



Plan

Work Packaging

User Guide



INEIGHT

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Lesson 1

Work Packaging Overview

InEight Project Suite Overview / Plan Work Packaging Overview

Lesson Duration: 45 minutes

Lesson Objectives

After completing this lesson, you will be able to:

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

1.1 InEight Project Suite Overview

Project Management and Lifecycle

Most projects that you will work on will follow a typical lifecycle; those involved will be assigned to different roles. Those roles can be broken down into four categories:

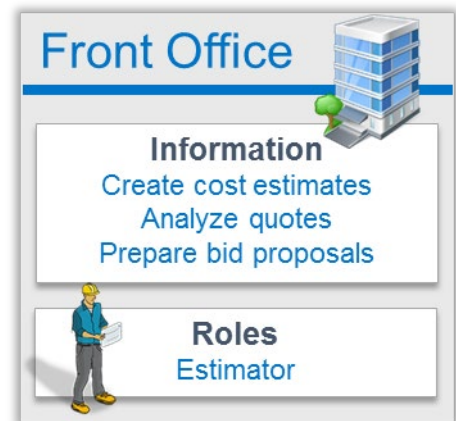
- Front office
- Field office
- Jobsite
- Back office

Front Office

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

The front office focuses on winning work and is comprised of estimators who, during the *bidding phase* of the project, estimating a project's value. This is done by calculating cost estimates, analyzing quotes, and capturing all the data necessary to submit a bid to the client.

Once the *bidding phase* is complete, the bid proposal is prepared and submitted to the client. The front office waits to hear they have the winning bid. If they win the work, they can start the *planning phase* and prepare to build the project.



Field Office

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

Budgeting and Forecasting

During the *execution phase* of a project, the field office manages the budget and forecasting for the project. They relay this information to the other field personnel so that understand how their work is budgeted, how they should build the work, who supplies the materials, who, if any, are the subcontractors, etc.

Contract Procurement

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

Work Planning and Quantity Tracking

Field engineers and superintendents prepare work plans for the foremen and their crews by breaking down the work into manageable pieces. They also create quantity-tracking plans, perform inspections, and create daily plans to distribute to the foremen on the jobsite.

Change Management

As issues arise, project engineers are responsible for their recording and submission to the client for approval. Once an issue is approved, a change order is executed.

Inspections Management

Inspections, as well as actual man-hours and quantities, are reported to the field office where they are reviewed and approved before being sent to the back office.

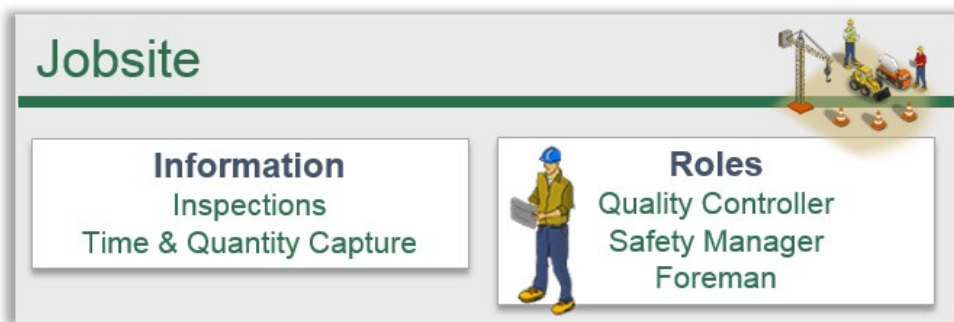


Jobsite

*Who works at the jobsite? What type of information do they record as they build the work?
Where does that information need to go and why?*

The jobsite is where you find quality controllers, field engineers, superintendents, safety managers and foremen. It is where the work is completed. The safety managers, superintendents and foremen are involved in safety inspections, while the quality controller and field engineers perform quality inspections before and after the work is complete. The foremen also record the man-hours of each craft worker, as well as the quantity of work completed each day based on the plan provided by the superintendent and field engineer.

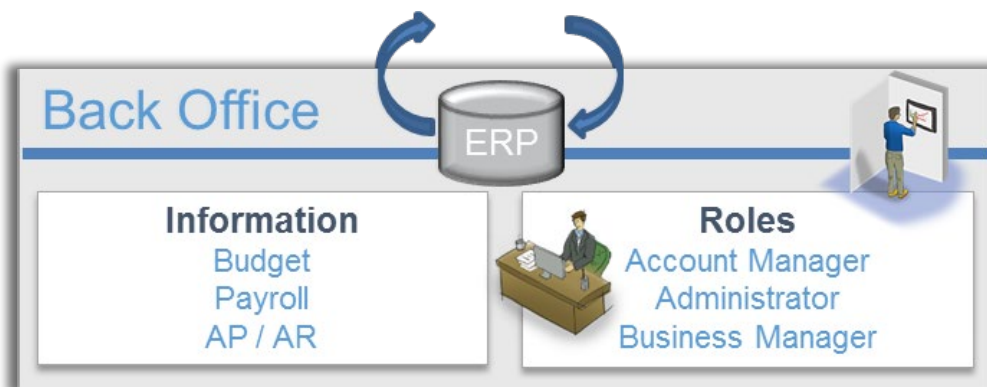
This information is relayed to the field office where it is verified and approved.



Back Office

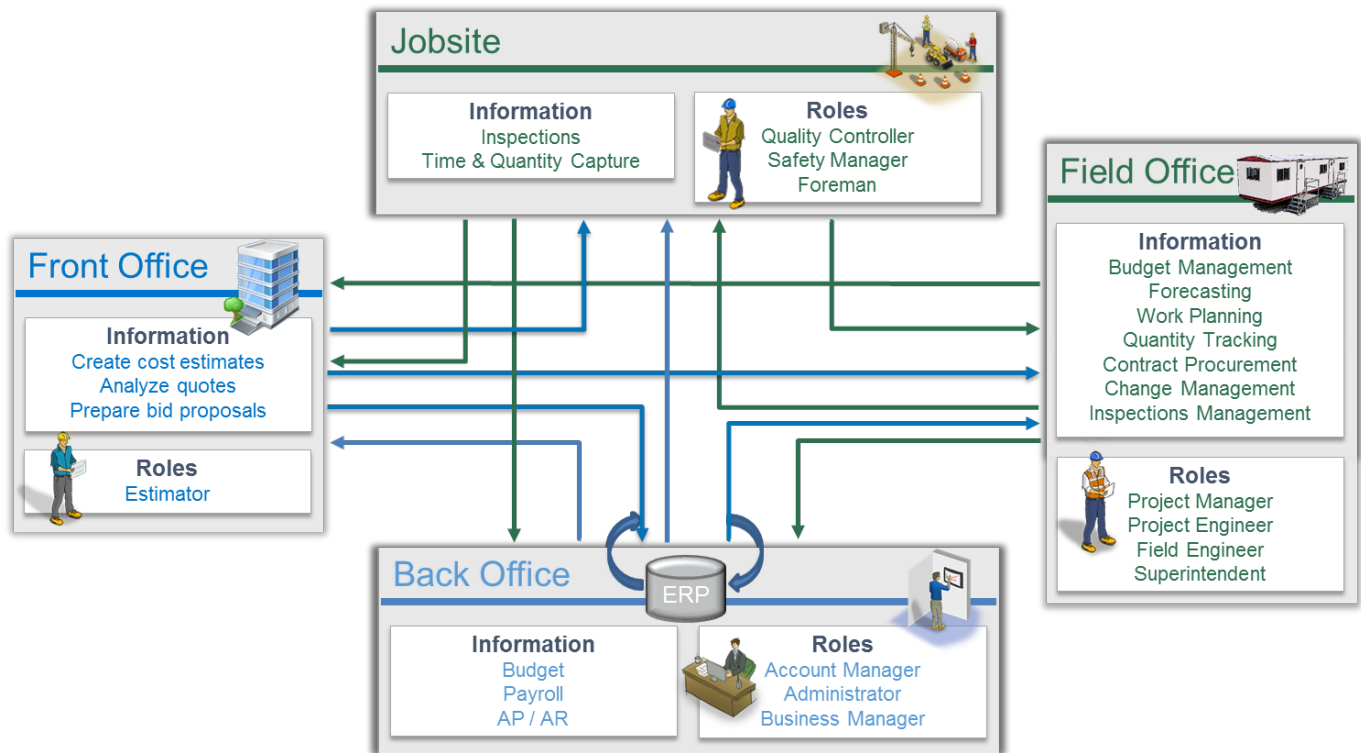
Which project-relation functions does the back office serve? Why is the back office critical in managing the project?

The back office is where account managers and administrative staff track budgets and ensure that payroll is correct and completed in a timely manner. Additionally, the back office tracks accounts payable and receivable and records revenue. After a contract is created, the business manager verifies that purchase orders are generated. All of the “actual” data - time or dollars - is communicated back to all of the other areas of the job.



Problems with Existing Systems

Communication on a project is often an issue. Accurate information must flow quickly between the different areas and disciplines. Reality has confirmed that critical information is often lost, miscommunicated, or received in an untimely manner. In some cases, information is re-entered in a new or separate system and therefore duplicated.



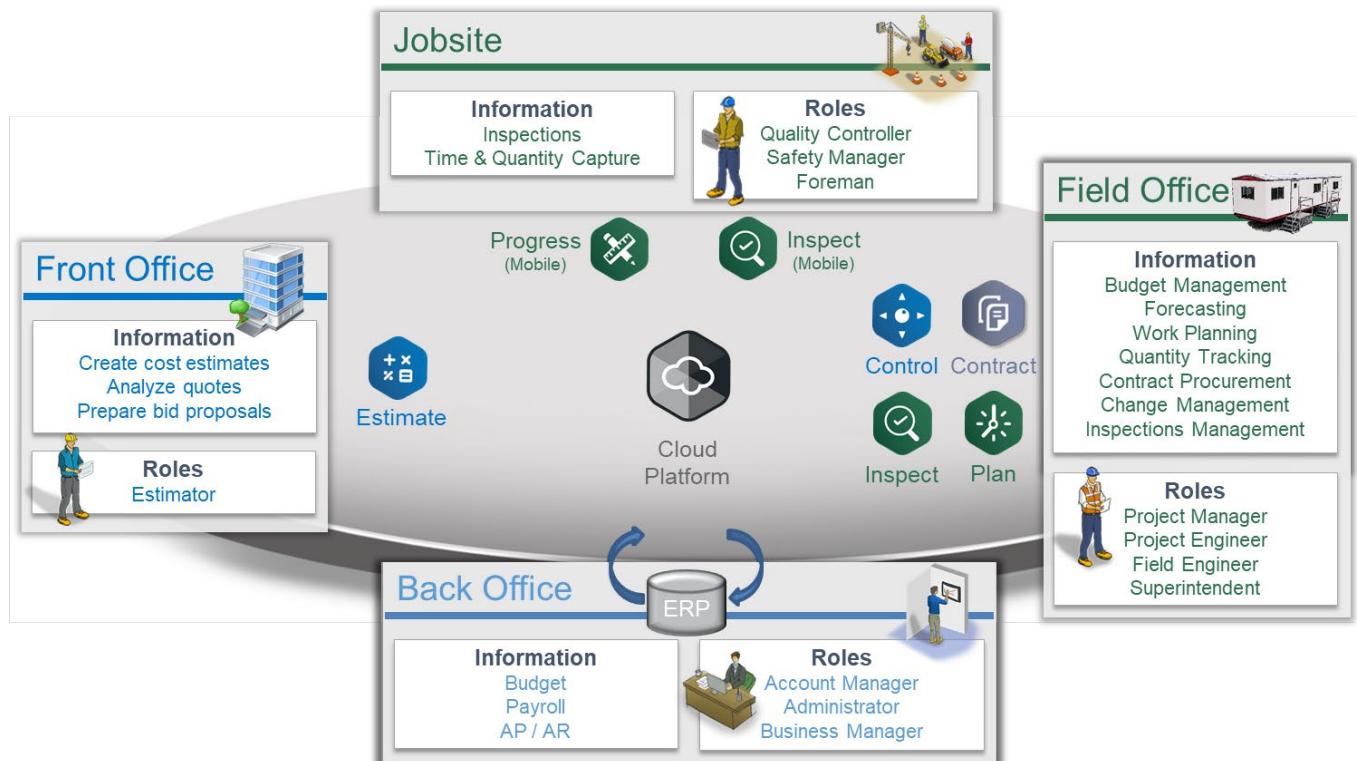
Employing too many systems to transmit information on a project can result in duplication, which is not efficient. Here are a few examples of such inefficiencies:

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

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

What is Project Suite?

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



How Does Project Suite Integrate into a Project?

Scenario: Step 1

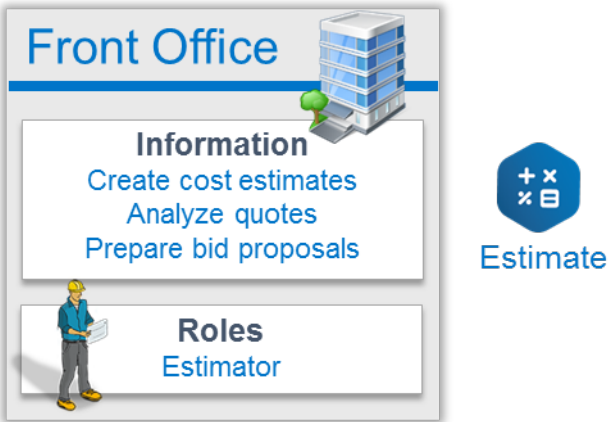
Skyline Construction Company decides to bid on a project to build a concrete foundation.

Upon submittal, the client informs Skyline that they are the preferred contractor for the work.

They now need to take the project from the estimate to the project execution phase.

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

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



Scenario: Step 2

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

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

Then, quality inspections are created to ensure that the built work meets the specifications as well as safety requirements.

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

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

Engineers utilize **InEight Inspect** to create the forms necessary for both the quality and safety inspections. They can send these forms to the **InEight Inspect Mobile** app so that the responsible party can complete them in the field.



Scenario: Step 3

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

The superintendent, Joe, can create a daily plan in the web-based **InEight Progress** module for the foreman, Jill, to use with her crew to erect the formwork for the foundation. Joe uses the quantities, budgets and claiming schemes from the work package his field engineer created and communicates exactly what Jill’s crew needs to complete tomorrow. Joe adds production goals for the day and safety notes related to the installation of the formwork. He communicates this information to Jill by ‘syncing it’ to the system. Once the plan is synced, Jill can access it using the **InEight Progress** app on her iPad.

Field Office

Information

Budget Management
Forecasting
Work Planning
Quantity Tracking
Contract Procurement
Change Management
Inspections Management

Roles


Project Manager
Project Engineer
Field Engineer
Superintendent


Plan


Progress

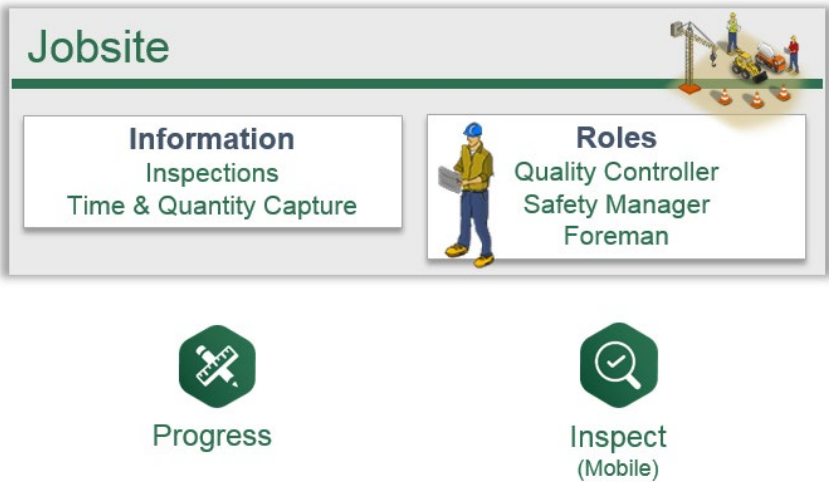
Scenario: Step 4

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

John, the quality controller on the project reviews the quality inspections that he needs to perform that day. He creates a plan with Jill to schedule a convenient time to meet.

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

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

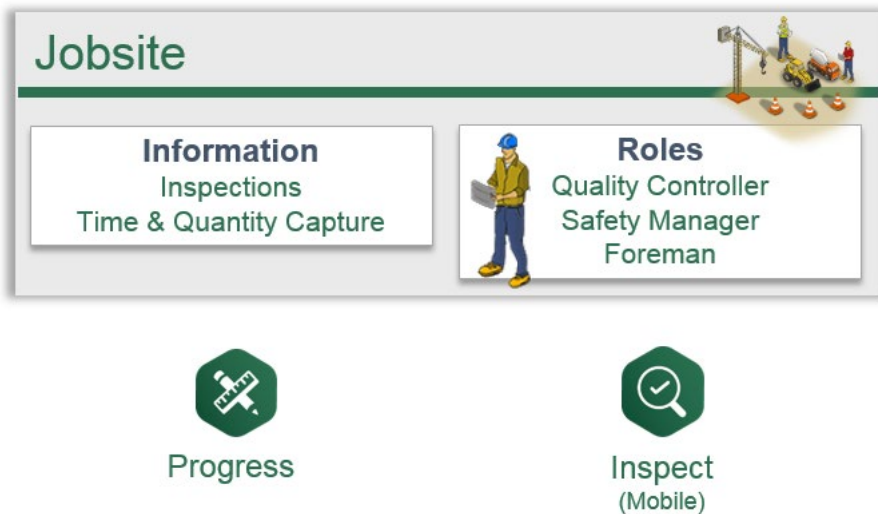


Scenario: Step 5

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

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

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



Scenario: Step 6

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

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

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

The field engineer can also verify that the quality controller's inspections were completed in the **InEight Inspect** application.

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

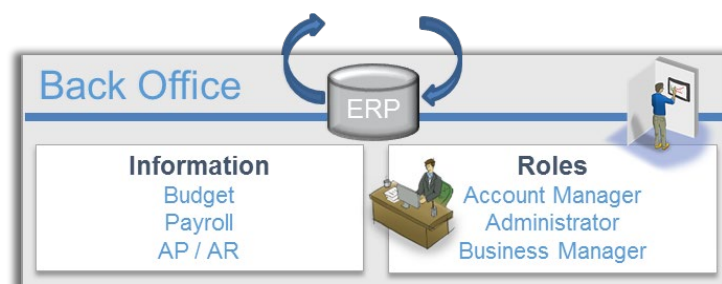


Scenario: Step 7

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

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

Within the **ERP system**, the account manager and administrators review all the time that has been approved in the field office, make adjustments if necessary, and submit the payroll to ensure everyone is paid accurately and on time. The information is synchronized into the **ERP system**, where it can be sent to **InEight Control** so project management in the front office can review the information.



Scenario: Step 8

At the end of the month, the project managers in the front office view all of the actual quantity and cost information, compare it to the budget, and project the final cost of each operation. Forecasts are then updated for the project.

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

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

Field Office

Information

Budget Management
Forecasting
Work Planning
Quantity Tracking
Contract Procurement
Change Management
Inspections Management



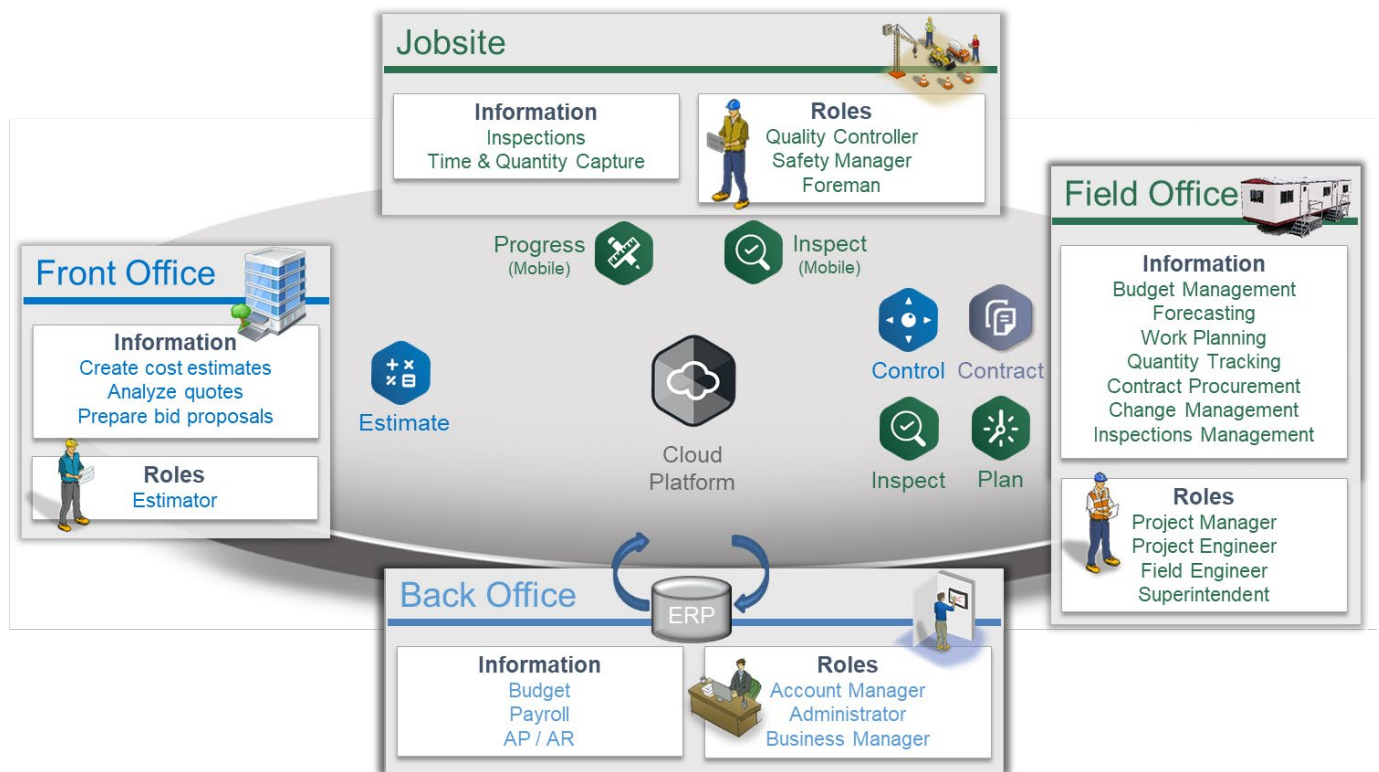
Roles

Project Manager
Project Engineer
Field Engineer
Superintendent



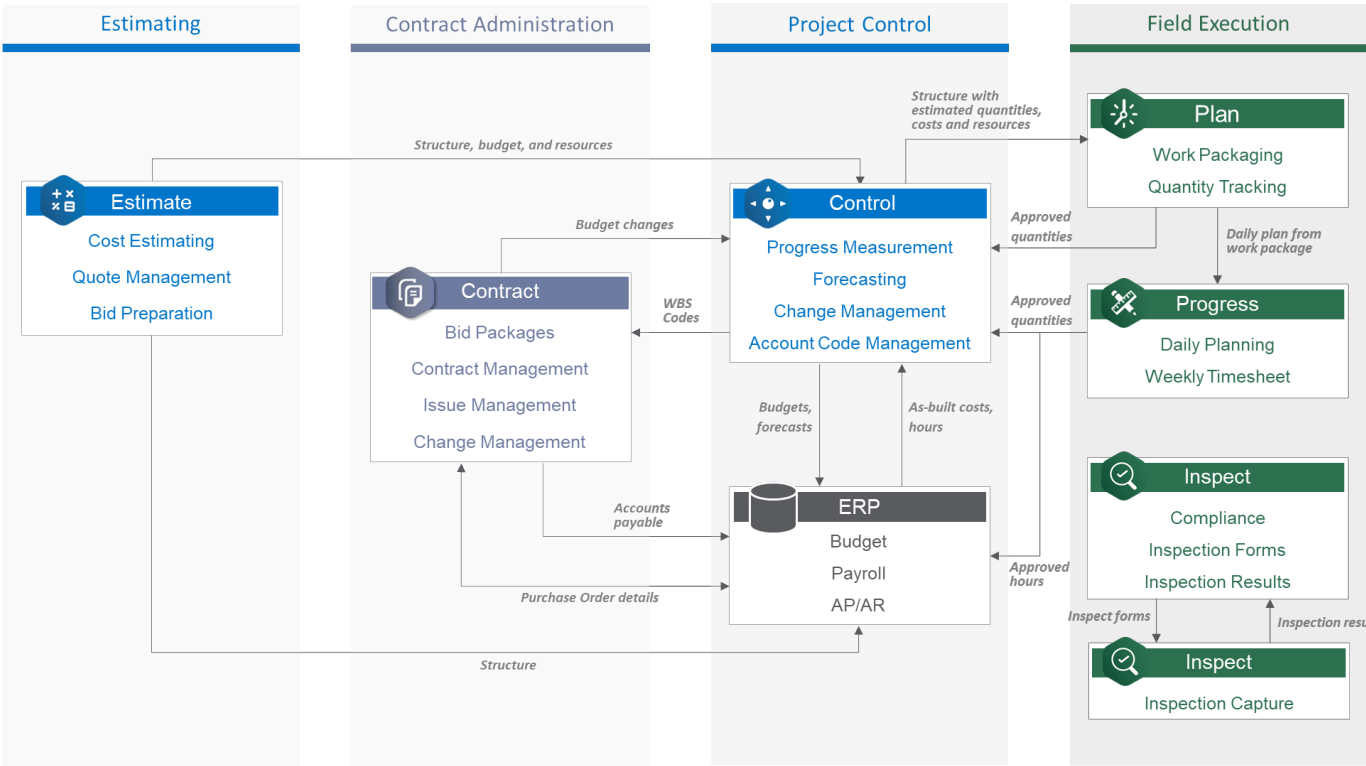
Summary

The information created for your project is communicated to all Project Suite applications and shared through the Cloud Platform. Project Suite is also able to connect and communicate to the project's ERP system and other 3rd party applications so that they can utilize the information, eliminating the need to re-enter data. Finally, all of this information can be archived for future reference, and selected information can easily be presented to the client.



Project Suite Workflow

The following workflow diagram illustrates in greater detail what information travels between the Project Suite applications and the ERP system and direction in which it flows.



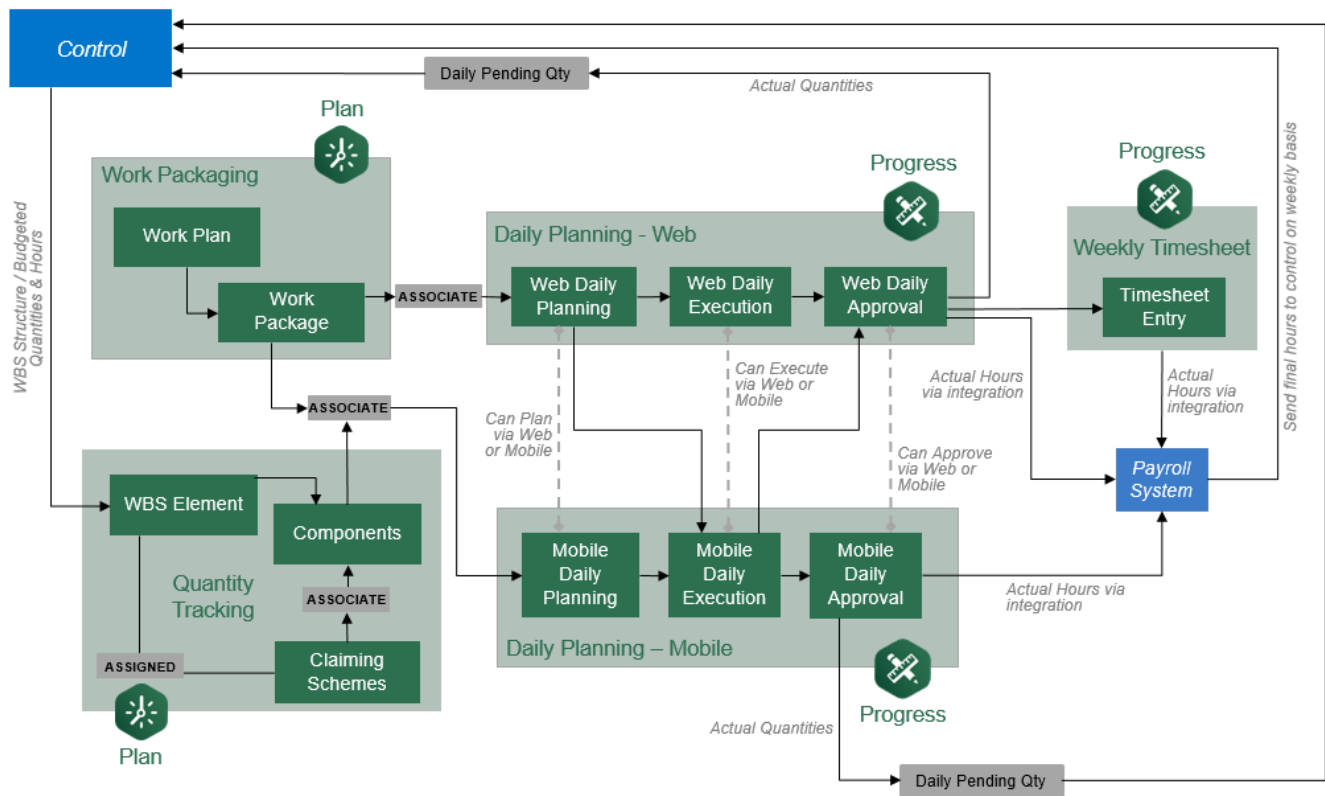
1.2 Plan Work Packaging Overview

Plan is an application in Project Suite. It is a tool for engineers and superintendents to plan their work and track quantities during the construction of the project.

Plan is organized into two modules:

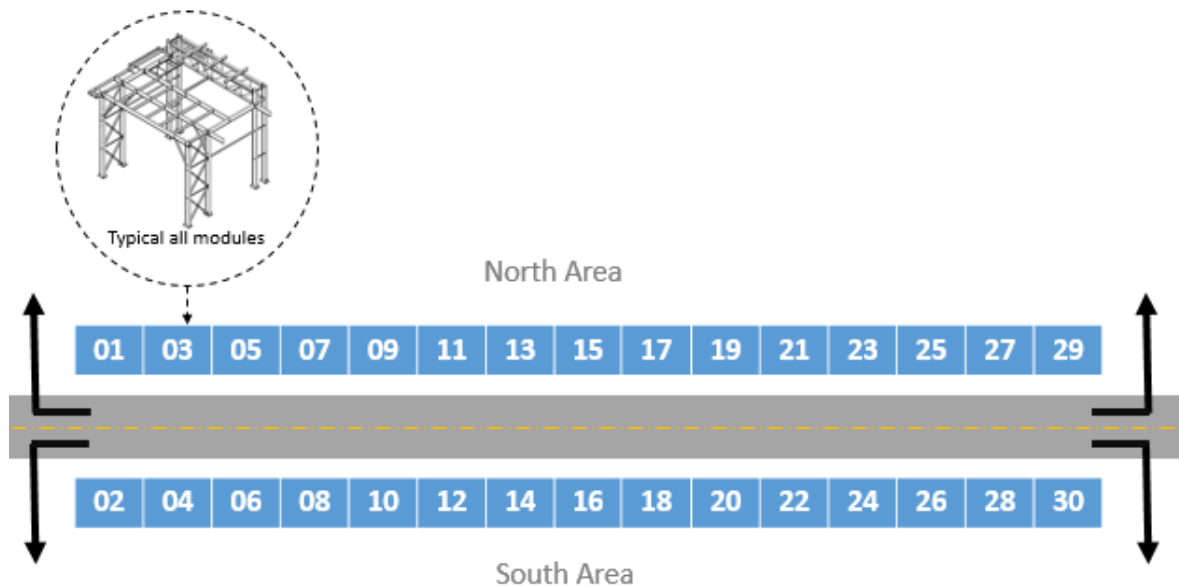
Plan Modules	
Work Packaging	Creating and managing work plans and work packages.
Quantity Tracking	Creating and managing components and claiming schemes. Claiming completed quantities.

InEight Plan Work Flow

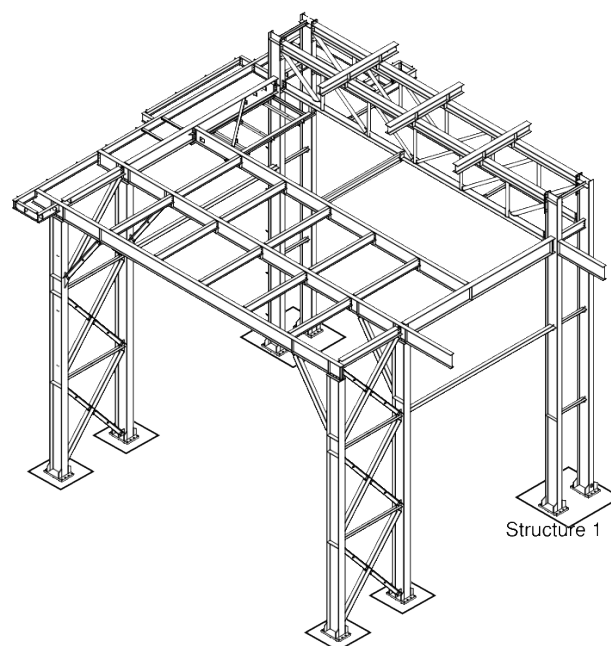


Scenario

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.

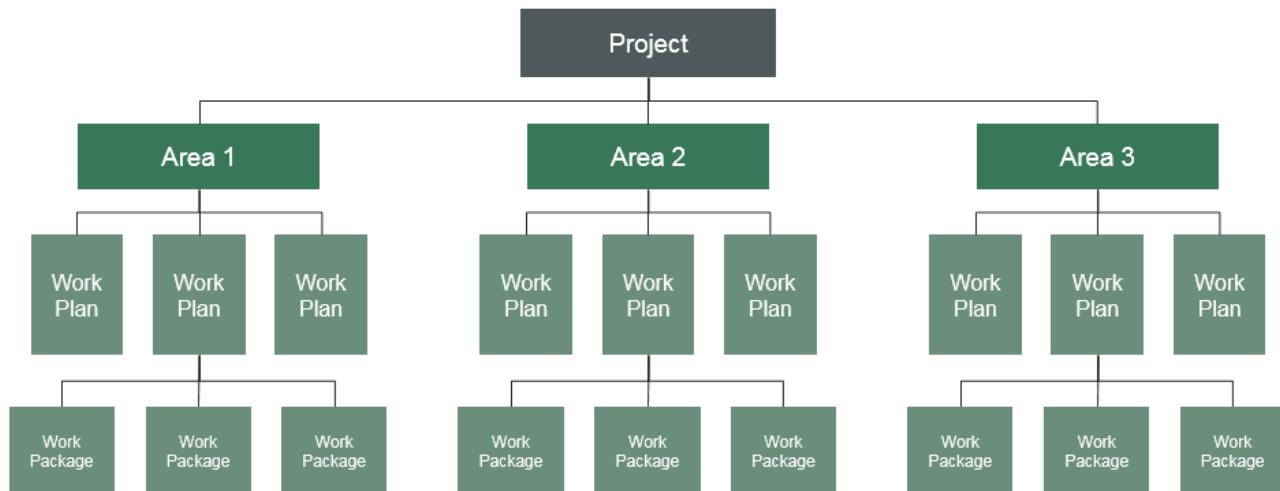


The image below depicts a layout for a steel structure project. The project consists of erecting 30 separate steel structures on opposite sides of a road. Each structure or module has been assigned a number 1-30.

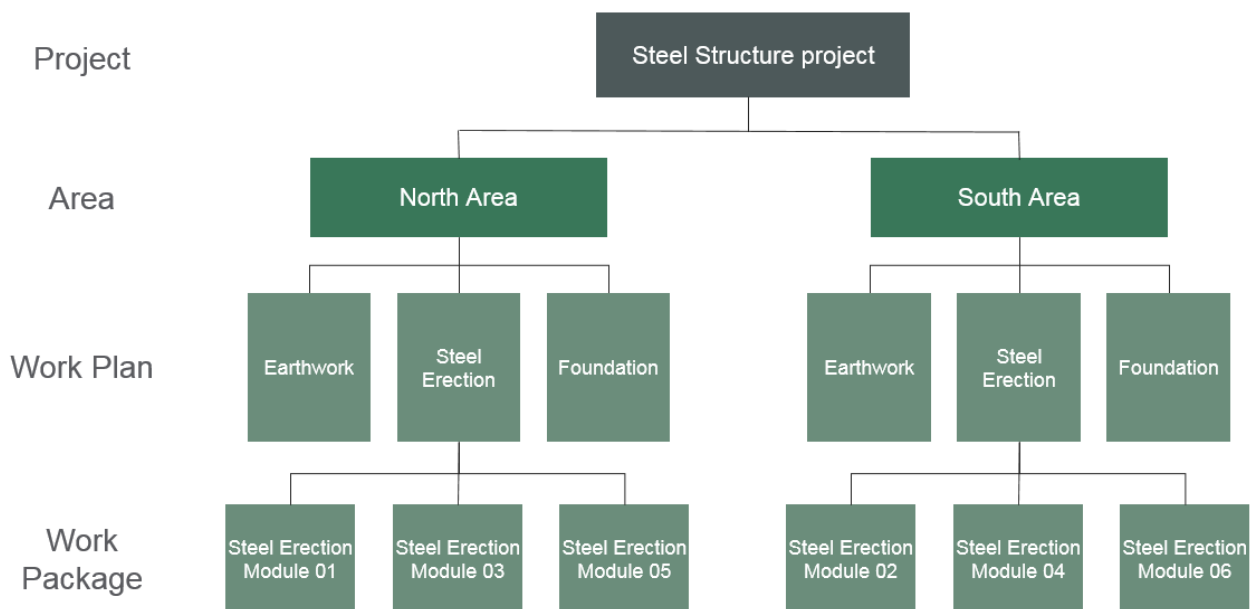


Work Packaging

Work Packaging helps break down the project into small, manageable pieces so that the work can be built and tracked effectively. Areas, work plans, and work packages can be designated in Plan.



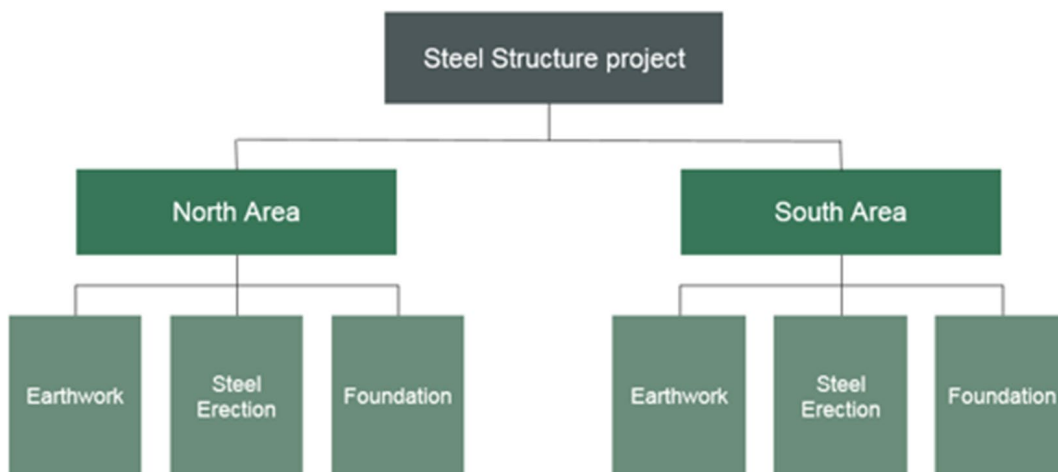
As mentioned in the scenario above, the scope of Steel Structure project was too big to manage without segmenting it down to work packages representing one to four weeks' worth of work. In Plan, this breakdown of the project could look like this:



Work Plan

After breaking the project into areas, it is possible to detail work plans to facilitate construction. Work plans are overarching plans intended to cover large project areas or disciplines and can range from a simple road grade to the installation of a turbine for a hydroelectric dam. They typically range from two to three months' worth of planned work, but can span the length of the entire project, depending on the project's scope. Work plans are used as big picture planning tools and contain high-level information. Work plans can be broken down into smaller work packages.

For the North and South areas of your project, you can create work plans based on work types: Earthwork, Steel Erection, Foundation.

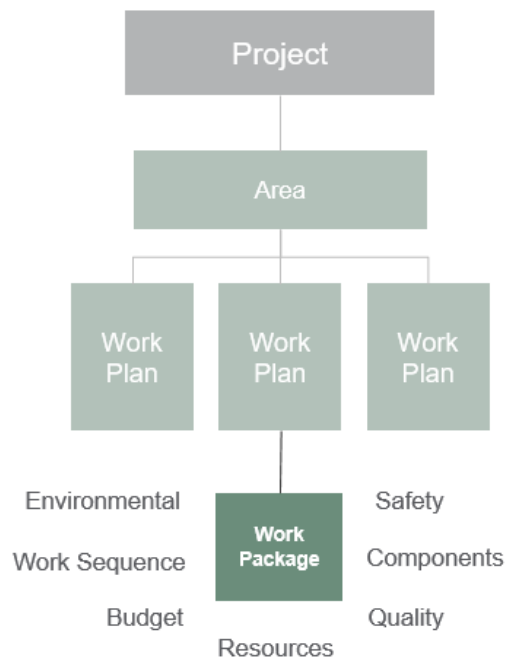


Work package

In Plan it is possible to break work plans down into work packages. Work packages are a specific set of work instructions derived from a work plan. Work packages are used to communicate the plan to the workers and to verify proper installation. They typically span a work segment of one to four weeks and contain all the details of the work within that scope.

Work package details include the following information:

- Work sequence
- Budget
- Resources required
- Components and quantities
- Safety, quality, and environmental concerns



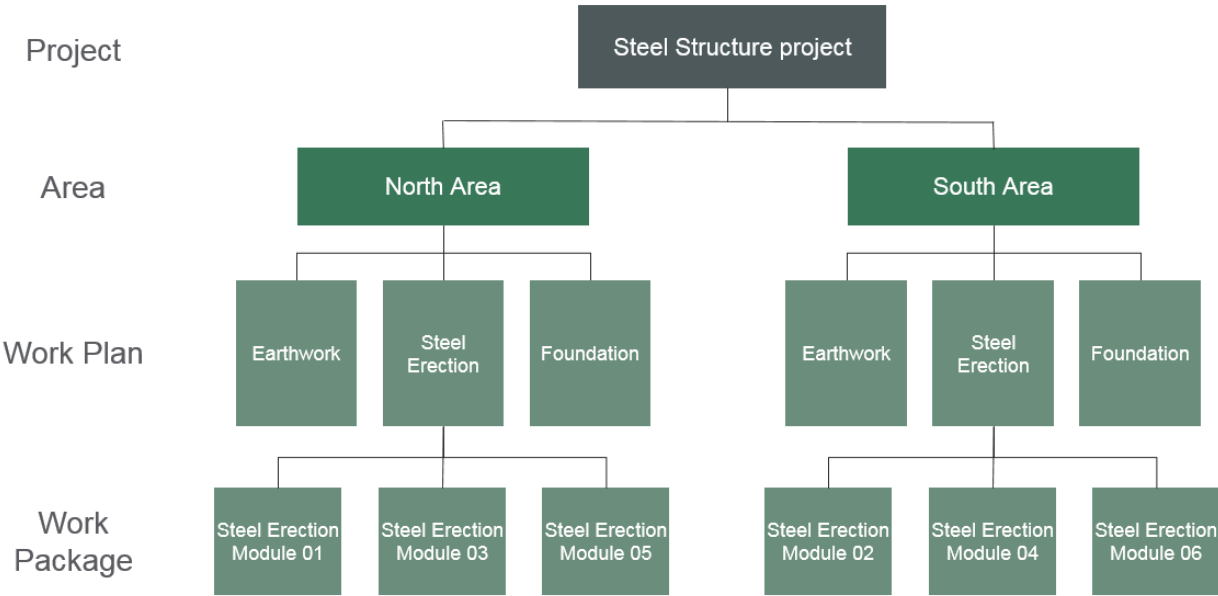
The image below shows what some of the details of a work package look like in Plan:

The screenshot shows the 'Steel Structure Job (105091)' interface with tabs for 'Plan' and 'Work packaging'. The 'DETAILS' tab is active, displaying a 'Work sequence' table and a 'Labor' table.

Work Step	Description	Attachments	Hold point
1	Off load steel		
2	Install steel		
3	Bolt and Torque		Yes
4	Quality Inspection		No

Employee ID	Name	Trade	Craft level
00012238	Kenneth Moore	Carpenters	Carpenter Journeyman
00342546	Troy Brown	Ironworkers (Structural)	Ironworker Journeyman
00386639	Joseph Kelly	Ironworkers (Structural)	Ironworker Journeyman
00376348	John Walsh Jr	Ironworkers (Structural)	Ironworker Foreman

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



IMPORTANT

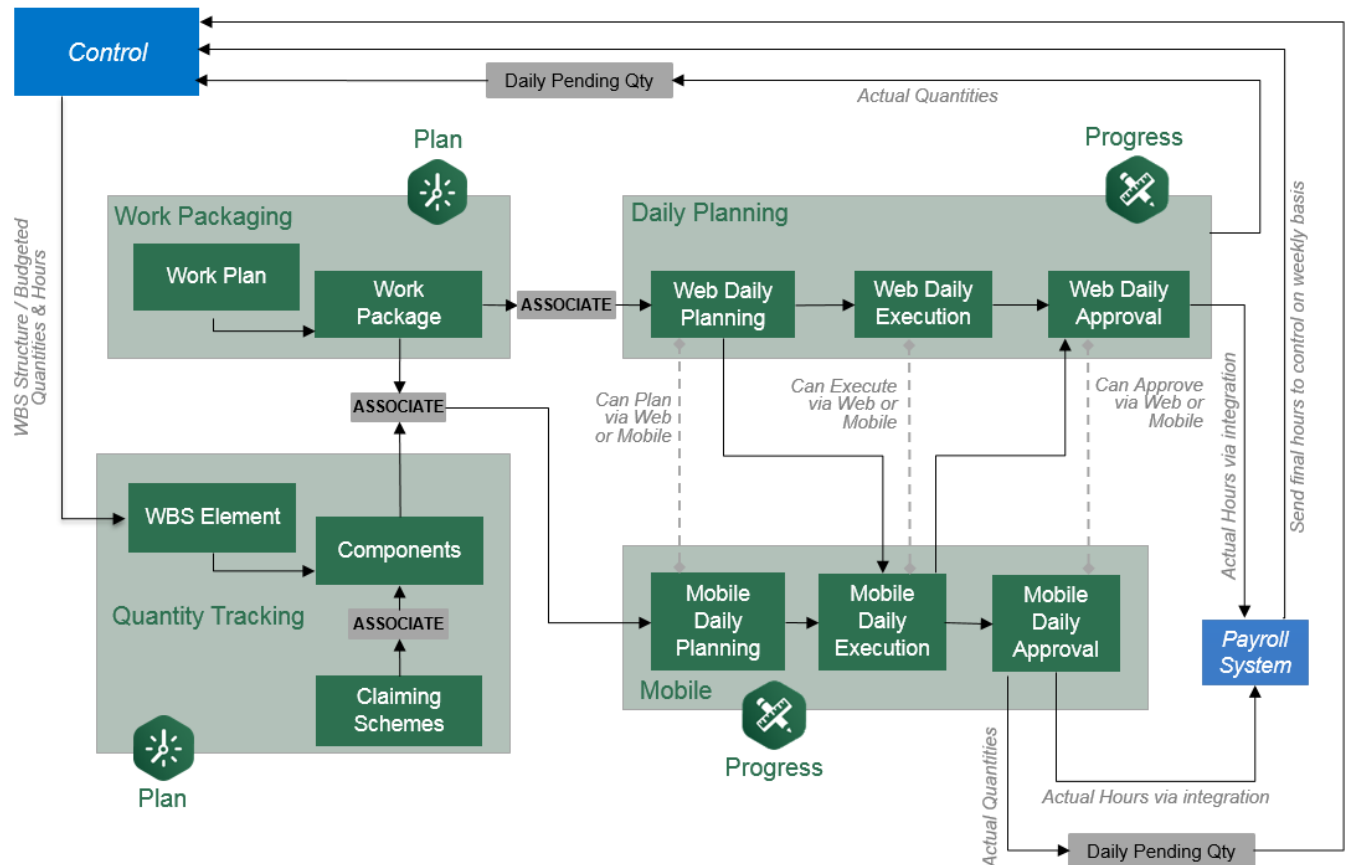
In Lesson 4 – Work Package Management, you will learn about work plans and work packages in detail, including how to create them and define plan details.

Comprehensive Workflow

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

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

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



Lesson 1 Review

1. Which two of the following are modules in Plan?
 - a. Quantity Tracking
 - b. Benchmarking
 - c. Work Packaging
 - d. Control
 - e. Model Manager
 - f. Advanced Reporting
 - g. Daily Planning
2. Work packages can be further broken down into which one of the following?
 - a. Components
 - b. Work Plans
 - c. Daily Plans
 - d. Resources

Lesson 1 Summary

As a result of this lesson, you can:

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

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Lesson 2

General Navigation

Page Navigation / Columns / Data Blocks / Viewsets

Lesson Duration: 30 minutes

Lesson Objectives

After completing this lesson, you will be able to:

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

2.1 Page Navigation

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

Scenario

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

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

All projects & organizations

PROJECTS

ORGANIZATIONS

ID

Name

Status

Organization

Created by

Created on

105091

Steel Structure Job

Active

S100000 - (PKS Inc)

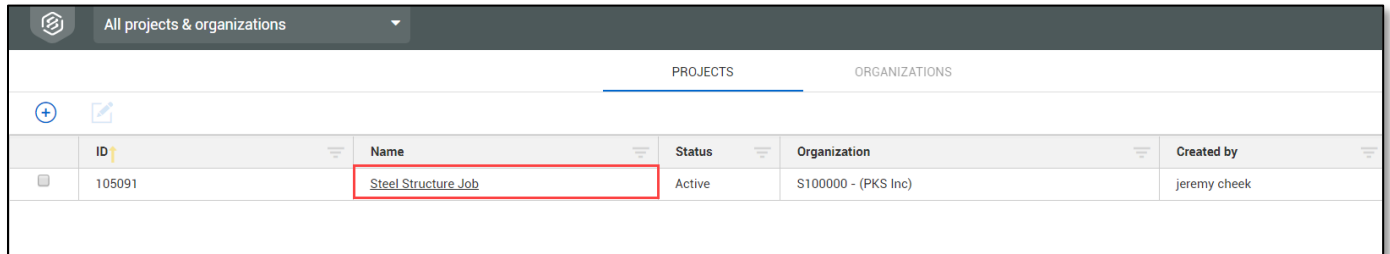
jeremy cheek

06/04/2018 3:30:26 PM

Selecting a project takes you to the project’s home page. From the home page, there are two different ways to access the Plan Quantity Tracking application. The following Step by Step shows you both ways.

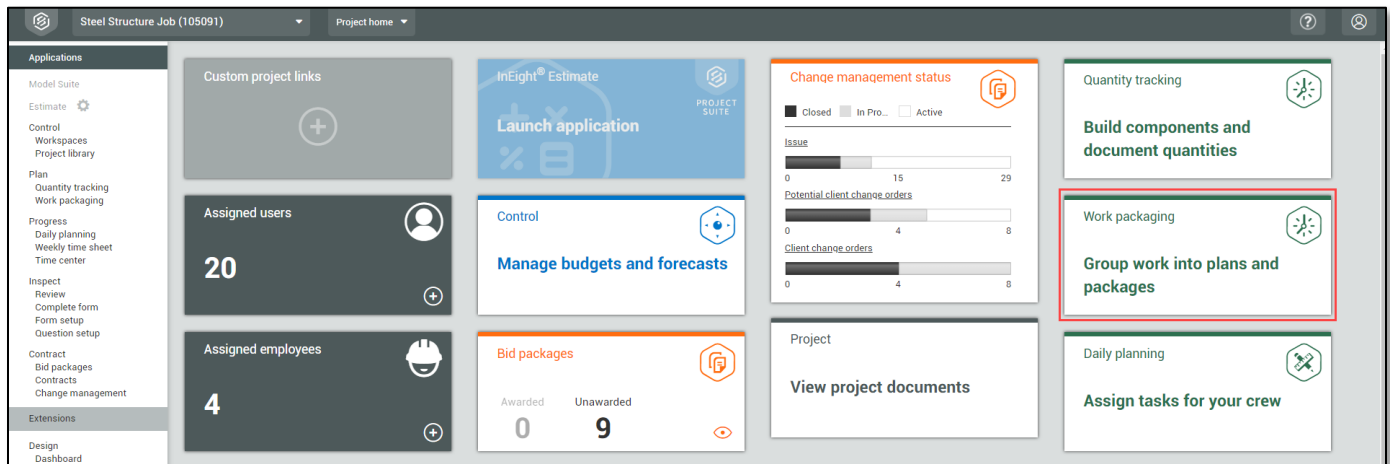
Step by Step 2.1.1 – Navigate to the Work Plans Page via the Project Dashboard

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



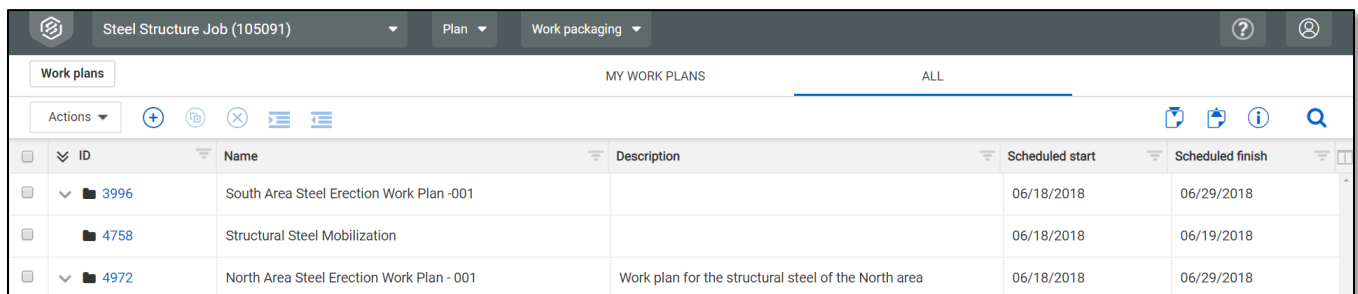
All projects & organizations				
PROJECTS			ORGANIZATIONS	
ID	Name	Status	Organization	Created by
105091	Steel Structure Job	Active	S100000 - (PKS Inc)	jeremy cheek

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



The screenshot shows the project home page for 'Steel Structure Job (105091)'. The left sidebar contains a menu with 'Applications' and 'Extensions'. Under 'Applications', 'Work packaging' is listed. The main area features several tiles: 'Custom project links', 'Assigned users' (20), 'Assigned employees' (4), 'InEight Estimate Launch application', 'Control Manage budgets and forecasts', 'Change management status' (with a progress bar), 'Quantity tracking Build components and document quantities', 'Work packaging Group work into plans and packages' (highlighted with a red box), 'Bid packages' (Awarded: 0, Unawarded: 9), 'Project View project documents', and 'Daily planning Assign tasks for your crew'.

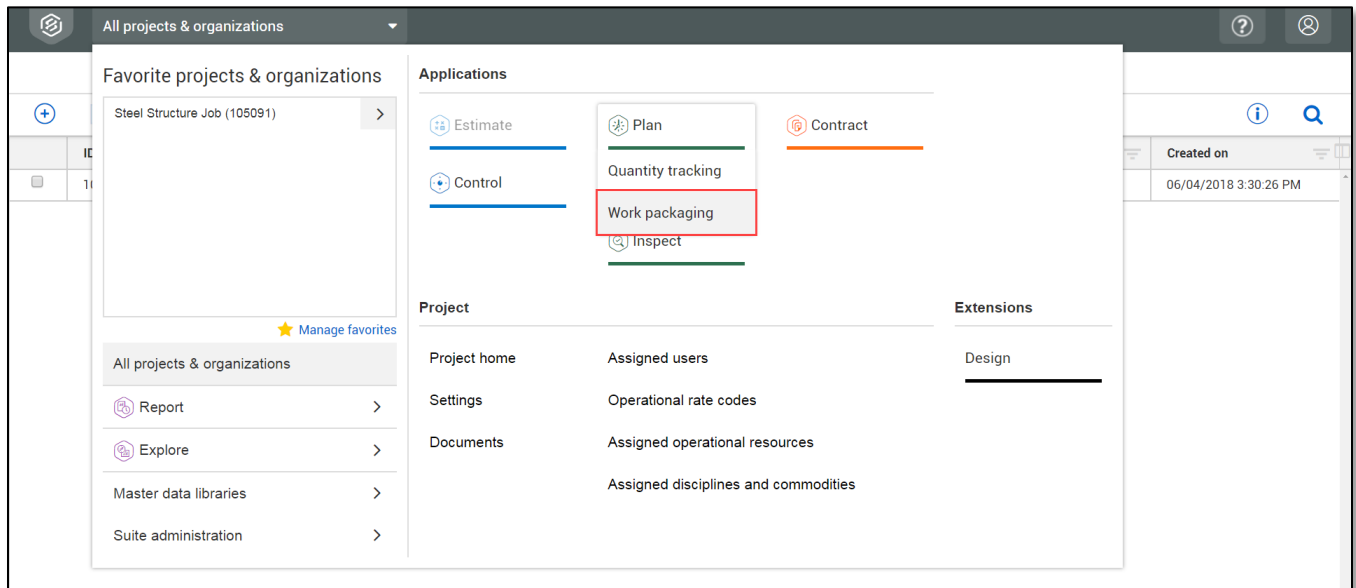
3. This opens the Work plans page.



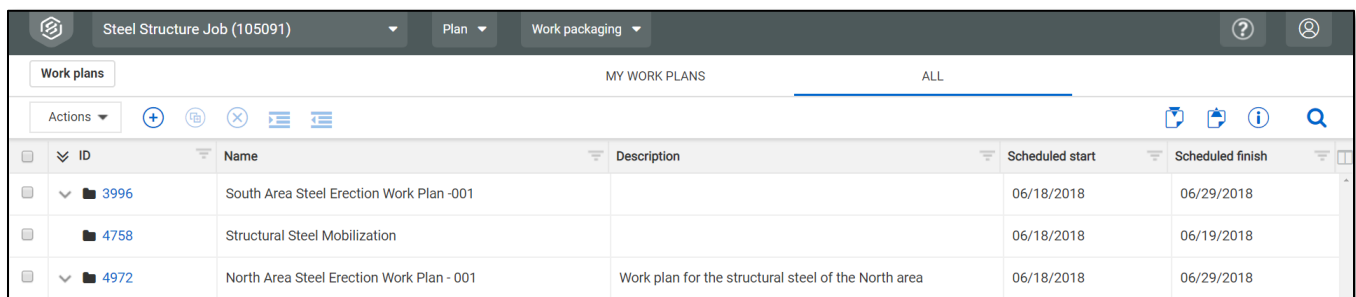
Steel Structure Job (105091) Plan Work packaging				
MY WORK PLANS			ALL	
ID	Name	Description	Scheduled start	Scheduled finish
3996	South Area Steel Erection Work Plan -001		06/18/2018	06/29/2018
4758	Structural Steel Mobilization		06/18/2018	06/19/2018
4972	North Area Steel Erection Work Plan - 001	Work plan for the structural steel of the North area	06/18/2018	06/29/2018

Step by Step 2.1.2 – Navigate to the Work Plans Page via the Menu Button

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



4. This opens the Work plans page.

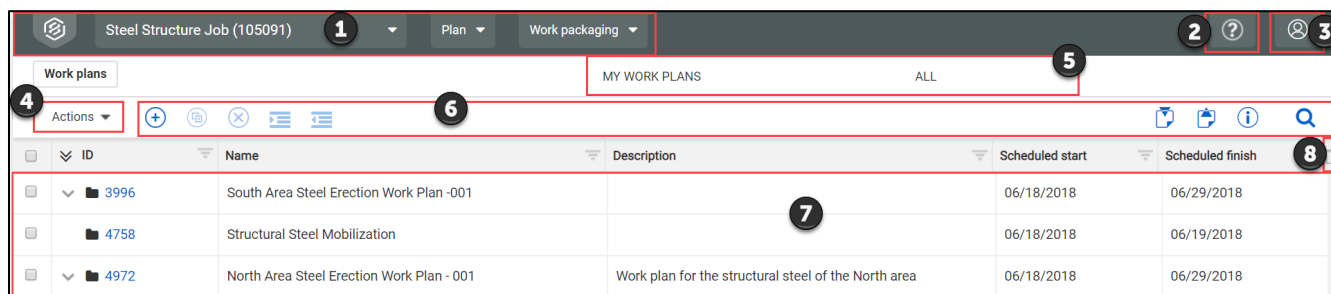


TIP

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

Overview – Work Plans Page

	Title	Description
1	Navigation Bar	Contains First, Second, and Third-Level menus to access organizational settings, project settings, and applications.
2	Help Menu	Contains Walkthrus to walk you step by step through processes within the module.
3	Notifications and User Profile	View notifications, user profile and log out.
4	Actions Menu	Select available actions for the current register tab you are viewing.
5	Tabs	Allow you to navigate between different functions on a page. The blue line indicates what tab you are currently on.
6	Toolbar	Contains functions for the page you are on: add, edit, delete, export, import, show details, and search.
7	Work Plans/Packages Register	List of all work plans and packages.
8	Column Chooser	Allows you to add or hide columns to make the plans/packages list user specific.

TIP

The **My Work Plans** tab displays all the work plans that *you* have created or are assigned to as the Superintendent, Engineer, or Foreman. You can select the **All** tab to view *all* work plans created for this job.

2.2 Columns

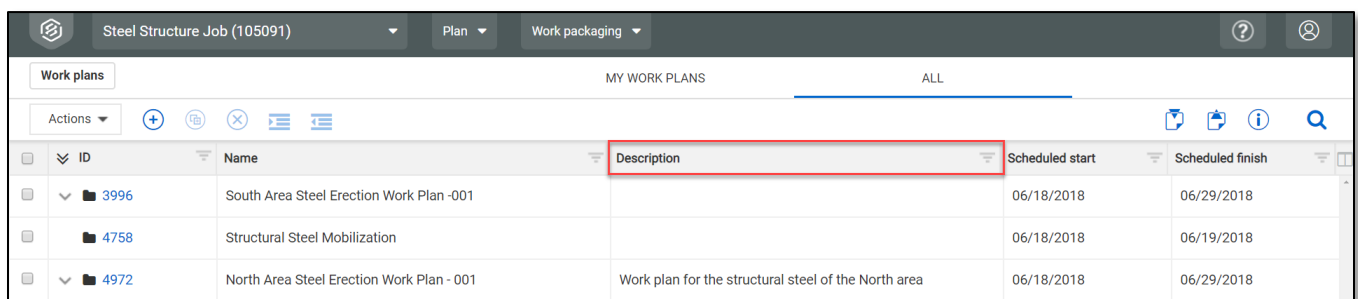
InEight Project Suite allows you to customize columns according to your preferences. Changes made to the placement of your columns will be retained the next time you access any page you have customized.

Move Columns

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

Step by Step 2.2.1 – Move Columns

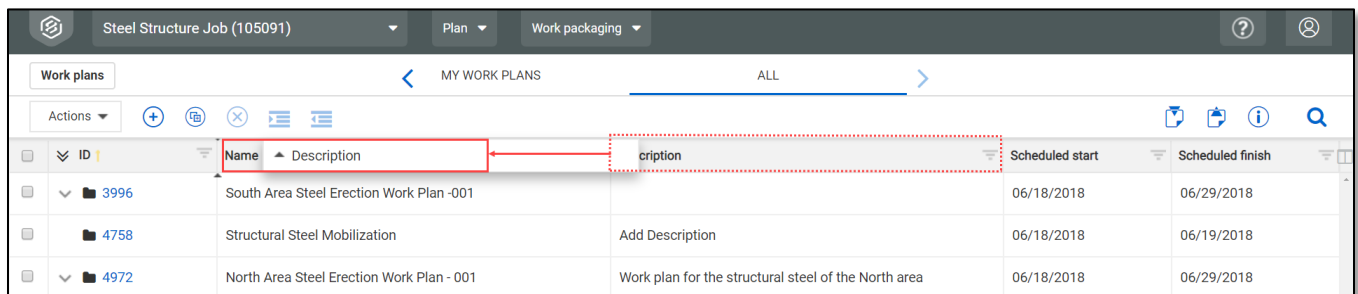
1. On the All tab of the Work plans page, click on the **Description** column header.



The screenshot shows the 'Work plans' page for 'Steel Structure Job (105091)'. The 'ALL' tab is selected. The table has columns: ID, Name, Description, Scheduled start, and Scheduled finish. The 'Description' column header is highlighted with a red box.

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

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



The screenshot shows the 'Work plans' page with the 'Description' column header being dragged. Two black arrows indicate the drop location to the right of the 'ID' column. The 'Description' column header is now positioned between 'Name' and 'Scheduled start'.

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

Sort Columns

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

Step by Step 2.2.2 – Sort Columns

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

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

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

Filter Columns

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

Step by Step 2.2.3 – Filter Columns

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

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

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

Scheduled start ↑ Scheduled finish

06/18

06/18

06/18

Show items with value that:

Is equal to

Is not equal to

Is after or equal to

Is after

Is before or equal to

Is Before

Clear Filter

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

Scheduled start ↑

Scheduled finish

06/18/2018

06/18/2018

06/18/2018

Show items with value that:

Is equal to

6/18/2018

And

Is equal to

Clear

Filter

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

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

Steel Structure Job (105091)

Plan

Work packaging

?

Work plans

<

MY WORK PLANS

>

ALL

Actions

+

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

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

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

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

The screenshot shows a filter configuration window. At the top, there are two tabs: 'Scheduled start' (selected) and 'Scheduled finish'. Below the tabs, there is a table with three rows, each containing the date '06/18/2018'. To the right of the table, there is a filter configuration area. It starts with the text 'Show items with value that:'. Below this, there is a dropdown menu set to 'Is equal to'. Underneath the dropdown, there is a text input field containing '6/18/2018' and a calendar icon. Below the input field, there is a dropdown menu set to 'And'. Below the 'And' dropdown, there is another dropdown menu set to 'Is equal to'. Below this second dropdown, there is another text input field (empty) and a calendar icon. At the bottom of the filter configuration area, there are two buttons: 'Clear' (highlighted with a red box) and 'Filter'.

TIP

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

Exercise 2.1 – Filter Columns

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

- | |
|---|
| 1. Find a discipline by using the column sort function. |
| 2. Remove the columns you do not need in your view. |
| 3. Apply a filter you would use to make the data more relevant. |

Congratulations, you have completed this exercise!

2.3 Data Blocks

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

Steel Structure Job (105091)

Plan

Work packaging

?

✕

Work plans

>

Steel Erection - Module 01

OVERVIEW

DETAILS

DOCUMENTS

+

✕

📁

View: Current viewset

Work sequence

<

•

>

☐	Work Step...	Description	Attachments	Hold point
☐	1	Off load steel	📎	
☐	2	Install steel	📎	
☐	3	Bolt and Torque	📎	Yes
☐	4	Quality Inspection	📎	No
☐	5	Turnover	📎	No

Labor

<

•

>

☐	Employee ID	Name	Trade	Craft level
☐	00342546	Troy Brown	Ironworkers (Structural)	Ironworker Jour
☐	00386639	Joseph Kelly	Ironworkers (Structural)	Ironworker Jour
☐	00376348	John Walsh Jr	Ironworkers (Structural)	Ironworker Fore
☐	00012238	Kenneth Moore	Carpenters	Carpenter Jour

Some data block fields allow the ability to fill in key work plan information.

Add Data Blocks

Step by Step 2.3.1 – Add Data Blocks

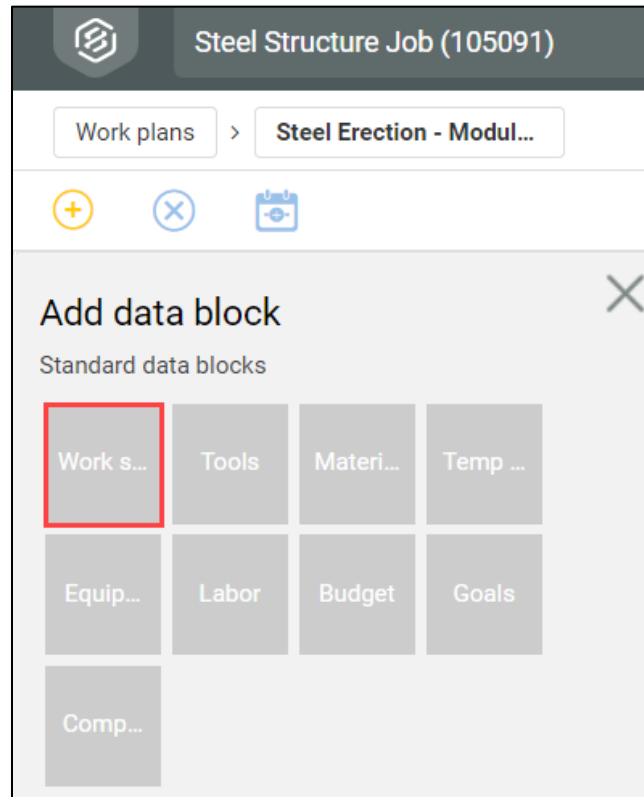
1. From the All tab on Work Plan page, select a **hyperlink** under the ID Column.

ID	Name	Description	Scheduled start	Scheduled finish
3996	South Area Steel Erection Work Plan -001		06/18/2018	06/29/2018
4750	Structural Steel Light Package			
5475	Steel Erection Upper Deck - Module 001	Upper rack steel erection		
4758	Structural Steel Mobilization		06/18/2018	06/19/2018
4972	North Area Steel Erection Work Plan - 001	Work plan for the structural steel of the North area	06/18/2018	06/29/2018
4974	Steel Erection - Module 01	Steel erection of module 1	06/30/2018	07/14/2018

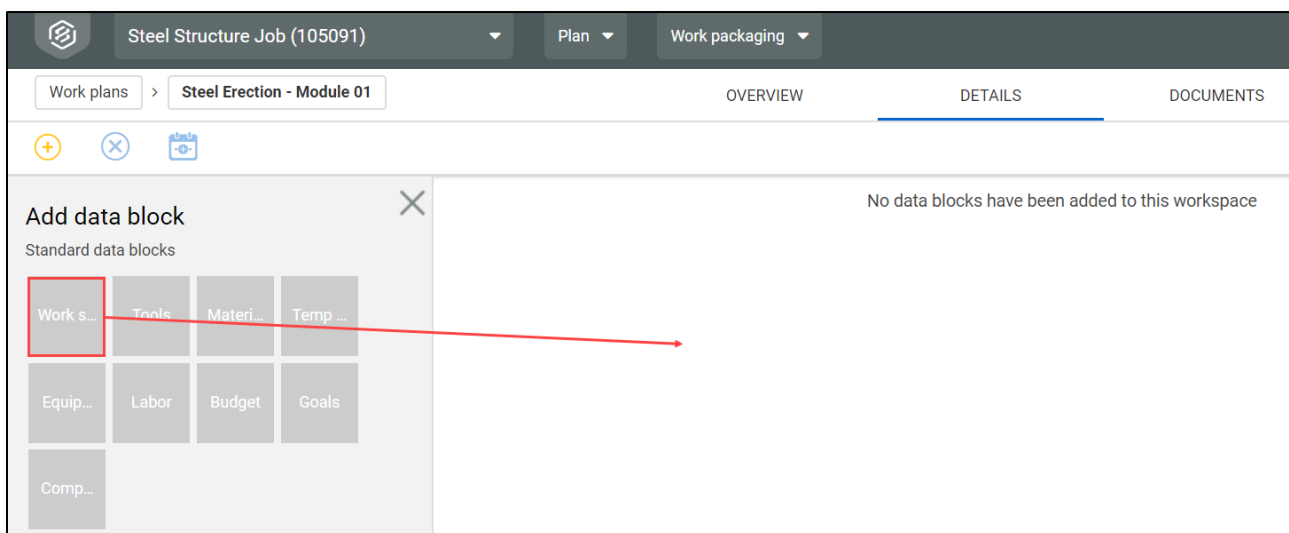
2. Once you are in an individual work plan, select the **Details** tab.

Steel Structure Job (105091)		Plan	Work packaging
Work plans >	Steel Erection - Modul...	OVERVIEW	DETAILS

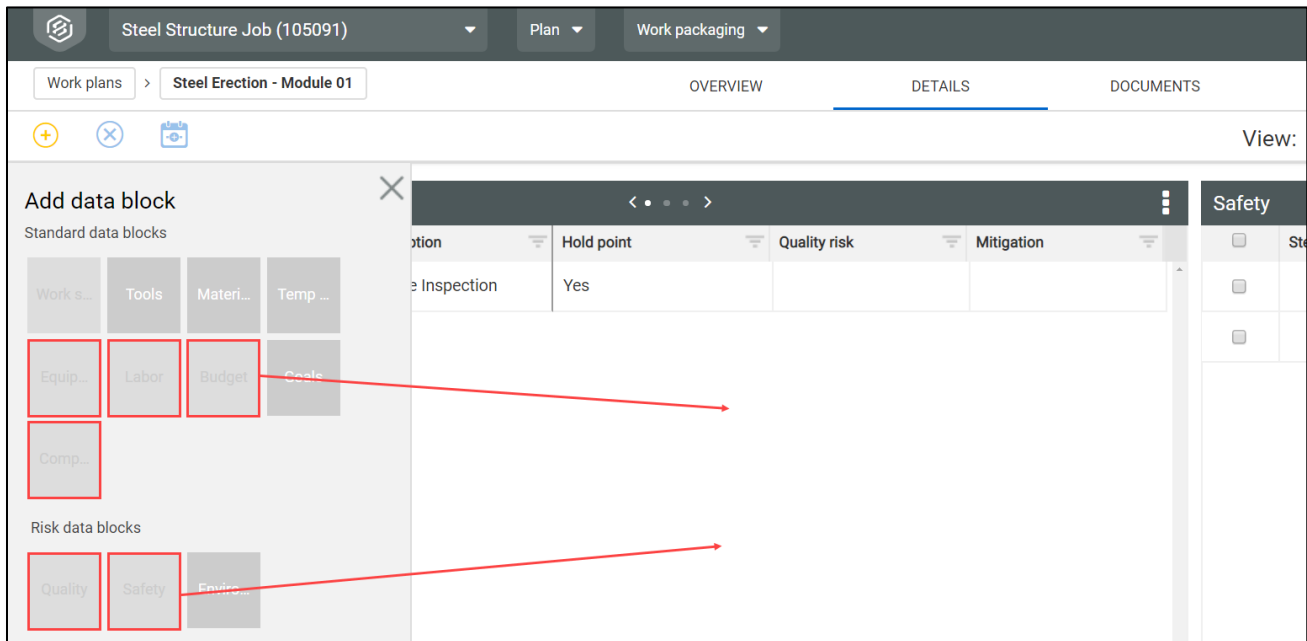
3. On the Add data block slide out panel on the left, select **Work sequence**.



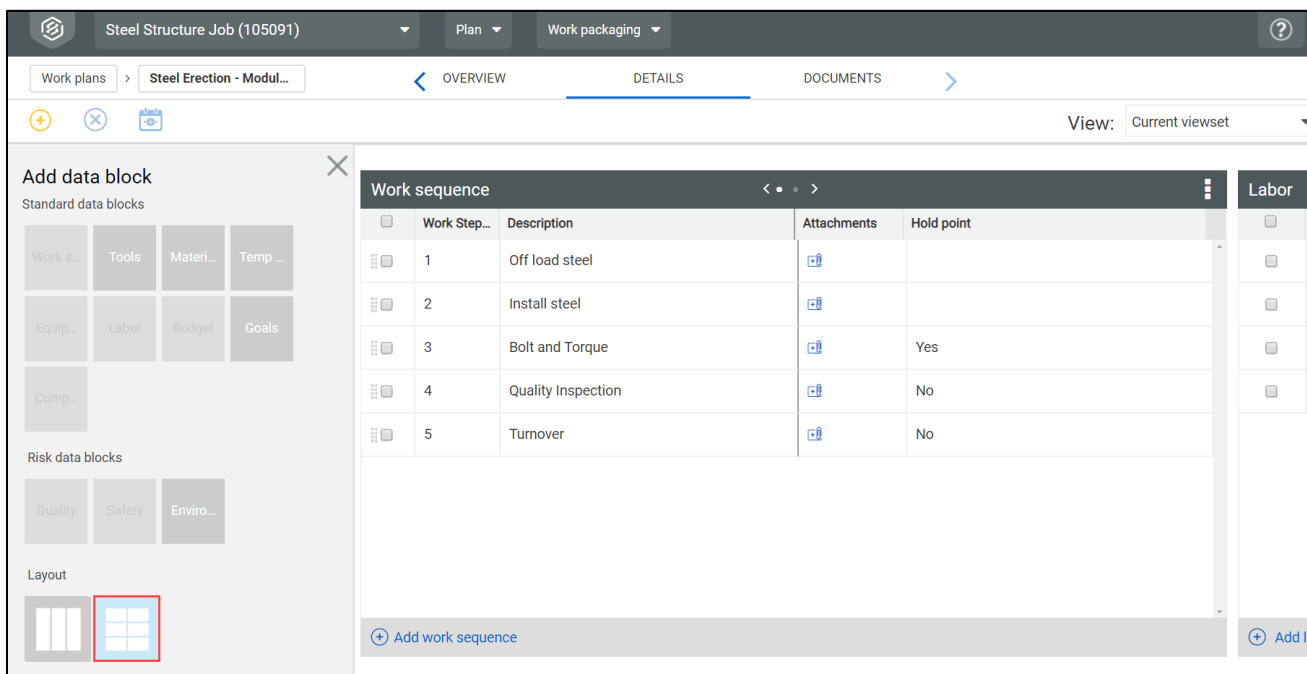
4. Drag it in to the blank white screen to your right.



- Also drag over the **Labor, Equipment, Components, Budget, Quality, and Safety** data blocks.



- Click the **Grid Layout icon** on the Add data block slide out panel.



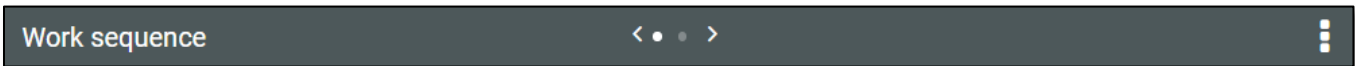
- This only applies to work packaging
- This allows you to scroll up and down instead of right to left

IMPORTANT

You can sort and filter columns whether they are in a data block or in a register page.

Navigate Data Blocks

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



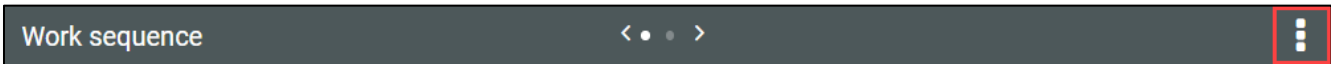
The number of dots between the arrows represent how many panes are in that data block.

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.

Step by Step 2.3.2 – Utilize the Context Menu

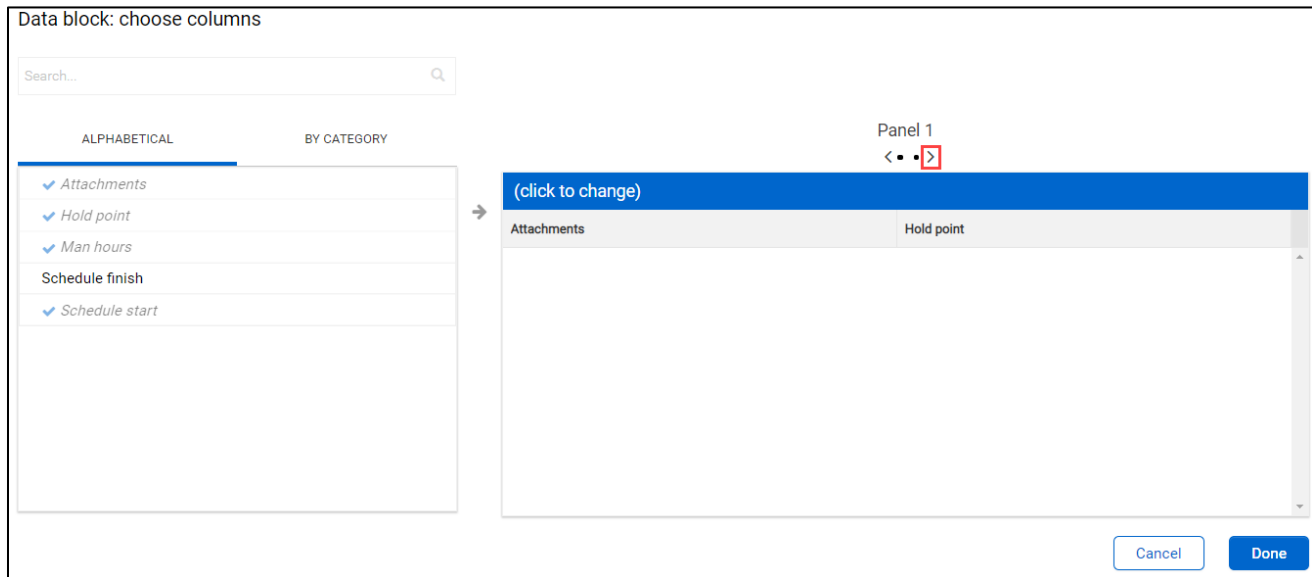
1. On the Details tab of the Work plans page, select the **Context Menu** for the Work sequence Data Block.



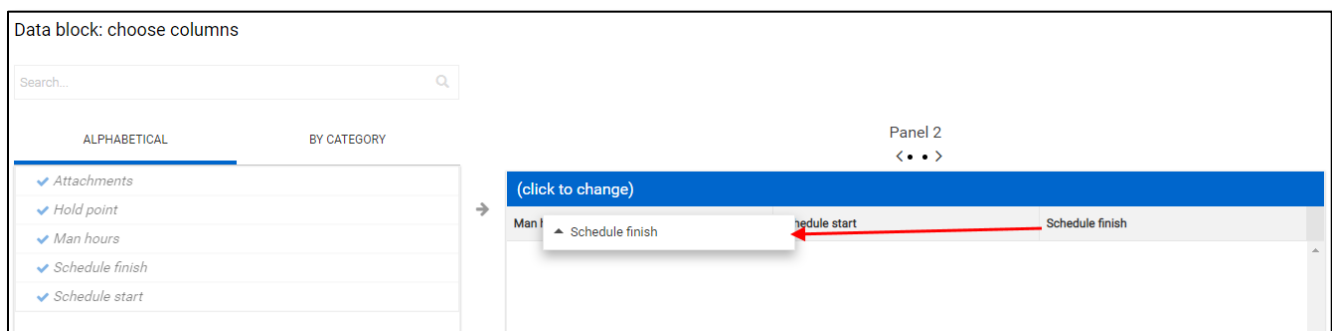
2. Select **Choose columns** from the drop-down menu.



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



- Within the data block, click and drag the **Schedule Finish** column to move it to the far left side of the data block columns.



IMPORTANT

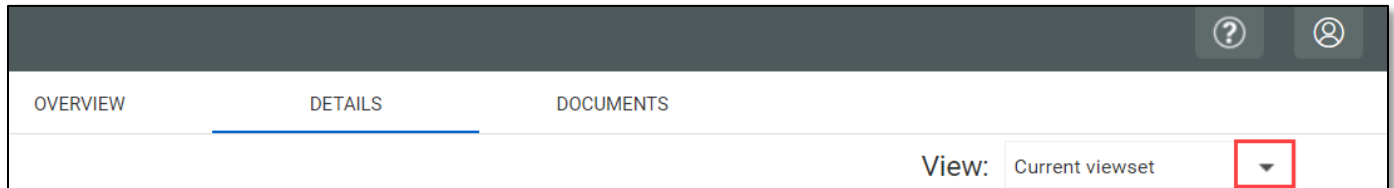
Each type of data block has its own unique default settings. Default settings include specific locked columns and total number of columns and panels.

2.4 Viewsets

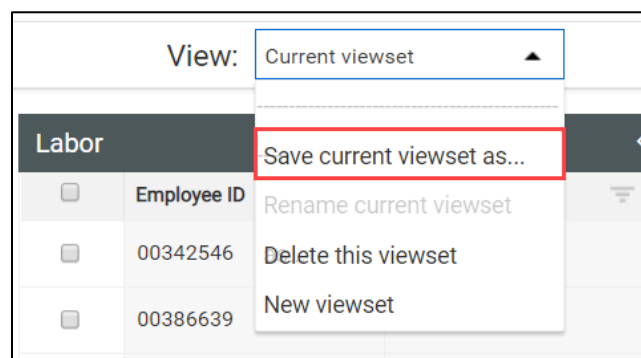
Once you have all desired data blocks organized to your liking, you can create a saved view of your page so that you can always revert back to it. This saved view is called a viewset.

Step by Step 2.4.1 – Create a Viewset

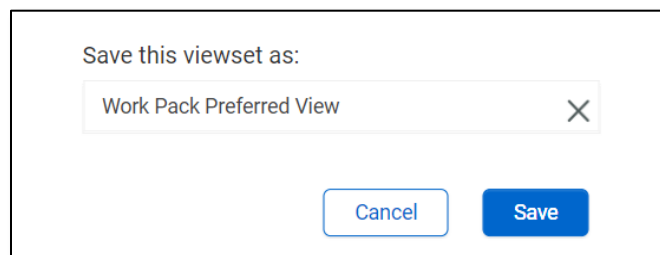
1. On the Details tab of your selected work plan, Select the **View** drop-down arrow to save the data block setup you created in Step by Step 2.3.1.



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



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



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

IMPORTANT

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

Exercise 2.2 – Create a Viewset

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

1. Select the data blocks you might need. (e.g., Labor, Equip, and Budget).
2. Select the desired columns you want to see in each data block.
3. Save your view.

Congratulations, you have completed this exercise!

Lesson 2 Review

1. How do you know which project you are working in?
 - a. Breadcrumbs
 - b. Navigation Bar – First Level Menu
 - c. Notifications and User Profile
2. How do you switch to a different Plan module?
 - a. Through the Navigation Bar
 - b. Through the Actions icon
 - c. Through the Breadcrumbs
3. On the Details tab of a work plan/package, how do you scroll up and down through data rather than left and right?
 - a. Create a custom data block on the Add data block slide out panel
 - b. Select the Grid Layout icon on the Add data block slide out panel
 - c. Use the left and right arrows to navigate between panes

Lesson 2 Summary

As a result of this lesson, you can:

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

Lesson 3

Work Package Management

Work Package Management Overview / Work Plan Creation / Work Package Details / Work Plan Import

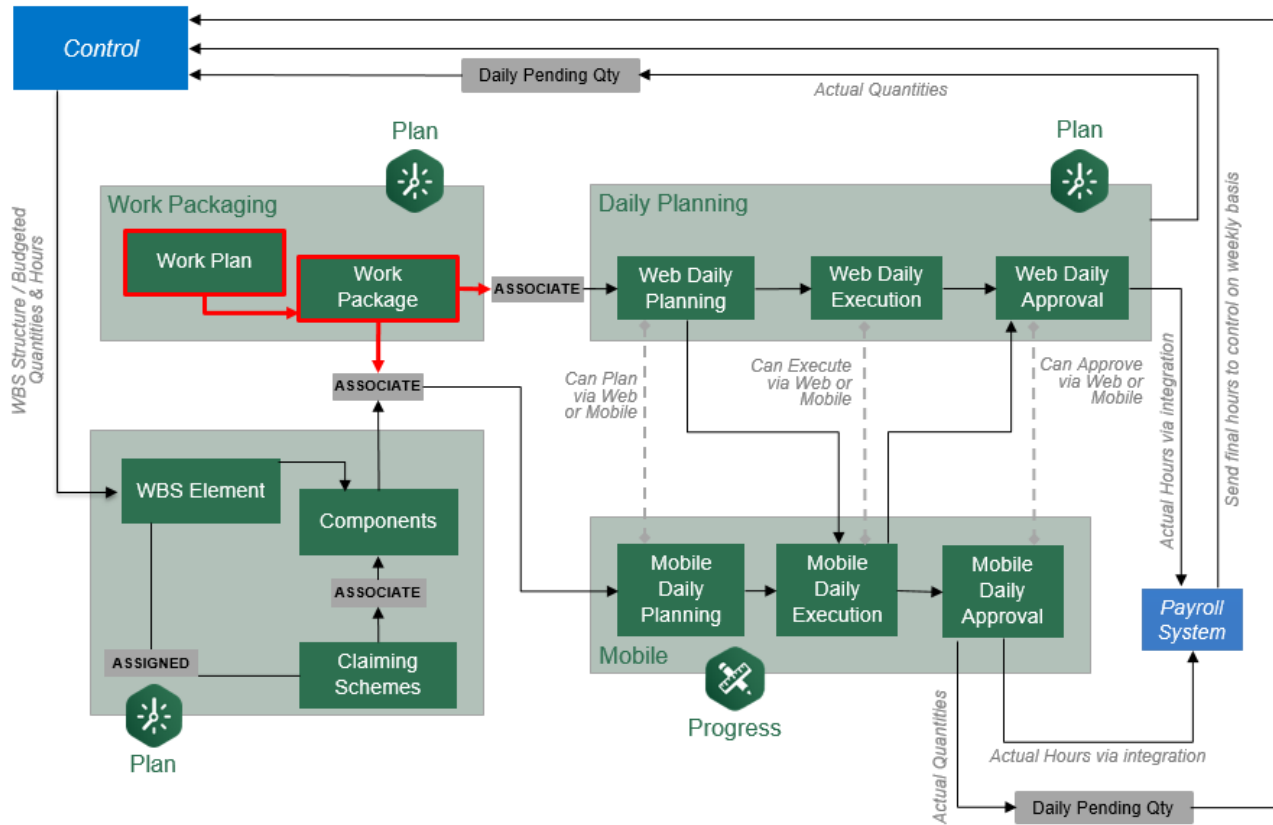
Lesson Duration: 60 minutes

Lesson Objectives

After completing this lesson, you will be able to:

- Explain how to manage work plans and packages
- Create a work plan and package
- Edit and review work plan/package details
- Import work plans/packages

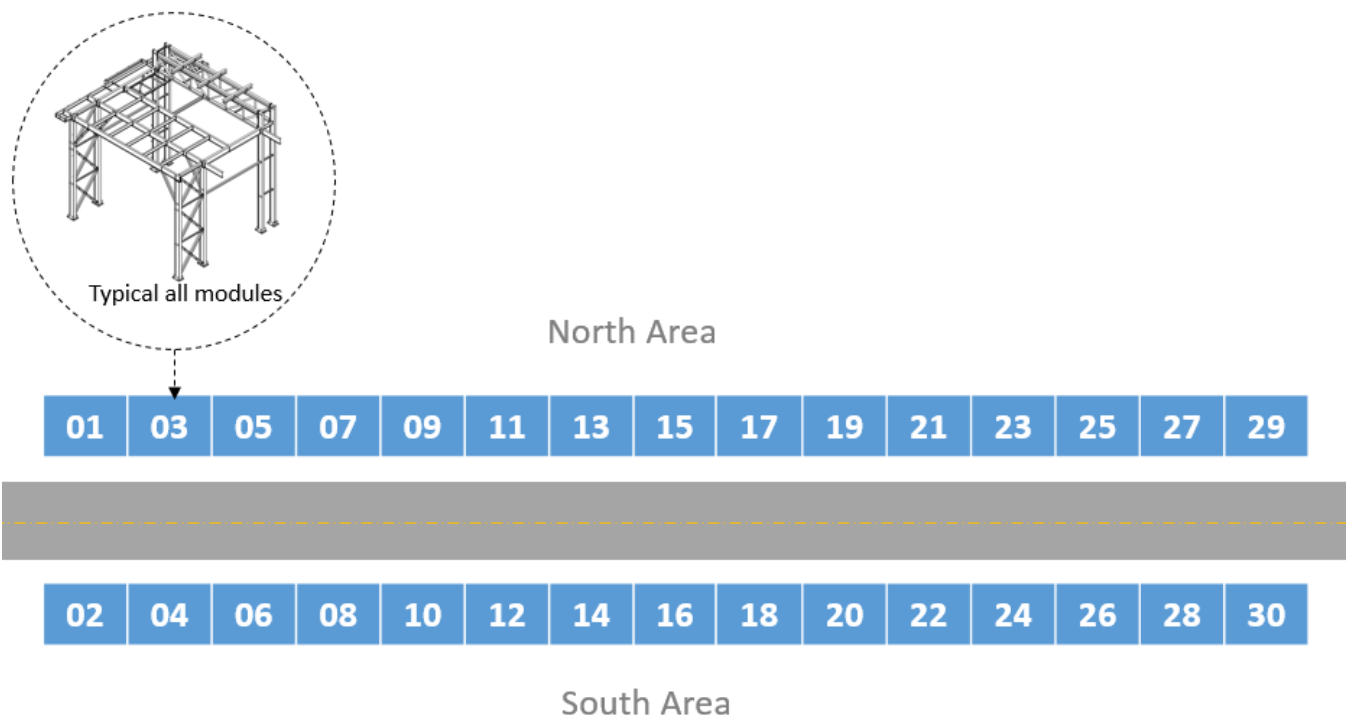
InEight Plan Workflow – Work Package Management



3.1 Work Package Management Overview

Scenario

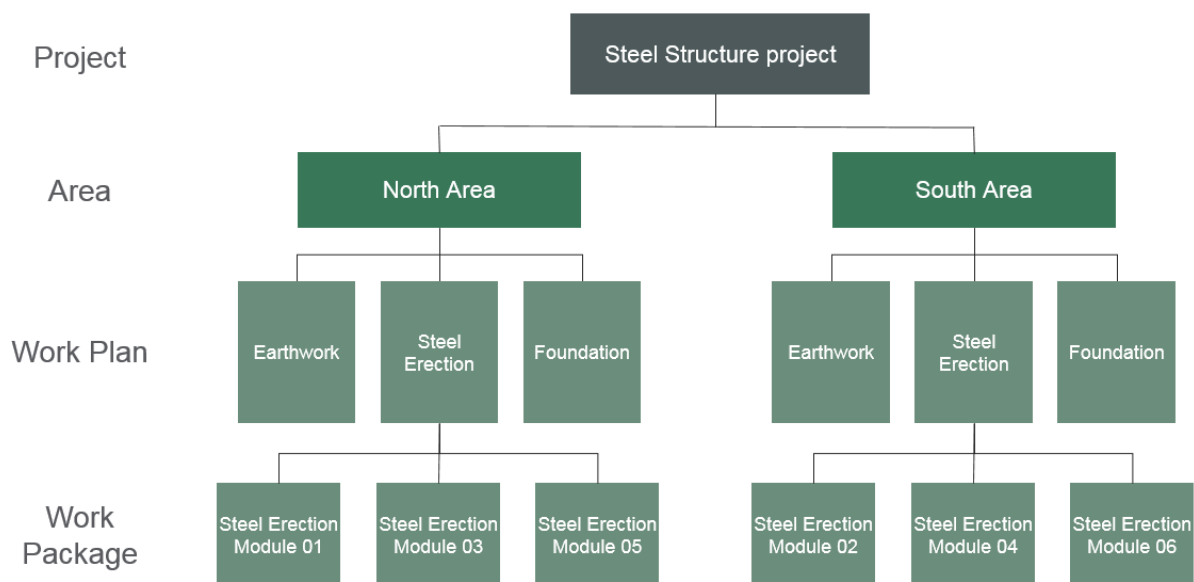
In today’s world, projects become bigger and bigger. Sometimes, looking at the entire project scope can become overwhelming. Dividing the scope into smaller pieces allows you to more effectively plan and manage the project. Imagine you are working on a project with the following scope: 30 modules in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



What is a Work Plan?

The Work Planning module is a way for you to break down and plan your work in an effective and efficient manner. It allows you to enact a detailed and well-organized plan for your work. You accomplish this by breaking work into plans and further down into packages.

Using the scenario above as an example, the scope can be divided into three different work plans: Earthwork, Foundation, and Steel Erection. The work is divided by area (North and South). Once the work plan structure is decided and built for a project, work packs can then be created to detail the work of each work plan.



3.2 Work Plan Creation

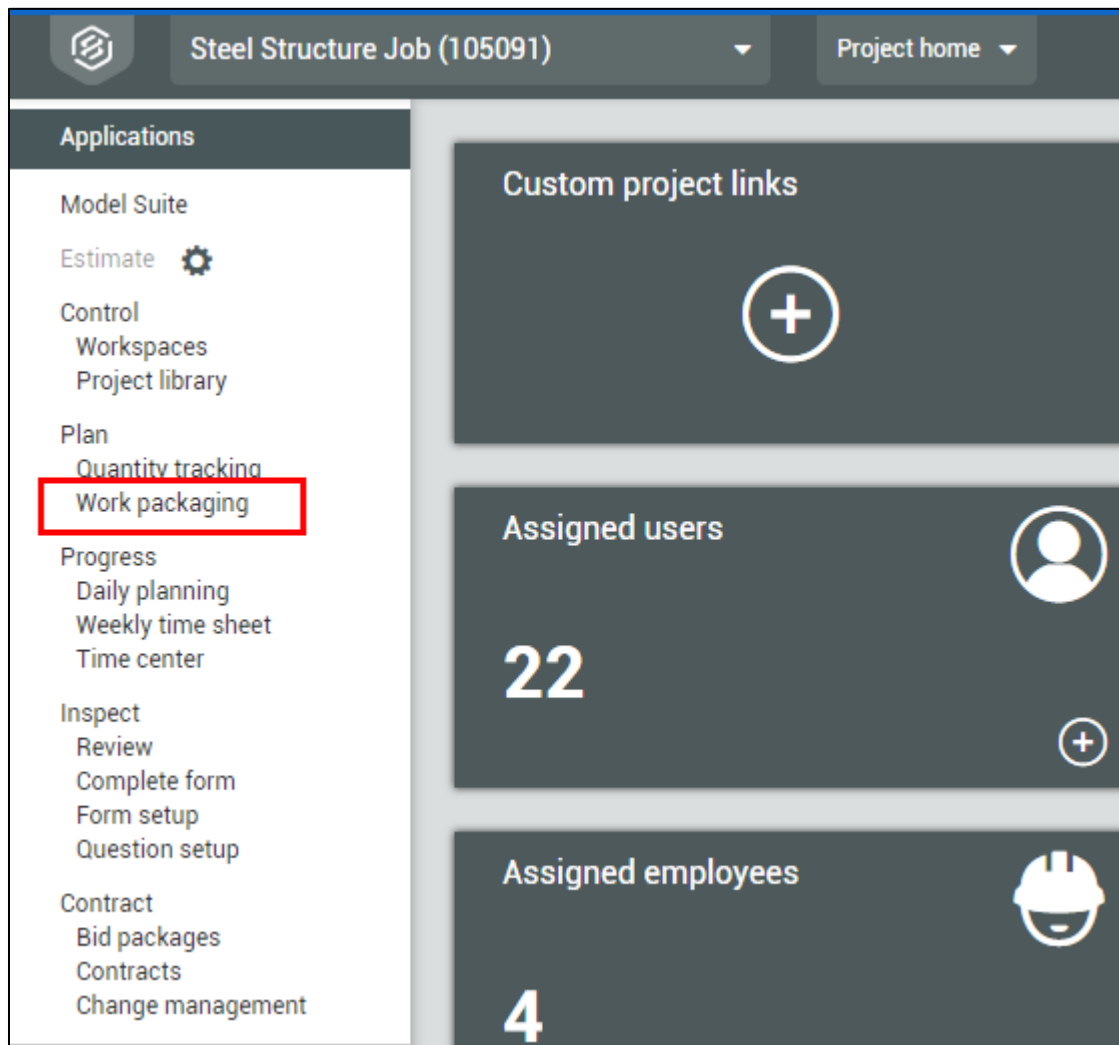
The first step in utilizing the Work Plan module is to set up your work plan structure. Once the work plan structure is built, work packs can be created and linked to the proper work plans.

Create Work Plan

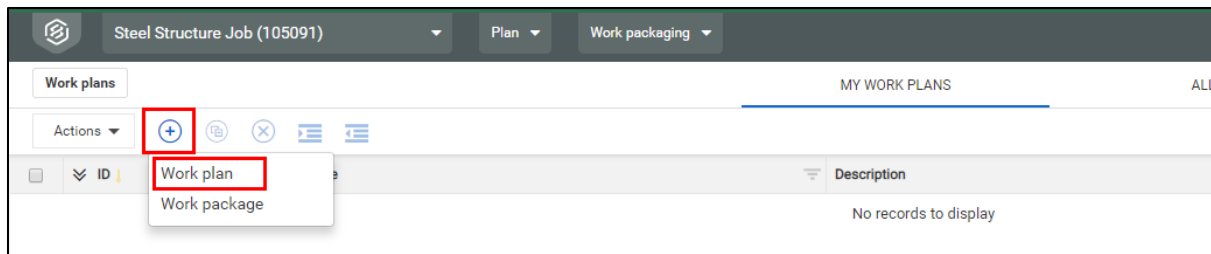
The following steps walk you through creating a work plan.

Step by Step 3.2.1 – Create a Work Plan

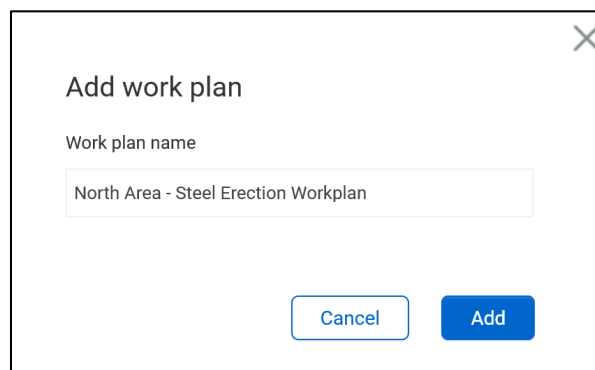
1. From the Steel Structure Training Job's Home page, navigate to the **Work packaging** page.



2. Click the **Add** button on the left toolbar and select **Work plan** from the drop-down list.



- This is where you can also add a Work Package
3. In the new dialog box, type **North Area - Steel Erection Work plan – [Your Initials]**.



4. Click **Add** to finish creating the work plan.

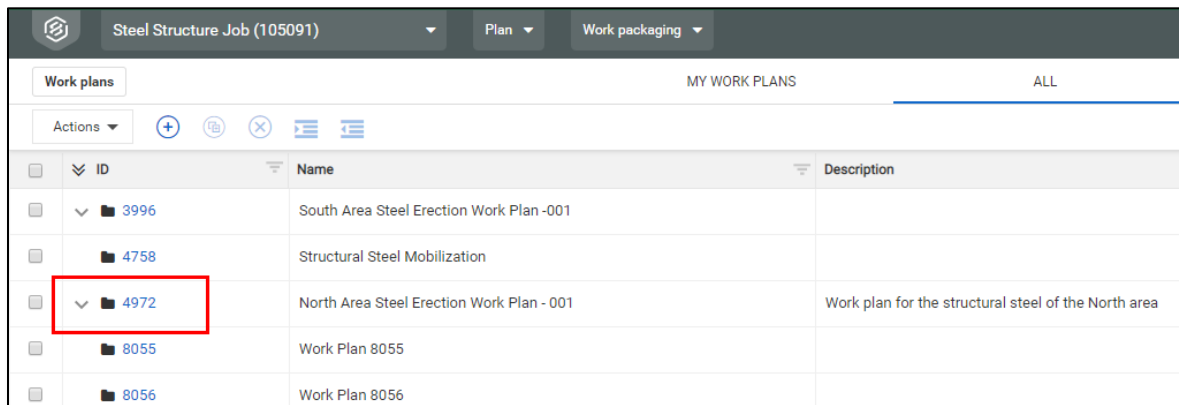
Edit Work Plans

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

- Schedule start and finish dates
- Discipline
- Risk
- Other fields

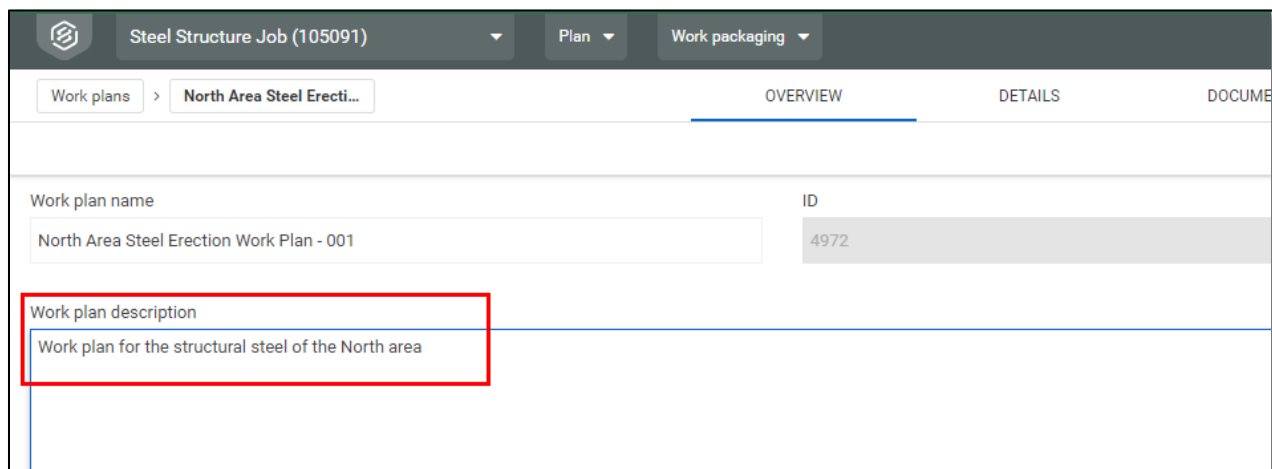
Step by Step 3.2.2 – Edit a Work Plan

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



ID	Name	Description
3996	South Area Steel Erection Work Plan -001	
4758	Structural Steel Mobilization	
4972	North Area Steel Erection Work Plan - 001	Work plan for the structural steel of the North area
8055	Work Plan 8055	
8056	Work Plan 8056	

- This takes you into the Overview tab of your work plan
2. Under Work plan description, type **Work Plan for the structural steel of the North area**.

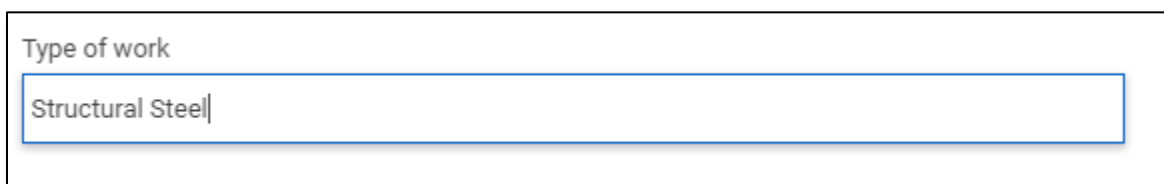


Work plan name	ID
North Area Steel Erection Work Plan - 001	4972

Work plan description

Work plan for the structural steel of the North area

- The Plan ID will automatically generate
3. In Schedule start, select a date.
 4. In Schedule finish, select a later date.
 - Created By will be automatically populated
 5. In Type of work, type **Structural Steel**.



Type of work

Structural Steel

6. From the drop-down list in the Discipline field, select **Metals**.



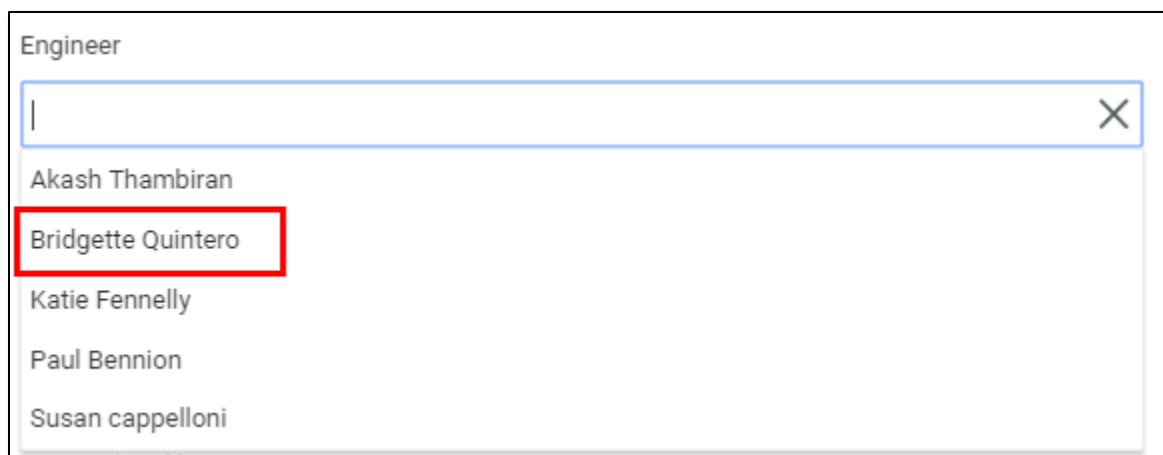
A screenshot of a web application showing a dropdown menu for the 'Discipline' field. The menu is open, displaying a list of options: Metals, Mechanical Equipment, Metals (highlighted in blue), Mining, Misc Specialty Work, Offshore Fabrication, Operational Support, and Overhead. A hint text 'Hint type "John"' is visible at the bottom left of the dropdown.

7. From the drop-down list in the Risk field, select **Medium**.



A screenshot of a web application showing a dropdown menu for the 'Risk' field. The menu is open, displaying a list of options: High, Medium (highlighted with a red border), and Low. The 'Type of work' field above it shows 'Structural Steel'.

8. Select **Bridgette Quintero** as the Engineer.

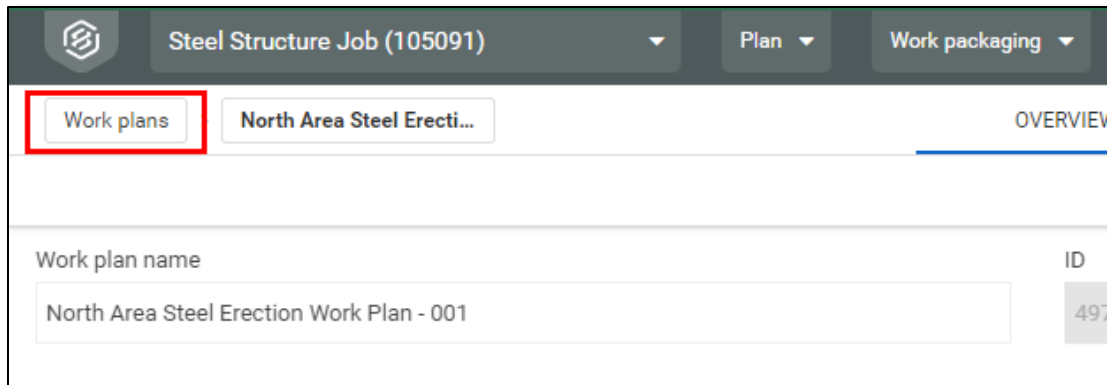


A screenshot of a web application showing a dropdown menu for the 'Engineer' field. The menu is open, displaying a list of names: Akash Thambiran, Bridgette Quintero (highlighted with a red border), Katie Fennelly, Paul Bennion, and Susan cappelloni. A search bar at the top of the dropdown is empty, and a close button (X) is visible in the top right corner.

TIP

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

9. In a similar manner, select **Bhavana Gupta** as the Superintendent and **Paul Bennion** as the Foreman.
10. Now that you have all the overview details, you can go back to the Work plans page by selecting **Work plans** in the Breadcrumbs.

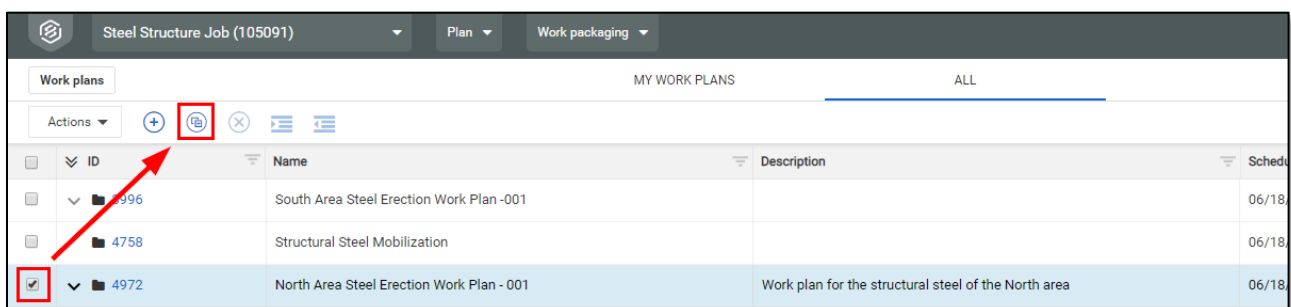


Copy Work Plans

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

Step by Step 3.2.3 – Copy a Work Plan

1. On the My Work Plans tab of the Work plans page, select your previously created work plan, then select the **Copy** icon.





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

- This brings up a new dialog box for you to select what information to carry over
2. Rename the work plan name to **South Area - Steel Erection Work plan – [Your Initials]**.
 3. Uncheck **Details (all data blocks)**.
 4. Select **Copy**.

Copy work plan/package

Work plan/package name

Include the following

☒ Overview page

☐ Details(all data blocks)

☐ Work sequence
☐ Tools
☐ Materials
☐ Temp structure
☐ Equipment
☐ Labor
☐ Documents

☐ Components
☐ Budget
☐ Goals
☐ Quality
☐ Safety
☐ Environmental

Cancel Copy

- A new work plan has been created

Steel Structure Job (105091)

Plan

Work packaging

Work plans

MY WORK PLANS

ALL

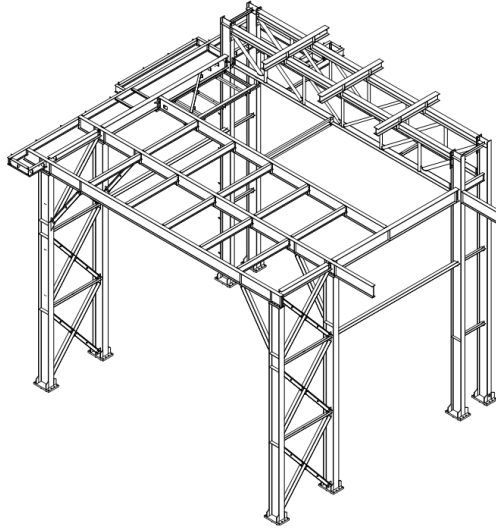
Actions

	ID	Name	Description	Sched
	3996	South Area Steel Erection Work Plan -001		06/18
	4758	Structural Steel Mobilization		06/18
	4972	North Area Steel Erection Work Plan - 001	Work plan for the structural steel of the North area	06/18

Create Work Packages

Work packages allow you to break a plan down into a more manageable size of work. They are often 1 to 4 weeks' worth of work.

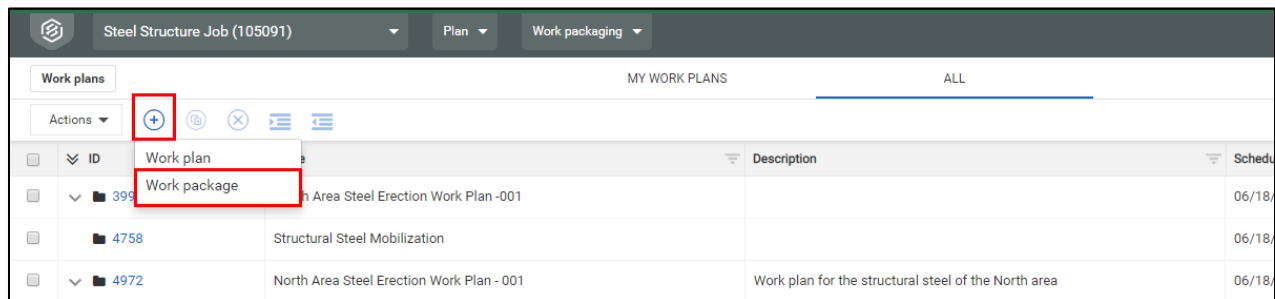
Continuing with the scenario above, you will create the work pack for the Steel Erection of Module 01.



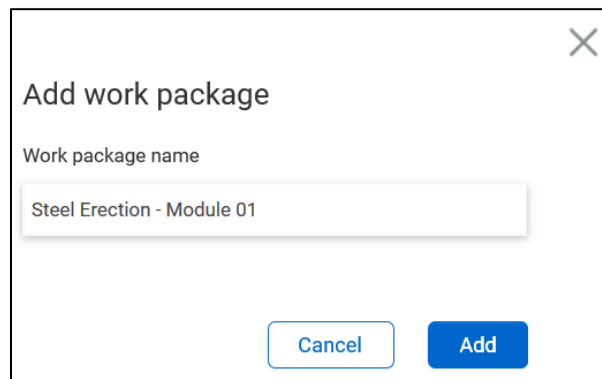
Within each package, you can assign the labor, components, equipment, materials, and other aspects you need to complete the work.

Step by Step 3.2.4 – Create a Work Package

1. On the My Work Plans tab of the Work plans page, select the **Add** button.
2. Select **Work package**.



3. In the new dialog box, type **Steel Erection - Module [your module number]**.



A dialog box titled "Add work package" with a close button (X) in the top right corner. It contains a label "Work package name" and a text input field with the value "Steel Erection - Module 01". At the bottom, there are two buttons: "Cancel" and "Add".

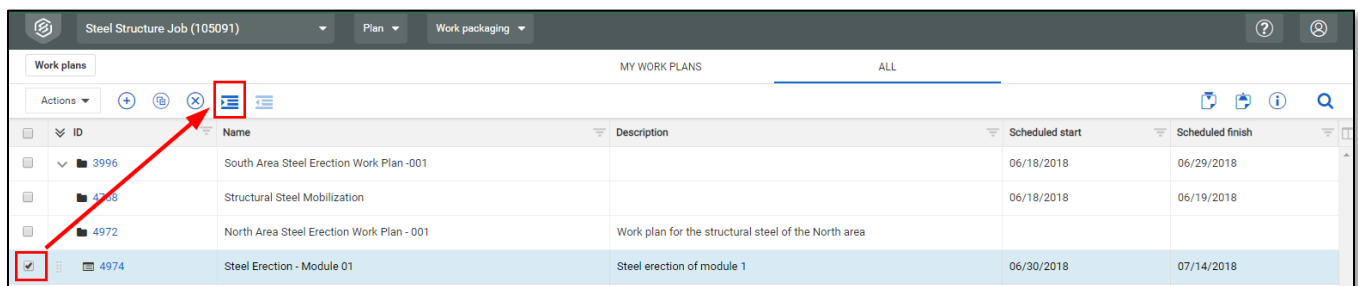
4. Click **Add**.

Group Work Packages

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

Step by Step 3.2.5 – Group a Work Package

1. On the My Work Plans tab of the Work plans page, select your recently created work package.
 - Notice that work packages and work plans have different icons
2. Click the **Move in to work plan** button ().



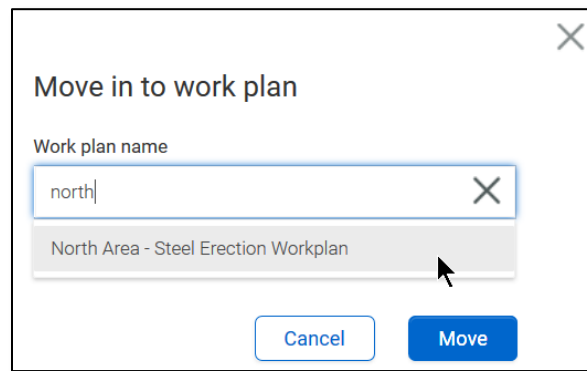
The screenshot shows the "Work plans" page for "Steel Structure Job (105091)". The "MY WORK PLANS" tab is selected, showing a list of work plans. A red arrow points to the "Move in to work plan" button (represented by a blue icon with a plus sign and a document) in the top toolbar. The table below lists the work plans:

ID	Name	Description	Scheduled start	Scheduled finish
3996	South Area Steel Erection Work Plan -001		06/18/2018	06/29/2018
4728	Structural Steel Mobilization		06/18/2018	06/19/2018
4972	North Area Steel Erection Work Plan - 001	Work plan for the structural steel of the North area		
4974	Steel Erection - Module 01	Steel erection of module 1	06/30/2018	07/14/2018

TIP

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

3. In the new dialog box, start typing the name of the plan you previously created.



- This is a dynamic field and will bring up a drop-down to select from as you are typing
4. Click **Move** to move the package.

3.3 Work Package Details

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.

Work Package Overview Tab

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

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

Step by Step 3.3.1 – Work Package Overview

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

Steel Structure Job (105091)

Plan

Work packaging

Work plans

MY WORK PLANS

ALL

Actions

ID	Name	Description	Schedule
3996	South Area Steel Erection Work Plan -001		06/18/20
4758	Structural Steel Mobilization		06/18/20
4972	North Area Steel Erection Work Plan - 001	Work plan for the structural steel of the North area	06/30/20
4974	Steel Erection - Module 01	Steel erection of module 1	06/30/20
8055	Work Plan 8055		

2. In the Overview tab of your work package, populate the Work plan description with **Steel erection - Module [your module number]**.

The screenshot shows the InEight Plan interface for a work package. At the top, there is a header bar with a logo, the text 'Steel Structure Job (105091)', a dropdown arrow, and tabs for 'Plan' and 'Work packaging'. Below the header, there is a breadcrumb trail: 'Work plans > Steel Erection - Modul...'. The main content area has two sections: 'Work plan name' with a text input field containing 'Steel Erection - Module 01', and 'Work plan description' with a text input field containing 'Steel erection of module 1'.

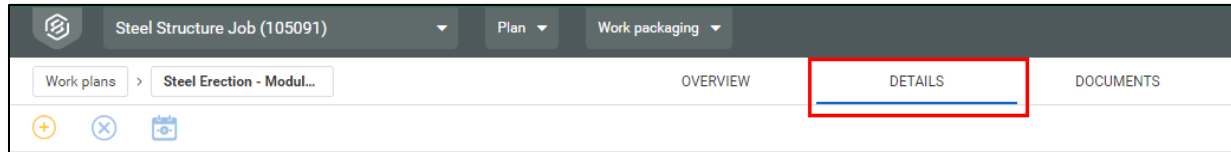
3. Select a Schedule start and Schedule finish date.
4. For Type of work, input **Steel Erection**.
6. From the drop-down list in the Discipline field, select **Metals**.
7. From the drop-down list in the Risk field, select **Medium**.
8. Select **Bridgette Quintero** as the Engineer.
9. Select **Bhavna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

Work Package Details Tab

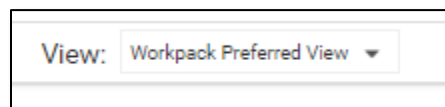
The Details tab is where the majority of your planning is accomplished. Here you can enter the planned labor, materials, equipment, components, among other aspects of the plan. You enter these details using data blocks. Some of the data blocks are open entry fields, such as safety, environmental, and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

Step by Step 3.3.2 – Work Package Details

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



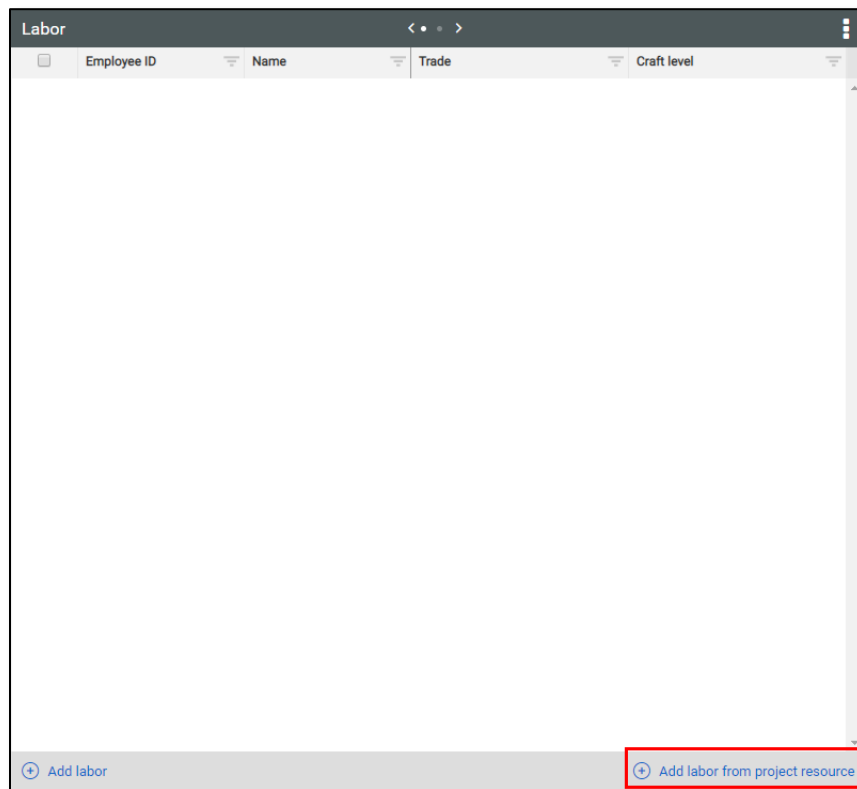
3. On the Details tab, change your view to your previously created viewset (see *Lesson 2 – General Navigation*).



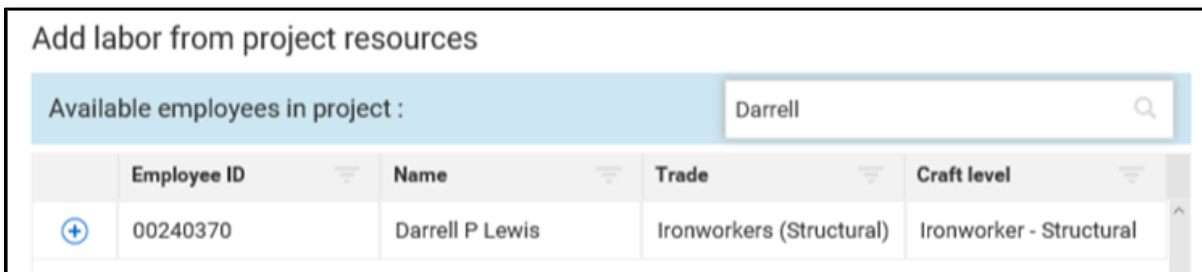
6. In the **Work sequence** data block, add the following work sequence steps:
 - Off load steel
 - Install steel
 - Bolt and torque
 - Quality inspection
 - Turnover
7. On the work step 3 – Bolt and Torque row, click in the Hold Point field and select **Yes** to create a hold point.

Work sequence				
	Work Step...	Description	Attachments	Hold point
	1	Off load steel		
	2	Install steel		
	3	Bolt and Torque		Yes
	4	Quality Inspection		No
	5	Turnover		No

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



9. In the new dialogue window, start searching for **Darrell P Lewis**.



TIP

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

IMPORTANT

You can add Multiple employees at a time in this dialog box.

10. Continue using the Search bar to look up and add the following:

- Kenneth Moore - Carpenter
- Troy Brown - Ironworker
- Joseph Kelly – Ironworker
- John Walsh Jr – Ironworker

Add labor from project resources

Available employees in project :

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

Selected employees:

- ⊗ Kenneth Moore-Carpenter Journeyman
- ⊗ Troy Brown-Ironworker Journeyman
- ⊗ Joseph Kelly-Ironworker Journeyman
- ⊗ John Walsh Jr-Ironworker Foreman

11. Click **Add**.

- The laborers appear in the Labor data block

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

Equipment

Equipment ID	Description	Category	EquipmentType	Ownership
--------------	-------------	----------	---------------	-----------

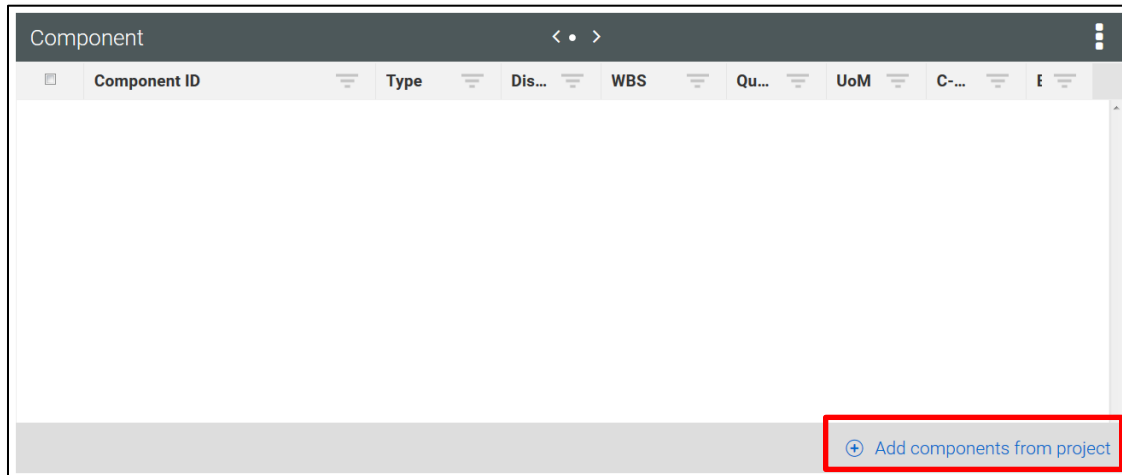
13. Look up and select the following pieces of equipment:

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

14. Select **Add**.

- The equipment appears in the Equipment data block

15. In the Component data block, select **Add components from project**.



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

Component ID	Type	Discip...	WBS	Quant...	UoM	C-B-U...	Es...
Module 01 - B23: Cross Brace Assembly	Activity	Metals	1005	0.15	Ton	20	3
Module 01 - B25: Beam Assembly	Activity	Metals	1005	0.254	Ton	20	5.08
Module 01 - C23: Cross Brace Assembly	Activity	Metals	1005	0.25816	Ton	20	5....
Module 01 - C24: Cross Brace Assembly	Activity	Metals	1005	0.14	Ton	20	2.8
Module 01 - A6 Connection to Foundation	Activity	Metals	1006	1	Ea	0.5	0.5
Module 01 - A7 Connection to Foundation	Activity	Metals	1006	1	Ea	0.5	0.5

IMPORTANT

When you add a component, it will automatically update the Budget data block.

17. In the Quality data block, in the first row, select **1** in the Step field.

18. In the Description field, type **Torque Inspection**.

Quality					
	Step	Description	Hold point	Quality risk	Mitigation
☐		Torque Inspection			

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

Quality					
	Step	Description	Hold point	Quality risk	Mitigation
☐		Torque Inspection	Yes		
			No		
			Yes		

20. In the Safety data block, in the first row, select **1** in the Step field and type **Crush Points** in the description field.

Safety				
	Step	Description	Hold point	Safety risk
☐	1	Crush Points		

21. At the bottom of the Safety data block, click on **Add safety item**.

22. In the resulting blank row, select **2** in the Step field.

23. In the Description field, type **Watch for falling objects**.

Safety				
	Step	Description	Hold point	Safety risk
☐	1	Crush Points		
☐	2	Watch for falling objects		

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

3.4 Work Plan Import

Scenario

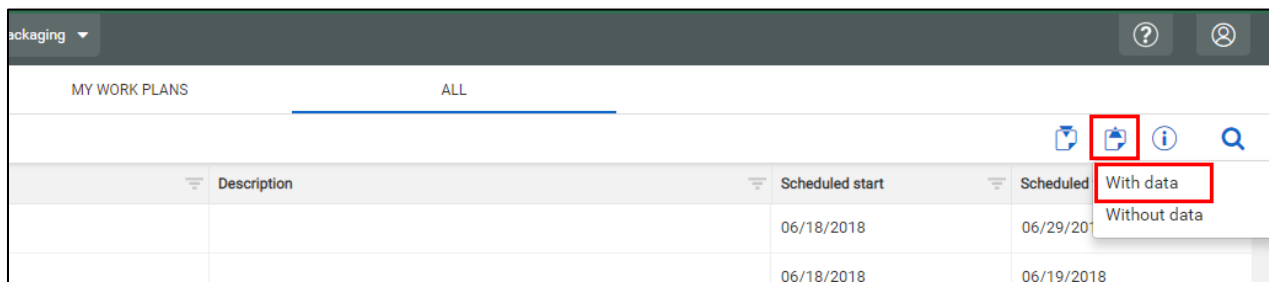
Sometimes you have multiple, similar work packages to create and a faster way to create them would make planning more efficient. By using the Import Template, the project team can input multiple work packages in an Excel document and upload it into Plan.

Import Template

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

Step by Step 3.4.1 – Create Work Plans from Excel Import

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



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 plans and work package on the Work plans page

English	User Selected Language				
REQUIRED	Field is required for import				
OPTIONAL	Field is optional for import				
VALIDATED	Field must match master data available in application				
IGNORED	Field not to be populated				
ID	Name	Description	Parent WorkPlan ID	Scheduled start	Scheduled finish
Numeric	Alphanumeric	Alphanumeric	Numeric	Date: MM/DD/YYYY	Date: MM/DD/YYYY
200	50	1000	100	10	10
3996	South Area Steel Erection Work Plan -001			6/17/2018	6/28/2018
4758	Structural Steel Mobilization			6/17/2018	6/18/2018
4972	North Area Steel Erection Work Plan - 001	Work plan for the structural steel of the North area		6/17/2018	6/28/2018
8055	Work Plan 8055				
8056	Work Plan 8056				
8057	Work Plan 8057				
9263	Work Plan 9263				
4750	Structural Steel Light Package		3996		
4974	Steel Erection - Module 01	Steel erection of module 1	4972	6/29/2018	7/13/2018



Excel templates “with data” are typically used to update existing components.

3. Input information into your template to be uploaded. At the bottom of the list, add the following information:
 - Name: **Steel Erection Upper deck - Module [your module number]**
 - Description: **Upper rack steel erection**
 - Assign proper work plan to your work package in the Parent Work plan ID field.

English	User Selected Language		
REQUIRED	Field is required for import		
OPTIONAL	Field is optional for import		
VALIDATED	Field must match master data available in application		
IGNORED	Field not to be populated		
ID	Name	Description	Parent WorkPlan ID
Numeric	Alphanumeric	Alphanumeric	Numeric
200	50	1000	100
3996	South Area Steel Erection Work Plan -001		
4758	Structural Steel Mobilization		
4972	North Area Steel Erection Work Plan - 001		
8055	Work Plan 8055		
8056	Work Plan 8056		
8057	Work Plan 8057		
9263	Work Plan 9263		
4750	Structural Steel Light Package		
4974	Steel Erection - Module 01	Steel erection of module 1	3996
5475	Steel Erection Upper Deck - Module 001	Upper rack steel erection	4972
			3996

4. Delete all the work packages/work plans that came with the import template.

	A	B	C	D	E	F
1	English	User Selected Language				
2	REQUIRED	Field is required for import				
3	OPTIONAL	Field is optional for import				
4	VALIDATED	Field must match master data available in application				
5	IGNORED	Field not to be populated				
6	ID	Name	Description	Parent WorkPlan ID	Scheduled start	Scheduled finish
7	Numeric	Alphanumeric	Alphanumeric	Numeric	Date: MM/DD/YYYY	Date: MM/DD/YYYY
8	200	50	1000	100	10	10
9	3996	South Area Steel Erection Work Plan -001			6/17/2018	6/28/2018
10	4758	Structural Steel Mobilization			6/17/2018	6/18/2018
11		Steel Erection Work Plan - 001			6/17/2018	6/28/2018
12		Work plan for the structural steel of the North area				
13		Work Plan 8055				
14		Work Plan 8056				
15		Work Plan 8057				
16		Work Plan 9263				
17		Structural Steel Light Package			3996	
18		Steel Erection - Module 01			4972	
19		Steel Erection Upper Deck - Module 001			6/29/2018	7/13/2018
20		Upper rack steel erection			3996	
21						
22						
23						
24						
25						
26						
27						
28						
29						
30						

5. Save this Excel file to your desktop as **[Your Initials] Plan Upload**.
6. In InEight Plan, click the **Import** button on the Components page.



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

Description	Scheduled start	Scheduled finish
	06/18/2018	06/29/2018
	06/18/2018	06/19/2018
Work plan for the structural steel of the North area	06/30/2018	07/14/2018

- An Import data from template window appears

Import data from template

The data will be imported into work plans

Drag and drop the file here or browse

[Browse...](#)

☐ Email me upon completion

[Cancel](#) [Import](#)

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

Import data from template – DD Plan Upload.xlsx

The data will be imported into work plans

Drag and drop the file here or browse

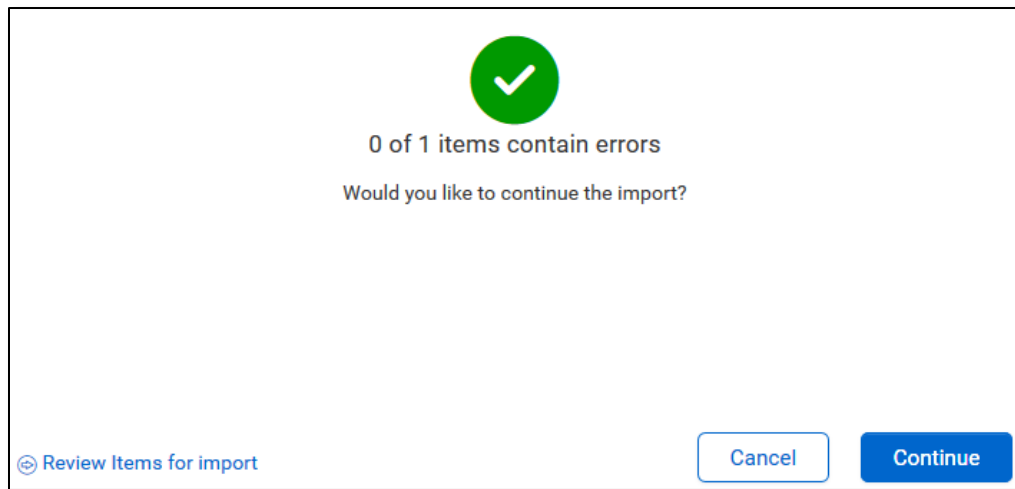
[Browse...](#)

☐ Email me upon completion

[Cancel](#) [Import](#)

8. Click the **Import** button.

- Another window appears, indicating whether any errors occurred



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

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

Exercise 3.1 – Enter Work Package Details

Now that you have learned to create work plans and packages and fill out all details, create your own work plan and package using the method you prefer. Make sure to fill out all details for your work package.

1. Include at least one safety item.
2. Include at least two components.
3. Include at least two labor resources.
4. Include at least two pieces of equipment.

Congratulations, you have completed this exercise!

Lesson 3 Review

1. Utilizing the import template, you can upload which of the following?
 - a. Work Plans
 - b. Work Packages
 - c. a & b
 - d. None of the above
2. Which of the following items are required to create a work package? (Select all that apply.)
 - a. Plan/package name
 - b. Shift
 - c. Plan date
 - d. Superintendent
 - e. Foreman
 - f. Engineer
 - g. Location

Lesson 3 Summary

As a result of this lesson, you can:

- Explain how to manage work plans and packages
- Create a work plan and package
- Edit and review work plan/package details
- Import work plans/packages