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# iPlan User Guide

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**IAMTech**

EXPERIENCE NOT THEORY.

A CPD LIMITED COMPANY

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## Logging on

You will be provided with your own unique company URL to access iPlan which will be in the format:

<https://www.iamtechapps.com/iPlan-<<ClientName>>>

*Note: Replace <<ClientName>> with your company name e.g. iPlan-IAMTech*

The user accounts would normally be set up with the username: <initial><surname>, e.g. jsmith

After a successful login to iPlan, you will be presented with the Dashboard.

## Help & Support

At the top-right, there is a link to a printable User Guide. Email support is available by emailing [support@iamtech.com](mailto:support@iamtech.com) or telephoning 0800 012 6969 (from outside the UK: +44 1642 955 350).

Alternatively, you can chat online to a support advisor from within the application by clicking on the Assist button in the top right hand corner.

## Creating an account

Select *Administration* from the menu at the top of the screen. Within the administration page navigate to **User Accounts & Permissions** and select *Users & Personnel*.

- Click on *Add* to open the new user interface.
- Fill in the required fields (\*).
- Select any appropriate Client or Personnel Drop Down Lists checkboxes.
- To grant access to iPlan select the associated checkbox.
- Enter an appropriate Username and Password into the respective fields.
- Select a role from Available Roles if required and click on the *Add* button to confirm the role.

Once the appropriate information has been set and entered, complete the process by clicking on the *Save* button.

## Changing password

- Click on your name at the top-right.
- Enter the current password.
- Enter and confirm the new password.
- Click the *Save* button.

## Logging Out

To log out click on the Logout link in the top right hand corner.

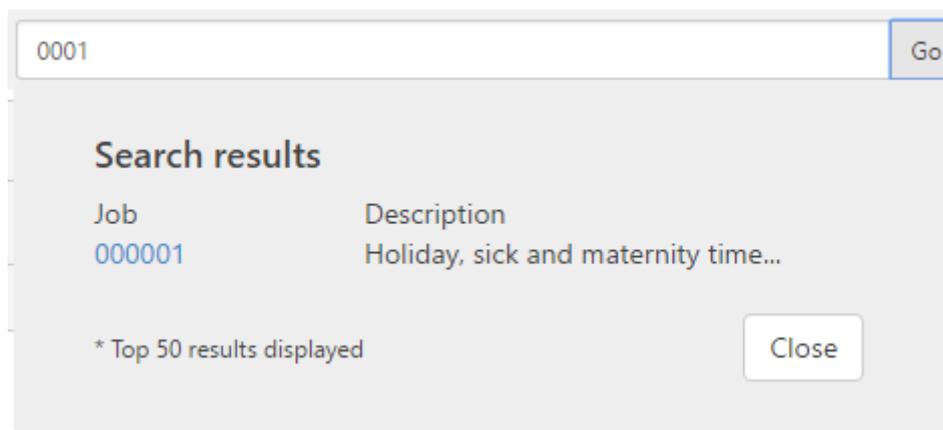
## Menus

The menu bar at the top offers access to different screens:

Home	Shows items requiring attention
Events	Show the Events grid, allowing access to their Jobs
Scaffold	The F91 spreadsheet (scaffold structures)
Equipment	The equipment failure log
Library	The workpack library providing access to all generated workpacks
Reports	Run any reports
Administration	Baseline actuals, Valuations and System Configuration
Dashboards	Sub-menu for Planning, Execution and KPI Dashboards

## Search

The search field can be used to quickly locate a job / workpack by typing in all or part of its reference number or description into the search box at the top-right of the screen, then clicking Go. Up to 50 records matching the criteria will be displayed and the reference number, clicking on the link will then open that record.



## Home Screen

The Home screen shows items that require your attention:

- Estimates awaiting your approval (if you are the selected approver)
- All Estimates awaiting approval (across all approvers)
- Job Activities requiring estimates

- Job Activities awaiting scope

Double-clicking on any of the Jobs or Activities in the grids above will jump directly to the screen where they can be actioned.

- Purchase Requisition

This will show any Material or Plant Hire Costs which have been approved and can be ordered in your ERP. The ERP reference number can be entered and saved back to iPlan.

### Import Jobs Manually (Work List Import)

To import Jobs manually into iPlan navigate to Administration -> Import Jobs.

Locate the csv file to import using the 'Browse' button.

Select the 'Import' button.

The Jobs will import via a background process so there is no need to keep the browser open. For large files this can take some time.

You can check on the status of your import by selecting 'View File Import/Export History' from the Administration menu.

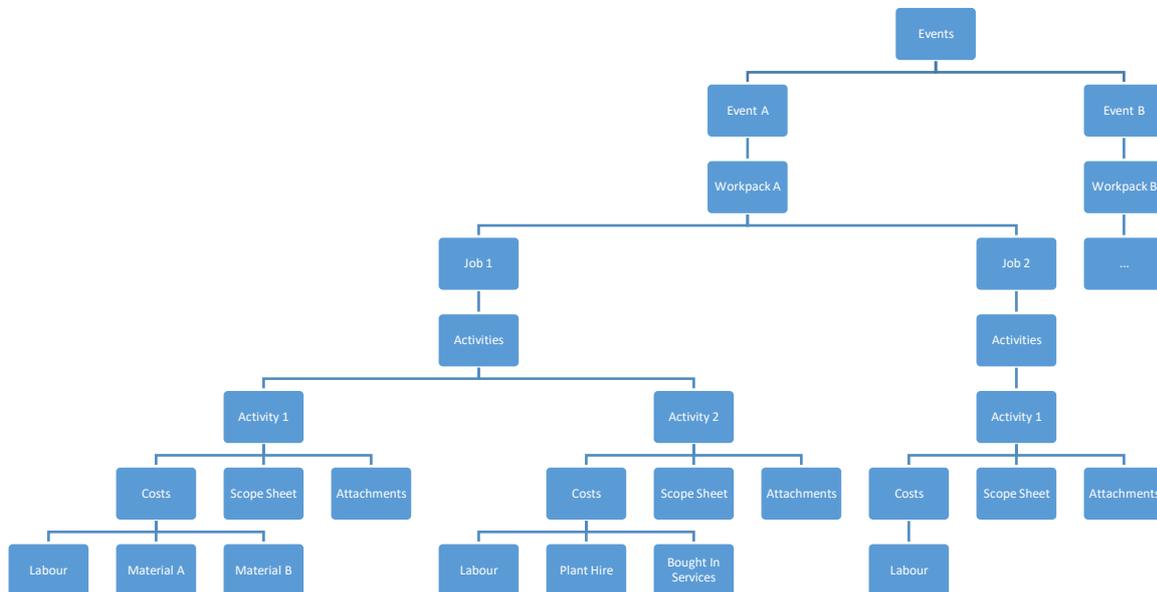
File Import History Overview		
Imports for the last 7 days are shown below. Click one to see further detail.		
Date Imported	File Type	File Name
04/10/2017 12:32:59	Services	<a href="#">iPlan_SNCActivityTask_20171003144754.txt</a>
04/10/2017 12:05:55	Orders	<a href="#">iPlan_SNCActivityItems_20171003144754.txt</a>
04/10/2017 11:27:26	Orders	<a href="#">iPlan_SNCActivityItems_20171003144754.txt</a>
04/10/2017 11:25:52	Orders	<a href="#">iPlan_SNCActivityItems-test.txt</a>
04/10/2017 11:04:23	Orders	<a href="#">iPlan_SNCActivityItems-iPlanSmall.csv</a>
04/10/2017 11:03:04	Orders	<a href="#">iPlan_SNCActivityItems-test.txt</a>

Select the File Name to view details of the import; this will include any issues that may have arisen with the data.

If your import does not exist in this list it is most likely still in-process.

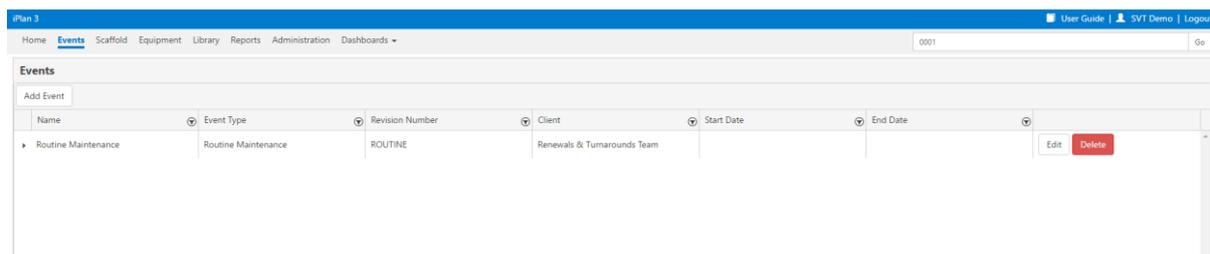
## Detailed navigation

The data within iPlan has a hierarchy:



- An event is made up of jobs, you can create as many jobs are required.
- Each job relates to one work pack.
- Each job can have multiple activities, a scope sheet and attachments.
- Each activity has multiple costs.

Click the Events menu item to navigate to the Events screen.



From here you can:

- Add an event.
- Edit or delete an existing event.
- Access the data within an existing event.

Click on the event dropper icon  which is to the left hand side of the event name will allow you to access the data within the event.

-  Jobs grid
-  Work pack generator
-  Timesheet Entry
-  Actual Expenditure Entry
-  Actual Progress Entry

## Jobs Navigation

The screen will change to show a grid of the jobs in the selected event.

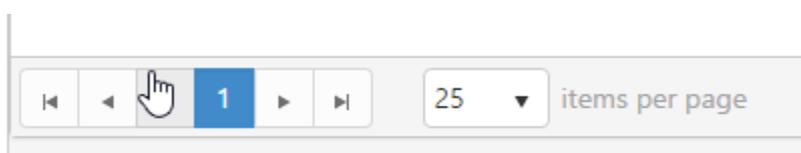
Routine Maintenance / Jobs

All	8	Unapproved	6	Ready for Approval	0	Awaiting Approval	0
<b>Jobs</b>							
Add Job							
Job Number	Job Title	SOR Date	SOR Number	SPA			
▶ 000001	Holiday, sick and maternity time						
▶ 000002	Preliminary work						
▶ 130505	Rope Access as per PMI/B6/PROJ/085/A						
▶ 130506	Lag some pipework and associated						
▶ 130507	Dismantle historic scaffold from SMP upper and lower roofs						

There is a summary at the top which displays the total number of jobs at each approval status. Clicking on each of the status boxes will filter the list of jobs by that status.

All	8	Unapproved	6	Ready for Approval	0	Awaiting Approval	0	Approved	2	Rejected	0	Complete	0
-----	---	------------	---	--------------------	---	-------------------	---	----------	---	----------	---	----------	---

The grid can be sorted and filtered by using the icons next to each column title. The grid will can be configured to show up to 100 jobs on each page.



Note the 'breadcrumb trail' underneath the menu. This will navigate backward to the events screen with all Events, or with the currently event.

Routine Maintenance / Jobs



Double-click on a job to see the full details. Click the icon to go back to the grid.

Routine Maintenance / Jobs

Job Number: 000001 Save

<p><b>Description</b></p> <p>Job Number *</p> <input type="text" value="000001"/> <p>Job Title *</p> <input type="text" value="Holiday, sick and maternity time"/> <p>SPA</p> <input type="text"/> <p>SOR Number</p> <input type="text"/> <p>SOR Date</p> <input type="text"/> <p>Job Duration</p> <input type="text"/> <p>Approval Status</p> <input type="text" value="APPROVED"/>	<p><b>Equipment</b></p> <p>Equipment</p> <input type="text"/> <p>Win Number</p> <input type="text"/> <p>Tag Number</p> <input type="text"/> <p>Equipment Type</p> <input type="text"/> <p>Inspection Type</p> <input type="text"/> <p>Work Type</p> <input type="text"/> <p>Job Scope Status</p> <input type="text"/>	<p><b>Location</b></p> <p>Plant</p> <input type="text"/> <p>Area</p> <input type="text"/> <p>Location</p> <input type="text"/> <p>Telephone Number</p> <input type="text"/> <p><b>References</b></p> <p>Drawing Number</p> <input type="text"/> <p>Berth Number</p> <input type="text"/> <p>Line Number</p> <input type="text"/> <p>System(s)</p> <input type="text"/>
--	---	--

Click on a job row in the grid view will expand the row allowing you to navigate to the following job information:

<span style="font-size: 1.2em;">▲</span> 130507	Dismantle historic scaffold from SMP upper and lower roofs

- Activities
- Estimate Approvals
- Pictures and Attachments
- Norms
- Work pack
- Transfer Job

## Creating Jobs

From the Jobs grid, click on the 'Add Job' button:

Jobs			
Add Job			
	Job Number	Job Title	Start Date
▶	11223344	Prep Work and Ramp Down Tasks	14/05/2018
▶	11223344ab	Test for Saving	18/07/2018
▶	11223345	8 Weekly Service Feed Chute Line	01/05/2018

- Enter a Job Number.
- Enter as Job Title.
- Click on the Save button.

## Creating Activities

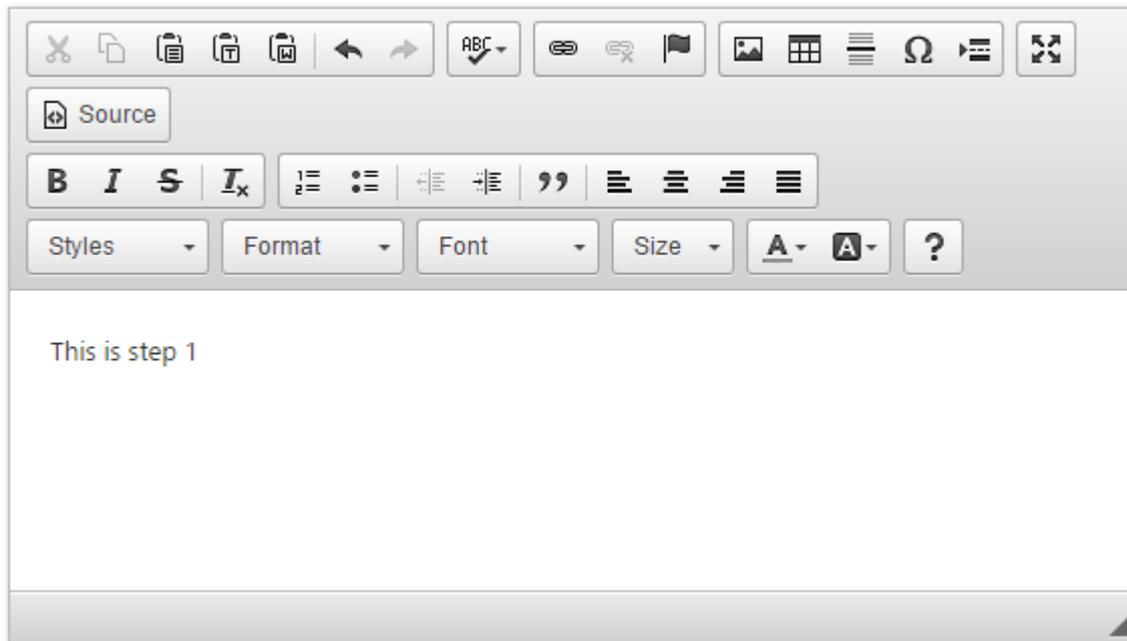
From the Activities grid, click on the 'Add Activity' button:

Activities				
Add Activity		Reorder Activities		Copy Activities
	Line Number	Short Description	Activity	Target (hours)
▶	1	erect	Scaffolding - Erect	10

- Enter a Short Description.
- Select an Activity type from the drop-down list.
- Click on the Save button.
- The other fields are configurable.

Note that the description field is a rich text field allowing details information to be entered and formatted ready to be included in the Work Pack print out.

### Description



The screenshot shows a rich text editor interface. At the top, there is a toolbar with various icons for editing, including cut, copy, paste, undo, redo, bold, italic, strikethrough, bulleted list, numbered list, link, unlink, insert image, table, horizontal line, link, unlink, and full screen. Below the toolbar is a 'Source' button. The main editing area contains the text 'This is step 1'. Below the text area are several dropdown menus: 'Styles', 'Format', 'Font', and 'Size', followed by 'A-' and 'A+' buttons for font color and background color, and a question mark icon.

Note that if you select a supervisor from the drop down list and click on the Notify Supervisor iPlan will send that person an e-mail containing a hyperlink to this “Job Step” asking them to enter a scope of work so that it can be estimated.

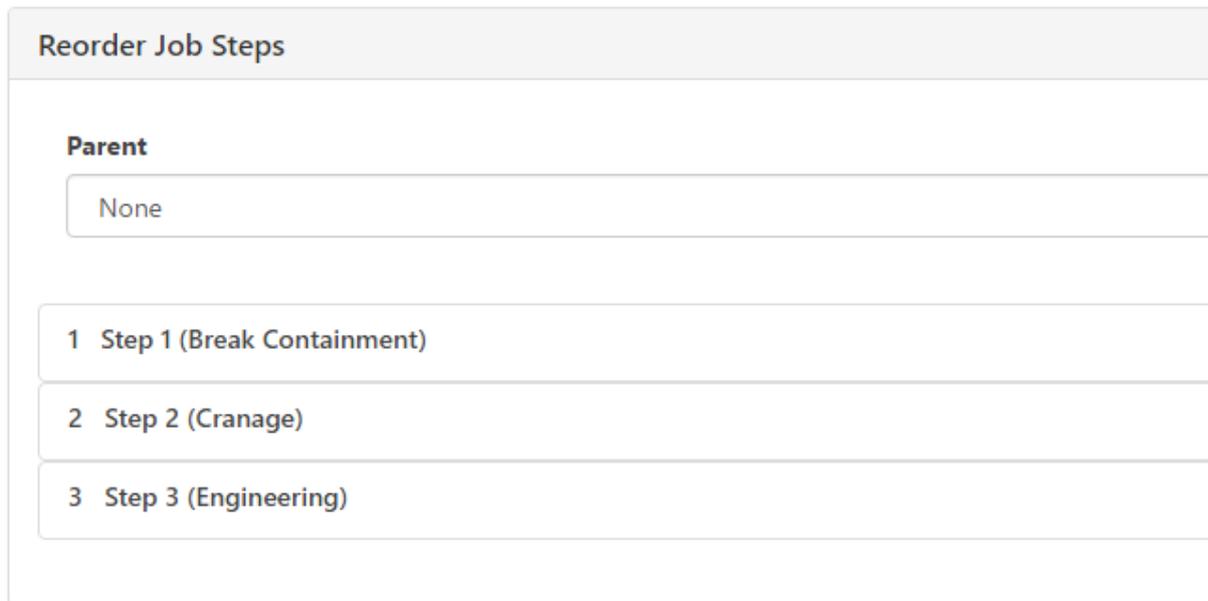
### Supervisor



The screenshot shows a dropdown menu for selecting a supervisor. The dropdown is currently displaying 'Richard Walker'. To the right of the dropdown is a blue button labeled 'Notify Supervisor'.

## Reordering Activities

On the Activities grid, click on the 'Reorder Activities' button. This will load a view which by default shows all of the top level Activities for the Job.



**Reorder Job Steps**

**Parent**

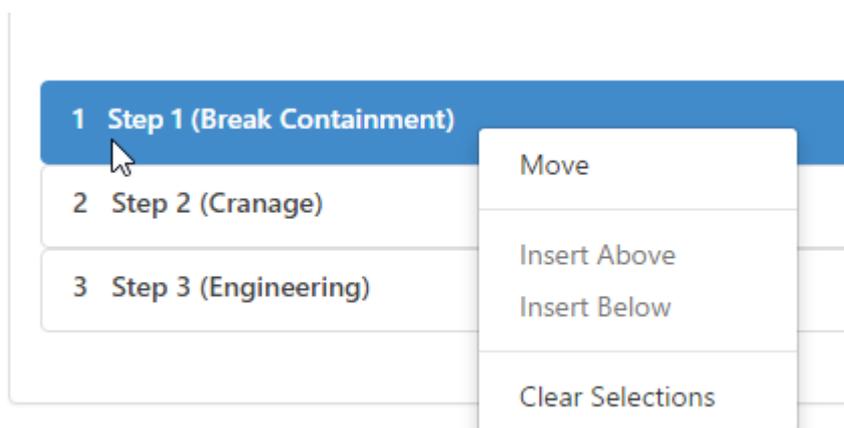
None

1 Step 1 (Break Containment)

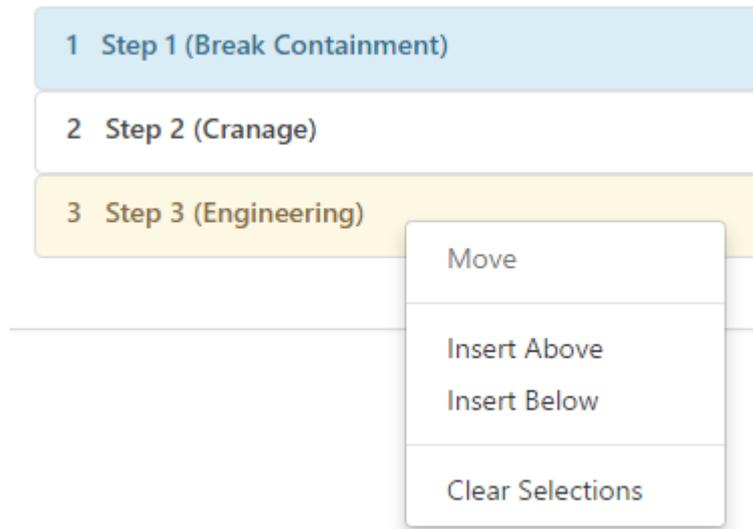
2 Step 2 (Cranage)

3 Step 3 (Engineering)

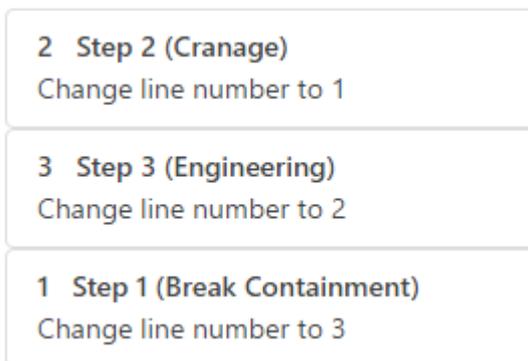
To change the order, first click on the Activity which you want to move, then right click to bring up the context menu. Now click on the 'Move' button.



Now click on where you would like to move the Activity to, then right click to bring up the context menu. Now click on the 'Insert Above' or 'Insert Below' button.



Note that the Activity numbers do not change immediately, and iPlan will tell you what the new numbers will be once you click the Save button. Click the Save button to commit the changes.



Note that the Parent drop down list will allow you to reorder indented Activities.

**Parent**



## Indenting Activities

On the Activities grid, double click on the Activity that you want to indent. Next select the parent Activity from in the 'Link to Top Level Activity' drop down list and click on the 'Save' button.

**Activity Details**

**Line Number**

**Variation**

**Activity Number**

**Link to Top Level Activity**

The Activities grid will now re-load, and you will see the activity shown underneath and indented its new parent.

To un-indent an Activity simply select 'None' in the 'Link to Top Level Activity' drop down list and click on the Save button.

## Copying Activities

On the Activities grid, click on the 'Copy Activities' button. Note that copied Activities will be appended to the bottom of the current Job.

<b>Activities</b>				
Add Activity		Reorder Activities		Copy Activities
	Line Number <span style="float: right;">▼</span>	Short Description <span style="float: right;">▼</span>	Activity <span style="float: right;">▼</span>	Target (hours)
▶	1	erect	Scaffolding - Erect	10

- Enter the Job number for the Job containing the Activities that you want to copy and click on the 'Go' button. This will load the Activities from that job into a table directly below.
- Note that you can copy Activities from the same Job, or from a different Job entirely.
- Click on the check boxes to select the Activities which are to be copied.
- Click on the 'Select Activities' button.

### Copy Activities

**Available Activities**

DM001 Go Select Activities

<input type="checkbox"/> All	Activity Description	Activity	Sum of Work (estimated hours)	Sum of Costs (Gross) (£)
<input type="checkbox"/>	1 - build scaff	Scaffolding - Erect	13.56	2080.4
<input checked="" type="checkbox"/>	2 - Remove the lagging	Insulation - Remove	0	0
<input checked="" type="checkbox"/>	3 - Replace	Insulation - Replace	0	0
<input type="checkbox"/>	4 - Take down	Scaffolding - Remove	0	0

- Note that the selected Activities will now move across to the 'Selected Activities' pod.
- Click on the "Copy" button to commit the copy process.

**Selected Activities**

Remove Activities

<input type="checkbox"/> All	Activity Description	Activity	Sum of Work (estimated hours)	Sum of Costs (Gross) (£)
<input type="checkbox"/>	2 - Remove the lagging	Insulation - Remove	0	0
<input type="checkbox"/>	3 - Replace	Insulation - Replace	0	0

- Note that the Activities grid will now re-load and the new Activities will appear at the bottom of the list.

### Activities Navigation

The Activities grid lists all the Activities for the selected Job.

The screen is in two parts:

- a grid of Activities displays all the activities for a selected Job.
- the Costs for the activity will be displayed in a grid under the selected activity

Activities													
Add Activity   Reorder Activities   Copy Activities													
Line Num...	Short Des...	Activity	Target (h...	Sum of W...	Sum of C...	Estimate ...	Variation	Instrume...	Start Date	End Date	Progress (...)	Progress ...	
2	inspect pipework for damage	Inspection		8124.61	166023.28	No					0		Edit Duplicate Delete
Costs													
Add Labour   Add New Norm   Add BIS   Add Material Item   Add Plant Hire													
Line Number	Cost Type	Short Text	Unit of Measure	Hours	Gross Price £	Actual Progress (%)							
1	Plant Hire	test - plant hire	ea		138,045.00	0	Edit	Delete	Transfer				
2	Material Items	material	ea		10,000.00	0	Edit	Delete	Transfer				
3	Bought In Services	test - bis			1,000.00	0	Edit	Delete	Transfer				
4	Labour	test - cost		72	3,769.92	0	Edit	Delete	Transfer				
1 - 9 of 9 items												25 items per page	

Note the breadcrumb trail has been expanded to cover the Job number (for the Job we selected). Clicking 'Jobs' will return to the Jobs grid, and clicking the Job number will return to the Jobs grid with only that job visible.

iPlan 3

[Home](#) [Events](#) [Scaffold](#) [Equipment](#) [Library](#) [Reports](#) [Administration](#) [Dashboards](#) ▾

[Rapid Shutdown](#) / [Jobs](#) / [RAPID\\_1](#) / [Activities](#)  
[Work Pack](#)

Note that clicking on the 'Work Pack' link will move to the Work Pack screen for the selected Job. The same sorting, filtering and paging techniques from the Jobs grid apply here too.

## Activity Scoping

Scoping in iPlan is the act of creating Activities and creating the Costs required for each activity.

Click on an Activity in the Activities grid. This will load the Costs grid for that Activity and the Activity navigation will appear underneath the activity:

Activities													
<input type="button" value="Add Activity"/> <input type="button" value="Reorder Activities"/> <input type="button" value="Copy Activities"/>													
Line Num...	Short Des...	Activity	Target (h...)	Sum of W...	Sum of C...	Estimate ...	Variation	Instrume...	Start Date	End Date	Progress (...)	Progress ...	
2	inspect pipework for damage	Inspection		8124.61	166023.28	No					0		<input type="button" value="Edit"/> <input type="button" value="Duplicate"/> <input type="button" value="Delete"/>

Costs								<input type="button" value="Pictures &amp; Attachments"/> <input type="button" value="Joint Integrity"/>	
<input type="button" value="Add Labour"/> <input type="button" value="Add New Norm"/> <input type="button" value="Add BIS"/> <input type="button" value="Add Material Item"/> <input type="button" value="Add Plant Hire"/>									
Line Number	Cost Type	Short Text	Unit of Measure	Hours	Gross Price £	Actual Progress (%)			
1	Plant Hire	test - plant hire	ea		138,045.00	0			<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Transfer"/>
2	Material Items	material	ea		10,000.00	0			<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Transfer"/>
3	Bought In Services	test - bis			1,000.00	0			<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Transfer"/>
4	Labour	test - cost		72	3,769.92	0			<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Transfer"/>

items per page
 1 - 9 of 9 items

-  Pictures and Attachments
-  Joint Integrity

Each of the options above is covered in its own section in the user guide.

To create a Cost click on one of the cost type buttons:

Costs				
<input type="button" value="Add Labour"/>	<input type="button" value="Add New Norm"/>	<input type="button" value="Add BIS"/>	<input type="button" value="Add Material Item"/>	<input type="button" value="Add Plant Hire"/>

Once all of the Costs have created against the Activity simply tick the 'Estimate Complete' check box on the Activity form. Once this has been done for all the Activities, the Job can then be sent for Estimate Approval.

## Estimating with Norms

From the Activities grid select the Activity the cost is associated with. Choose the 'Add Norm' button from the Costs grid.

**Costs**

Add Labour Add New Norm Add BIS Add Material Item Add Plant Hire

A selection of Norms will be displayed; choose the Norm type that you would like to use:

Norms

Add New Norm

- Fabrication
- Scaffold
- Mechanical
- Valve
- Painting
- Electrical
- Instrumentation
- Insulation
- Mechanical Structural
- Fabric Maintenance

button to start adding norms to this Job Number.

The Norm-specific form will now load. Make the selections using the drop-down lists and enter the required quantities. Once complete click on the 'Save' button.

Add Norm Selection

Equipment type	Pipe/Bolt/Manway size	Schedule/Length/Width	Quantity	Break		Make	
				Mech	Rigger	Mech	Rigger
Control Valve	5	150	10	27.39	19.72	50.87	36.62
Totals:				27.39	19.72	50.87	36.62

+ -

A new cost will now appears in the Costs grid containing the hours and resources specified in the norm.

### Adding Job Cards to Activities

Note: Job Cards are configured as part of the iPlan setup.

Note: Job Cards can be included in the work pack.

On the activity edit screen, scroll down to the Job Cards section:

Add Tools & Equipment

Additional Notes



- Click on the relevant job card button, the screen shot above shows only one job card as being available “Add Tools & Equipment”.
- Enter the relevant information onto the Job Card.
- Click the Save button.

## Adding Costs

The Costs grid can be accessed when you click on an existing Activity in the Activities grid.

Activities													
Line Num...	Short Des...	Activity	Target (h...)	Sum of W...	Sum of C...	Estimate ...	Variation	Instrume...	Start Date	End Date	Progress (...)	Progress ...	
2	inspect pipework for damage	Inspection		8124.61	166023.28	No					0		<input type="button" value="Edit"/> <input type="button" value="Duplicate"/> <input type="button" value="Delete"/>

Costs							
Line Number	Cost Type	Short Text	Unit of Measure	Hours	Gross Price £	Actual Progress (%)	
1	Plant Hire	test - plant hire	ea		138,045.00	0	<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Transfer"/>
2	Material Items	material	ea		10,000.00	0	<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Transfer"/>
3	Bought In Services	test - bis			1,000.00	0	<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Transfer"/>
4	Labour	test - cost		72	3,769.92	0	<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Transfer"/>

Click on one of the Add buttons to add a Cost of that type. Each type of Cost has a slightly different input form with fields that are relevant to that type.

Double-click a Cost, or select the Edit button, to see the full detail.

### Labour Cost

The Labour Cost form looks like this:

Details	Labour (manual override)
Line Number * <input type="text" value="9"/>	Trade <input type="text" value="C-ACCESS - Scaffolder"/>
Actual Progress (%) <input type="text"/>	Resource (limited by Trade) * <input type="text" value="CONT - Contractor"/>
Cost Type <input type="text" value="Labour"/>	Number of Resources * <input type="text"/> <input type="button" value="Calculate"/>
Short Text * <input type="text"/>	Hours In Day * <input type="text" value="8"/>
Additional Details <input type="text"/>	Duration (days) * <input type="text"/> <input type="button" value="Calculate"/>
	Rate Type (£) <input type="text" value="Unscoped"/>
	Hours * <input type="text"/> <input type="button" value="Calculate"/>
	Rate (£) <input type="text" value="42.78"/>
	Cost (£) <input type="text" value="0"/> <input type="button" value="Calculate"/>
	Supervisor Cost (£) <input type="text"/> <input type="button" value="Calculate"/>

Many of the fields are configurable. The key item is the number of Hours (this is the effort, i.e. the 'man hours'). This is multiplied by the Rate, which then gives a total cost.

You can enter the effort as a number of hours, or you can enter the number of resources and duration, then press Calculate next to the Hours field, which will calculate it for you. These three fields work together in any combination, so you can fill in any two to calculate the remaining one.

### Bought In Services (BIS) Cost

**Details**

**Line Number \***

**Actual Progress (%)**

**Cost Type**

**Short Text \***

**Additional Details**

**Bought In Service**

**Total Cost (£)**  **PO Number**

### Material Cost

**Details**

**Line Number \***

**Actual Progress (%)**

**Cost Type**

**Short Text \***

**Additional Details**

**Material Item**

<p><b>Item Number Search</b>  <input type="text"/> <input type="button" value="Search"/></p> <p><b>Description</b>  <input type="text"/></p> <p><b>Unit Price</b>  <input type="text"/></p> <p><b>Total Cost</b>  <input type="text" value="0"/></p> <p><b>PO Number</b>  <input type="text"/></p> <p><b>Goods Received</b>  <input type="text"/></p> <p><b>Material Rating</b>  <input type="text"/></p> <p><b>Construct</b> <input type="radio"/> <b>Destruct</b> <input type="radio"/></p> <p><b>Phase</b>  <input type="text"/></p> <p><b>Estimate LT (days)</b>  <input type="text"/></p> <p><b>Issued By</b>  <input type="text"/></p>	<p><b>Item Number</b>  <input type="text"/></p> <p><b>Unit of Measure</b>  <input type="text"/></p> <p><b>Quantity</b>  <input type="text" value="0"/></p> <p><b>Location</b>  <input type="text"/></p> <p><b>Date Required</b>  <input type="text"/></p> <p><b>Issued To</b>  <input type="text"/></p> <p><b>Material Size</b>  <input type="text"/></p> <p><b>Supply</b>  <input type="text"/></p> <p><b>LLT</b>  <input type="checkbox"/></p> <p><b>Drawing Number</b>  <input type="text"/></p> <p><b>Responsible Person</b>  <input type="text"/></p>
--	--

The Item number search can be used to find material details from your stock list (which is loaded into iPlan as part of the configuration phase). This way, you won't need to enter detail into every box – just the quantities and any refinements necessary.

### Plant Hire Cost

**Details**

Line Number \*  
9

Actual Progress (%)

Cost Type  
Plant Hire

Short Text \*

Additional Details

**Plant Hire Details**

Item Number Search  Search

Description

Supplier  
Please Select...

Cost Per Period (£)  
0

Hire Cost (£)  
0

Total Cost (£)  
0

Goods Received

Off Hire

Item Number

Unit of Measure

Hire Period  
0

Unit \*  
Not Applicable

Quantity

Extras (£)  
0

PO Number

On Hire

Serial Number

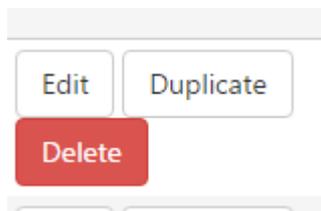
Costs								Pictures & Attachments		Joint Integrity	
Add Labour		Add New Norm		Add BIS		Add Material Item		Add Plant Hire			
Line Number	Cost Type	Short Text	Unit of Measure	Hours	Gross Price £	Actual Progress (%)					
▶ 1	Material Items	new material	ea		1,776.00	0	Edit	Delete	Transfer		
▲ 9	Material Items	scaffold boards			750.00	0	Edit	Delete	Transfer		
<div style="display: flex; justify-content: space-between; align-items: center;"> <span>£ Expenditure</span> <span>Progress</span> </div>											
▶ 10	Material Items	scaffold poles			525.00	0	Edit	Delete	Transfer		
▶ 11	Material Items	clips/bolts pack			1,500.00	0	Edit	Delete	Transfer		
▶ 13	Labour	expert help		12	513.36	0	Edit	Delete	Transfer		

Click on a Cost to expand the grid row and uncover the extra navigation to:

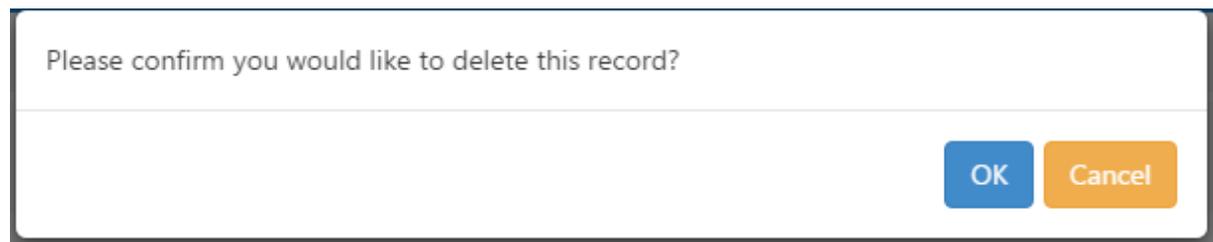
-  Actual Expenditure
-  Actual Time
-  Actual Progress

### Activity Deleting

To completely remove an Activity simply click on the 'Delete' button on the Activity grid.



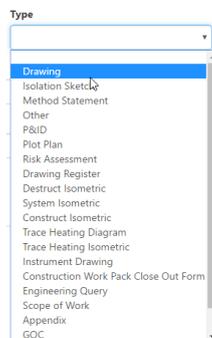
Note you will be asked to confirm if you want to do this (as a delete cannot be undone).



## Adding Pictures and Attachments

Other documents and photographs etc. can be attached to the Job and/or Activities.

- From the Job or Activities grid, use the 'Pictures & Attachments' navigation icon .
- Click on the Add button.
- Select the type of attachment from the drop-down list:



- Enter the details as required and click on the Save button/
- Please note that the 'Include in Register' check box controls if the attachment is included in the document register section of the 'Work Pack'.
- Click on the 'Browse' button.
- Click on the 'Upload' button.

Note you can add as many photos and attachments to the Job and Activities as required.

### Pictures & Attachments

Attachment: Drawing (WP-930 Trace Heating cct B4.pdf)

Attachment: Photograph (TP Photos Slide1.PNG)

- To delete an attachment simply click on the "Delete" button.

## Joint Integrity (DFT)

Each Activity can have multiple Joint Integrity records added to it. These will then appear in the GOC section of the Work Pack Printout .

To access the Joint Integrity form from the Activities grid click on the relevant Activity, then click on the Joint Integrity icon .

Job Steps		
Add Job Step	Reorder Job Steps	Copy Job Steps
Job Step Number	Short Description	Activity
▶ 1	Step 3	Engineering
◀ 1.1	Step 2	Cranage



- Click on the 'Add Joint Integrity' button to load the form.
- Complete the required fields. Most of this data is provided by the Hydra tight system.
- Click on the Save button.
- Note that if you select the Destruct option then you will see the prompt below when you click on Save.

Materials will be created and linked to this record on save (replacing any existing linked materials), would you like to continue?

- If you now look back at the Materials Costs, you will note that the relevant materials are there.

## Accessing the Work Pack

Every Job has a corresponding “Work Pack”. There are a few different ways to access the Work Pack:

- From the bread crumb trail click on the Work Pack link, this appears when you are on the Activities grid.

Rapid Shutdown / Jobs / RAPID\_1 / Activities  
Work Pack

- From the Jobs grid click on the print icon (far right below).

Jobs			
<input type="button" value="Add Job"/>			
Job Number	Job Title	SOR Date	Start Date
RAPID_1	CYC151 Replace Compressed Air Isolation		
     			

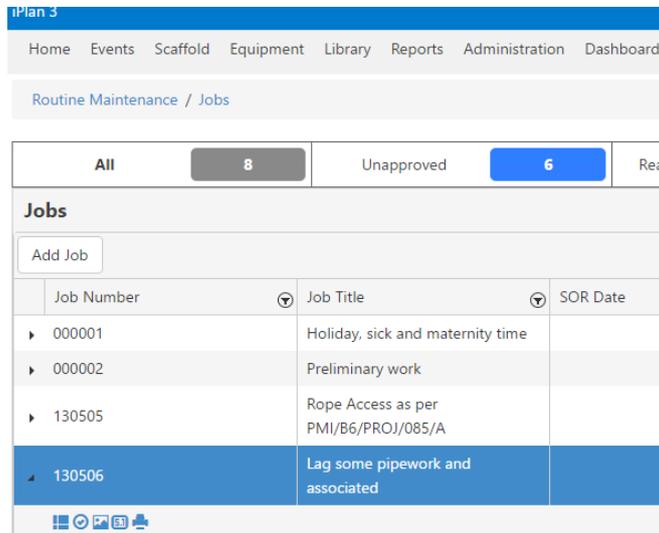
- From the ‘Library’ link on the main menu, this will display all of the Work Packs which have been generated.

iPlan 3							
<a href="#">Home</a>	<a href="#">Events</a>	<a href="#">Scaffold</a>	<a href="#">Equipment</a>	<a href="#">Library</a>	<a href="#">Reports</a>	<a href="#">Administration</a>	<a href="#">Dashboards</a> ▼
Workpack Library							
Title	Work Pack Number	% Complete	Revision				

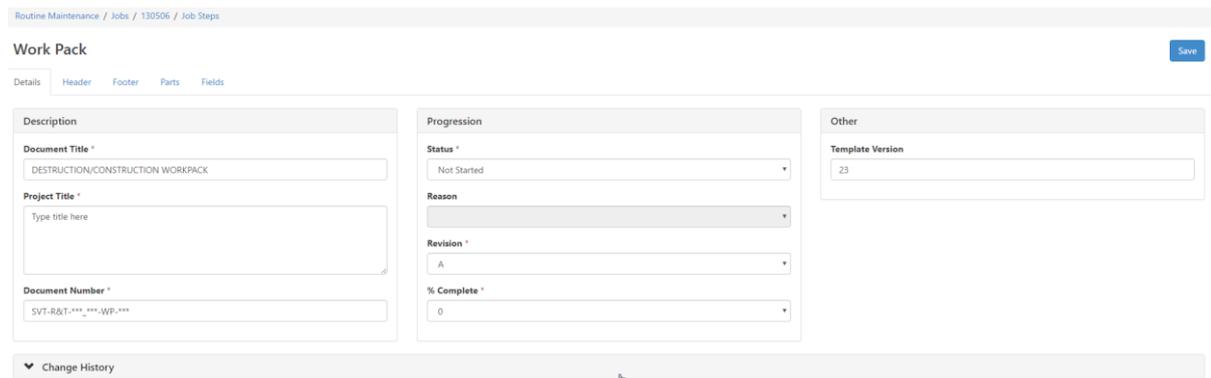
## Creating the Work Pack for the first time

Before you can create a Work Pack you must create a Job. Once the Job has been setup you can create a Work Pack by applying a 'Work Pack Template' to that Job.

To do this from the Jobs grid click on the 'Work Pack' icon:



The 'Work Pack' screen loads. This screen allows you to control everything which will be contained in the printed Work Pack. By default, the Work Pack Template selected in the Event will be used. Click on the 'Save' button in the top-right hand corner initiates the creation of the Work Pack for this Job. Making changes now will change this individual Work Pack – it will not change the Work Pack Template.



The Work Pack Template can be modified via the Administration menu.

## Printing the Work Pack

Once the Work Pack has been initiated by click on the Save button, you can now Generate the Work Pack print out by clicking on the 'Generate' button.

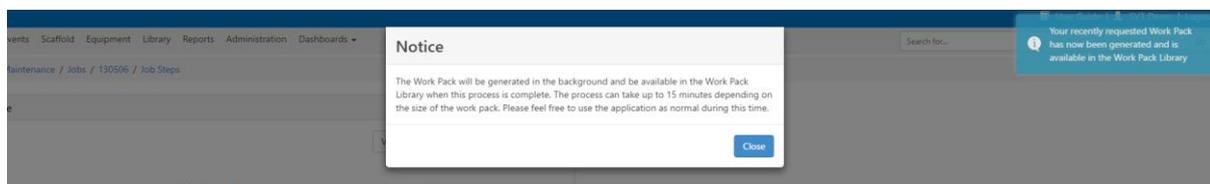
You will be presented with the options below. They allows you to specify what will be included in the print out. Checking all the boxes will include everything; or you can check just the things you want to include.

Next click on the 'Generate Work Pack button'.

**Include**

Parts	<input checked="" type="checkbox"/>	Core Elements	<input type="checkbox"/>	Attachment Types
Front page	<input checked="" type="checkbox"/>	Job Technical Details	<input type="checkbox"/>	
Work Pack Review Comment Sheet	<input checked="" type="checkbox"/>	Materials	<input checked="" type="checkbox"/>	
Brief Outline of workscope, references, HSE, Related WP details	<input checked="" type="checkbox"/>	GOC	<input checked="" type="checkbox"/>	
Workscope iPlan	<input checked="" type="checkbox"/>	Scope Sheets	<input type="checkbox"/>	
Construction Workpack Drawings and Details	<input checked="" type="checkbox"/>	Scaffold	<input type="checkbox"/>	
Bill of Materials	<input checked="" type="checkbox"/>	Job Technical Details Summary	<input checked="" type="checkbox"/>	
G O C	<input checked="" type="checkbox"/>	Drawing Register	<input checked="" type="checkbox"/>	
Scope of Work Requirements	<input checked="" type="checkbox"/>			
Appendices	<input checked="" type="checkbox"/>			
Construction Workpack Close Out	<input checked="" type="checkbox"/>			

iPlan will now generate the 'Work Pack' for printing. This may take some time depending on how much information is to be included. iPlan will notify when this has been completed, so you can continue to use iPlan as normal.



To download the Work Pack Printout, click on the Library link on the main menu. By default, your print out will be at the top of the grid. However, you may need to use a filter on the grid. Click on the Download button.

Home Events Scaffold Equipment **Library** Reports Administration Dashboards

Search for...

**Workpack Library**

Title	Work Pack Number	% Complete	Revision	Revision Modified On	Generated Date	Generated By	
DESTRUCTION/CONSTRUCTION WORKPACK	130506	0	A		27/09/2016 10:13:51	SVT Demo	<a href="#">Edit</a> <a href="#">Download</a>

The Work Pack (PDF file) will be downloaded to your computer ready for printing or e-mailing.

iPlan 3 Work Pack 2016-09-27 10-14-55.pdf 1 / 13

**North Sea Midstream** **Sullom Voe Terminal**  
Renewals & Turnarounds Team

WBS Title: Type title here  
Discipline: Enter text here

**Execute Work Pack**  
SVT-R&T-\*\*\*-\*\*\*-WP-\*\*\*

**Document Revision & Distribution**

Rev	Reason for Issue	Department/Area	Name(s)	Signature(s)	Date
A	Built and Checked	WP Engineer / Work pack Lead			
A	Review and Check for release	Functional SPA			
A	Review and Comment	Engineering TA			

**Constructability Review Site Visit**

Rev	Reason for Issue	Department / Area	Name(s)	Signature(s)	Date
A	Review and Comment	Execution SPA			
A	Review and Comment	CoW Team			
A	Review and Comment	Execution Team			
A	Review and Comment	GOC Team			

**Contents**

Section	Description
Section 1	Brief Outline of workscope, references, HSE, Related WP details
Section 2	Workscope method statement ( iPlan )
Section 3	Workscope related drawings and photographs
Section 4	Bill of Materials
Section 5	SOC WP reference & B11 form
Section 6	Scope of Work Requirements Checklist
Section 7	Appendices

iPlan applicable	Y	N	iPlan applicable	Y	N
iPlan Number			iPlan Number		

## Work Pack Details

The Work Pack Details describe the overview of the Work Pack, its status and the version number of the Work Pack template which has been used.

You can also specify the:

- Current Status of the “Work Pack”.
- Current Revision of the “Work Pack”.
- Percentage Complete of the “Work Pack”.

The document title, project title and document number fields can be used to populate the fields / placeholders. Please see the Work Pack Fields section.

Work Pack Generate Delete Save

Details Header Footer Parts Fields

Description	Progression	Other
<p><b>Document Title *</b></p> <input type="text" value="DESTRUCTION/CONSTRUCTION WORKPACK"/>	<p><b>Status *</b></p> <input type="text" value="Please Select..."/>	<p><b>Template Version</b></p> <input type="text" value="23"/>
<p><b>Project Title *</b></p> <input type="text" value="Type title here"/>	<p><b>Reason</b></p> <input type="text"/>	
<p><b>Document Number *</b></p> <input type="text" value="SVT-R&amp;T-***-***-WP-***"/>	<p><b>Revision *</b></p> <input type="text" value="A"/>	
<p><b>Logo</b></p> <input type="text"/> <input type="button" value="Browse..."/> <input type="button" value="Upload"/>	<p><b>% Complete *</b></p> <input type="text" value="0"/>	

## Work Pack Header & Footer

The Work Pack header and footer allows you to control the contents of these sections on all pages of the Work Pack print out.

To access the header and footer tabs from the Jobs grid, find the relevant “Job”, click on the “Job” to expand the row and then click on the “Work Pack Icon” .

Jobs		
Add Job		
Job Number	Job Title	SC
▶ 000001	Holiday, sick and maternity time	
▶ 000002	Preliminary work	
▶ 130505	Rope Access as per PMI/B6/PROJ/085/A	
▶ 130506	Lag some pipework and associated	



Click on the Header / Footer Tabs, you can then enter the required text and formatting using the rich text editors. Click Save to commit the changes, generate the new “Work Pack” and new header and footer will be used.

## Work Pack

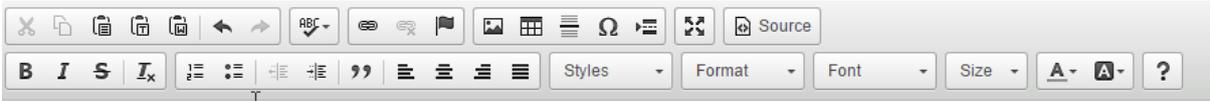
Details **Header** Footer Parts Fields



JOB / PROJECT TITLE:	{{ProjectTitle}}
DOCUMENT TITLE:	{{DocumentTitle}}
DOCUMENT NUMBER:	{{DocumentNumber}}

## Work Pack

Details Header **Footer** Parts Fields



Rev {{StatusModifiedDate}}

## Work Pack Parts

The “Parts” in a “Work Pack” form control the main content of the “Work Pack” print out.

To create a new part:

- Click on the Add button.
- Enter the order number (by default the new part is placed at the bottom).
- Enter the content and format it using the rich text editor.
- Specify the Page orientation of the part.
- Enable the core elements which will be included in the part, these are:
  - Job Technical Details (a detailed list of all the “Job Steps”).
  - Materials (the material take off list grouped by location).
  - GOC (the Joint Integrity form).
  - Scope Sheets (currently doesn’t do anything).
  - Scaffold (the F91 register).
  - Job Technical Detail Summary (a list of all the “Job Steps”).
  - Drawing Register (the drawing register).
- Click on the Save button.

The screenshot displays the 'Work Pack' interface. At the top, there is a breadcrumb trail: 'Routine Maintenance / Jobs / 130506 / Job Steps'. Below this, the 'Work Pack' title is shown with 'Generate', 'Delete', and 'Save' buttons. A navigation bar includes 'Details', 'Header', 'Footer', 'Parts', and 'Fields'. The 'Parts' section on the left lists various components like 'Front page', 'Work Pack Review Comment Sheet', and 'Scope of Work Requirements', with an 'Add' button. The 'Selected Part' panel on the right shows fields for 'Name \*' (Last Part), 'Order \*' (11), and 'Page Orientation' (Portrait/Landscape). It also features a 'Core Elements' section with checkboxes for 'Job Technical Details', 'Materials', and 'GOC'. A rich text editor with a toolbar is used for the 'Content' field, which contains the text: 'This is the main content which will appear before the CORE elements that have been enabled.' A 'Delete' button is located in the top right corner of the 'Selected Part' panel.

## Work Pack Attachments (Print Out)

You are able to control exactly where an attachment will be included in the “Work Pack” print out. To do this navigate to the “Work Pack” screen and click on the “Parts” tab.

- We are assuming that the attachment has already been uploaded to the relevant “Job” or “Job Step”.
- Click on name of the Part which you want the attachment to appear in.
- Scroll down to view the “All Job Attachments” section which appears underneath the Content rich text editor.
- Click on the plus icon  to include the attachment in this section of the print out.
- You can click on the up and down arrows to specify the order that the attachments will be printed out.

### All Job Attachments

Include/Exclude	Job Step	Type	Date	File Name	Drawing/Document/BOM No.	Order
		Drawing		WP-930 Trace Heating cct B4.pdf	Drawing 1	 
		Photograph		TP-Photos Slide1.PNG		 

## Work Pack Fields

The fields tab on the “Work Pack” screen lists all of the placeholders which you can use in the “Work Pack”. When the “Work Pack” is printed the placeholder values you have entered in the “Work Pack” are replaced with the corresponding value. For example:

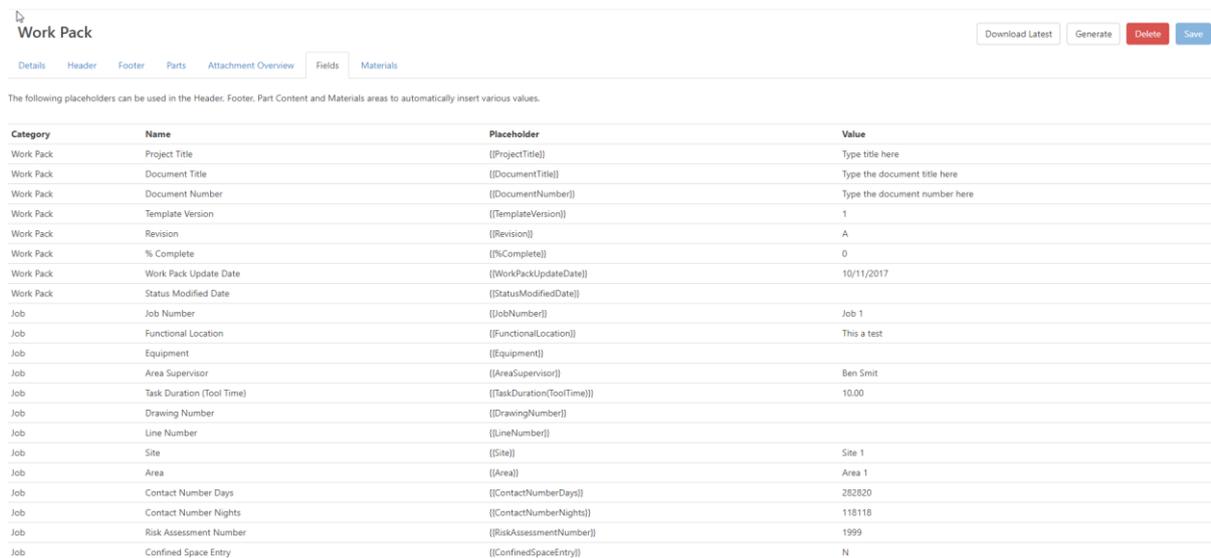
If the following text is entered in the Header:

{{Document Title}}

Then the following will be printed in the header:

DESTRUCTION/CONSTRUCTION WORKPACK

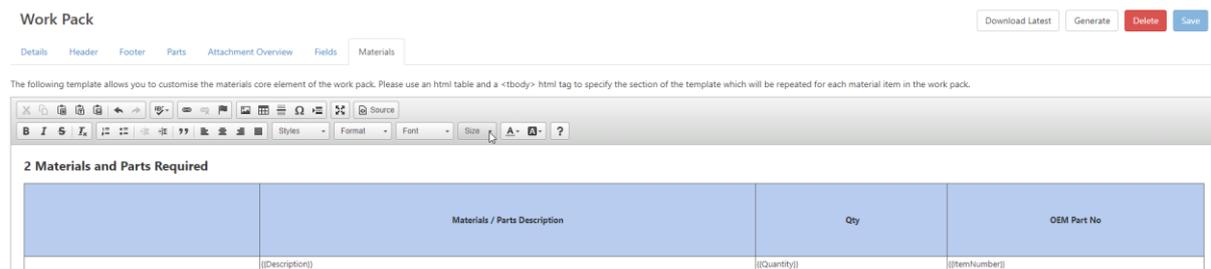
The following placeholders can be used:



Category	Name	Placeholder	Value
Work Pack	Project Title	{{ProjectTitle}}	Type title here
Work Pack	Document Title	{{DocumentTitle}}	Type the document title here
Work Pack	Document Number	{{DocumentNumber}}	Type the document number here
Work Pack	Template Version	{{TemplateVersion}}	1
Work Pack	Revision	{{Revision}}	A
Work Pack	% Complete	{{%Complete}}	0
Work Pack	Work Pack Update Date	{{WorkPackUpdateDate}}	10/11/2017
Work Pack	Status Modified Date	{{StatusModifiedDate}}	
Job	Job Number	{{JobNumber}}	Job 1
Job	Functional Location	{{FunctionalLocation}}	This a test
Job	Equipment	{{Equipment}}	
Job	Area Supervisor	{{AreaSupervisor}}	Ben Smit
Job	Task Duration (Tool Time)	{{TaskDuration(ToolTime)}}	10.00
Job	Drawing Number	{{DrawingNumber}}	
Job	Line Number	{{LineNumber}}	
Job	Site	{{Site}}	Site 1
Job	Area	{{Area}}	Area 1
Job	Contact Number Days	{{ContactNumberDays}}	282820
Job	Contact Number Nights	{{ContactNumberNights}}	118118
Job	Risk Assessment Number	{{RiskAssessmentNumber}}	1999
Job	Confined Space Entry	{{ConfinedSpaceEntry}}	N

## Work Pack Materials

The materials tab on the “Work Pack” screen allows you to optionally customise the content for the Materials Core Element. You can use the Materials place holders which are listed under the Fields tab and a <tbody> (a html table) to define the exact layout. If this field is left blank, then the standard Material Core Element will be used in the work pack print out.



The screenshot shows the 'Materials' tab in the 'Work Pack' interface. It features a rich text editor with a toolbar and a table template. The table has the following structure:

2 Materials and Parts Required			
	Materials / Parts Description	Qty	OEM Part No
	{{Description}}	{{Quantity}}	{{ItemNumber}}

## Work Pack Change History

Every time a user makes a change to a “Work Pack” or a “Job” this is logged in the system, you can then view what was changed when and by whom. There are a couple of different ways of accessing this information:

- Click on “Library” on the main menu.
- Select the “Work Pack” in the “Work Pack Library” grid view.
- Click on the dropper icon.
- Click on the list icon to view the changes.

This view shows all of the changes which have been made to the “Work Pack” since the last time that it was generated for printing.

The screenshot shows the 'Work Pack Library' interface in iPlan 3. The main table lists work packs with columns for Title, Work Pack Number, % Complete, Revision, Revision Modified On, Generated Date, and Generated By. The selected work pack is 'DESTRUCTION/CONSTRUCTION WORKPACK' with number 130506, 0% complete, and revision A. Below this, a detailed change history table is shown with columns for Date, User, Action, and Name. The changes listed include adding a 'Part (Work Pack Review Comment Sheet)' and several other parts. A detailed view of the 'Part (Work Pack Review Comment Sheet)' is expanded, showing fields like Name, Order, Content, Core Elements, and Page Orientation with their old and new values.

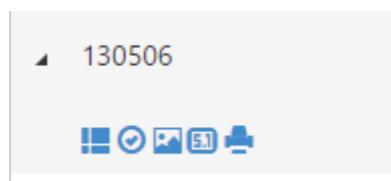
Title	Work Pack Number	% Complete	Revision	Revision Modified On	Generated Date	Generated By
DESTRUCTION/CONSTRUCTION WORKPACK	130506	0	A		27/09/2016 10:13:51	SVT Demo

Date	User	Action	Name
27/09/2016 10:09:52	SVT Demo	Added	Part (Work Pack Review Comment Sheet)
		<b>Field</b>	<b>Old value</b>
		<b>New value</b>	
		Name	Work Pack Review Comment Sheet
		Order	2
		Content	WP Review Comment Sheet Item Comment Revised By Date Comments update actions Addressed By Date Signatories Comments Update Acceptable
		Core Elements	None
		Page Orientation	Landscape
27/09/2016 10:09:52	SVT Demo	Added	Work Pack Template (DESTRUCTION/CONSTRUCTION WORKPACK)
27/09/2016 10:09:52	SVT Demo	Added	Part (Construction Workpack Close Out)
27/09/2016 10:09:52	SVT Demo	Added	Part (Workscope iPlan)
27/09/2016 10:09:52	SVT Demo	Added	Part (Front page)
27/09/2016 10:09:52	SVT Demo	Added	Part (Scope of Work Requirements)

Secondly the changes made to the “Work Pack” print out can be viewed in the “Work Pack” screen, to access this from the “Jobs” grid:

- Click on the “Work Pack” icon:



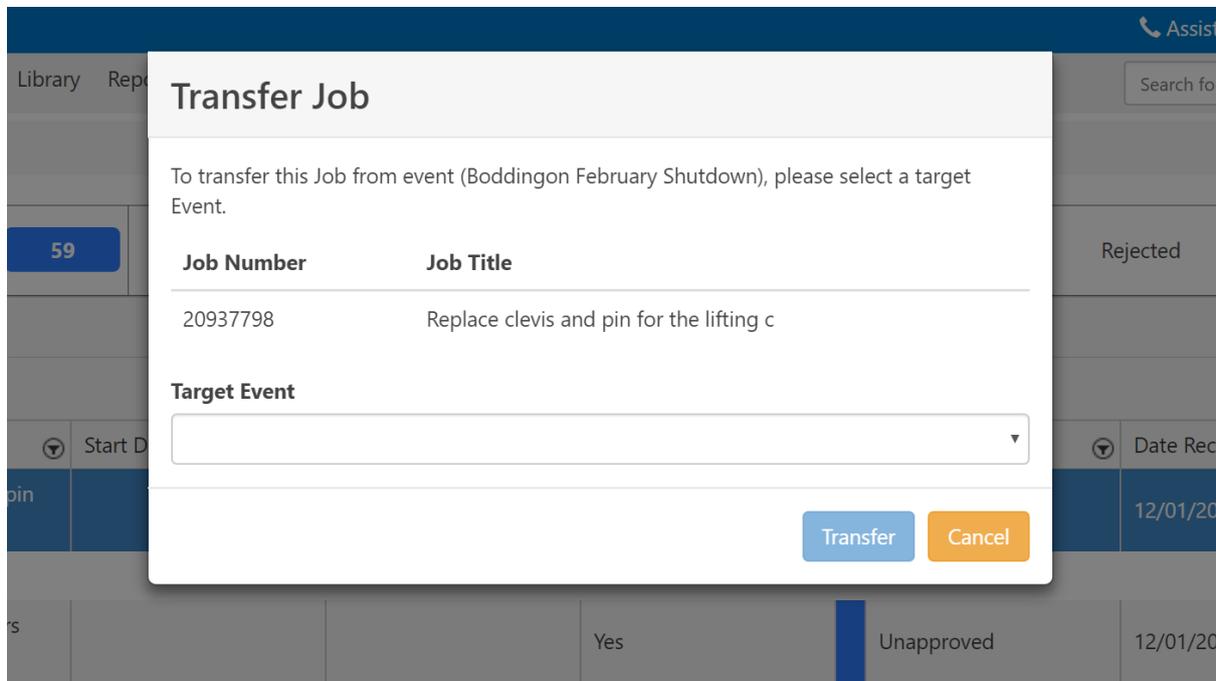
- Expand the Change history dropper.
- Click on the list icon to view the details of the changes.

Change History			
Date	User	Action	Name
27/09/2016 10:09:52	SVT Demo	Added	Part (Work Pack Review Comment Sheet)
		<b>Field</b>	<b>Old value</b> <b>New value</b>
		Name	Work Pack Review Comment Sheet
		Order	2
		Content	WP Review Comment Sheet Item Comment Revised By Date Comments update actions Addressed By Date Signatories Comments Update Acceptable
		Core Elements	None
		Page Orientation	Landscape
27/09/2016 10:09:52	SVT Demo	Added	Work Pack Template (DESTRUCTION/CONSTRUCTION WORKPACK)
27/09/2016 10:09:52	SVT Demo	Added	Part (Construction Workpack Close Out)

## Transfer a Job

To transfer a Job from one Event to another select the 'Transfer Job'  button from the Jobs Grid.

A modal window will load.



Job Number	Job Title
20937798	Replace clevis and pin for the lifting c

Target Event

Transfer Cancel

Choose a Target Event from the list of Events in the drop down list.

Select the 'Transfer' button to move the Job.

Please note – you can transfer multiple Jobs using the 'Transfer Jobs' button from the Administration menu.

## Job Change History

It is also possible to view all of the changes which have been made to a "Job", to access this:

- From the "Job Grid" double click on the required "Job"
- Scroll to the bottom of the "Job Form" and expand the Changes dropped by clicking on it.

- To view details of exactly what was changed click on the list icon.





## Variations

If the scope of a job needs to be altered after it has been approved this can be achieved in iPlan by creating a Variation.

Once a Job has been approved any new Job Steps which are created will form part of a variation. iPlan automatically assigns these steps to the next available variation number. The Variation can then be approved in the same way. There is no limit on the number of Variations.

So, to create a Variation simply create as many new Job Steps as required to describe the change in scope to the Job. Do this on the Job stepping screen see the section titled "Creating Job Steps" for further details.

## Entering Expenditure

On the Events screen, click Routine Maintenance to reveal the navigation icons. Click the second-last one to show the Expenditure screen.

Ensure the date is as desired.

Click 'Add new expenditure', enter the Job Number, pick a Job Step, pick a service, enter a description, and a cash value for the expenditure.

Press the blue + button to duplicate the line, change the Cost, description and cash value.

Press Save. Switch to the second tab (View progress) and note the data just entered.

Switch back to the first tab (Enter Expenditure) and click the red – button to delete a line. After confirming, switch back to the second tab and note that the progress entry has been deleted.

## Entering Time (iPlan)

On the Events screen, click Routine Maintenance to reveal the navigation icons. Click the middle one to show the Timesheet screen.

### Actual Time (including non-productive)

Ensure the date is as desired. Pick a Supervisor and enter a Word Request number. The Job Step list will populate, so pick one. Then the Cost list will populate, so pick one.

Click 'Add time', pick an employee, then enter the timesheet entries for that day (time worked, allowances and non-productive time).

### Predicted Time

Time can be marked as Predicted (and entered per person, or rolled up using the special employee 'predicted time'). The Predicted time will appear in the Valuation, but not on the timesheet report. It can be deleted later, before the real time worked is entered.

The Predicted time is summarised in the Predicted Time tab. HOW DO WE DELETE IT?

### Hours Holding

If time cannot yet be entered against a Cost, perhaps because it is not yet approved, then it should be entered into the Hours Holding area. The same screen is used – just enter the Job number, but do not pick a Job Step.

Time can be transferred from the Hours Holding area into Actual Time (once a Job is approved) using the View Time tab.

Press Save. Switch to the final tab (View Time) and note the data just entered.

## Valuation

### Baseline Actuals

Administration menu has a 'Baseline actuals' section. Pick Site and Client. Press 'Show open actuals' to show everything that is ready to be baselined. Press 'Baseline clients' to baseline the actuals.

### Valuation Report

Administration menu has a 'Valuations' section. Pick the week ending date that you want to run the valuation up to. Press 'Run valuation'.

A valuation can be deleted if it has not been finalised.

To finalise a valuation, press the Finalise button.

To download a valuation in CSV format (to load into Excel) press Download.

## Reports

The Reports menu will open the Reports screen. All of the reports are listed on the left within the 'Reports' section. Select a report for the report description and filters to load (to the right).

There are three filters :

1. General filter: choose site, client(s), event(s) and optionally start and end date
2. Jobs filter: choose to filter based on any meta data relating to the Job
3. Activities filter: choose to filter based on any meta data relating to the Activity

The Job and Activities filter allow you to build complex queries to get exactly what you want from your data.

Select the '+' button to build a query. You can select the Field (data), Operator (e.g. Equals, Less than, Greater than) and Value (search term). You can have multiple conditions in any one report. An example query would be:

Jobs Filter				
Field	Operator	Value		
Job Number	Contains	34256	+	Delete
-Or-				
Field	Operator	Value		
Permit Number	Equals	162738973	+	Delete
Add Condition				

This will return any Jobs with a Job Number that contains the value '34256' or any Jobs with a Permit Number that equals '162738973'.

To remove conditions select the 'Delete' button.

Once your filter is full defined, select the Run Report button. A report will be generated and load in a new Excel window.

### The Live Work Order with Incomplete Progress Report

The **Work Orders** for the **Events** that where selected are displayed in the report where the **Progress** has started but not completed (That is **progress** is more than 0% but less than 100%).

If you choose the **From Date** all **progress** that has a **week ending** of less or equals to the **From Date** will be displayed. If you do not choose a **From Date** you see only the **progress** that has not been given a **week ending date**.

**Cumulative Work Hours** and **Latest Finished** fields will only be shown when the **Labour cost** has been closed.

### Exporting to Primavera (Primavera XML Export)

Accessible from the Reports screen the Primavera XML Export will produce an XML data file that can be imported into Primavera to allow work to be logic linked scheduled and resource levelled. This export includes activities, activity codes and resource codes.

Within Primavera you can configure the import (from iPlan) to suit your requirements. For example, whether to ignore or update tasks that already exist in the schedule.

### Dashboards

iPlan provides three separate Dashboards (KPI Dashboard, Planning Dashboard and Execution Dashboard) that display a snapshot of the current position for a given Event.

## KPI Dashboard

The KPI Dashboard is designed with Routine Maintenance in mind. Although the charts/widgets can be changed based on your requirements; generally, a KPI widget displays the current position of a specific query. For example, % Scheduled Compliance.

The data on the gauges update every 24 hours. The other charts run on-demand and shows live data.

To access the KPI Dashboard:

- Select the Dashboards link from the Main Menu
- Select KPI Dashboard
- Choose an event from the Routine Maintenance Events in the drop-down list

Please find below a table of some of the available charts for the KPI Dashboard

Title	Description
<b>Remaining Scoped Work</b>	How many approved hours remain.
<b>Preventative Maintenance</b>	How many approved hours for preventative maintenance.
<b>% Preventative Maintenance Cost</b>	The percentage of the overall approve costs which are allocated to preventative maintenance tasks.
<b>% Scheduled Compliance</b>	How well the schedule has been executed, note this can only be calculated if the user imports the planned scheduled dates and the actual completion dates each time the schedule is issued.
<b>% Emergency Repairs (Priority A)</b>	The overall percentage of emergency repairs which are the highest priority.
<b>% Emergency Repairs (Priority B)</b>	The overall percentage of emergency repairs which are the second highest priority.
<b>Time Between failures</b>	The average number of days between equipment failures across all equipment on the plan in days.
<b>Downtime</b>	The total down time in hours across all equipment on the plant.
<b>% Maintenance Cost</b>	The overall percentage of the actual costs which have been assigned to preventative maintenance tasks.
<b>% Corrective Repairs</b>	The overall percentage of the actual costs which have been assigned to corrective maintenance tasks.
<b>% Scoped work</b>	The overall percentage of activities which are estimated tasks.
<b>% Unscoped work</b>	The overall percentage of activities which are “not” estimated tasks.
<b>Order Progress</b>	All jobs / order by estimate approval status.
<b>Operations Awaiting Estimate</b>	The activities which need to be estimated by trade.
<b>Estimates Awaiting Approval</b>	The number of jobs and variations which need to be approved by estimate approver.
<b>Remaining Scope Work</b>	Trend showing the total number of approved hours which can be scheduled for completion.
<b>% KPI History</b>	This shows the trends of the gauges.
<b>Average Time Between Failures</b>	This shows the trend of the average time between equipment failures.
<b>Downtime</b>	This shows the trend of the average time that equipment is down when it fails.
<b>Time Spent Performing PM Work</b>	The total number of actual hours worked on preventative maintenance tasks.

<b>Non-Productive Time</b>	Shows the number of hours pend on non-productive time by non-productive time code.
<b>Emergency Work</b>	Shows the hours on variations by job / order.
<b>Productivity Ratio</b>	Shows the productivity ratio by trade.

### Planning Dashboard

The Planning Dashboard helps to assist in the planning of a Shutdown or Project. Each chart runs off live data and will help you to understand how much scope has been estimated in preparation for your event. It will also advise you on scope you may need to remove in order to complete the shutdown within the specified window.

To access the Event Planning Dashboard:

- Select the Dashboards link from the Main Menu
- Select Event Planning Dashboard
- Choose an event from the Events in the drop-down list

Please find below a table of some of the available charts for the Event Planning Dashboard

<b>Title</b>	<b>Description</b>
<b>Time to event</b>	The number of days remaining until the planned start date.
<b>Key Overall Event Status</b>	Shows a breakdown of the approved hours and costs for the event based on the approved estimates. It also shows what the anticipated actual hours and costs will be based on the productivity factor which is calculated based on what the user enters on the event screen.
<b>Order Progress</b>	The status of all Jobs / Orders in the event, the end goal being that all of these must be approved before the event start date.
<b>Risk Matrix</b>	Each number on the chart indicates the total number of jobs which have been placed into the category. Click on the number to toggle if it is to be include or excluded from the scope of the event. Each time you add / remove items from the scope of the event the Monte Carlo simulations will be re-calculated. Note click on Save selections will update the jobs.
<b>Monte Carlo (see separate Monte Carlo section for more detail)</b>	This shows the results of the Monte Carlo simulations. The chart shows the number and % of the simulations which results in a pass (a pass being the jobs which are in scope where completed within the budget for the overall event). Blue bars are within budget and red bars show the number of simulations which failed to remain in budget.
<b>Operations Awaiting Estimate</b>	Shows the number of activities / operations which are on jobs which are awaiting approval grouped by trade.
<b>Estimates Awaiting Approval</b>	Shows the number of estimates which are awaiting approval grouped by approver.
<b>Burndown (Planning Stage)</b>	This shows the overall % of approved jobs. The event planning start and planning end dates are used to determine the X axis. If the green line moves below the blue line this is good and shows that the event is on track to have all planning activities completed on time, above means that the event is falling behind.

## Execution Dashboard

The Execution Dashboard will assist you in understanding the overall position of your shutdown. Are you on track to complete on-time? Has emergent work jeopardised the success of the shutdown? What work is remaining? Cost of estimate versus actual spend.

To access the Event Execution Dashboard:

- Select the Dashboards link from the Main Menu
- Select Event Execution Dashboard
- Choose an event from the Events in the drop-down list

Please find below a table of some of the available charts for the Event Execution Dashboard

Title	Description
<b>Productivity Ratio</b>	Productivity Ratio of the overall event.
<b>Event Totals</b>	Tracks actual spends against actual.
<b>Progress % Complete</b>	Shows a count of how many jobs are at each stage of completion. Red bars fall below the event completion threshold which is set for each event.
<b>Progress Burndown</b>	Shows the overall % completion of all approved work. The event start and end dates are used to determine the X axis. If the green line moves below the blue line this is good and shows that the event is on track to be completed on time, above means that the event is falling behind.
<b>Progress by Trade</b>	Shows the overall % complete split by trade for all approved work.
<b>Progress by Supervisor</b>	Shows the overall % complete split by supervisor for all the approved work.
<b>Non-Productive Time</b>	Shows the total hours allocated to non-productive time codes.
<b>Emergent Work</b>	Shows the hours per order that have been introduced since the shutdown began.
<b>Productivity Ratio (Trade)</b>	Shows all the trades and the current productivity ratio for each. A red bar indicated that the trade has a problem and has fallen below the threshold.
<b>Remaining Work (Trade)</b>	<p>Shows the total remaining work in hours per Trade, a red bar indicates that the remaining work for that trade is higher the trade capacity for the event.</p> <p><b>The remaining work chart in the Execution dashboard</b></p> <p>The Trade Capacities fields in the Event form <b>must</b> be set for this report to work. For each trade you must enter the total available man hours for the duration of the event.</p> <p>The <b>Number of Days Remaining</b> for the event is worked out for the day the dashboard is used. By dividing events <b>Trade Capacity Hours</b> by <b>Days in the Event</b> we get the <b>Daily Hours</b>.</p> <p><b>Daily Hours</b> times <b>Number of Days Remaining</b> = <b>Remaining Capacity in Hours</b></p>

	<p>We divide the <b>Estimated Hours</b> for each trade by 100 then times that by the result of <b>Progress Percentage</b> – 100. To get the <b>Remaining Hours not Completed</b>.</p> <p>If the <b>Remaining Hours not Completed</b> is less than <b>Remaining Capacity in Hours</b> we show the hours Within capacity.</p> <p>If not we show <b>Remaining Capacity in Hours</b> as Within capacity and the <b>Remaining Hours not Completed – Remaining Capacity in Hours</b> as Overallocated.</p>
<b>Earned Value</b>	Shows the actual cost vs. the estimated cost broken down by trade.

### Monte Carlo

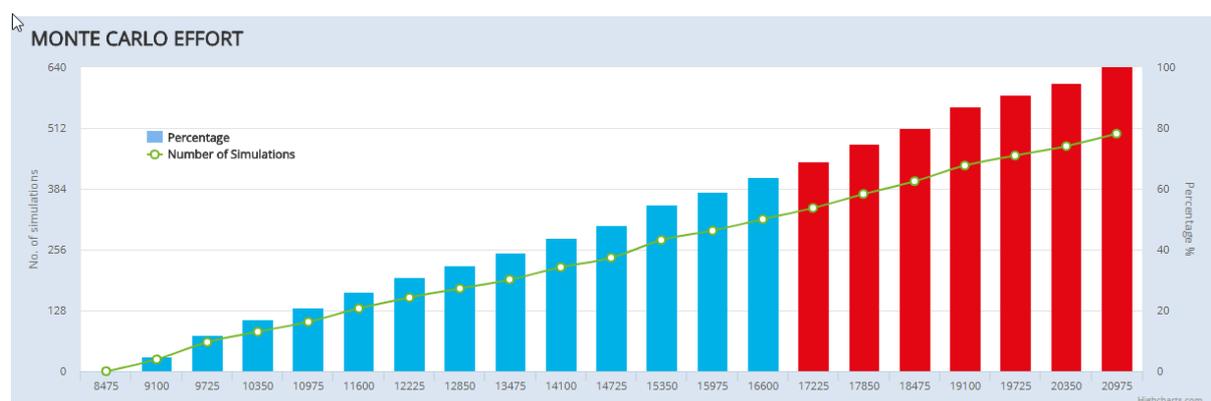
The Monte Carlo simulator will help you to understand whether the work in-scope (for the shutdown) can be completed within the specified time-frame.

The Monte Carlo simulator is accessed via the Event Planning Dashboard.

It works by running 500 simulations and plotting a value between the best and worst case guesstimates (man hours) for each job (in the scoping phase). Once estimates are available, the simulator will use the estimate rather than the guesstimate thus becoming more accurate.

It plots a chart with red and blue bars. The blue bars indicate that work falls within the total budgeted man hours and the red bars indicate whether the work is beyond the total budgeted man hours.

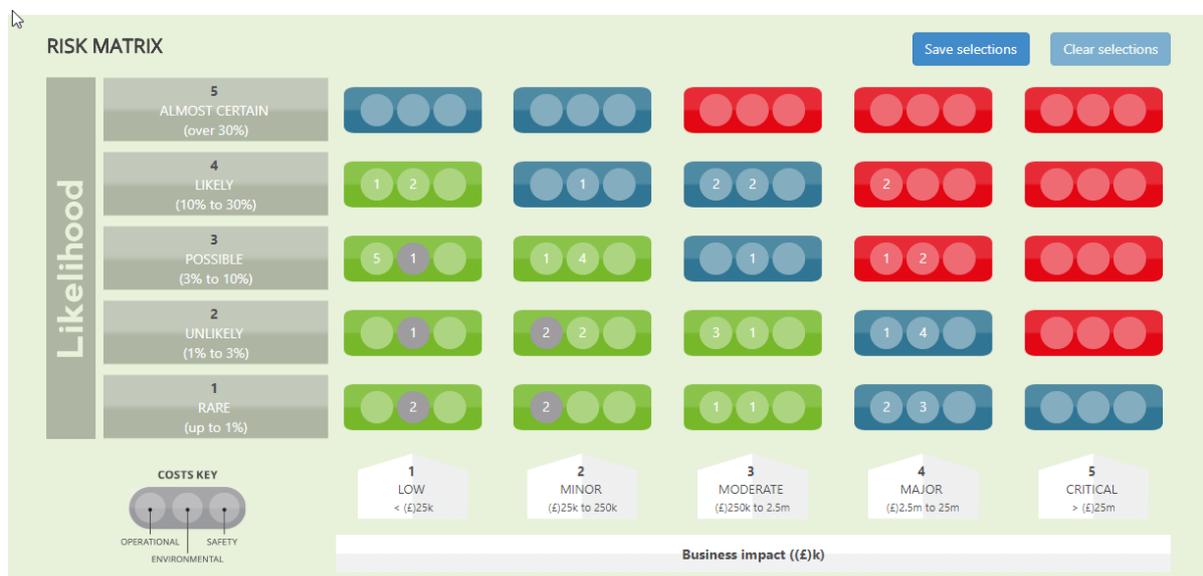
The percentage indicates the proportion of simulations which completed on or before the man hours indicated at the bottom of the bar.



The Monte Carlo is a powerful way of breaking down and understanding the scope of an event prior to detailed planning. It reduces planning costs as you will understand roughly how achievable your scope is before estimation.

Monte Carlo can also form statistical evidence which can argue that not all work is equal and can be de-scoped from the event. To utilise this, you need to categorise your job by risk. To categorise risk, each job should be assessed by the following:

- The possibility/likelihood of failure
- The impact of such failure (financial)
- The classification (operational, safety, environmental)

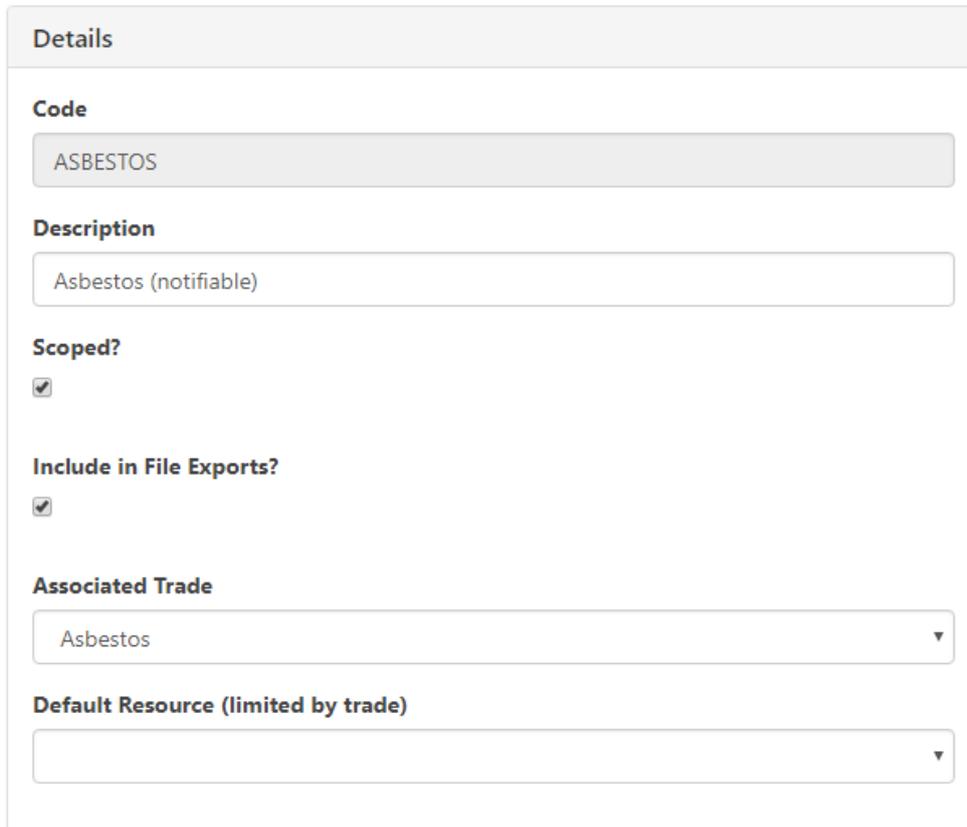


Work can then be excluded from the scope of the shutdown based on risk. For example, all work that is categorised as being rare with a low business impact (£) should be excluded first (bottom left (green) of the diagram above).

Once scope is excluded, the simulator can be re-run to see if the shutdown is now achievable.

## Activity Types

Each job step must be assigned an Activity type when it is created. Activity types are setup under Administration. Below is a screen shot on an activity type:



The screenshot shows a 'Details' form for an activity type. The form contains the following fields and options:

- Code:** A text input field containing 'ASBESTOS'.
- Description:** A text input field containing 'Asbestos (notifiable)'.
- Scoped?:** A checkbox that is checked.
- Include in File Exports?:** A checkbox that is checked.
- Associated Trade:** A dropdown menu with 'Asbestos' selected.
- Default Resource (limited by trade):** An empty dropdown menu.

Each activity type is associated to one trade. Optionally a default resource code can be selected.

## Trades

*Note: trades cannot currently be created in iPlan, if you require a new trade then you must log a support ticket with IAMTech.*

Trades have trade rates and can have associated resources.

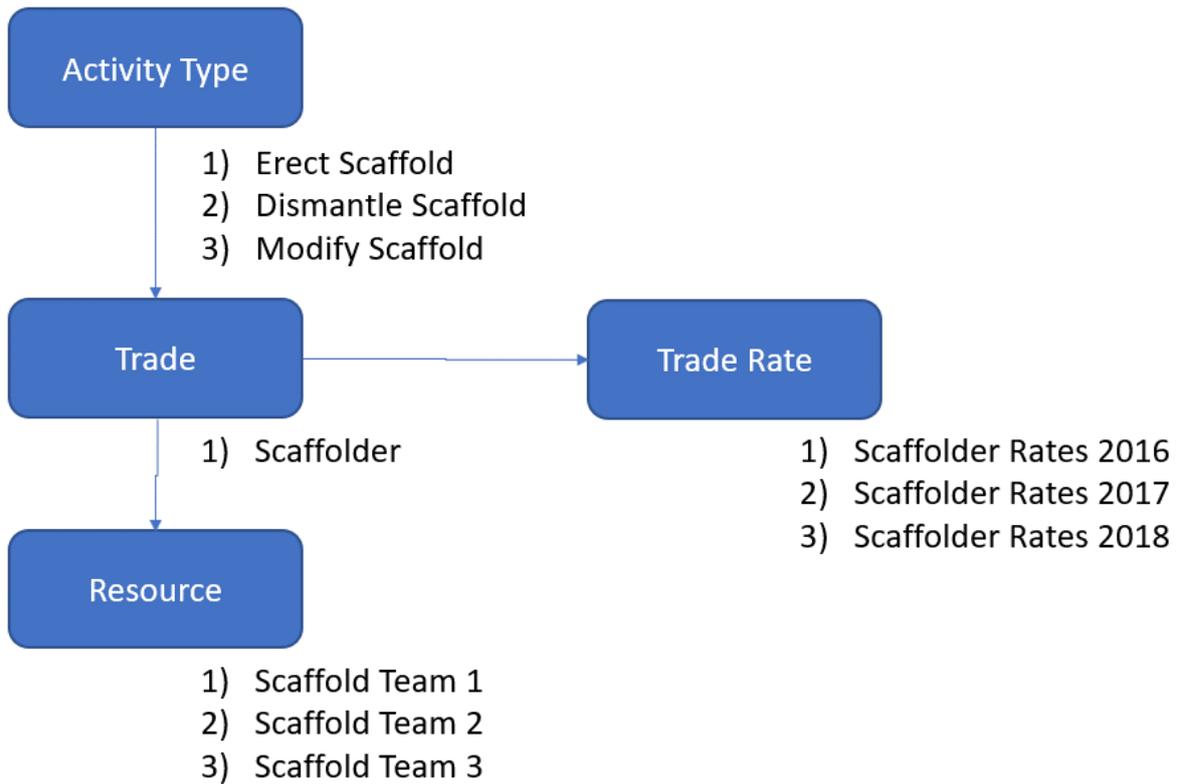
## Resources

Resources may be people, groups of people, resource code, they can be whatever helps resource levelling and planning.

### Activity Types & Trades & Resources

- Activity types represent the type of work being done.
- Trades represent the type of person performing the work and how much that will cost.
- Resources represent the person, group of people, piece of equipment e.g. crane or some other useful code which can be used for scheduling.

The diagram below represents an illustrative example of the relationship between all three:



### Transferring a Job

Jobs can be transferred to an alternative Event using 'Transfer Jobs' within Administration.

iPlan 3 | Assist | User Guide | DIAB Admin | Logout

Home | Events | Scaffold | Equipment Failures | Library | Reports | Administration | Dashboards

Search for... Go

#### Transfer Jobs

[Transfer](#)

The screen enables you to transfer Jobs from one event to another. Choose an event from the 'Available Jobs' pod and then select any Jobs you would like to move. Select the 'Select Jobs' button. The chosen Jobs will now be displayed in the 'Selected Jobs' pod. Choose an event to transfer the Jobs to and select the 'Transfer' button to commit the changes.

##### Available Jobs

Choose an Event to to transfer the Jobs from

Select Jobs

All	Job Number	Job Title	Job Modified Date	Approval Status
-----	------------	-----------	-------------------	-----------------

##### Selected Jobs

Choose an Event to to transfer the Jobs to

Remove Jobs

All	Job Number	Job Title	Job Modified Date	Approval Status
-----	------------	-----------	-------------------	-----------------

To transfer Jobs, select the current Event from the 'Available Jobs' drop-down list. A list of all Jobs within that event will load. Select the Jobs you would like to transfer. Choose the 'Select Jobs' button to move the Jobs to the 'Selected Jobs' pod.

Pick the Event you would like to transfer the Jobs too from the 'Selected Jobs' drop-down list.

Choose the 'Transfer' button to move the Jobs to the new Event.

Please note – you can transfer a single Job at a time using the 'Transfer Job'  button from the Jobs Grid.

## iPlan Mobile

iPlan Mobile enables you to create scope and capture time and progress on a mobile device. Jobs are pulled down (Synced) from the iPlan database and saved to the mobile device. You can then:

- Scope an existing Job/Activity or add new Jobs/Activities. Include description, duration, number of resources, as well as take photos.
- Enter Progress (% complete) for any approved Jobs
- Enter Time worked for any approved jobs.

Once changes have been made you should Sync back into iPlan to commit your changes.

It is possible to use iPlan Mobile without an internet connection, the act of Sync'ing is the only action which requires an internet connection.

## Icons

The table below depicts all of the icons used throughout iPlan Mobile.

	Unapproved Job
	Approved Job
	Edit Record
	Confirm Changes (Disabled, no changes made, or invalid data inputted).
	Confirm Changes (Enabled)
	Cancel / Close
	Record Locked for Editing (Click on the record to see the reason it has been locked).
	Delete Record
	Progress
	Supervisor



## Login

You will be provided with your own unique company URL to access iPlan Mobile which will be in the format:

<https://www.iamtechapps.com/iPlanMobile-<<ClientName>>>

*Note: Replace <<ClientName>> with your company name e.g. iPlanMobile-IAMTech*

iPlan Mobile will remember your session details (login) for 12 hours. You will be asked to enter your login details if your session has expired when you select the 'Sync' button.

## Downloading Jobs from iPlan

To refine the Jobs that are downloaded to your mobile device, complete the filter on the Home screen.

You are logged in as 'Richard Walker' ('rw')

**Filter Jobs to Sync**

Require Scoping

Requires (Time & Progress)

Include Images

Supervisor  
Please select...

Event  
Please select...

No. Jobs

By default, iPlan Mobile will download all of the jobs from iPlan which require scoping and have been approved and require progressing / actual time recording. Photos / Images will not be downloaded by default.

**Note that if you try and download all of the jobs from iPlan then this can lead to very long download times, it is strongly recommended that you apply a custom filter to reduce the number of jobs that will be downloaded.**

Choosing 'Require Scoping' will bring down Jobs that have 'Scope Complete' set to true on the Job.

(note:

- When an Activity is added or updated on the Mobile App 'Scope Complete' is set to yes or ticked on the job when you sync.
- You will see this if you have an unapproved job already synced, with no activities on it.
- Then add an Activity on the Mobile App and sync.
- To see the job you will need to uncheck both 'Require Scoping' and 'Requires (Time & Progress)' then sync again to see the job until the job is approved. )

Choosing 'Requires (Time & Progress)' will bring down Approved Jobs that require progressing and or Time Recording.

Choosing 'Include Images' to download any images.

Choose a 'Start' / 'End' date to download any jobs which have been scheduled to be worked on during this date range.

Choose the 'Supervisor' will download any jobs which have been allocated to that supervisor or has one or more job steps which have been allocated to that supervisor.

Choose the 'Event' to limit the events from which the jobs will be downloaded from.

Move the 'No. Jobs' slider to limit the number of Jobs which will be downloaded, note the default is 50, however this can be changes to include many more as and when this is required.

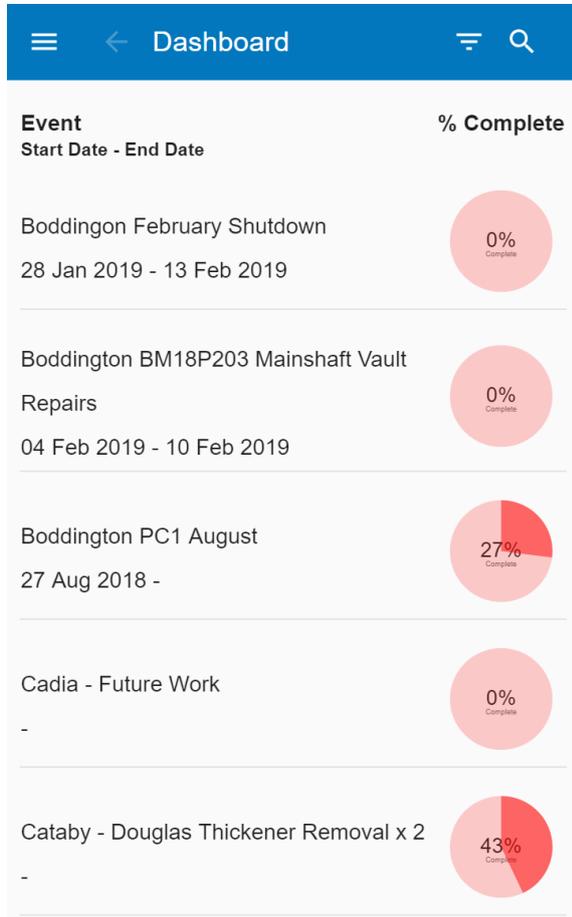
Click on the 'SYNC' button to start the download.

Once 'Synced', you're able to work offline without an internet connection.

## Dashboard

Select 'Dashboard' from the menu.

A screen will load that displays all of the events that match the sync filter or search filter.



The screenshot shows a mobile application interface for a dashboard. At the top, there is a blue header bar with a hamburger menu icon on the left, the word 'Dashboard' in the center, and a search icon on the right. Below the header, the main content area is a list of events. Each event entry consists of the event name, the start and end dates, and a circular progress indicator showing the percentage of completion. The progress indicators are red circles with white text indicating the percentage. The events listed are:

Event	Start Date - End Date	% Complete
Boddingon February Shutdown	28 Jan 2019 - 13 Feb 2019	0%
Boddingon BM18P203 Mainshaft Vault Repairs	04 Feb 2019 - 10 Feb 2019	0%
Boddingon PC1 August	27 Aug 2018 -	27%
Cadia - Future Work	-	0%
Cataby - Douglas Thickener Removal x 2	-	43%

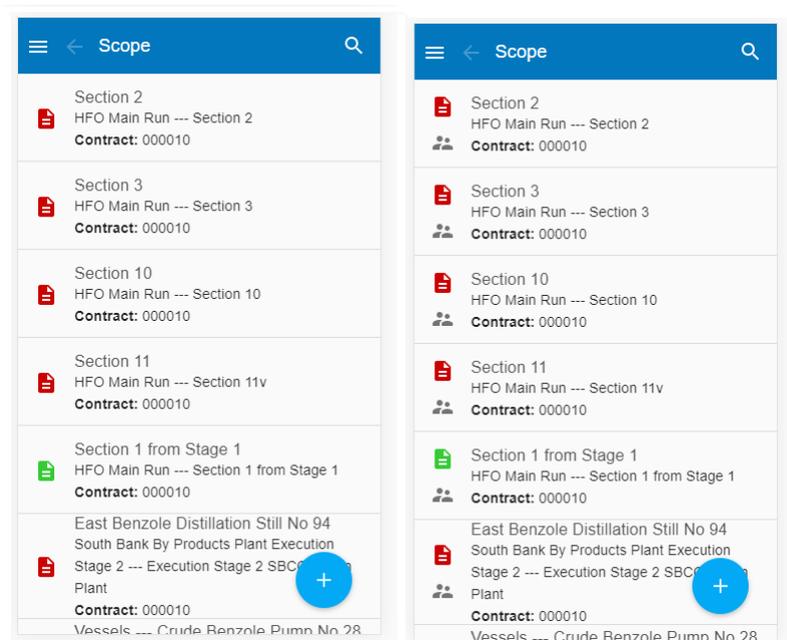
Each event is displayed alongside the start/event dates, as well as the overall progress % complete.

## Scope

Select 'Scope' from the menu.

A screen will load that displays all downloaded Jobs.

If you are a supervisor for the Job you will see the supervisor icon as seen on the screen on the right.



Each Job will be prefixed with a red or green scope icon. Green indicates the Job is fully scoped and red suggests it requires scoping.

You can use the Search icon to refine this list further.

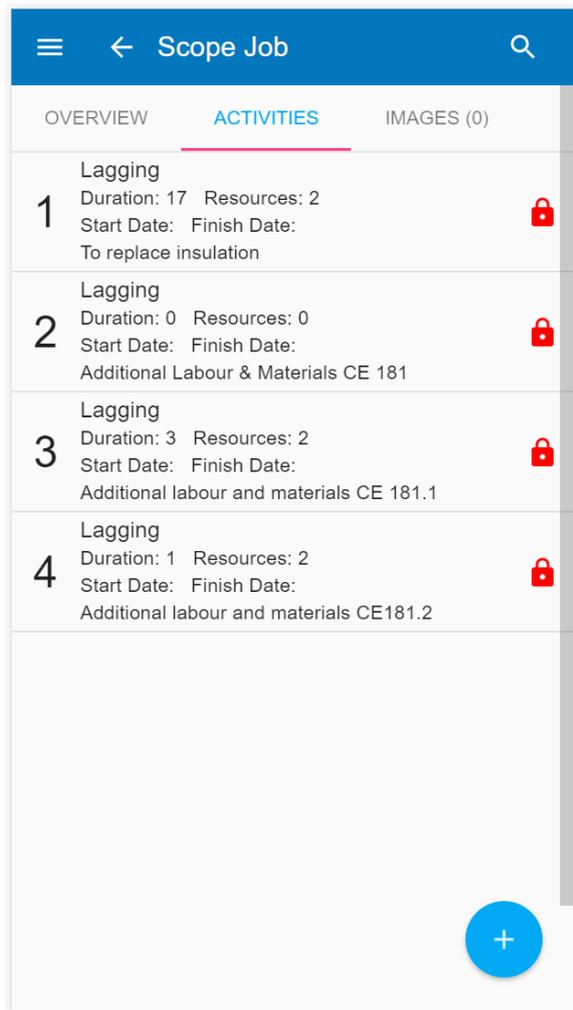
### *Capturing Scope*

To add scope to an existing Job select a row in the list.

A new screen will load that will enable you to edit the details of the Job, add/modify its activities and take/upload photos.

To modify the Job, select the 'Edit' button on the 'Overview' tab.

To add/modify the activities, select the 'Activities' tab.



Select an existing activity to edit its detail or choose the '+' button to add a new activity.

*Please note – mobile offers a quick and convenient solution to adding scope on-site; all features of iPlan Desktop do not exist in mobile. To add more detail to your Job/Activities, you'll need to open iPlan Desktop.*

#### *Taking Photos*

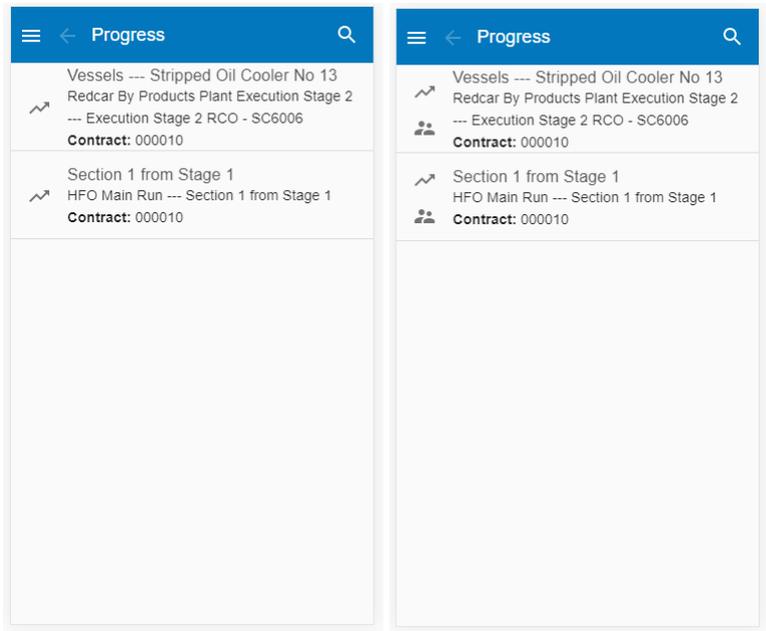
To add photos, select the 'Images' tab and then choose the photo icon to take a photo with your mobile device.

### Progress (Mobile)

Select 'Progress' from the menu.

A screen will load that will display all Approved Jobs.

If you are a supervisor for the Scope you will see the supervisor icon as seen on the screen on the right.

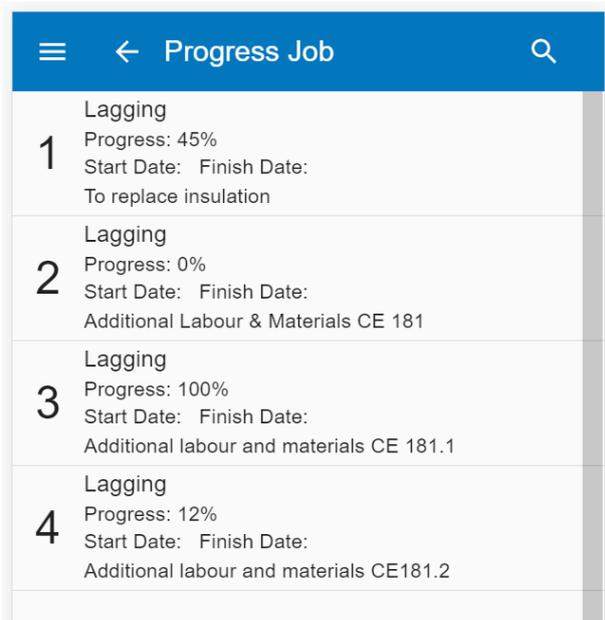


You can use the Search icon to refine this list further.

### Capturing Progress

To enter/modify progress for a Job, select the record in the list.

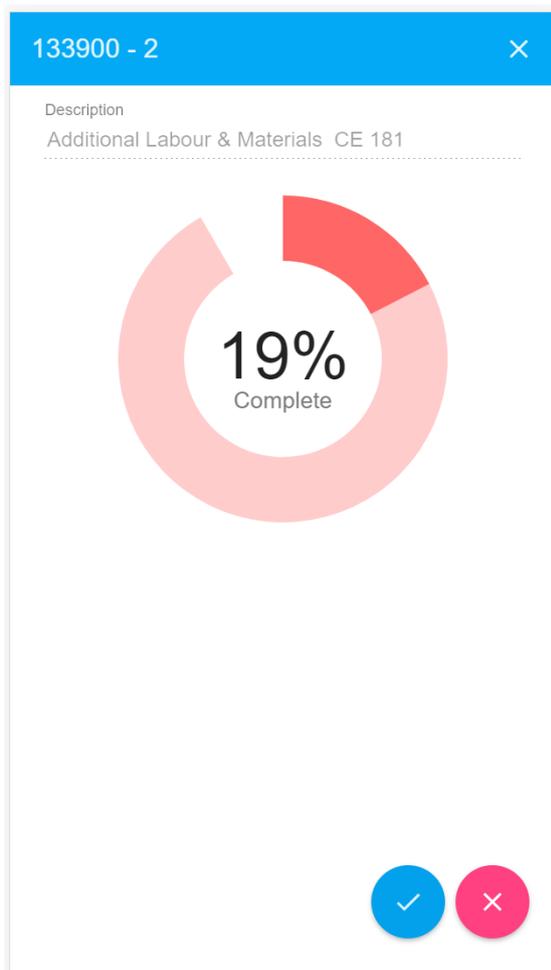
A list of all activities within the Job will load.



	Progress	Start Date	Finish Date	Description
1	45%			To replace insulation
2	0%			Additional Labour & Materials CE 181
3	100%			Additional labour and materials CE 181.1
4	12%			Additional labour and materials CE181.2

Select the activity that the progress entry corresponds to.

A new screen will load that has a % selector tool. Drag the line on the widget until the % is correct.



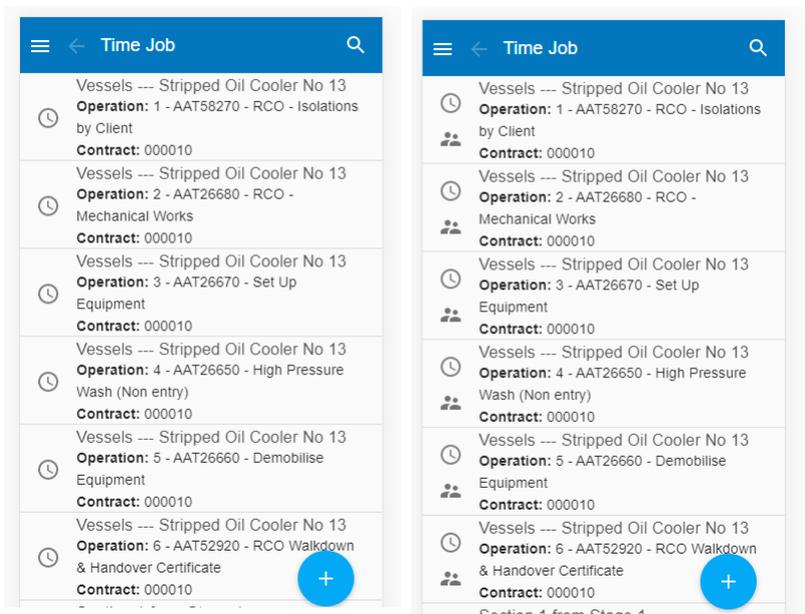
Select the done button to save your changes.

### Time Recording (Mobile)

Select 'Time' from the menu.

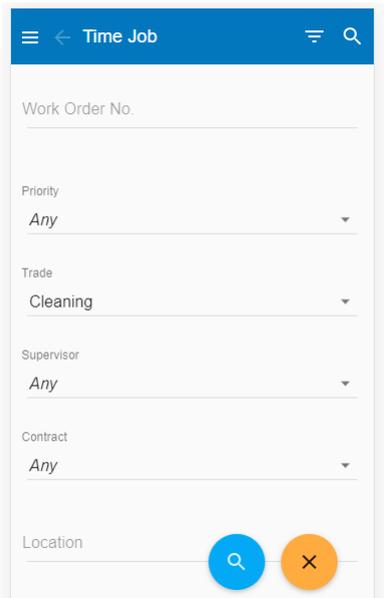
A screen will load that will display all approved activities which can have time recorded against them.

If you are a supervisor for the Job you will see the supervisor icon as seen on the screen on the right.



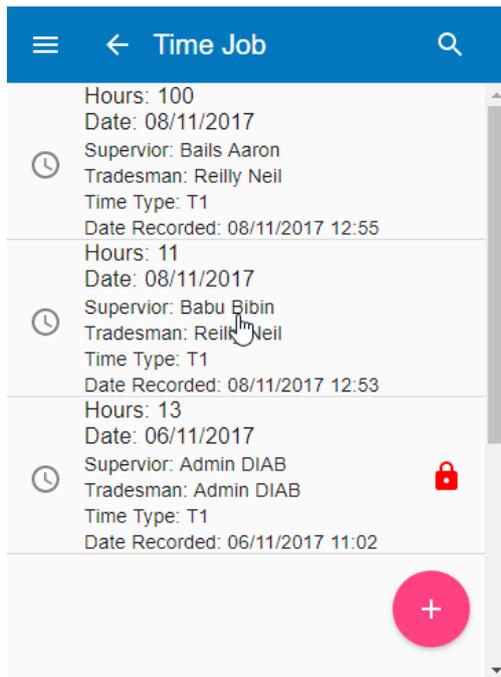
## Search Scope/Time

You can use the Search icon to refine your filter. When you see this icon  a filter is applied. Click on the search icon  to view the filter options.



## Capturing Time

Press on the job / activity in the list to view a list of existing time recordings and create new ones.



- Press on the plus icon to create a new time entry.
- Press on a time entry row to edit that time entry.
- Press and hold anywhere on the list of time entries will allow you to delete existing time entries.
- Note: the red padlock indicates that the time entry record is locked and cannot be edited or deleted from the system.

The time entry form automatically selects the default options, simply enter the number of hours and click on the blue tick to save the hours.

## Add Time - Job 1 - 1 - Scaffolder Advanced



Date Recorded



13-11-2017



Hours

8



Time Type \*

T1



Supervisor \*

Admin DIAB



Tradesman \*

Admin DIAB



Note: The time type, supervisors and tradesmen are all defined in the iPlan database. If a name is missing, then this needs to be added to iPlan before it will appear in iPlan mobile.

Note: Time is recorded against a supervisor and an individual tradesman. If this is not required for your site then we suggest that a default tradesman and or supervisor is created to act as a bucket where all of the hours can be recorded.

## Syncing data back to iPlan

Once all time entries have been entered, select the 'Home' link from the menu and choose the 'Sync' button. Whilst syncing is in progress, the button is greyed out. It will re-enable once the sync is complete. All modifications made offline will now be visible in iPlan Desktop.

You will need an internet or 3G/4G data connection to sync back to iPlan.