


# QUICK GUIDE – PROGRESS DAILY PLANNING

## CREATE A DAILY PLAN



### 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.

<input type="checkbox"/>	Plan ID	Plan date	Plan name
<input checked="" type="checkbox"/>	1380	Tue, 29 Mar 2022	WP - 4th day of frame...

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

Include the following

<input checked="" type="checkbox"/> Tasks	<input checked="" type="checkbox"/> Resource hours
<input checked="" type="checkbox"/> Components	<input checked="" type="checkbox"/> Notes and tags
<input checked="" type="checkbox"/> Resources	<input checked="" type="checkbox"/> Toolbox talks
<input checked="" type="checkbox"/> Extra pay	<input checked="" type="checkbox"/> Attachments

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**.

ID	Title
<input checked="" type="checkbox"/> (00)A001	Ground Floor Plan
<input checked="" type="checkbox"/> (00)A004	Third Floor Plan
<input type="checkbox"/> (00)A006	Fourth Floor Plan

- 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**.

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## CREATE A DAILY PLAN



### PREPARING A DAILY PLAN

1. Open a **Daily Plan**.

Plan ID	Plan date	Plan name	Shift
<input type="checkbox"/> 1380	Tue, 29 Mar 2022	WP - 4th day of fram...	Day Shift

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.

Tool box talks

Safety

Safety concern	Mitigation
<div>  Traffic at site will be increasing because of truckload arriving </div>	

Quality

Add safety topic

Add quality topic

Environmental

General

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

OVERVIEW	DETAILS	TIME SHEET	QUANTITIES	NOTES / ISSUES	PRODUCTIVITY
<div> <div>  Add tasks and resources </div> <div>  Clear hours </div> </div> <div> <div> <div>1005</div> <div>Erect Steel - Light</div> <div>  :12   </div> </div> <div> <div>1006</div> <div>Bolted Connections</div> <div>  :22   </div> </div> </div> <div> <div> <div>Alejandro Ramirez</div> <div>Laborers - Laborer Journeyman</div> <div>IN8-10023</div> </div> <div> <div>ST: 4</div> <div>ST: 6</div> </div> </div>					

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

OVERVIEW

DETAILS

TIME SHEET

QUANTITIES

NOTES / ISSUES

PRODUCTIVITY

Submit

Task

1005 Erect Steel - Light

1005 Erect Steel - Light

Module 01 - A23 Cross Brace Assembly

Module 1 - A23 Cross Brace Assembly

Complete	Claim %	Step	Quantity	Planned quantity
<input checked="" type="checkbox"/>	15	Shakeout/Transport	0.15000	0.15000
<input checked="" type="checkbox"/>	45	Erect/Bolt Up	0.15000	0.15000
<input type="checkbox"/>	30	Final Torque	0.15000	0
<input type="checkbox"/>	10	QC Verification	0.15000	0
Component total			0.15000	0.09000

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

OVERVIEW	DETAILS	TIME SHEET	QUANTITIES	NOTES / ISSUES	PRODUCTIVITY
<div> <div>Timeline</div> <div> <div>Wednesday May 21 10:25 AM</div> <div>Equipment - late arrival</div> <div> <div>Edit</div> <div>Delay</div> </div> </div> </div> <div> <div>Tags:</div> <div> <div>Delay</div> <div>Add tags</div> </div> </div> <div> <div>Associations:</div> <div> <div>ML-1000000 JLG-1500SJ Manlift</div> <div>Add associations</div> </div> </div>					

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

OVERVIEW										DETAILS	TIME SHEET	QUANTITIES	NOTES / ISSUES	PRODUCTIVITY					
<div><div></div><div></div></div>																			
Task ID		Description		Planned			MHRs per Qty			Planned G/L									
				QTY	UoM	MHRs	Planned	Current Budget		Cost	MHRs								
1005		Erect Steel - Light		0.090	Ton	0.00	0.000	20.000		90	1.8								

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