PLAN USER GUIDE WORK PACKAGING



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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.

j All projects & o	organizations	-							?	8
			PF	ROJECTS	ORGANIZATIONS					
									(j)	Q
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
	All projects & c	All projects & organizations     PROJECTS       PROJECTS     Image: Status in the sta	All projects & organizations       PROJECTS     ORGANIZATIONS       ID1     Name     Status     Organization       105091     Steel Structure Job     Active     \$100000 - (PKS Inc)	All projects & organizations       PROJECTS     ORGANIZATIONS       ID1     Name     Status     Organization       105091     Steel Structure Job     Active     \$100000 - (PKS Inc)	All projects & organizations     PROJECTS     ORGANIZATIONS       ID1     Name     Status     Organization     Created by       105091     Steel Structure Job     Active     S100000 - (PKS Inc)     jeremy cheek	All projects & organizations       PROJECTS     ORGANIZATIONS       ID1     Name     Status     Organization     Created by       105091     Steel Structure Job     Active     S100000 - (PKS Inc)     jeremy cheek	All projects & organizations       PROJECTS       ORGANIZATIONS         PROJECTS       ORGANIZATIONS         ID1       Name       Status       Organization       Created by       Created on         105091       Steel Structure Job       Active       S100000 - (PKS Inc)       jeremy cheek       06/04/2018 3:30:26 mini-			

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.

et.	🖉 Links		Control		② Quantity	tracking		_
Add project image	Organization		Manage budgets and fo	precasts	Build com quantities	ponents and	document	
Steel Structure Training Job (105091)	Project			Launch			La	unch
Ar i socuri cinesion	InEight University		④ Work packaging		🛞 Daily plan	nning		
Workspaces			Group work into plans a	and packages	Assign tas	sks for your c	rew	
Project library				Laupch			La	unch
Plan								
Quantity tracking Work packaging	Project notes	Z	6 Contracts		③ Supporting	ng documents		
Progress			Status	Count	Pending	Rejected	Expiring	
Daily planning Time center			Executed Non-executed	1	1	0	0	
Weekly time sheet			Rejected	0				
	🔅 Settings				Bid pack	ages		
Compliance								

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.

105091 (Steel Training Job)	ome 👻			() A <sup>2</sup> () (
et.	🖼 Project notes		Control	② Quantity tracking
Add project image			Manage budgets and forecasts	Build components and document quantities
105091 (Steel Training Job)			L	Launch
plications	Work packaging		8 Daily planning	ℓ Links
) Model ) Document ) Schedule ) Estimate O	Group work into plans and packages	Launch	Assign tasks for your crew	Organization InEightU a
Report Reports Examples	Bid packages  Awarded Unawarded		Supporting documents  Pending Rejected Expiring	restbol / testbol / testbo
Dashboards API documentation	0 0	۲	0 0 0	Project
) Control	© Contracts		Change status	Prime contract summary
Vorkspaces Project library Plan	Status Executed Non-executed	Count 0 0	Closed In Pro Active	Actual values Original contract \$0.00
Quantity tracking Work packaging	In approval Rejected	0	0 0 Potential client change orders	D Executed Client CO's \$0.00 Adjusted/Current contract \$0.00
Progress Daily planning			Client change orders	In Review Client CO's \$0.00     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**.

S) TOSOGT (Steel framing Job) +	Project nome 👻						(9)	<del>ц</del> (8)
et.	Applications						③ Quantity tracking	
Add project image	Model	🚯 Estimate 🛛 🛱	Plan	Contract	s and forecasts		Build components and document qua	ntities
105091 (Steel Training Job)	Documer	nt 💽 Control	Quantity tracking Work packaging	Change		Launch		Launch
cations	Schedule		Compliance				∉ Links	
Model Document	Project			Extensions	r your crew		Organization	
Schedule	Project home	Assigned users		Design		Launch	InEightU	
Report	Settings	Assigned operational re	sources	Billing	uments		Test567Test567Test567Test567Test567Tes MahendranMahendranMahendranMahendra	
Reports	Workflows	Assigned disciplines an	d commodities		Rejected	Expiring	Karthik	
Explore Dashboards			-		0	0 。	TEST 124	
API documentation							Tigot	
Control	0	Contracts		Change statu	15		Prime contract summary	
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Pian Quantity tracking	in p	approval	0	0 Rotential client char	0	0	Executed Client CO's	\$0.00
Work packaging			0	Potential cireffi cria	196-26-26		Adjusted/Current contract	\$0.00
Progress				0 Client change order	0	0	In Review Client CO's	\$0.00
Daily planning	-			0	0	0	Projected contract	\$0.00

#### 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.

G Steel Structure	Training Ju	ob (105 tions 🔻	091 <b>1</b> Plar <b>2</b> ⊕ ⊕ ⊗ ⊑ ⊒	Work packaging 3							4 2 A 9 ∎ ⊮ ⊮	(5) () Q
Planning Schedule			Work package name	ID T Description	\Xi Schedule ID 👳 S	itart date 🛛 👻 End date	🐨 Total man hours	🐨 Mhr % comp	Cost % comp	Status 👻	Created by T Last updated on	10
			▶ 🗀 <u>North</u>	North							09/06/2018	
	-	-1	2 In South	South							09/06/2018	
		0	▶ 🗅 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	We	ork packaging > North				CONSTRUC	TION WORK PACKAGES	CONSTRUCTION	ON WORK AREA OVER	VIEW 2			-	
	•	Z 😣 🗉 📼	<b>a</b> 3										4 🎟	(j)
playid: rth		😻 Work package name	Ξ ID	- Description	👻 Schedule ID 👘	Start date	🐨 End date 👘	Total man hours	\Xi Mhr % comp	Cost % comp	Status	\Xi Created by	- Last updated on	-(
cription:		► D CWP-North Area St	eel Er 7	Work package for structural	s	08/03/2020	08/14/2020		0 0.00%	0.00%	Draft	Neil Stein	08/03/2020	
	5													
r % Complete	Γ													
0%														
% Complete														
0%														
man hours: 0														

# 2.1.2 CONSTRUCTION WORK PACKAGES (CWP) PAGE

16: D. North Area Steel Erection		54 0				WORK	PACKAGES	CC P	ONSTRUC PACKAGE	TION WORK OVERVIEW		WORKSPACE	GENE	RAL CONSI	IDERATIONS	DOCUMENT	2					0
nber:	( <del>+</del> )	Work package na	Ime 3	⊤ ID		Description	T Sc	hedule ID	- s	itart date	÷ Er	d date 📑	Total man ho	ours 🗔	Mhr % comp	Cost % comp	Status	Ŧ	Created by	τL	ast updated on	
cription: rk package for structural steel	0	🔋 IWP-Steel Er	ection - Module	8	5	Steel erection of Moc	lule 0		c	8/03/2020	06	/07/2020			0.00%	0.00%	Draft		Neil Stein	0	18/03/2020	9
0%	5																					
dule ID: : date: August 3, 2020 date: August 14, 2020																						

# 2.1.3 INSTALLATION WORK PACKAGES (IWP) PAGE

		OVERVIEW WO	ORKSPACE CONSTRAIN	MANAGEMENT DOCUMEN	18 (2)		
n - Module 001							
6	Overview						
Vodule 001							
	IWP ID	IWP name	CWP			CWA	
	8	IWP-Steel Erection - Module 001	CWP-N	orth Area Steel Erection	•	North-North	•
	Description						
	Steel erection of Module 001						
%							
	Scope of work						
	Scope of work						
	Scope of work						
	Scope of work		т				
%	Scope of work		I				
%	Scope of work	Discipline	Ţ Type of	work		Risk	
%	Scope of work	Discipline Metals	Type of Steel Ere	work		Risk Medium	
%	Scope of work	Discpline Metals	Type of Steel Ere	work		Risk Medium	
%	Scope of work Location Schedule ID	Discipline Metals Schedule name	Type of Steel Erc Schedul	work ction ed start date		Risk Međium Scheduled end date	
% 2020 020	Scope of work Location Schedule ID	Discipline Metals Schedule name	Type of Steel Err Schedul Mon, 3.	work ction ed start date lug 2020	G	Risk Medium Scheduled end date Fil (7 Aug 2020	
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<b>%</b> 2020 020	Scope of work Location Schedule ID Status	Discipline Metals Schedule name	Type of Steel Err Schedul Mon, J.	work ction ed start date ug 2020 com	đ	Risk Međium Scheduled end date Fil 7 Aug 2020	

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.

A	ctions - (+) (+) (×								
		in the second second	-	· · · · · · · · · · · · · · · · · · ·	Schedule ID	Start date		End date	
	➢ Work package name	ID	Description	-	Schedule ID	Start uate	-	Lifu uate	
	Work package name	ID	North	-	Schedule ID	Start date		Ella date	

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

Wor	k plans				
Ac	tions 🕶 🕂 🕂 😥 🖾				
	⊗ Work package name 👘 ID 🔺 Descr	iptior 🗲	\Xi Schedule ID 🛛 😇 Sta	rt date 👘 End date	
		Description			
	North	North			

### 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	

- 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.

tions	• 🕀 🗹			lanage ITPs												‡≡ D		View: Saved	view wit	h Contract		· Cr (	7 8	Save clai
	Name	Parent record	Assembly	Туре	Discipline /	Commodity	Claiming scheme	WBS	•		Quantity		To date of	uantity	UoM			% Complete		WBS forecast 0	ITY	WBS planned Q	IY V	WBS to date Q
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	A1040-copy-1			<ul> <li>Activity</li> </ul>	Grad													(	.00000	11,239.34400		11,981.43894	1	11,215.09269
	A1040-copy			Activity	Grad	Available (	columns			Selecti	ed columns				- 1			100	0.00000	11,239.34400		11,981.43894	1	11,215.09269
	Luke Nov 14.033-c			Activity	Over										- 1			0	.00000					
	Luke Nov 14.001-2			Activity	Over										- 1			150.00	A 0000					
	Luke Nov 14.001-2	Defect testing 2	Defect testing 2	<ul> <li>Activity</li> </ul>	Over	C	olumn Name	î			Parent reco	ird	•	•				0	.00000					
	Luke Nov 14.001-1			Activity	Over	0 1	1jul-test		>		Assembly		1	1	- 1			0	.00000					
	Luke Nov 14.001			Activity	Over		ccount code		+		Claiming st	cheme		*				30	.00000					
	Updated name usin			Activity	Over		ccount Code Descripti	on		0	WBS		1.		- 1			100	.00000					
	Luke Nov 14.033			<ul> <li>Activity</li> </ul>	Over	0												0	.00000					
	Luke Nov 14.032			<ul> <li>Activity</li> </ul>	Over		ccount Code Number			0	Discipline /		A		- 1			(	.00000					
	Luke Nov 14.031			Activity	Over		ccount description			-	Commodity				- 1			(	.00000					
	Luke Nov 14.029			Activity	Over		ctual Length			-	Type		•	-	- 1			0	.00000					
	Luke Nov 14.028			<ul> <li>Activity</li> </ul>	Over								_		- 1			(	.00000					
	Luke Nov 14.027			Activity	Over						Г	Cancel		Save				(	.00000					
	Luke Nov 14.017			Activity	Over													(	.00000					
	Luke Nov 14.026			Activity	Overhead		Overhead					0.00000	_	0.00000				(	.00000					
	Luke Nov 14.016			Activity	Overhead		Overhead					0.00000		0.00000				(	.00000					
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	Luke Nov 14.025			Activity	Overhead		Overhead					0.00000		0.00000					00000					

## 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**.

Scheduled star	t T T 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 Filter

- 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

Steel Structure Jo	b (105091)	ing 💌	? 8
Work plans	MY WORK PLANS	ALL	
Actions 🕶 🕒 👘			🖻 🗊 🛈 🔍
♥ ID	Description	Name	Scheduled start
✓ ■ 4972	Work plan for the structural steel of the North area	North Area Steel Erection Work Plan - 001	06/18/2018 06/29/2018
V 🖿 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	t T 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
	Clear Filter

# TIP Apply multiple rules to your filter. For example, setting a "Contains" **or** "Is equal to" filter for your column would allow you to bring in two distinct results at once.

# 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															
	Ē					C	VERVIEW		WORKSPACE CON	STRAINT MANAGEMENT	T DOCUMENTS			View: Work Packag	ing
- Steel Erection	Com	ponents							<>		Planning complete		(+) Add component	ts by WBS	
erection of Module 001.			Component ID		- Description		7	Quantity	👻 UoM	7	WBS 1	Percent complete	Estimated hours	Discipline/Commodity	Ŧ
workspace		1	Module 01 -	A6 Connection to Fou	Module 1 - A	Connection to Foundat	ion	1	Ea			0	0	Metals	Θ
quipment	#	1	Module 01 -	A7 Connection to Fou	Module 1 - A	Connection to Foundat	ion	1	Ea			0	0	Metals	Θ
taterials udget		<u>1</u>	Module 03 -	A6 Connection to Fou	Module 3 - A	Connection to Foundat	ion	1	Ea			0	0	Metals	Θ
Components Lessons learned Quality forms Work sequence		1	Module 03 -	A7 Connection to Fou	Module 3 - A	Connection to Foundat	ion	1	Ea			0	0	Metals	Θ
		1	Module 05 -	A6 Connection to Fou	Module 5 - A	Connection to Foundat	ion	1	Ea			0	0	Metals	Θ
abor sals sality															
bor ials iality fety vironmental <u>Save workspace as view</u>															
abor Dals Jafity Afety Ivironmental <u>Save workspace as view</u>	Work	sequer	ICE						(• )		<ul> <li>Planning complete</li> </ul>		Add work :	step	
bor pals yality fety vironmental <u>Save workspace as view</u>	Work	Sequer Work st	ICE ep number 1	Description	_	Attachments	Hold poin	ıt	< • > Mar	1 n hours	Planning complete Sch	edule start	Add work : Scheduld	step	
ibor Dals Jality Jetty vironmental <u>Save workspace as view</u>	Work	sequer Workst ∷1	ICE ep number †	Description Off load steel	_	Attachments	Hold point	ıt.	<•→ Mar	1 n hours	Planning complete Sch	edule start	Add work Schedule	step finish	*
abor oals uality afety wironmental <u>Save workspace as view</u>	Work Ŧ Ŧ	Sequer Work st	ice ep number †	Description Off load steel Install steel	-	Attachments	Hold poin	ıt	< • > Mar	n hours	Planning complete Sch	edule start	Add work Schedule	step finish	8
Jabor Soals Duality Jakety Invironmental Save workspace as view	Work T T T	sequer Work st 1 2 3	ICE ep number †	Description Off load steel Install steel Bolt and torque		Attachments	Hold point	ıt	< • > Mar	n hours	Planning complete	edule start	Add work Schedule	step finish	×
Lubor Goals Goaldy Safety Environmental Save workspace as view	Work T T T T	<b>Sequer</b> Work st 1 2 1 3 1 4	ICE ep number †	Description Off load steel Install steel Bolt and torque Quality inspection		Attachments T T T T T T	Hold point	ıt	<•≯ Mar	hours	Planning complete	redule start		step Enish	8 8 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).

105091 (Steel Trai	ining Job	) 👻 Plan 👻	Work packaging 🔻
Work Packages	Work	packaging > North	
North		℅ Work package name	ID $=$
North		∧ 🕞 <u>CWP- North Area Steel Ere</u>	90982
		IWP- 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.

Steel Training Job	o (105091) 🔹 🔻
Work packages	Work packaging > Nor
IWP- Steel Erection 35734 Steel erection of Module 001	Work sequence Work step Description
Manage workspace	
Vork sequence     Tools     Temporary structures     Labor     Goals     Quality     Safety     Environmental	
Save workspace as view	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	+ Add work step	:

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.

ualit	y						<b>&lt; •</b> •		P	lanning complete		🕀 Add quality	step		
		Step †	Ŧ	Description	Ŧ	Mitigation	÷	Type of inspection	-	Inspector	Ŧ	Spec	Ŧ	I&TP	Choose columns
Ŧ	1	1		Torque Inspection											Pop out to new windo
Ŧ	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	ining Job) 🔹 Plan 👻	Work packa	ging 🔻						
Work Packages	Work packaging > North > CWP	- North Area Steel Er	rection > IWP- Steel	Erection - Module 0					
Hork Fuckages	Ê			OVERVIEW	WOR	KSPACE	CONSTRAINT MANA	GEMENT	DOCUMENT
Data block: choose colu	imns								×
hold	Q								
ALPHABETICAL	BY CATEGORY				Panel 1				
Hold point		(click t	to change)						
		Inspecto	r Mitigation	Type of ins	Quality risk	Spec	I&TP	Tolerance	es
									*
									-
							C	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.

		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.

Work p	backagin	g > Nor	th > CWP- North Are	a Steel Erection >	IWP- Ste	el Erection - M	odule 0							Create daily plan
<b>+</b>						OV	ERVIEW	WO	RKSPACE	CONSTRAINT N	IANAGEMENT	DOCUMENTS		
														Labor
Quality	y							<>	🔳 Pla	nning complete			:	Equipment
		Step † 😇	Description -	Hold point	Qualit	y risk	Mitigation	⊤ Тур	e of inspection	- Inspector	\Xi Spec		Ŧ	
Ŧ	1	1	Torque Inspection	Yes									⊗ ^	
<b>#</b>	1	2	New quality item 3										$\otimes$	
Ŧ	1	3	New quality item 2										$\otimes$	Quality
														Torque Inspection $\bigcirc$ Safety
													-	
Onfatu														Environmental
Salety		Step 1	= 1	escription	-	Safety risk		<,	Pla Mitigation	nning complete	-	Required safety its	-	
π	69	1		Crush points		Sectory mark			guton			unity in	× *	
I	<u>m</u>	2		Vatch for falling object	ts								$\otimes$	
														Clear Next

Plan details 2 Com	firm resourc		
* Plan date		* Plan name	
	Ċ		
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.

Qualit	y								E P	lanning complete			<ul> <li>Add quality ste</li> </ul>	р	
		Step † 👘	Description	- Hold point	-	Quality risk	- Mitigation	 Type of inspection	-	Inspector	7	Spec	-	I&TP	
Ŧ	1		New quality item 3												$\otimes$
Ŧ	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.

Quality										
		Step † 👘 😇	Description -	Hold point =	Quality risk					
<b>#</b> (	1		New quality item 3							
<b>#</b> [	1	1	Tor, New quality item 3	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.

TIP	You ca	an so	rt an	d fil	ter your dat	a b	lock colun	nns.	_				
	Qua	lity		i		i							
			Step †	-	Description	-	Hold point	Ŧ					
	Ŧ	1	1		Torque Inspection		Yes						
	Ŧ	1	2		New quality item 3								
	Ŧ	1	3		New quality item 2								
NOTE	Delete	e an i	tem l	by s	electing it t	hen	clicking o	n the i	ed "x"	to the	right	•	
	T	PP-0 1		Tor	ue Inspection	Vac							
	I			Nev	/ quality item 3	163						$\otimes$	

#### 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	y					• •
		Step † 👘	Description	-	Mitigation	-
Ŧ	1	1	Torque Inspection			
Ŧ	1	2	New quality item 2			

Work	sequence				Planning complete	te 🕀	Add work step	:
	Work step number †	Description	Attachments	Man hours		Schedule start	Schedule finish	
Ŧ	⊞ 1	Off load steel	<b>+0</b>					$\otimes$
Ŧ	ij 2	Install steel	+0					$\otimes$
Ŧ	∰ 3	Bolt and torque	ŦÛ					
Ŧ	<u>∷</u> 4	Quality inspection	+0					$\otimes$
Ŧ	<u></u> 5	Turnover	<b>+</b> 0					$\otimes$

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

ining Job) 👻	Plan 👻 Work packaging 👻					0	Å <b>®</b> ∣	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>		
the second second second								
item number	- Description	-	Category	- Responsibility	😇 Due date	\Xi Status	$\overline{\mathbf{x}}$	
001	Description     Bolt and torque	-	Category Work Sequence	\Xi Responsibility	T Due date	- Status Open	-	⊗ ^
ttem number	Description     Bolt and torque	-	Category Work Sequence	Transibility	\Xi Due date	Transformed Status		⊗ ^

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	<pre>&lt; • • &gt;</pre>	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.

Save this viewset as:	
First Last Preferred View	$\times$
Cancel	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	Acti	ms ▼ (+) (E) ⊗ 🔚 🖼		
Planning Schedule	<b>T</b> .	Queries		Work
	- Ch	Queines		▶ [
		🛨 🗹 🛞 Search Q		► E
		My queries		► C
				► E
				C:
				► C
		v		
		Clear Cancel Update Results		
	Θ		•	

#### 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 24.11

# 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**.

105091 (Steel Training Job) -	Project home 👻				_		?	¢ <b>.</b> ® (	
est.	Applications				-		② Quantity tracking		
Add project image	( Model	Model 🔅 Estimate 🏠 🛞 Plan 🛞 Contr			ts and forecasts		Build components and document quantities		
105091 (Steel Training Job)	Document	📀 Control	Quantity tracking	Change		Launch		Launch	
	Schedule		Work packaging						
ications							₿ Links		
Noder	Project			Extensions	r your crew		Organization		
Schedule	Project home	Assigned users		Design		Launch	InEightU		
Estimate	Project details	Operational rate codes		Billing			Test567Test567Test567Test567Test567Tes		
Report	Settings	Assigned operational re	sources		iments		MahendranMahendranMahendran		
Reports	Workflows	Assigned disciplines an	d commodities		Rejected Expiring		Karthik		
Explore					0 0		TEST 124		
Dashboards API documentation			-			۲	Project		
Control	Contra	acts		<ul> <li>Change sta</li> </ul>	itus		Prime contract summary		
Workspaces	Status		Count	Closed	n Pro Active		Actual values		
Project library	Executed		0	Issue			Original contract	\$0.00	
Plan	Non-execut In approval	ied		0	0		Executed Client CO's	\$0.00	
Quantity tracking Work packaging	Rejected		0	Potential client d	hange orders		Adjusted/Current contract	\$0.00	
Progress				0 Client change or	0 ers	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.

	ning Job (105091) 🔹 Plan 👻 Work packaging 👻
Work Packages	Actions 🔻 (+) [+ 🛞 🗾 💶
Planning Schedule	Configure CWA and project values = ID = I
	□ □ <u>South</u>
	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 ▼ 🕕 🕞	
Planning Schedule	Construction work package CWP	- Description
	Construction work pa ge - CWP	North
	C South	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	Add CWP CWP name CWP- North Area Steel Erection Work Plan - XXX		
CWP name CWP- North Area Steel Erection Work Plan - XXX	CWP name CWP- North Area Steel Erection Work Plan - XXX	Add CWP	
CWP- North Area Steel Erection Work Plan - XXX	CWP- North Area Steel Erection Work Plan - XXX	CWP name	
		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.

命 Steel Structure Train	ning Job (1050	91) <del>-</del> Plan - N	Work packaging 👻
Work Packages	Actions 🔻	+ + × = -	
Planning Schedule	<b>-</b>	℅ Work package name	ID T
		▶ 🗅 <u>North</u>	
		🗀 <u>South</u>	
		🖌 🗁 Unassociated packages	
		🗒 <u>CWP-North Area S</u>	11
		IWP-mn,n	5
		@ <u>CWP-hkh</u>	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 Trai	ning Job (105)	091) 🝷 Plan 👻 Work pa	ckaging 👻
Work Packages	Actions 🔻	↔ 🕂 🛞 🖬 🖽	
Planning Schedule	- □	℅ Work package name	Ŧ
		▶ C⊐ <u>North</u>	
		🗅 South	
		🖌 🗁 Unassociated packages	
		II DEP-North Area S 11	
		<u> IWP-mn,n</u> 5	
		I <u>CWP-hkh</u> 4	

- 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.

Work Packages	Work packa > Area > CWP-No	rth		WORK PACKAGES	CONSTRUCTION WOR PACKAGE OVERVIEW	WORKS	PACE G	ENERAL IDERATION	NS DOCUMENTS	
same: CWP-North Area Steel Erection sumber:		CWP ID		CWP name		CWP Last update	d on		CWP Last updated by	
i2116 Jescription:		62116		CWP-North Area Steel Ere	ction	04/21/2022				
fork package for structural steel		CWP Description								
0%		Work package for structural steel of No	ok package for shructural titlef of North area							
0%		CWA ID		CWA description		Planning start da	te		Planning end date	
		Area	•	Area	•			Ċ.		ä
st % Complete		Plan Status		Superintendent		Engineer			Planner	
		Draft	•							
		Schedule ID		Hint type "John" Schedule Name		Bint type "John" Scheduled start			Hint type "John" Scheduled finish	
0%										C3
		Work package summary								
hedule ID.		WBS	WBS de	scription	Quantities		UOM		Hours	
t date: date:		2618	Sub Tra	cking - D1 MV Terms	20.12346		Each		70.43211	^
tatus: Draft aperintendent: eld Engineer: larmer:										
otal man hours: 70										

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.

合 Steel Structure Trai	ining J	lob (1050	91) - Plan - Work packaging -
Work Packages	A	ctions 🔻	
Planning Schedule	-		Work package name      □     D     □     Description     □
	11		A 🗁 North North
			B CWP-North Area S 9
			🗅 <u>South</u> 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

# 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	
0	Model	🙃 Estimate 🛛 😫	In Plan	Contract	s and forecasts		Build components and document gu	antities
Add project image	Document	Control	Quantity tracking	🖄 Change		Launch		Launch
oplications	3 Schedule		Compliance				∉ Links	
Model	Project			Extensions	r your crew		Organization	
Schedule	Project home	Assigned users		Design		Launch	InEightU a	
Report	Project details Settings	Operational rate codes Assigned operational re	sources	Billing	ments		Test567Test567Test567Test567Test567Tes MahendranMahendranMahendranMahendra	
Reports	Workflows	Assigned disciplines and	d commodities		Rejected	Expiring	Karthik	
Dashboards	_				0	0 💿	Project	
Control	Ontra	cts		Change st	atus		I Prime contract summary	
Workspaces	Status		Count	Closed	In Pro Active		Actual values	
Project library	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	ning Jol	b (1050	191) 👻 Plan 👻 Work packaging 👻
Work Packages	Acti	ons 🔻	
Planning Schedule	•		Construction work package - CWP
			<ul> <li>South</li> <li>Unassociated packages</li> </ul>

- 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	Add IWP IWP name IWP- Steel Erection - Module 001			
IWP name IWP- Steel Erection - Module 001	IWP name IWP- Steel Erection - Module 001	Add IWP		
IWP- Steel Erection - Module 001	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	Ad	ions •	0 8 0	لو وا													Φ۹
enning Schedule	•	0	Construction work     Installation work     Engineering work     Construction	rk package - G k package - NK k package - EV	kape typit" p Engineering work	Description D1-OENDAAL1	Activity of	Bat dete 🔻	End-date V	Planning start,	Planning and C	Total man hours	Mrt.o.	Cost % co.	Status	♥ Greated by ♥	Last upda 05/23/202 05/23/202
		0	<ul> <li>25 QLA1</li> </ul>			01-Area 1 (							6				69-25-26
		53	B DRT.Gance	80790	CMP								0.00%	0.00%	Draft	Loke Mailatt	06/27/28
		0	C> 81.42			01-Area 21							•				05/25/20
		0	C) 01_A3			01-Area 31											05/23/2
		0	C) 81.44			01-Area-41											69/29/2
		0	C> 91.45			01-Area 51											69/29/2
		0	C) \$2.41			52-Area 1 (											65/35/2
		0	C) \$2,42			\$2-Area 21											05/25/2
		0	C) 12-A1			\$2-Area 31							•				65/23/2
		0	C) 12-M			\$2-Area 41											65/25/2
		0	C) 12-M			\$2-Area 51											65/25/2
		0	C) \$2.46			\$2-Area 6-)											65/25/2
		0	· C Unassociated pa.														

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).

	EWPName *	v	Description	Engineeri	na Discipline 🔍	Project number	v
•	ConcColumnsArea2		Area 2 - At grade concrete columns 10-20 v	t Structure	1	106582	
۲	ConcColumnsArea3		Area 3 - At grade concrete columns 10-20 v	t Structure	1	105502	
۲	ConcColumnsArea4		Area 4 - At grade concrete columns 10-20 v	t Structure	4	105582	
Selected EWPs							Clear al

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

Work Packages	N	tions +	0 0 0														<u>۹</u>
arring Schedule			Work package name — $\forall$	8 V	Package type"	Description T	Anisyst 17	Bat date	End-date 7	Planning stall.	Planning and C	Total man hours?"	MyX-m.	Cost Non.	Datus 1	Coated by T	Lastup
		0	<ul> <li>C1 01-00N</li> </ul>			D1-GENEVAL1						0					03/23/2
		0	<ul> <li>C1 \$2,05%</li> </ul>			\$2-0EMER4L1											03/23/
		0	- ID 01-81			D1-Area11											03/23/
		0	I - TO CARLONNER	80799	OWP							0	0.08%	0.00%	Draft	Luke Mallatt	05/27
		0	× conclutu.	00791	DAD	Area 1 - At grade co.				07/01/2023	08/24/2023		0.02%	0.00%	Draft	Luke Mallatt	06/27/
		0	C5 82.42			D1-Area 21											03/23
		0	C> 82-A3			01-Area 31						0					03/23
		0	C1 83.44			01-Area 4()											69/23
		0	C 02:48			01-Area 51											03/23
		0	C 22.41			12-Area 11											03/23
		0	C) \$2:42			52-Area 21											65/23
		0	C1 52,43			\$2-Area 31											03/23
		0	C) \$2:M			\$2-Ares 41											03/23
		0	C) 52.45			\$2-Area 51											69/23
		0	C) 52.45			52-Area 5-1											03/23
		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.

合 Steel Structure Train	ning Job (1050	191) 🝷 Plan 👻 Work packaging 👻
Work Packages	Actions <b>v</b>	⊕ 🕀 😣 🖬 🗉
Planning Schedule	▼ □	℅ Work package name Um = ID =
		₄
		B CWP-North Area S 9
		🗀 <u>South</u>
		🖌 🗁 Unassociated packages
		IWP-Steel Erectio 12
		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.

	ty Com	ponents									Planning status:	Draft		٠				€	dd Activity	comp	onents by	WBS	
		Component name 👘	Description	-	Quantity	7	U. =	WBS †	Ŧ	Per 😇	WBS CE Mhrs/unit	Ŧ	Comp C	÷ V	WBS CB	- 0	Comp C	- 0	scipline	-1	ITPs		
1	+	Luke Nov 14.001-2			4.00000					0.0								0	verhead		ď	Θ	

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

/ork Packages	Work p	ack	AS1 > IWP-Demo								I≣ G	enerate packa	ige 😤 Preview	/ R
	<b></b>			OVERV	IEW .	WORKSPACE	CONSTRAIN	IT MANAGEMENT	DOCUMENTS			View:	Compliance testing	
-Demo							Inspe	ctions & Test plans						
	Activi	ity Com	ponents				P 💿							
workspace			Component name \Xi Description	\Xi Quantity 👳	U. 👻 WBS 🕇	\Xi Per.,	÷ •	Cast In Dises	Conorat					
	Д	(III)	Luke Nov 14.001-2	4.00000		0.0		809	Concret					
								Version 3				-		
dget								2/9	Θ					
								2.0	, v					
ssons learned														
ork sequence														
fork sequence pols emporary structures														
ork sequence pols emporary structures pals														
ork sequence iols ennorary structures sals jality ifety														
ork sequence pols remonrary structures pols uality afety wirronmental							Acti	vities						
ork sequence pols emocrary structures als uality alety wironmental <u>Save workspace as v</u>	iew						Acti	vities						
vik sequence ofs monarary structures als alstry fety vironmental <u>Save workspace as v</u>	iew Qualit	ty					Acti	Vities Position ID ==	System ID 👳	Activity des 👳	Frequency 👳	Hold/Witne_ 🤤	Specificatio_ =	
ik sequence ols monary structures als ality fety vironmental <u>Save workspace as v</u>	Qualit	ty	Step † 🦷 Description	⊽ Hold point ⊽ Quality risk	Ÿ	Mitigation	Acti	Position ID =	System ID 👳	Activity des 👳 Design Mixes	Frequency 👳 45 Days Prior to	Hold/Witne_ =	Specificatio_ = =	
nk sequence ols menoary structures als ality fety vironmental <u>Save workspace as v</u>	itew Qualit	ty	Step † 💎 Description	〒 Hold point ▼ Quality risk	Ŧ	Mitigation	Acti	Vities Position ID = 1 2	System ID $\overline{\Rightarrow}$ 1 2	Activity des_ = Design Mixes Mill Certification_	Frequency = 45 Days Prior to _ Prior to Placem_	Hold/Witne_ = Not applicable Not applicable	Specificatio_ *Spec XXX Sec _ *Spec XXX Sec _	
nik segunne ols menorare structures als alsty fety vironmental <u>Save workspace as v</u>	iew Qualit	ty	Step ? 🤍 Description	▼ Hold point ▼ Quality risk	Ÿ	Mitigation	Acti	Position ID = 1 2 3	System ID 1 2 3	Activity des_ = Design Mixes Mill Certification Batch Plant insp	Frequency 45 Days Prior to _ Prior to Placem_ Prior to Selectin.	Hold/Witne Not applicable Not applicable Not applicable	Specificatio *Spec XXX Sec *Spec XXX Sec *Cast-in-Place	
nik segunce ols monorar structures als alsty fety vironmental <u>Save workspace as v</u>	Qualit	ty	Step 1 💎 Description	⊤ Hulf point ⊤ Quality risk	Ŧ	Mitigation	Ple 2	Position ID Position ID 1 2 3 4	System ID 〒 1 2 3 4	Activity des_ = Design Mixes Mill Certification Batch Plant Insp Concrete Pre-Pl	Frequency 45 Days Prior to _ Prior to Placem_ Prior to Selectin Prior to Selectin	Hold/Witne_ Not applicable Not applicable Not applicable Witness	Specificatio Spec XXX Sec Spec XXX Sec Spec XXX Sec Cast-In-Place Spec XXX Sec	
vik segunce oh menoarvis structures ality ality fety vironnental <u>Save workspace as v</u>	Quain	ty	Step 1 🤍 Description	▼ Hold point ▼ Quality risk	Ŧ	Mitigation	Ple 2	vities Position ID 1 2 3 4 5	System ID 1 2 3 4 5	Activity des_ Design Mixes Mill Certification Batch Plant Insp Concrete Pre-PL. Rebar Inspection	Frequency 45 Days Prior to Prior to Placem. Prior to Selectin. Prior to Every C. Prior to Every C.	Hold/Witne_ Not applicable Not applicable Not applicable Witness Not applicable	Specificatio 'Spec XXX Sec 'Spec XXX Sec 'Cast-In-Place 'Spec XXX Sec 'Reinforcing Ste	
ok segunce obi encourt structures tals talsy wironmental <u>Save workspace as s</u>	Qualit	ty	Step 1 🤍 Description	⊤ Hold point ⊤ Quality Hak	Ÿ	Mitigation	Ple S	Position ID Position ID 1 2 3 4 5 6	System ID 👳 1 2 3 4 5 6	Activity des_ Design Mixes Mill Certification Batch Plant Insp Concrete Pre-PL Rebar Inspection Concrete Place	Frequency 45 Days Prior to Prior to Placem. Prior to Selectin. Prior to Every C. Prior to Every C. Every Concrete	Hold/Witne_ Not applicable Not applicable Witness Not applicable Witness	Specificatio 'Spec XXX Sec 'Spec XXX Sec 'Spec XXX Sec 'Spec XXX Sec 'Spec XXX Sec	
ok segunce obi encourt structures als alsy wironmental Enre workspace as v	Qualit	ty	Bite 1 🦁 Description		¥	Mitigation	Ple S	Position ID Position ID 1 2 3 4 5 6 7	System ID 👳 1 2 3 4 5 5 6 7	Activity des_ Design Mixes Mill Certification Batch Plant Insp Concrete Pre-Pl Concrete Place Concrete Flace	Frequency 45 Days Prior to _ Prior to Placem. Prior to Selectin. Prior to Selectin. Prior to Every C Every Concrete _ Firist 3 Trucks. E.	Hold/Witne. Not applicable Not applicable Not applicable Witness Not applicable Witness	Specificatio. *Spec XXX Sec _ *Spec XXX Sec _ *Cast-In-Place _ *Spec XXX Sec _ *Spec XXX Sec _ *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.

Avail	able ITPs in Project					
	ITP ID	7	ITP name	$\overline{T}$	Description	$\overline{\tau}$
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	
Selec	oted ITPs					Clear al

80 Ve	Cast-In-Place og ersion 3 IP Concrete ITP	Concret		Home inspect 1045 Version 9 Home inspection - Pre	-pu			
2	2/9	Θ		1/4	Θ			
						6		
								÷
tivit	ties							Ŧ
tivit	ties Position ID 😇	System ID	-1	Activity des 😇	Frequency	Hold/Witne	Specificatio	*
tivit	ties Position ID == 1	System ID 2	100	Activity des \Xi Inspect applianc	Frequency = Every time	Hold/Witne 😇 Witness	Specificatio 🔻	*
tivit 2	ties Position ID == 1 2	System ID 2 5	The second se	Activity des \Xi Inspect applianc Inspect attic an	Frequency = Every time Every time	Hold/Witne = Witness Witness	Specificatio = Inspect applianc Inspect attic an	*
tivit 2	Position ID 1 2 3	System ID 2 5 3	The second secon	Activity des 😨 Inspect applianc Inspect attic an Inspect electrical	Frequency = Every time Every time Every time	Hold/Witne Witness Witness Witness	Specificatio = Inspect applianc Inspect attic an Inspect electrical	*
tivit 2 3	ties Position ID	<b>System ID</b> 2 5 3 6	Transfer P	Activity des 😴 Inspect applianc Inspect attic an Inspect electrical Inspect exterior	Frequency = Every time Every time Every time Every time	Hold/Witne Witness Witness Witness Witness	Specificatio 😴 Inspect applianc Inspect attic an Inspect electrical Inspect exterior	*
tivit J J	ties Position ID T 1 2 3 4	<b>System ID</b> 2 5 3 6		Activity des Inspect applianc Inspect attic an Inspect electrical Inspect exterior	Frequency	Hold/Witne Witness Witness Witness Witness	Specificatio Inspect applianc Inspect attic an Inspect electrical Inspect exterior	*

# 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.

W Samson Solar 9	15MW 104487 7	Plan / Work packaging						ineight QA 101-23.2	
Work Packages	work p_	> ASI > Friday_	_					11	Generate package
riday fun day	Create de	aily plan with all available data		OVERVIEW	WORKSPACE	CONSTRAINT MANAGEMENT	DOCUMENTS	View:	•
130	Safety		_			Planning status: Draft	•	Add safety step	
age workspace		Step †	· Description	😇 Safety risk	· Mitigation	· Account code	· Account code desc	👻 Required safety items 👘	
Equipment   Equipment   Endpet   Endpet   Contract components   Lessons learned   Doubly forms   Work sequence   Toolog   Toolog   Toolog   Toolog   Toolog   Coolog   Coo	x								

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

	-								DVCD405								
/P-demo	•						OVERVIEW	WO	INNSPACE	CONSTRAINT	MANAGEMENT				Create d	aily plan	
191									_	_					Component	s	
	Activity	Com	onents	Bassistar		Quartit	P	lanning status	Draft	•	()	Add Activity con	ponents by WBS	- Pissisia	2688		Θ
ge workspace	n		Component name	- Description		Quantity	÷ U. ÷ I	WBS †	- Per	WBS CE MP	hrs/unit - Comp	C 👻 WBS C	5 Comp C	- Disciplin	e		
Equipment	Ŷ	•				+0.00000									Labor		
Materials Budget															Lauoi		
Activity components															00353443	Ulises Gutierrez	Θ
Lessons learned															00187301	Lance Fisher	Θ
Quality forms															00428594	Steve Garrett	0
															Equipment		
Work sequence															Equipment		
Work sequence Tools Temporary structures															Equipment		
Work sequence Tools Temporary structures Labor															Equipment		
Work sequence Tools Temporary structures Labor Goals Quality															Equipment		
Work sequence Tools Temporary structures Labor Goals Quality Safety															Equipment Quality		
Work sequence Tools Labor Goals Quality Safety Environmental															Quality		
Work sequence Tools Tools Temporary structures Labor Ooals Quality Safety Environmental Save workspace as view			<												Equipment Quality		
Work sequence Tools Temporary structures Labor Goals Quality Safety Environmental Save workspace as view	Labor		<				р	lanning status	Draft	Ť	(€) Ad	d labor ① Add	labor from resource	es .	Equipment		
Work sequence Tools Temporary structures Jabor Joals Duality Salety Environmental Salve workspace as view	Labor		<	Craft level	7 Code	Description	pj n Qua	Nanning status	Draft Employee ID	•	⊕ Ad Name	d labor 💿 Ada	labor from resource	es	Quality Safety		
Work sequence Tools Temporary structures Labor Goals Quality Safety Environmental Sarve workspace as view	Labor		< Trade र Staff	Craft level 3	Code 1.C.01.4.12	Description	Pi n Que	lanning status antity 〒 1 1.00000 0	Employee ID 00309893	¥ 	O Ad Name Evan Berberich	d labor 📀 Ado	labor from resource	es Ə	Quality		
Work Requestion Tools Temporary structures Labor Coals Quality Safety Environmental Saver, workspace as view	Labor Ț		Trade Trade Staff	Craft level 3 Staff Default Staff Default	Code 1.C.01.4.12 6-MOBE (05)	Description	pj n Qua	Hanning status antity = 1 1.00000 ( 1.00000 (	Draft Employee ID 00309893 00353443	•	Ad Name Evan Berberich Ulises Qutierrez	d labor ④ Ada 〒 Qua	Ilabor from resource	•• ••	Quality Safety		
Wok segunce Tools Temporary structures Laki Cools Could Safety Environmental Saret rocksoace as view	Labor P P P		Trade 👻 Staff Staff	Craft level Staff Default Staff Default Staff Default	<ul> <li>Code</li> <li>1.C.01.4.12</li> <li>G-MOBE (05)</li> </ul>	Description	P! n Qua	Nanning status antity = 1 1.00000 ( 1.00000 ( 1.00000 (	2 Draft Employee ID 00309893 00353443 00187301	¥	Ad Name Evan Berberich Ulises Outierrez Lance Fisher	d labor ④ Ado	labor from resource	•• • •	Quality Quality Safety Environmer	tal	
Wok segunce Tools Temporary structures Judie Goals Quality Safety Safety Safety Safety Safety Safety Safety Safety Safet suchSaget as view	Labor 다 다 다		۲ <b>rade マ ت</b> Staff Staff Specialty Craft	Craft level 3 Staff Default Staff Default Staff Default Foreman	Code 1.C.01.4.12 6-MOBE (05) 1.C.06.1.03	Description	Pi n Qua	tanning status antity 국 [ 1.00000 ( 1.00000 ( 1.00000 ( 1.00000 (	Draft Employee ID 00305893 00157301 0042594	Ŧ	Ad     Name     Evan Berberich     Ulises Outierrez     Lance Fisher     Steve Garrett	d labor 🕑 Add 로 Qui	labor from resource	• • •	Quality Quality Safety Environmen	tal	
JWork sequence Jools Jrempory structures Labor Goals Joally Safety Environmental Sare workspace as view	Labor P P P P		< Trade ਵ Staff Staff Staff Staff Specialty Craft	Craft level Staff Default Staff Default Staff Default Foreman	Code 1.C.01.4.12 6-MOBE (05) 1.C.06.1.03	Description	pi n Qua	Henning status antity ⊽ I 1.00000 ( 1.00000 ( 1.00000 (	Draft           Employee ID           0003090903           00035443           00187301           00428594	¥	Ad     Name     Evan Berberich     Ulises Outierrez     Lance Fisher     Steve Garrett	d labor 🕢 Add	tlabor from resource	• • •	Quality Quality Safety Environmen	tal	

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

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			

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

Comp	ponent			
	Component name	Description	Total MHRs	
$\otimes$	2688	COUNTY ROADS - LUKE1	100	
				Ŧ
Emple	oyee			
	Employee ID	Name	Trade	
$\otimes$	00353443	Ultran Turberrag	Staff	<u>^</u>
$\otimes$	00187301	Lance Figher	Staff	
Equip	ment			
	Equipment ID	Description	Category	
				-

UP	an details <b>2</b> Confirm resour	ce 3 Tool box tal	ks		
Safety					
	Safety concern		Mitigation		
				*	
				v	
Quality	,				
	Quality concern		Mitigation		
				<u>^</u>	
				v	
Enviror	mental				
	Environmental concern		Mitigation		
				*	

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	-	-	
	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**.

	C LINKS	<ul> <li>Control</li> </ul>	Quantity tracking	
Add project image	Organization	Manage budgets and forecasts	Build components an	d document
Minimum of 540px x 360px	Project	Launch	quantities	Launch
Demo Project   09062021 💿				
Quantity forecasting	(+)	(*) Work packaging	(🛞 Daily planning	
Engineering	C C	Group work into plane and	Accient tooks for your	arow
Estimate 💿		packages	Assign tasks for your	crew
Control		Launch		Launch
Workspaces				
Project library	📮 Project notes	Contracts	③ Supporting documents	
Plan		Status Co	unt In approval Rejected	Expiring
Quantity tracking		Executed	0 0	0
Work packaging		Non-executed	0 0	•
Progress		In approval	0	
		Rejected	0 Rid packages	
Daily planning	to3 Settings		<ul> <li>Biu packages</li> </ul>	

- 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	Work	plans									
	Actions $\checkmark$ $( \div )$ $( \div )$ $( \div )$ $( \div )$										
Planning Schedule		℅ Work package name	ID $-$	Description -	Schedule ID						
		∧ ▷ North		North							
		🎚 🗸 🔋 <u>CWP- North Area Ste</u>	90982	Work package for the struct							
		✓ □ South		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
		IWP- Steel Erection - Module 0	90984	Steel erection of Module 001.	
0%			_		

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

Work Packanes	Work	packagin	g > North > CWP-	North Area St	eel Erection > IWP- Steel I	Erection - Module 0		_
from a donageo	+					OVERVIEW	WORKSPACE	CONSTRAINT MANAGEMENT
IWP- Steel Erection								
Steel erection of Module 001.	Comp	onents					<	• • >
			Component ID	-	Description	🚊 Qua	antity 📃	Mot
Manage workspace	Ŧ	1	Module 01 - A6 Connec	tion to Fou	Module 1 - A6 Connection to	Foundation 1	E	a
Equipment	Ŧ	1	Module 01 - A7 Connec	tion to Fou	Module 1 - A7 Connection to	Foundation 1	1	a
Budget	Ŧ	1	Module 03 - A6 Connec	tion to Fou	Module 3 - A6 Connection to	Foundation 1	1	ia
<ul> <li>Components</li> <li>Lessons learned</li> </ul>	Ŧ	1	Module 03 - A7 Connec	tion to Fou	Module 3 - A7 Connection to	Foundation 1	1	ā
Quality forms Work sequence	Ŧ	1	Module 05 - A6 Connec	tion to Fou	Module 5 - A6 Connection to	Foundation 1		ā
Tools     Temporary structures     Labor								

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

Work Packages	Work	packaging	g > North > CWP- North Are	ea Ste	eel Erection > IWP- Steel Erection - Module 0
Work Publicageo	<u>+</u>				OVERVIEW
IWP- Steel Erection 90984 Steel erection of Module 001.	Comp	onents			
Management			Component ID		Description
Manage workspace	Ŧ	1	Module 01 - A6 Connection to Fo	)u	Module 1 - A6 Connection to Foundation
<ul> <li>Equipment</li> <li>Materials</li> </ul>	Ŧ	1	Module 01 - A7 Connection to Fo	u	Module 1 - A7 Connection to Foundation
<ul> <li>✓ Budget</li> <li>✓ Components</li> </ul>	Ŧ	1	Module 03 - A6 Connection to Fo	)u	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.

	Ê				OVERVIEW	WORKSPA	CONSTRAINT M	IANAGEMENT	DOCUMENTS				
/P- Steel Erection	Com	onents				<pre>&gt;</pre>	2 Planning complete		Add compone	nts by WBS	:	Module 03 - A6 Connection to	Э
el erection of Module 001.			Component ID -	Description	- Quantity	👻 UoM	\Xi WBS †	··· Percent co	Estimated h	Discipline/Commodity-		Module 01 - A7 Connection to	Э
age workspace	*	<u>1</u>	Module 01 - A6 Connectio	Module 1 - A6 Connection to F	oundat 1			0	0	Metals	Θ *	Module 05 - A6 Connection to	9
Equipment	#	61	Module 01 - A7 Connectio	Module 1 - A7 Connection to F	oundat 1			0	0	Metals		Labor	
Materials		61	Module 03 - A6 Connectio	Module 3 - A6 Connection to F	oundat 1			0	0	Metals	Θ		
Components	I	69				Ea							
Lessons learned Quality forms	I	69						0					
Work sequence												Equipment	
SALE HOLING COLUMN	11/ 1				_				0			Torque Inspection New quality item 3	
	Work	sequend	20 Description	Attachmente	Held point	<.>	Planning complete	Sabadula atart	(+) Add worl	: step	:		
	I		Off load steel	(i)	nou point	Mail Hours		03/23/2020	03/23	2020	× ^	Safety	
	*	2	Install steel	Ē				03/23/2020	03/27	2020	$\otimes$	Watch for falling objects	
		3	Bolt and torque		Yes			03/26/2020	03/27	2020	$\otimes$		
	<b>.</b>	4	Quality inspection	•							$\otimes$		
	Ŧ		Turnover	(Fil							$\otimes$	Environmental	
	Ŧ	5											
	Ŧ	5										Clear	Ne

- · 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
	INEIGHT

9. Enter your new daily plan details.


		<b>O</b>	
* 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**.

U	Plan details 2 Confirm resource	3 Tool box talks	
Comp	ponent		
	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
Empl	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	Safety concern	Mitigation	
$\otimes$	Watch for falling objects	magaton	
J	5 ,		
Juali	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		eer Erection - Module OUT			
		OVERVIEW	VORKSPACE CONSTRAINT MANAGEMENT DOCUMENT	'S	
: Steel Erection - Module 001					
e: iption: erection of Module 001	Overview				
Complete	IWP ID	IWP name	CWP	CWA	
comprete	8	IWP-Steel Erection - Module 001	CWP-North Area Steel Erection	▼ North-North	
	Description				
0%	Steel erection of Module 001				
Complete					
	Scope of work				
0%	Scope of work	Discipline	Type of work	Risk Medican	
0%	Scope of work	Discipline Metals	Type of work.	Risk Medium	
0%	Scope of work Location Schedule ID	Discipline Metals Schedule name	Type of work Stel Erection Scheduled start date	Risk Medium Scheduled end date	
0% e (D: the August 3. 2020) : August 3. 2020	Scope of work Location Schedule ID	Discipline Metals Schedule name	Type of work Stel Erection Scheduled start date Mon, 3 Aug 2020	Flick Medium Scheduled end date	
0% le 10. de August 3. 2020 e: August 7. 2020 Drah	Scope of work Location Schedule ID	Discipline Metals Schedule name	Type of work           Stell Exection           Scheduled start date           Mon, 3 Aug 2020	Filsk Medium Schedvaled end date Fil. 7 Aug 2020	
0%	Scope of work Location Schedule ID Status	Discipline Metals Schedule name Last updated by	Type of work Stel Erection Scheduled start date Mon, 3 Aug 2020 Last updated on	Risk 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 > North > CWP- North Area Steel Erection > IWP- Steel Erection - Module 0			
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 Packaging	v
+ Add equipment	Add equipment from resources	:
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.

Ŧ			0\	VERVIEW	WORKSPACE	CONSTRAINT MANA	SEMENT DOCUME	(TS		View: Work Packaging
Vork	sequence					<• >	Planning comple	te	Add work step	i
	Work step number †	Description	Attachments	Hold point		Man hours		Schedule start	Schedule finis	h
Ŧ	ii 1	Off load steel	•							$\otimes$
Ŧ	ji 2	Install steel	•							$\otimes$
Ŧ	∦ 3	Bolt and torque	•							$\otimes$
Ŧ	≣ 4	Quality inspection	•							$\otimes$
I.	<u>∏</u> 5	Turnover	•							$\otimes$

Work sequence				
Work step number †	Description	Attachments	Hold point	
1	Off load steep	<u>+0</u>		
2	Install steel	<b>+</b> 0		
3	Bolt and torque	<b>(+0</b> )	None	
4	Quality inspection	<u>+0</u>	None	
5	Turnover	[ <b>+</b> 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 l	abor from project reso	urces							
		PROJECT RE	SOURCES ESTIMATE/CONTROL RESOURCES						
Availa	able employees in project :								
	Employee ID	7	Name	1	Trade	-	F	Craft level	Ŧ
€	00020111		Jack Spooner		Pipe Workers			Pipefitter Journeyman	-

- TIP You can search based off any of the fields associated to the employee (e.g., Employee ID, Trade).
- NOTE You can add multiple employees at a time in this dialog box. Only employees who can be added to daily plans will show up in the drop-down selection See your Account Administrator if you do not see an employee.
- 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 step				
Step		Description		Safety risk	7	Mitigation		Required safety items	1		
1		Crush Points								$\otimes$	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		7
	•	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 > GEN > Demo					🔚 Generate package 🔒 Generate r
		OVERVIEW	WORKSPACE CONS	ITRAINT MANAGEMENT	OCUMENTS	
Friday # j ption.	Overview 🔉					
Complete	TWP ID	IWP name	CW	IP.		CWA
	65251	Demo Friday	N	one	•	GEN - General - General - General - General-General this is 💌
	Description					
0%						
Complete	Scope of work					
0%	Location	Discipline	Tys	pe of work		Risk
	Schedule ID	Schedule name	Sci	heduled start date		Scheduled end date
ile ID. ate:					6	6
e.	Status	Planning start date	Pla	anning end date		Last updated by
Draft	Draft	•	62		6	Luke Mallatt
Draft tendent						
Draft endent pineer. r.	Last undated on					

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

=	Ġ New ∨ D	ocument / Package / Drafts	~		Plan Test Project   PLANTEST $arsistarrow$								\$ ®	00
T Filte	er/Sort										View:	Unsaved (S	System)	
Actions	• 3• 4					С	$\overline{\pm}$ Clear all filters	Manage columns	10	Show:	All	•	Search all Drafts	Q
D B	Туре	Package ID	Title	Phase/Reason for Issue										
_	•	=	6 = ×	7	_									
	Standard	DEMOFRIDAY-65251	DemoFriday-65251	Issued For Constuction (reason)										
		6			_									
Items-1	Selected items: 0													
© 2022 In	Eight Inc.   Terms &	Conditions   y 22.08.04.01											INE	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.

= A 1044971 Samaan J	Calar AZENBU / Dian / Wark anakaning										
	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/Sta	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	e-64186			
		Trade Select one					* Reason for Issue	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				e c	
		Tender release				II C				G	
		Tender close								e o	~
		© 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.

	de 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 F				
evision 1	package (IWP)		Project: Samson Solar 975MW (104487)	
evision 2	*			
	Budget WBS cription Quantity UeM CT	-Mikey/Unit CE-Unit/Mikes CE-Mitrs CE-Unit cost CE-Budget		
	Goals			
	Activity Components			
	Labor			
	Safety			
	Safety Quality			
	Safety Quality Environmental			
	Safety Quality Environmental Quality Forms Constraint Management			
	Safety Quality Environmental Quality Forms Cousting Management Equipment			

## 3.6 WORK PACKAGE IMPORT AND EXPORT

## 3.6.1 IMPORT TEMPLATE

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

#### CREATE WORK PACKAGES FROM EXCEL IMPORT

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



TIP Excel templates without data are used for creating new components from scratch, usually during project setup. Excel templates with data are typically used to update existing work plans/packages.

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

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

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

- Name
- Package Type
- Description
- Assign the proper CWP to your work package in the CWP ID field

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

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	ted La	nguage			
REQUIRED	Field is req	uired	for import			
OPTIONAL	Field is opt	ional	for import			
VALIDATED	Field must	matcl	h master data availa	ble in appl	ication	1
IGNORED	Field not to	be p	opulated			
Name	Package Ty	pe	e de la		Descr	iption
Alphanumeric	CWP/IWP/	Calib	ori - 11 - A A	\$ - %	, 🖽	numeric
50	3	R	$T = \Delta - \Delta - \Box$	· ←0 .00	~	
IWP- Steel Erection - Module 001	IWP	Ľ	<sup>⊥</sup> = <u>∨</u> , <u>⊥</u> . ⊥	0, 00 →0	×	erection of Module 001
CWP- South Area Steel Work plan	CWP				Work	Package for the structural steel of the North
CWP- North Area Steel Work plan	CWP	X	Cut		Work	Package for the structural steel of the North
IWP- Steel Erection Upper Deck - Module 001	IWP	[]	Copy		Uppe	r rack steel erection
		帘	Paste Options:			
			Ê Ê			
			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**.

		Q
Created by	Last updated on	= []
	11/12/2019	-
bridgette quintero	11/13/2019	
bridgette quintero	11/14/2019	
	11/12/2019	

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

Import dat	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.

Wor	¢p								🖨 Print Report
			OVERVIEW	WORKSPACE	ONSTRAINT MANAGEMENT	DOCUMENTS			
۲								🗆 PI	anning complete
	Item number 👘 😇	Name / ID	Description 🔫	Category	· Responsibility ·	Due date 📃	Expected date 👘	Notes	Status 👻
	001	1005	Erect Steel - Light	Components		10/15/2021	10/15/2021	+	⊘ <sub>Open</sub> <sup>↑</sup>

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 CC	INSTRAINT MANA	GEMENT	DOCUMENTS				
۲	8											Planning complete	
	Item number † 😇	Category -	Name / ID	7	Description	3	Responsibility	7	Due date	Expected date	T Notes	Status	
	001	Work package	123	×							۲	$\odot$	^
			47771 - IWP-RAC-02-123	^									
			47923 - IWP-RAC-03-123										
			48123 - IWP-UGE-03-24	~									
			48123 - IWP-UGE-03-24	v									

- 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!