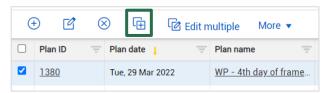## FROM SCRATCH

1. From the project home page, select Progress > **Daily Planning**.
2. Select the **Add** ⊕ icon to create a new plan.
3. Complete the form and click **Create plan**.

FROM A COPY

1. Select a **Daily Plan** then, click the **Copy** icon.

2. Complete the form.
3. Select the items you want to copy to the new plan.

4. Click **Create plan.**
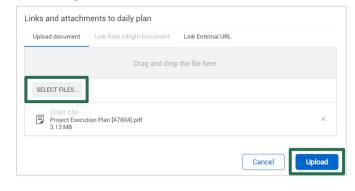
ADD LINKS AND ATTACHMENTS

1. Open a daily plan during any phase, then click **Links and attachments**.

2. Select the **Add** ⊕ icon.

TO UPLOAD A DOCUMENT FROM YOUR COMPUTER

a) Click the **Upload document** tab.
b) Click **Select Files** to upload or drag and drop into the gray box.
c) Click **Upload**.

TO LINK FROM INEIGHT DOCUMENT

a) Click **Link from InEight Document**.
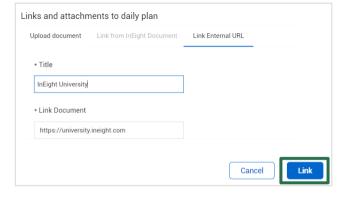b) Filter options and select **Apply**.

b) Select files to link, then click **Link from InEight Document**.

c) Click **Close**.

TO ADD A LINK FROM AN EXTERNAL URL

a) Click the **Link External URL** tab.
b) In the Title field, input a name for the link.
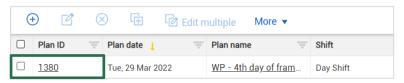c) In the Link Document field, input the URL. Click **Link**.

Phone: In United States: +1 800 801 1426 **In Australia:** 1 800 727 102 **Worldwide:** +61 3 9291 0820 **Email:** support@ineight.com

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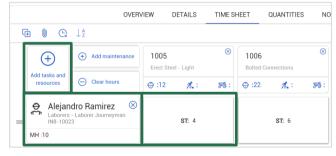
PREPARING A DAILY PLAN
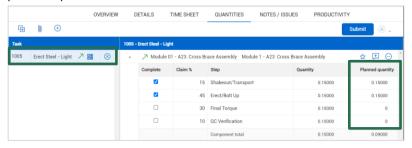
1. Open a **Daily Plan**.

2. Open the **Details tab**.
3. Click on the **Add** ⊕ icon to add planner notes and toolbox talks for safety, quality, environmental and general discussion.
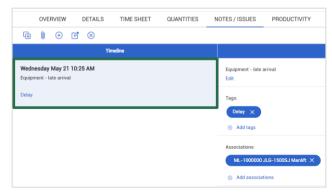

4. Open the **Time Sheet** tab.
5. Add the tasks, employees and equipment for that day's work and allocate planned hours.

6. Open the **Quantities** tab, add tasks and components to be installed and enter their planned quantities.

7. Open the **Notes/Issues** tab to include a note for the crew, pictures, add any associations, and document issues.

8. Open the **Productivity** tab to review your Planned G/L. Make adjustments on the Quantities and Time Sheet tabs if needed.

9. After reviewing the plan hours, continue by clicking the **Submit** button.