name ↓ □ = ID =
	North
	□ III → P <u>CWP-North Area S</u> 9
	South
	🗌 🔺 🗁 Unassociated packages
	✓ III IVP-Steel Erectio 12
	C CWP-North Area S 11

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.

Move into CWP
Work plan name
Steel ×
CWP- North Area Steel Erection Work Plan - XXX
CWP- South Area Steel Erection Work Plan - XXX
Cancel Move

- 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.

#### 3.3.7 LINK ACTIVITY COMPONENTS

The activity components can be managed in both the Quantity Tracking and Work Packaging modules. To link the components, click the **Edit** icon in the ITP's column.

ivit	y Comp	ponents									Planning status:	Draft		٠			0	Add Activi	ty com	ponents by	WBS	
		Component name	Description	 Quantity	7	U. 👻	WBS †	-	Per_	-	WBS CE Mhrs/unit	Ŧ	Comp C	F I	WBS CB	Comp C	. <u>-</u>	Discipline	1	ITPs		
	+	Luke Nov 14.001-2		4.00000					0.0									Overhead		Ľ	Θ	

Select the **Add** icon to show all available and approved ITPs.

Work Packages	Work pack	> AS1 > IWP-Demo							la Ge	enerate packag	ge 😂 Preview	v Re
Work Packages	<b></b>		OVERVIEW	WORKSPACE	CONSTRAINT	MANAGEMENT	DOCUMENTS			View: c	compliance testing	
P-Demo			-		Inspect	tions & Test plans						
14	Activity Co	omponents			P 💿							
ge workspace		Component name 🐨 Description	$\overline{=}$ Quantity $\overline{=}$ U. $\overline{=}$ WBS	is† 👻 Per 👻	v	Cast-In-Place	Concret					
	<b>Р 🖻</b>	Luke Nov 14.001-2	4.00000	0.0	8	09	Concret					
						ersion 3 IP Concrete ITP				-		
Activity components					2	2/9	Θ					
Work sequence Tools												
Duality forms Work sequence Tools Temnorary structures Goals												
Work sequence Tools Temporary structures Goals Quality												
Work sequence Tools Temporary structures Goals Quality Safety Environmental					Activi	ities						
Work sequence Tools Termorary structures Goals Quality Safety					Activi					4-1/469-0	Sector -	
Work sequence Temporary structures Goals Quality Safety Environmental	Quality				Pla	Position ID =				Hold/Witne_ =		
Work sequence Tools Temporary structures Goals Duality Safety Environmental		Step 1 V Description	♥ Hold point ♥ Quality risk	T Mitigation	Pla	Position ID 👻	1	Design Mixes	45 Days Prior to	Not applicable	"Spec XXX Sec	1
Work sequence Tools Temporary structures Goals Duality Safety Environmental		Step † 💎 Description	₩ Hold point <sup>™</sup> Quality fisk	♥ Miligation	Pla V	Position ID = 1 2	1 2	Design Mixes Mill Certification	45 Days Prior to Prior to Placem	Not applicable Not applicable	"Spec XXX Sec	
Work sequence Temporary structures Goals Quality Safety Environmental		Step ? T Description	∀ Hold point <sup>™</sup> Quality risk	V Miligation	Pla 🗹	Position ID = 1 2 3	1 2 3	Design Mixes Mill Certification Batch Plant Insp	45 Days Prior to Prior to Placem Prior to Selectin	Not applicable Not applicable Not applicable	"Spec XXX Sec "Spec XXX Sec "Cast-In-Place	
Work sequence Tools Temporary structures Goals Duality Safety Environmental		Step 1 T Description	♥ Hold point ♥ Quality risk	V Milgation	Pi:	Position ID = 1 2 3 4	1 2 3 4	Design Mixes Mill Certification Batch Plant Insp Concrete Pre-Pl	45 Days Prior to Prior to Placem Prior to Selectin Prior to Every C	Not applicable Not applicable Not applicable Witness	"Spec XXX Sec "Spec XXX Sec "Cast-In-Place "Spec XXX Sec	
Work sequence Temporary structures Goals Quality Safety Environmental		Step 1 V Description	♥ Hold point ♥ Quality risk	▼ Mitigation	Pt:	Position ID = 1 2 3 4 5	1 2 3 4 5	Design Mixes Mill Certification Batch Plant Insp Concrete Pre-Pl Rebar Inspection	45 Days Prior to Prior to Placem Prior to Selectin Prior to Every C Prior to Every C	Not applicable Not applicable Not applicable Witness Not applicable	*Spec XXX Sec *Spec XXX Sec *Cast-In-Place *Spec XXX Sec *Reinforcing Ste	
Work sequence Tools Temporary structures Goals Quality Safety Environmental		Step ? 🔻 Description	❤ Held point ♥ Quality fisk	∀ Mitgation	Pi:	Position ID 😨 1 2 3 4 5 6	1 2 3 4	Design Mixes Mill Certification Batch Plant Insp Concrete Pre-Pl Rebar Inspection Concrete Place	45 Days Prior to Prior to Placem Prior to Selectin Prior to Every C	Not applicable Not applicable Not applicable Witness Not applicable Witness	"Spec XXX Sec "Spec XXX Sec "Cast-In-Place "Spec XXX Sec	

To add ITPs to Components, click the Add icon next to the available ITP. When an approved ITP is selected and added, it brings it to the component where you can mark the activities as complete. The data integrates with InEight Compliance, so you can schedule and manage the inspections.

	ole ITPs in Project					
	ITP ID	7	ITP name	Description		<u>.</u>
۲	809		Cast-In-Place Concrete ITP	CIP Concrete ITP		_
€	1014		Luke new on Oct 24	Luke new on Oct 24 (82.03.04)		
€	1045		Home inspection	Home inspection - Pre-purchase		
Selecte	ed ITPs				CI	ear all

V	Cast-In-Place		Home inspect 1045 Version 9 Home inspection - Pre				
2	2/9	Θ	1/4	Θ			
				1	de la companya de la		
							-
ctivi	ities						Ŧ
ctivi	ities						*
ctivi	Position ID 👳	System ID 👘	Activity des 😇	Frequency =	Hold/Witne	Specificatio	~
		System ID 7	Activity des = Inspect applianc	Frequency = Every time	Hold/Witne =	Specificatio \Xi Inspect applianc	*
	Position ID =						*
ctivi	Position ID =	2	Inspect applianc	Every time	Witness	Inspect applianc	*
	Position ID = 1 2	2 5	Inspect applianc Inspect attic an	Every time Every time	Witness Witness	Inspect applianc Inspect attic an	*
	Position ID 1 2 3	2 5 3	Inspect applianc Inspect attic an Inspect electrical	Every time Every time Every time	Witness Witness Witness	Inspect applianc Inspect attic an Inspect electrical	•

# 3.3.7.1 DAILY PLAN CREATION WITH ALL LINKED PROJECT VALUES

You can select multiple records with linked project values, so you can see all available data points. This selects all the eligible data from an IWP that can be used in an InEight Progress daily plan.

To create a daily plan with all linked projects values, select a work package, and then go to the Workspace tab. Click the **Create daily plan with all available data** icon, and then create a daily plan

#### with all available data.

lay fun day a voidspace Periodic day fun with at available dar Safety Periodic day fun with at available dar Safety Periodic daries Safety S	Samson Solar 975M	/W   104487 / Plan / Work packag							0 7 8 🛛
lay funday a Secret daily plan with a provide data a workspace Equipment Statering Secret daily plan with a provide data Secret daily plan with a provide data Secret daily plan Secret daily	Work Packages	Work p > AS1 > Frida	IY —						Generate packag
s Safety workspace  payment Attends Budget B				OVERVIEW	WORKSPACE	CONSTRAINT MANAGEMENT	DOCUMENTS	View:	•
workspace       Step f       Image: Description       Image: Descring: Description </th <th>riday fun day</th> <th>Create daily plan with all availa</th> <th>able data</th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th>	riday fun day	Create daily plan with all availa	able data						
tipuponet		Safety				Planning status: Draft	<b>*</b>	Add safety step	
Materials Alas Alas Alas Alas Alas Alas Alas A	ige workspace	Step †	T Description	· Safety risk	···· Mitigation	T Account code	- Account code desc	Required safety items	
	] Equipment Materials Bedopt Jactivity components Jostanci components Jostanci served Jostanci sevence Jostan Jost								

The eligible data from the IWP shows, and the Create daily plan panel opens on the right side of the page.

							OVERVIEW		VORKSPACE								
WP-demo							OVERVIEW		TURKSPACE						Create dai	ly plan	
5391	1.000		ponents							_	<b>A</b>				Components		
	Activ	ty Com	Component name	- Description		Quantity	- U	Planning stat	us: Draft	WBS CE Mhrs/un	-	ctivity componen		- Discipline	2688		Θ
nage workspace	Д	t i i i i i i i i i i i i i i i i i i i	2688	COUNTY RO		40.00000	CY CY	2688	413.0	2.5	100.0	0.0	0.0	WBS *			
Equipment	Ť		2000												Labor		
Materials     Budget																	
<ul> <li>Activity components</li> <li>Contract components</li> </ul>																Ulises Gutierrez	Θ
Lessons learned																Lance Fisher Steve Garrett	Θ
Quality forms Work sequence															Equipment	SheverGamen	
Tools																	
Temporary structures Labor																	
Goals																	
🗌 Quality ✔ Safety															Quality		
Environmental														-			
Save workspace as view	¥		<											• •			
	Labo				_	_		Planning stat	Durft.	Ŧ		Add labor	·	•			
	Labor		Trade 😨	Craft level 👻	Code	Description		Quantity =	Employee ID	· Nan		· Qualificatio			Safety		
	д	÷	Staff	Staff Default	1.C.01.4.12			1.00000	00309893	Eva	n Berberich			A			
	д	÷	Staff	Staff Default	6-MOBE (05)			1.00000	00353443	Ulis	es Gutierrez						
	д	ŧ	Staff	Staff Default				1.00000	00187301	Lan	ice Fisher				Environmental		
									00428594		ve Garrett						
	д		Specialty Craft		1.C.06.1.03				00428594								

Click Next to start the create a daily plan wizard with all the linked project values.

1 Plan details 2	Confirm resour	ce (3) Tool box talks	
* Plan date		* Plan name	
Fri, 24 Mar 2023			
Shift		Work plan/package ID - Name	Planner notes
FIRST SHIF	•	65391 - IWP-demo	
Location			
Approvers (1 Required)		Hint type "133" or "Site"	
No approvers added			
+ Add approver			
Executors (1 Required)			
No executors added			
+ Add executor			
			Cancel

Confirm resources and Tool box talks and then select Create plan.

Comp	ponent			
	Component name	Description	Total MHRs	
$\otimes$	2688	COUNTY ROADS - LUKE1	100	A
				Ŧ
Emple	oyee			
	Employee ID	Name	Trade	
$\otimes$	00353443	Ultran Duffering	Staff	
$\otimes$	00187301	Lance Table	Staff	
Equip	ment			
	Equipment ID	Description	Category	
				-

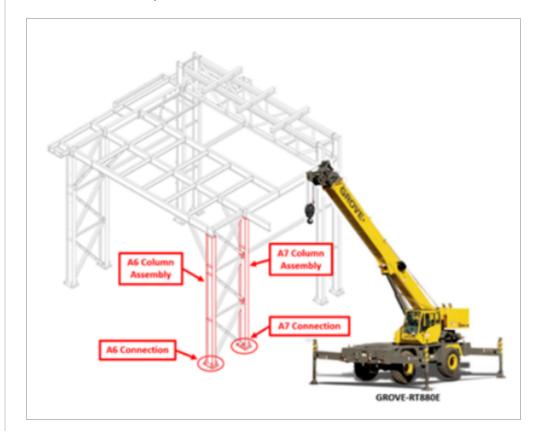
( <u>1</u> )P	lan details <b>(2)</b> Confirm resource	3 Tool box talks	
Safety			
	Safety concern	Mitigation	
			<b>A</b>
			Ŧ
Quality	/		
	Quality concern	Mitigation	
			<b>^</b>
			Ŧ
Enviro	nmental		
	Environmental concern	Mitigation	
			<u>~</u>

NOTE Resource must be active to show available data points.

### 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-	This should be auto populated with the name of the

#### Overview - Daily Plan Wizard (continued)

	Title	Description
	Name	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.
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.

* Plan date	* Plan name		
	• 2		
Shift	Work plan/package ID - Name	Planner notes	
Day Shift	- 4	5	
Location	-	-	
Looditon			
	Hint type "123" or "Site"		
* Approvers (1 Required)			
No approvers added			
+ Add approver			
Executors (1 Required)			
No executors added			
+ Add executor			

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 <u>Work</u> <u>Package Creation</u> 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**.

Organization		
organization	Manage budgets and forecasts	Build components and document
Project	Launch	quantities
I		
. (+)	Work packaging	() Daily planning
$\smile$	work packaging	(a) Daily planning
	Group work into plans and packages	Assign tasks for your crew
	Launch	Launch
📮 Project notes	6 Contracts	Supporting documents
	Status Count	In approval Rejected Expiring
	Executed 0	
	Non-executed 0	
	In approval 0	
Settings	Rejected 0	Bid packages
	Project notes	

- 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.

Work Packages		ons ▼ (+) [+ (×) ) ፲			
Planning Schedule	Acti	Work package name ₹		Description -	Schedule ID
		∧  North		North	
		🏢 🗸 🔋 <u>CWP- North Area Ste</u>	90982	Work package for the struct	
		✓ □ <u>South</u>		South	
		🗀 Unassociated packages			

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

Work Packages	Work	cpackaging > North > CWP-	North Area Steel Erection		
Work Publicageo				WORK PACKAGES	CONSTRUCTION PACKAGE OVER
CWP- North Area Ste 90982	+	🗹 🛞 🕞			
Work package for the		Work package name	U T	Description	Schedule ID
		JWP- Steel Erection - Module 0	90984	Steel erection of Module 001.	
0%			_		

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

Work Packages									
	Ē.					OVERVIEW	WORKSPACE	CONSTRAINT MANAGEME	
IWP- Steel Erection									
90984 Steel erection of Module 001.	Comp	onents					<	• • >	
			Component ID	-	Description	📃 Qua	ntity 📃 U	oM -	
Manage workspace	Ŧ	1	Module 01 - A6 Connect	ion to Fou	Module 1 - A6 Connection to F	oundation 1	E	а	
<ul> <li>Equipment</li> <li>Materials</li> </ul>	Ŧ	1	Module 01 - A7 Connect	ion to Fou	Module 1 - A7 Connection to F	oundation 1	E	a	
Budget	Ŧ	1	Module 03 - A6 Connect	ion to Fou	Module 3 - A6 Connection to F	oundation 1	E	a	
<ul> <li>Components</li> <li>Lessons learned</li> </ul>	Ŧ	1	Module 03 - A7 Connect	ion to Fou	Module 3 - A7 Connection to F	oundation 1	E	а	
<ul> <li>Quality forms</li> <li>Work sequence</li> </ul>	Ŧ	1	Module 05 - A6 Connect	ion to Fou	Module 5 - A6 Connection to F	oundation 1	E	a	
<ul> <li>Tools</li> <li>Temporary structures</li> <li>Labor</li> </ul>									

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

Work Packages	Work	packaging	> North > CWP- North Area S	Steel Erection > IWP- Steel Erection - Module 0.
	Ê			OVERVIEW
IWP- Steel Erection 90984 Steel erection of Module 001.	Comp	onents		
			Component ID	Description
Manage workspace	Ŧ	1	Module 01 - A6 Connection to Fou	Module 1 - A6 Connection to Foundation
<ul> <li>Equipment</li> <li>Materials</li> </ul>	Ŧ	1	Module 01 - A7 Connection to Fou	Module 1 - A7 Connection to Foundation
Budget Components	Ŧ	1	Module 03 - A6 Connection to Fou	Module 3 - A6 Connection to Foundation

• 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.

Work Packages	Ê						Erection - Module 0	WORK:	PACE CONSTRU					Create daily plan	
WP- Steel Erection	1							HORK	CONSTRUCTION					Components	
9984	Com	ponents						<	Planning comp	iete (	Add componer	nts by WBS	:	<ul> <li>Module 03 - A6 Connection to</li> </ul>	- Θ
teel erection of Module 001.			omponent ID	$\overline{\nabla}$	Description		- Quantity	👻 UoM	\Xi WBS t			Discipline/Commodity		Module 01 - A7 Connection to	- e
nage workspace		1 M								0	0		•	Module 05 - A6 Connection to	- Θ
Equipment	×		todule 01 - A7		Modula 1 - 47.0		lat 3			0			-	Labor	
Materials										0		Metals			
Budget  Components	Ŧ		/odule 03 - A6								0				
Lessons learned	Ŧ					onnection to Found		Ea		0		Metals			
Quality forms Work sequence	Ŧ	1 M	fodule 05 - A6	Connectio	Module 5 - A6 C	onnection to Found	lat 1			0	0	Metals			
Tools														Equipment	
Environmental Save workspace as view														Quality	
														Torque Inspection	e
	Work	k sequence	:					<• >	Planning comp	ete	Add work	: step	:	New quality item 3	0
		Work step r	num Descr	iption		Attachments H	old point	Man ho	urs	Schedule start	Sched	ule finish			
	#	j 1	Off Io	ad steel		•				03/23/2020	03/23/	2020	⊗ ^	Safety	
	#	2	Instal	l steel		∎				03/23/2020	03/27/	2020	$\otimes$	Watch for falling objects	e
	#	3	Bolt a	nd torque		• <b>!</b> \	es			03/26/2020	03/27/	2020	$\otimes$		
		14	Qualit	ty inspection		œ.							$\otimes$		
	I	5	Turno	ver		F							×	Environmental	
	-					<u> </u>									
														Clear	Next

- · 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.

Quality	
Torque Inspection	Θ
New quality item 3	Θ
Safety	
Watch for falling objects	Θ
Environmental	
Clear	Next
1	NEIGHT

9. Enter your new daily plan details.



Plan details (2)	Confirm resour	ce (3) Tool box talks	
* Plan date		* Plan name	
Shift		Work plan/package ID - Name	Planner notes
First Shift	-	90984 - IWP- Steel Erection - Module 001	
Location			
Approvers (1 Required)		Hint type "133" or "Site"	
No approvers added			
+ Add approver			
Executors (0 Required)			
No executors added			
+ Add executor			

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

(1)F	Plan details 2 Confirm resource	3 Tool box talks	
Comp	ponent	<u> </u>	
	Component ID	Description	Total MHRs
$\otimes$	Module 03 - A6 Connection to Fou	Module 3 - A6 Connection to Foun	0
$\otimes$	Module 01 - A7 Connection to Fou	Module 1 - A7 Connection to Foun	0
Emple	oyee		
	Employee ID	Name	Trade
		No employee topics added	
Equip	ment		
	Equipment ID	Description	Category
		No equipment topics added	

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

Safet	y Safety concern	Mitigation	
$\otimes$	Watch for falling objects	magaton	
J	5 ,		
Quali	N.		
Juan	Quality concern	Mitigation	
$\otimes$	Torque Inspection		
$\otimes$	New quality item 3		
Invir	onmental		
	Environmental concern	Mitigation	
		No environment topics added	
		No environment topics added	

 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.

Work Packages	The second secon	Steel Erection > IWP-Steel Erection - Module 001			
e:		OVERVIEW	WORKSPACE CONSTRAINT MANAGEMENT DOCUMENT	s	
e: -Steel Erection - Module 001 ber:					
ription: el erection of Module 001	Overview				
% Complete	IWP ID	IWP name	CWP	CWA	
o comprete	8	IWP-Steel Erection - Module 001	CWP-North Area Steel Erection	▼ North-North	
	Description				
0%	Steel erection of Module 001				
0 /0					
6 Complete	Scope of work				
o o o mprese	acope of work				
0%					
0%	Location	Discipline	Type of work	Risk	
0%	Location	Discipline Metals	Type of work           Steel Erection	Risk Medium	
	Location Schedule ID				
ale ID: ante: August 3, 2020		Metals	▼ Steel Erection	Medium	
ale ID: inte: August 3, 2020 6e: August 7, 2020 : Draft	Schedule ID	Metals Schedule name	Ettel Erection Scheduled start date Mon, 3 Aug 2020	Medium Scheduled end date	
ale ID: alte: August 3, 2020 fe: August 7, 2020		Metals	Steel Erection     Scheduled start date	Medium Scheduled end date	

# 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.

Work packaging         >         CWP- North Area Steel Erection		_	
CVERVIEW OVERVIEW	WORKSPACE	CONSTRAINT MANAGEMENT	DOCUMENTS

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

	View: Work Par	ckaging 🔻
+ Add equipment	Add equipment from resource	25
- Permit expires	- Quantity	-
		*

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

Ê			ov	ERVIEW	WORKSPACE	CONSTRAINT MANAGE	EMENT DOCUMENTS			View: Work Packaging	-
Work	sequence					< • >	Planning complete		(+) Add work step		:
	Work step number †	Description	Attachments	Hold point		Man hours		edule start	Schedule finish		
Ŧ	11	Off load steel	•								⊗ ^
Ŧ	<u>∥</u> 2	Install steel	•								$\otimes$
Ŧ	∦ 3	Bolt and torque	<b>E</b> Î								⊗
Ŧ	≣ 4	Quality inspection	•								$\otimes$
Ŧ	≣ 5	Turnover	•								$\otimes$
•		Turnover									

Work sequence				
Work step number 1	Description	Attachments	Hold point	
1	Off load steep	<u>+0</u>		
2	Install steel	<b>=</b> 0		
3	Bolt and torque	<b>=</b> 0	None	•
4	Quality inspection	<u>+0</u>	None	
5	Turnover	F=0	No	

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.

Add la	abor from project resou	urces						
		PROJECT RES	SOURCES ESTIMATE/CONTROL RESOURCES					
Availa	able employees in project :							
	Employee ID	$\overline{\tau}$	Name	7	Trade	-	Craft level	Ŧ
$\odot$	00020111		Jack Spooner		Pipe Workers		Pipefitter Journeyman	A

- 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.

Safety				< •	• >	🕂 Add	safety ste	ep	
Step	Ŧ	Description	 Safety risk		Mitigation	 Required safety items	1		
1		Crush Points						$(\mathbf{x})$	2

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 <u>Constraint Management</u>.

NOTE

# 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.

,	(1050	91)			1 <b>-</b>	Work packaging 👻										? 4	8	C
	Wo	ork packaging	<b>,</b> ,	North > IV	VP-tes	t												
	Ð		$\otimes$				OVERVIEW	WORKSPACE	CONSTRAINT MAN	AGEMENT	DOCUM	ENTS						
		Title		Revision #		Link (URL)	Document Number	Comments	Ŧ	Work sequer	nce † 🛛 🗄	Source	Ŧ	Modified by	-	Modified on		
	•	Drawing1		1		Drawing1	IWP_Drawing2.png	Updated						Vicky Pierce		06/08/2020		^

The document number is randomly generated to integrate with Document. Any changes made to the title updates the revision.

#### 3.5.4.1 GENERATE PACKAGE

When you click the Generate package icon, it sends a request to Document that enables the Generate report button and disables the Generate package button.

Work Packages	Work p > CEN > Demo				🔚 Generate package 📑 Generate r
		OVERVIEW	WORKSPACE CONSTRAINT MANAGEMENT	DOCUMENTS	
o Friday ec plion.	Overview 🔉				
Complete	IWP ID	IWP name	CWP		CWA
	65251	Demo Friday	None	•	GEN - General - General - General - General-General this is 💌
	Description				
0%					
Complete	Scope of work				
0%	Location	Discipline	Type of work		Risk
			*		
	Schedule ID	Schedule name	Scheduled start date		Scheduled end date
				8	6
ate:		Planning start date	Planning end date		Last updated by
le ID. ste: Draft	Status			8	Luke Mallatt
rte: e: Draft tendent:	Status Draft	*	62		
te: e. Draft		*	8		

In Document, the package will show after you click the Refresh icon.

≡	ŵ New ∨	Document / Package / Drafts	~		Plan Test Project   PLANTEST $ \checkmark$								\$ ®	0
	Filter/Sort										V	iew: Unsave	d (System)	
Acti	ons • 🚺 •					С	$\overline{\pm}$ Clear all filters	Manage columns	1≣	Show:	All		Search all Drafts	۹
	Туре	Package ID	Title	Phase/Reason for Issue										
	•		6 = ×											
	Standard	DEMOFRIDAY-65251	DemoFriday-65251	Issued For Constuction (reason)										
<u> </u>		6			_									
		0 View selected Clear selection												
© 202	12 InEight Inc.   Terms	& Conditions   y 22.08.04.01											IN	EIGHT

NOTE You must click Generate package for the package to show in Document . When you delete the package in Document, the Generate package button is enabled in Plan.

#### 3.5.4.2 LINKED DOCUMENT PACKAGE

If a work package is integrated with an InEight Document package, a link is now provided to the Document package.

On the Documents tab of a work package, a link to the associated Document package is shown at the top of the page. Click the link to open Document to the associated package.

三 🎧 104487   Samson S	Solar 975MW / Plan / Work packaging										
	Work p > GEN > Luke C > Luke s										
Work Packages	⊕ ⊠ ⊗	OVERV	IEW	WORKSPACE	CONSTRA	INT MANAGEME	NT DO	CUMENTS			
Name: Luke sample IWP											
Number: 65118	Linked Document package: LukesampleIWP-65118										
Description:	Title 🔤 Revision # 👘 Link (URL)	Document Numb	ber	Comments		- Work a	equence †	- Source			
Mhr % Complete											
		O A https://us.teambinder.com	/DocumentSuite/0949	6191-9aa9-461	0-853f-d3b733343a	182/Packages/St	indard/Sent/2729	99/Edit			☆ =
		۲									
				DETAILS	DOCUMENTS	RECIPIENTS	LINKS	TRANSMITTAL HISTORY	PACKAGE SECURITY		
		Actions 🔻 🕀 🔻 New 👻	Generate addendum	Close out		0	}				Cancel Save
		Package ID					* Package title				î
		ONEMORECHANCE-64186					Onemorechance				
		Trade Select one				-	* Reason for Issue Other	e			
		outer one					Issued For Cons	stuction (reason)			
		Approximate value					Preferred format				
		Long title					Details				
		Hard copies of documents av	ailable from			112					
		Company					Contact				
		Select one				*	Select one				
			Schedule				Forecast				
		Design release				E C				= C	
		Tender release				II C				<b>C</b>	
		Tender close				<b>⊟</b> ©				80	~
		© 2022 InEight Inc.   Terms & Condi	tions   <u>v 22.06.04</u>								INEIGHT

#### 3.5.4.3 DEFINE REVISION FOR IWP REPORT

The Revision option in the Work package report lets you select the revision. This automatically updates to the next revision if the one selected is not available. You can also manage revisions in InEight Document. The Revisions shown in the drop-down list are the ones available from the project.

	ds For Document			
evision	Status	Discipline	Туре	
Revision A	<ul> <li>Issued for Information</li> </ul>	<ul> <li>Administration</li> </ul>	<ul> <li>Work Package</li> </ul>	
Revision A	A			
evision B				
evision C evision D				
evision E				
evision 1	package (IWP)		Project: Samson Solar 975MW (104487)	
evision 2	*			
	Budget WBS cription Quantity UeM CT	-Mikiny/Unit CE-Unit/Mikin CE-Mikin CE-Unit cost CE-Budget		
	Goals			
	Activity Components			
	Labor			
	Safety			
	Safety Quality			
	Quality			
	Quality Environmental Quality Forms			

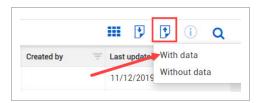
# 3.6 WORK PACKAGE IMPORT AND EXPORT

## 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	8	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 ap	plication				
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

nglish	User Selected Language			
REQUIRED	Field is required for import			
OPTIONAL	Field is optional for import			
/ALIDATED	Field must match master data available in appl	ication		
GNORED	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	
WP- Steel Erection Upper Deck - Module 001	IWP	Upper rack steel erection		35733

NOTE

Drop-down lists show for fields that are validated in the import templates for line items.

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

English	User Select	ed La	anguage					
REQUIRED	Field is req	uired	for import					
OPTIONAL	Field is opt	ional	for import					
VALIDATED	Field must	mate	h master data av	ailable in appl	ication			
IGNORED	Field not to	bep	oopulated					
Name	Package Ty	pe	11-14-1 11-14-1		Descr	iption		
Alphanumeric	CWP/IWP/	Cali	bri - 11 - A	A \$ - %	9 🖽	numeric		
50	3	· · · · · · · · · · · · · · · · · · ·	$I \equiv \diamond \cdot A$					
IWP- Steel Erection - Module 001	IWP	_	1 = 🗸 👖	0€ 00. 1	×	erection of Module 001		
CWP- South Area Steel Work plan	CWP			Y	Work	Package for the structural steel of the North		
CWP- North Area Steel Work plan	CWP	X	Cut		Work	Vork Package for the structural steel of the North		
IWP- Steel Erection Upper Deck - Module 001	IWP	[]	Copy		Uppe	r rack steel erection		
		ĥ	Paste Options:					
			Paste Special					
			Insert					
	-		<u>D</u> elete					
			Clear Contents					

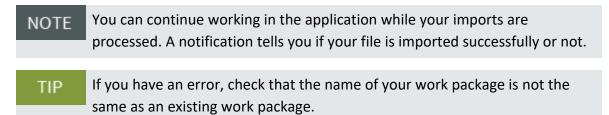
- NOTE When you import a template to Work packing with a blank value in a field, the previous value is not deleted. If want to delete a value when importing, you must type null in the field.
- 5. Save this Excel file to your desktop.
- 6. In InEight Plan, on the Work plans/packaging page, click the **Import icon**.

		ÌQ								
Created by	Last updated on	=								
	11/12/2019	1								
bridgette quintero	11/13/2019									
bridgette quintero	11/14/2019									
	11/12/2019									

- An Import data from template window appears
- 7. Click **Browse** to find your saved template.

Import da	ta from ten	nplate		
The data will be imp	orted into work plans			
		Drag and drop the file here or browse Browse		
🔲 Email me upon	completion		Cancel	nport

- 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



9. Click Close.

Import data from template	
File successfully added to import queue.	
You will be alerted once the file has completed the import process.	
O View file import queue	
	Close

# 3.6.2 EXPORT TO ANOTHER PROJECT

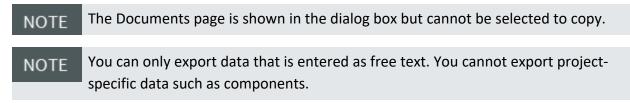
The following Step by Step shows you how to export some or all of a work package to another project.

# 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.



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 projectspecific 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.

NOLK	ap → IWP-d														🖨 Print Repo
				OVERVIEW		WORKSPACE	CONSTRAINT M	NAGEMENT	DOC	UMENTS					
0															Planning complete
		Name / ID	-	Description	Ŧ	Category	- Responsib	ity	- Due da	ite	Ŧ	Expected date	Ŧ	Notes	 Status
				Erect Steel - Light		Components			10/15			10/15/2021		⊕	Onen

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 <u>Enable external material tracking integrations</u> 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.

					OVERVIEW		WORKSPACE	CON	ISTRAINT MANAGEMENT		DOCUMENTS						
Ð	8														Plannin	g complete	
	Item number † 👘	Category	Ŧ	Name / ID	-	Description		-	Responsibility	Ŧ	Due date 👘	Expected da	e 😤	Notes	Statu	s	
2	001	Work package		123	×									۲	$\odot$		
				47771 - IWP-RAC-02-123	^												
				47923 - IWP-RAC-03-123													
				48123 - IWP-UGE-03-24	-												

- 4. Click in the blank field under the Category column, and then select a category from the dropdown 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!