

# iPlan Sap User Manual

**Issue Date: 30/06/2015**

**Version: 1.1**



**IAMTech**  
EXPERIENCE NOT THEORY.

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## 1. Login

To login to iPlan Sap, load <http://www.cpd-limited.com/iplansap> into your browser.

Enter your unique username and password into the form provided, and select 'Login'.

You will be redirected to the 'Dashboard' (home) screen.

If you are experiencing any problems with the login process, please contact IAM Tech Technical Support:

**Tel:** 01642 438131

**Email:** [servicedesk@iamtech.com](mailto:servicedesk@iamtech.com) (Helpdesk ticket will be created)

## 2. Dashboard

The Dashboard is the landing page after login and provides access to the rest of the system.

Users will only see features they have permission to view. Users' permissions are controlled via Administration and maintained by administrator users.

The Dashboard is built up of a number of useful widgets. These widgets will be built on over time.

### 2.1. Estimates Awaiting Approval

This widget is useful for users who are authorised estimate approvers.

It will display all estimates currently awaiting approval by the logged-in user. Double-clicking the estimate will load the 'Estimate Approval' screen for the selected estimate.

## ESTIMATES AWAITING APPROVAL

Event	Order	Description
Routine Maintenance	030031610079	LST1006A steam tracing leak on E103
Routine Maintenance	030031609226	Leak A4AC-2013-31 Replacement Line

25 items per page
 1 - 2 of 2 items

## 2.2. Operations Awaiting Estimate

This widget is useful for estimators; it displays all operations that do not have an estimate.

Estimators can filter/sort the grid by any of the headers [Event, Order Number, Operation, Priority, Work Centre and Trade].

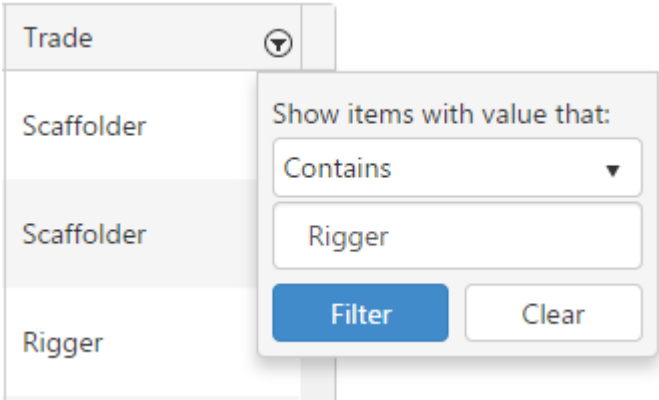
## OPERATIONS AWAITING ESTIMATE

Event	Order Number	Operation	Priority	Work Centre	Trade
Routine Maintenance	030031575245	0010	F	DTACCSC	Scaffolder
Routine Maintenance	030031575245	0020	F	DTACCSC	Scaffolder
Routine Maintenance	030031575245	0049	F	DTRIGSC	Rigger
Routine Maintenance	030031575245	0059	F	DTRIGSC	Rigger
Routine Maintenance	030031586224	0040	C	DTMECSC	Mechanical Fitter
Routine	030031586224	0050	C	DTRIGSC	Rigger

25 items per page
 1 - 25 of 477 items

To filter, select the filter icon next to the column on which you would like to filter. Select the type of filter from the drop-down list [see '[Filtering Grids in iPlan Sap](#)'], and enter your search term. Select the 'Filter' button to update the data shown in the grid. For example, to see all rigger estimates, select the filter icon next to Trade, and leave the default filter type selected

(Contains). Enter 'Rigger' into the text field, and select the 'Filter' button. The grid will now be updated to display all rigger operations awaiting an estimate.



To sort the grid, select the column heading; the grid will sort the data in ascending (or descending) order. For example, selecting the Work Centre heading will sort the data by work centre alphabetically.

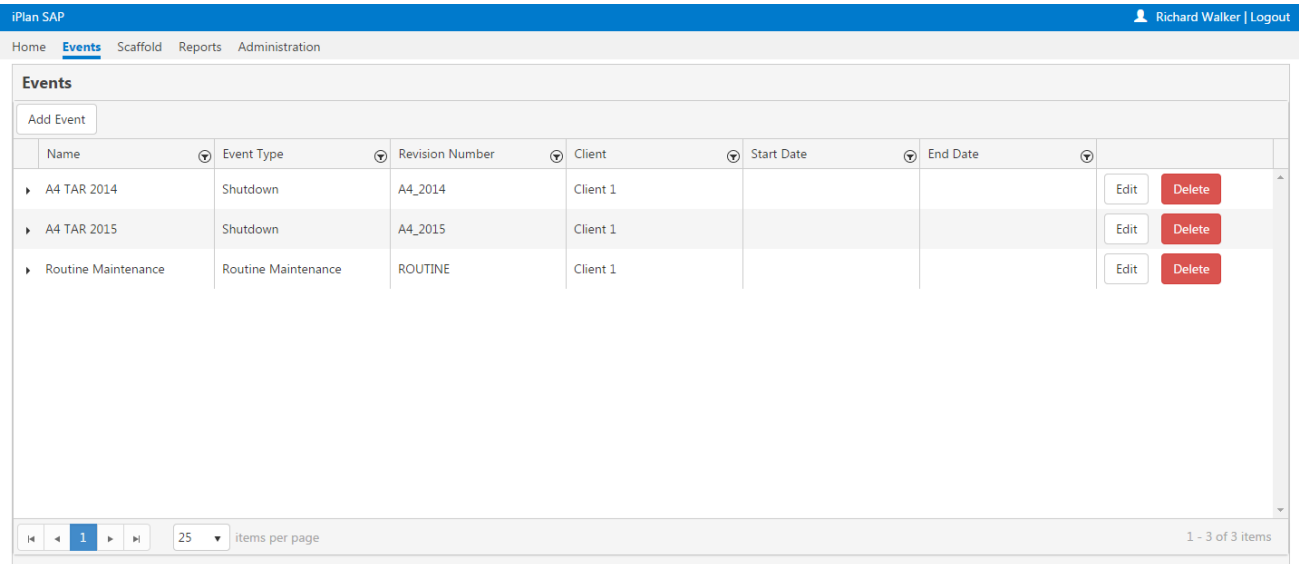
To view/enter an estimate, double-click the estimate, and the service will load.

3. [Events](#)

The 'Events' screen can be located by selecting 'Events' from the top menu.

A grid will load of all events for the client(s) to which you have access.

You can filter/sort the grid by any of the headers [Name, Event Type, Revision Number, Client, Start Date and End Date] [see '[Filtering Grids in iPlan Sap](#)'].



To view details/edit the event, select the 'Edit' button or double-click the grid row.

To add a new event, select the 'Add Event' button.



### 3.1. [Event Form](#)

The event form will facilitate the creation of/update to iPlan Sap events.

The event groups orders into a logical collection of work.

The screenshot shows the 'Event Routine Maintenance' form in the iPlan SAP system. The form is divided into several sections: 'Description' (Name: Routine Maintenance, Event Type: Routine Maintenance, Client: Client 1, Description: ), 'Personnel' (Lead Planner: Gemma Coulman, Lead Inspector: Bernice Hogan, Event Manager: Erin Hamilton, Contracts Manager: Lonnie Russell), 'Dates & LLT Materials' (Start Date: 01/01/2015, End Date: 20/03/2015, Long Lead Time Materials (%): 10), 'Status' (Revision Number: ROUTINE), and 'Systems' (Plant Systems: 102 x, 107 x, 132 x, 127 x). A 'Save' button is located in the top right corner.

Events are defined by Description, Personnel, Dates & LLT Materials, Status and Systems.

Complete the form fields, and select the 'Save' button to commit the changes.

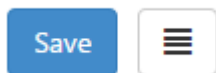
Revision Number dictates the orders that are associated to an event through the import process.

This close-up view of the 'Status' section shows the 'Revision Number' field with the value 'ROUTINE'. The field is highlighted with a red oval.

In this example, any orders (in the import file) that have a revision number of 'ROUTINE' will be associated to the 'Routine Maintenance' event in iPlan. Modifying the revision number will alter the routing of the import process.

Orders that do not have a revision number will be imported into a default event. This can be changed by updating the revision number in Sap. The next import will move the order to the correct event.

To navigate back to the events grid, select the 'Grid' button at the top-right of the event form.



### 3.2. [Delete Event](#)

To delete an event from iPlan, select the 'Delete' button next to the event in the events grid. You will be asked to confirm the deletion. On confirmation, the event will be deleted from iPlan and removed from the grid.

### 3.3. [Event Sub-menu](#)

An Event sub-menu will be displayed when you select an event from the events grid.








This menu is made up of a series of icon links that will enable you to explore details of the event.

Hover over the icon to get a tooltip description of the link.

Select the icon to navigate to the chosen screen.

The Event sub-menu consists of links to:

-  Orders
-  Work Pack
-  Time Entry
-  Expenditure
-  Progress

## 4. [Orders](#)

The 'Orders' screen can be located by selecting the  icon from the Event sub-menu.

iPlan SAP

Richard Walker | Logout

HomeEventsScaffoldReportsAdministration

/ Events / [Routine Maintenance] / Orders

All858

Unapproved94

Awaiting Approval2

Approved762

Rejected0

Orders

Order Nu...	Order Des...	#Scoped	#Unscoped	Priority	Project Type	Functional...	Win Numb...	Approval Status	Order Cre...	Order Mo...
030031610024	T704 - Level in S/G doesnt match dogbox	0	1	B	Routine Maintenance	4733-A4CO-9L-95-LIC_713	80672028B	Approved	23/02/2015	25/02/2015
030031610078	LIC607-control very erratic-please check	0	1	B	Routine Maintenance	4733-A4CO-9L-E5-LT_607	210316	Approved	23/02/2015	25/02/2015
030031610106	P533 seal failed	0	1	B	Routine Maintenance	4733-A5AC-9I-BK-P_533	35277	Approved	23/02/2015	25/02/2015
030031610030	F829 C-802 buffer gas filter high DP	0	2	B	Routine Maintenance	4733-A4CO-9N-DB-F_829	58544	Approved	23/02/2015	25/02/2015
030031610043	mechanical testing of Orbital welding.	0	2	B	Routine Maintenance	4733-HRTC-PC-YT-D4707		Approved	23/02/2015	25/02/2015
030031606468	R02-2396268 LEAK ON 7210 BASELINE	2	3	B	Routine Maintenance	4733-INEO-ME		Approved	06/02/2015	25/02/2015
030031610267	SIS INPUT TEST	0	1	C	Shutdown	4733-K1PL-9K-Z1-L1H_4507	78007	Approved	23/02/2015	25/02/2015

12345678910...25

items per page

1 - 25 of 858 items

All of the orders for the chosen event will load in a grid.

Orders are categorised by approval status: Unapproved, Ready for Approval, Awaiting Approval, Approved and Rejected.

By default, 'All' orders are displayed; selecting any of the status types will update the grid to show orders that fall into that category. For example, selecting 'Unapproved' will only show orders that are unapproved.

You can filter/sort the grid by any of the headers [Order Number, Order Description, #Scoped, #Unscoped, Priority, Project Type, Functional Location, WIN Number, Approval Status, Order Created Date, Order Modified Date] [see 'Filtering Grids in iPlan Sap'].

To find an order (by order number), select the filter icon next to the Order Number column, and leave the default filter type selected (Contains). Enter the order number (or partial order number) into the text field, and select the 'Filter' button. The grid will now be updated to display all orders that match.

To view details of the order, double-click the order's grid row.

#### 4.1. Order Form

The order form displays data specific to the order. This data is imported from Sap during the import process.

Order details are grouped into categories: Description, Equipment, Location & Status, Key Dates, Supervisor, Systems, Revision History and Valuation History.



## 4.2. Order Sub-menu

An Order sub-menu will be displayed when you select an order from the orders grid.





030031610024	T704 - Level in S/G doesn't match dogbox	0	1	B	Routine Maintenance	4733-A4CO-9L-95-LIC_713	80672028B	Approved	23/02/2015	25/02/2015
--------------	--	---	---	---	---------------------	-------------------------	-----------	----------	------------	------------

This menu is made up of a series of icon links that will enable you to explore details of the order.

Hover over the icon to get a tooltip description of the link.

Select the icon to navigate to the chosen screen.

The Order sub-menu consists of links to:

-  Operations
-  Estimate Approval
-  Pictures & Attachments
-  Norms

## 5. Operations

The 'Operations' screen can be located by selecting the  icon from the Order sub-menu.

iPlan SAP

Richard Walker | Logout

HomeEventsScaffoldReportsAdministration

/ Events / [Routine Maintenance] / Orders / [030031610101] / Operations

Event: Routine Maintenance | Order: 030031610101 - Unapproved

Operations

Operation N...	Operation D...	Work Centre	Scoped	Duration	Number of R...	Priority	Sum of Costs	Estimate Co...	Variation
▶ 0010	2396286-JTD E102 ERC SCAFF Line 1.1	Centre Access Scoped	Yes	0	0	D	0	No	
▶ 0020	2396286-JTD E102 ERC SCAFF Line 1.2	Centre Access Scoped	Yes	0	0	D	0	No	
▶ 0030	2396286-JTD E102 ERC SCAFF Line 1.3	Centre Access Scoped	Yes	0	0	D	0	No	
▶ 0040	2396286-JTD E102 ERC SCAFF Line 1.4	Centre Access Scoped	Yes	0	0	D	0	No	
▶ 0050	2396286-JTD E102 ERC SCAFF Line 1.5	Centre Access Scoped	Yes	0	0	D	0	No	
▶ 0060	2396286-JTD E102 ERC SCAFF Line 1.6	Centre Access Scoped	Yes	0	0	D	0	No	

12

25

items per page

1 - 25 of 33 items

All operations for the chosen order will load in a grid.

You can filter/sort the grid by any of the headers [Operation Number, Operation Description, Work Centre, Scoped/Unscoped, Duration, Number of Resources, Priority, Sum of Costs, Estimate Complete, Variation] [see '[Filtering Grids in iPlan Sap](#)'].

To find an operation (by operation number), select the filter icon next to the Operation Number column, and leave the default filter type selected (Contains). Enter the operation number (or partial operation number) into the text field, and select the 'Filter' button. The grid will now be updated to display all operations that match.

To view/edit the operation, double-click the operation's grid row.

## 5.1. [Operation Form](#)

The operation form displays data specific to the operation. This data is imported from Sap during the import process.

Operation details are grouped into two categories: Operation Details and Estimate.

The screenshot displays the iPlan SAP interface for an operation form. The top navigation bar includes 'Home', 'Events', 'Scaffold', 'Reports', and 'Administration'. The breadcrumb trail shows the path: / Events / [Routine Maintenance] / Orders / [030031610101] / Operations. The main header indicates the event is 'Routine Maintenance' and the order is '030031610101 - Unapproved'. A 'Save' button and a menu icon are located in the top right corner.

The form is divided into two main sections: 'Operation Details' and 'Estimate'.

**Operation Details:**

- Operation Number:** 0030
- Variation:** (empty field)
- Operation Description:** 2396286-JTD E102 ERC SCAFF Line 1.3
- Work Type:** (dropdown menu)
- Work Centre:** Centre Access Scoped
- Scoped?:** ☒
- Trade:** C-ACCESS - Scaffolder

**Estimate:**

- Duration:** 0
- UoM:** H
- Priority:** D
- Work:** 0
- Number of Resources:** 0
- Operation Key Description:** (empty field)
- Sum Of Costs:** 0
- Control Key:** 0020
- Additional Notes:** (empty text area)

The following operation fields are editable in iPlan Sap: Work Type, Duration and Priority. The remaining fields are read-only.

Select the 'Save' button to commit any changes.

Modifications to the Duration and Priority fields made in iPlan Sap are exported from iPlan Sap back into Sap during the nightly 'Approved Estimates' export.

If the operation is a scaffold erect or dismantle, then a 'Scaffold Dates' pod will be visible. This will display the erect, on hire, off hire and dismantle dates for the operation as well as the calculated weekly hire charge. The scaffold dates are entered in the 'Scaffold' section of iPlan Sap [see '[Scaffold Dates](#)'] but visible at the operation.

Scaffold Dates

This operation is a scaffold erect, with a weekly hire charge of £0.00.

**Erect Date**

**On Hire Date**

**Off Hire Date**





**Dismantle Date**

▼ Valuation History

## 5.2. Operation Sub-menu

An Operation sub-menu will be displayed when you select an operation from the operations grid.

0020	2394915-CARRY OUT INTEG INSP TO REPORT F	Centre Elec Scoped	Yes	0	0	C	0	No	
------	--	-----------------------	-----	---	---	---	---	----	--










This menu is made up of a series of icon links that will enable you to explore details of the operation.

Hover over the icon to get a tooltip description of the link.

Select the icon to navigate to the chosen screen.

The Operation sub-menu consists of links to:

-  Services
-  Job Card
-  Pictures & Attachments
-  Norms

## 5.3. Services Grid


When an operation is selected, the services for that operation will load underneath the operations grid in a separate services grid. This will enable you to view information about the operation and service on one screen.

Event: Routine Maintenance | Order: 030031606986 - Unapproved

Operations										
Operation N...	Operation D...	Work Centre	Scoped	Duration	Number of R...	Priority	Sum of Costs	Estimate Co...	Variation	
0020	2394915-CARRY OUT INTEG INSP TO REPORT F	Centre Elec Scoped	Yes	0	0	C	0	No		
<div> </div>										
<div> <div> 1 </div> <div> 25 </div> <div> items per page </div> <div> 1 - 1 of 1 items </div> </div>										

Services									
Line Number	Service Type	Short Text	Quantity	Labour Hours	Unit Of Measure	Gross Price	Progress (%)		
10	Labour	LABOUR	0	0	H	0	0		
20	Materials	BOUGHT IN MATERIALS	1	0	LE	0	0		
30	Bought In Services	BOUGHT IN SERVICES	1	0	LE	0	0		
40	Plant Hire	PLANT HIRE	1	0	LE	0	0		
50	Premium Time	PREMIUM TIME	1	0	LE	0	0		
60	Overhead	OVERHEAD	1	0	LE	0	0		
<div> <div> 1 </div> <div> 25 </div> <div> items per page </div> <div> 1 - 6 of 6 items </div> </div>									

6. Services

The ‘Services’ screen can be located by selecting the  icon from the Operation sub-menu. The services will also load underneath the operations grid (on the ‘Operations’ screen) if an operation has been selected [see ‘Services Grid’].

Services										
Line Number	Service Type	Short Text	Quantity	Labour Hours	Unit Of Measure	Gross Price	Progress (%)			
10	Labour	LABOUR	0	0	H	0	0			
20	Materials	BOUGHT IN MATERIALS	1	0	LE	0	0			
30	Bought In Services	BOUGHT IN SERVICES	1	0	LE	0	0			
40	Plant Hire	PLANT HIRE	1	0	LE	0	0			
50	Premium Time	PREMIUM TIME	1	0	LE	0	0			
60	Overhead	OVERHEAD	1	0	LE	0	0			
<div> <div> 1 </div> <div> 25 </div> <div> items per page </div> <div> 1 - 6 of 6 items </div> </div>										



All services for the chosen operation will load in a grid.

You can filter/sort the grid by any of the headers [Line Number, Service Type, Short Text, Quantity, Labour Hours, Unit of Measure, Gross Price, Progress %] [see '[Filtering Grids in iPlan Sap](#)'].

There can be up to six services per operation: Labour, Materials, Bought-in Services, Plant Hire, Premium Time and Overhead.

To view/edit the service, double-click the service's grid row.

## 6.1. [Service Form](#)

The service form displays data specific to the service. This data is imported from Sap during the import process.

Services have two pods for data entry: Service Details and Costs & Measurements.

The screenshot shows the iPlan SAP web application interface. At the top, there is a blue header bar with the text 'iPlan SAP' on the left and a user profile 'Richard Walker | Logout' on the right. Below the header is a navigation menu with links: Home, Events, Scaffold, Reports, and Administration. A breadcrumb trail is visible: / Events / [Routine Maintenance] / Orders / [030031606986] / Operations / [0020] / Services. On the right side of the form, there is a 'Save' button and a menu icon. The form is divided into two main sections: 'Service Details' and 'Costs & Measurements'. The 'Service Details' section contains fields for 'Line Number' (value: 20), 'Actual Progress (%)' (value: 0), 'Service Type' (value: Materials), 'Short Text' (value: BOUGHT IN MATERIALS), and 'Additional Details' (a large empty text area). The 'Costs & Measurements' section contains fields for 'Quantity' (value: 1), 'Gross Price' (value: 0), and 'Unit of Measure' (value: LE).

The following service fields are editable in iPlan Sap: Quantity, Gross Price and Additional Details. The remaining fields are read-only.

Select the 'Save' button to commit any changes.

Modifications to the Quantity and Gross Price fields made in iPlan Sap are exported from iPlan Sap back into Sap during the nightly 'Approved Estimates' export.

## 6.2. [Labour Services](#)

Labour Services have a 'Labour' pod in addition to the standard service form.

Save

Service Details

Line Number

10

Actual Progress (%)

0

Service Type

Labour

Short Text

LABOUR

Additional Details

Costs & Measurements

Quantity

0

Gross Price

0

Unit of Measure

H

Labour

Trade

C-ELEC - Electrician

Resource (limited by trade)

Electrical

Rate Type

Scoped

Change...

Hours

0

Rate (£)

29.98

Cost (£)

0

The 'Labour' pod is used to calculate the resources required for the selected operation.

To estimate, select a resource, and enter the hours for the effort required. Trade, Rate Type and Rate are read-only fields – they have been generated on import.

The cost is calculated using the hours and rate.

Select the 'Save' button to commit any changes.

Entering a figure into the Hours field is classed as 'manual estimation'; estimation can also be achieved via the norms (see 'Norms'). If an estimate has been calculated by a norm, the Hours field (in the service form) will be read-only. This is to maintain the integrity of the norm calculation. You can switch to a manual estimation by deleting the norm (the Hours field will then be editable again).

### 6.2.1. [Rate Type Change](#)

The rate type can be changed (by users with appropriate access rights). To change the rate, select the 'Change' button next to the Rate Type field.

## Change Rate Type

Please select a new rate type and provide the reason for changing it.

**Rate Type**

Scoped ▼

**Reason**


Change

Cancel

Select a new rate type and enter a reason for the change in the Reason text area.

Please note – records of rate type changes and the associated reason(s) are logged and audited in iPlan.

## 7. Norms

The 'Norms' screen can be located by selecting the  icon from the Order, Operation and Service sub-menus.

There are currently four norms in iPlan Sap: Fabrication, Scaffold, Mechanical and Valve.

Each norm will assist in estimating the labour hours for an operation.

To use a norm, select the appropriate norm from the Add New Norm menu.

iPlan SAP

Richard Walker | Logout

[Home](#) [Events](#) [Scaffold](#) [Reports](#) [Administration](#)

[/ Events / \[Routine Maintenance\] / Orders / \[030031606986\] / Norms](#)

Event: Routine Maintenance | Order: 030031606986 - Norms

Add New Norm ▼

Fabrication

Scaffold

Mechanical

Valve

Norm" button to start adding norms to this order.

Save

The norm will load.

**Material**  
Please Select...

**Add Norm Selection**

Activity	Size	Spec	Client Uplift	Quantity	PF	Rig	Welder	Plater
Please Select...	Please Select...	Please Select...	No	0	0.00	0.00	0.00	0.00
<b>Totals:</b>					0.00	0.00	0.00	0.00

Save Cancel

Each type of norm will have a different set of form fields to drive the calculation. Complete the form by choosing from the drop-down lists and entering the appropriate value(s).

Once all required selections have been made, the total hours for each trade will be calculated.

**Material**  
Carbon Steel

**Add Norm Selection**

Activity	Size	Spec	Client Uplift	Quantity	PF	Rig	Welder	Plater
Cut	1" (25)	S_STD	No	10	3.99	0.00	0.00	0.00
<b>Totals:</b>					3.99	0.00	0.00	0.00

Save Cancel

In this example (above), the norm has estimated that it will take a pipefitter 3.99 hours to complete the activity.

Multiple lines can be included in a single norm calculation. Select the '+' button to duplicate the row. To add a blank row, select the 'Add Norm Selection' button.

**Material**  
Carbon Steel

**Add Norm Selection**

Activity	Size	Spec	Client Uplift	Quantity	PF	Rig	Welder	Plater
Cut	1" (25)	S_STD	No	10	3.99	0.00	0.00	0.00
Branch Weld (90 D)	1/2" (15)	S_XS	No	20	0.00	0.00	84.84	0.00
<b>Totals:</b>					<b>3.99</b>	<b>0.00</b>	<b>84.84</b>	<b>0.00</b>

**Save** **Cancel**

In this example, there are now two activities in the calculation: Cut and Branch Weld. The original 3.99 hours is still attributed to the pipefitter (Cut), and 84.84 hours are assigned to the welder (Branch Weld).

Select the 'Save' button to commit any changes.

On save, the norm will close, and the following screen will be displayed:

**Event: Routine Maintenance | Order: 030031606986 - Norms**

**Add New Norm** **Save**

Name	Pipe Fitter - 3.99 hours	Rigger - 0.00 hours	Welder - 84.84 hours	Plater - 0.00 hours
Calculation 1	0020 2394915-CARRY OUT INTEG INSP TO			

**Edit** **Remove**

The next step is to save the hours calculated by the norm to operation(s). Each trade's hours can be saved to a single operation. For example, the pipefitter hours (3.99) can be assigned to an operation, and the welder hours (84.84) can be assigned to a different operation.

To assign the hours, select an operation from the list of operations displayed in the drop-down list (directly under the appropriate trade).

Select the 'Save' button to commit any changes.

The Labour service for the selected operation will now show the saved hours calculated in the norm.

Save ⋮

Service Details	Costs & Measurements	Labour
<b>Line Number</b> <input type="text" value="10"/>	<b>Quantity</b> <input type="text" value="0"/>	<b>Trade</b> <input type="text" value="C-ELEC - Electrician"/>
<b>Actual Progress (%)</b> <input type="text" value="0"/>	<b>Gross Price</b> <input type="text" value="0"/>	<b>Resource (limited by trade)</b> <input type="text" value="Electrical"/>
<b>Service Type</b> <input type="text" value="Labour"/>	<b>Unit of Measure</b> <input type="text" value="H"/>	<b>Rate Type</b> <input type="text" value="Scoped"/> <span>Change...</span>
<b>Short Text</b> <input type="text" value="LABOUR"/>		<b>Hours</b> <input type="text" value="3.99"/>
<b>Additional Details</b> <div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div>		<b>Rate (£)</b> <input type="text" value="29.98"/>
		<b>Cost (£)</b> <input type="text" value="119.62"/>

Each operation can be assigned one trade. For example, you can assign the pipefitter or welder hours to an operation (not both).

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[/ Events / \[Routine Maintenance\] / Orders / \[030031606986\] / Norms](#)

**Event: Routine Maintenance | Order: 030031606986 - Norms**

Add New Norm
Save

**Fabrication**

• One or more operations on this norm have already been selected elsewhere.

**Name**  


Edit Remove

**Pipe Fitter - 7.98 hours**

**Rigger - 0.00 hours**

**Welder - 84.84 hours**

**Plater - 0.00 hours**

You can edit the norm calculation at any time (pre-approval) by selecting the 'Edit' button next to the norm calculation. The norm will load containing all of the saved selections. Select the 'Save' button to commit any changes.

To remove the association between the norm and an operation, de-select the operation from the 'Trades' drop-down list. Select the 'Save' button to commit any changes.

To remove the norm calculation altogether, select the 'Remove' button next to the norm calculation.

Multiple norms can be created per order; this includes multiple norms of the same or different types.

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Event: Routine Maintenance | Order: 030031606986 - Norms

Add New Norm
Save

Fabrication

Name

Calculation 1

Edit

Remove

Pipe Fitter - 3.99 hours

0020 2394915-CARRY OUT INTEG INSP TO

Rigger - 0.00 hours

Welder - 84.84 hours

Plater - 0.00 hours

Mechanical

Name

Calculation 2

Edit

Remove


Mech (break) - 30.24 hours

Mech (make) - 56.16 hours

Rigger (break) - 0.00 hours

Rigger (make) - 0.00 hours

## 8. Pictures & Attachments

The 'Pictures & Attachments' screen can be located by selecting the  icon from the Order or Operation sub-menu.

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/ Events / [Routine Maintenance] / Orders / [030031606986] / Operations / [0020] / Attachments

Pictures & Attachments

Upload

File Type

Choose File

Browse...

Save

Pictures & Attachments

There are no attachments for this operation

To upload a picture/attachment, select the File Type, and choose a file using the 'Browse...' button. Select the 'Save' button to upload the file.

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[/ Operations](#)
[/ \[0020\]](#)
[/ Attachments](#)

### Pictures & Attachments

Upload

File Type


Choose File

Browse...

Save

Uploaded 118.6 KB successfully.

Pictures & Attachments

Operation	File Name	File Type	File Size	Upload Date	
0020 - 2394915-CARRY OUT INTEG INSP TO REPORT F	 IAM_logo_blue2_low.jpg	Picture	118.6 KB	23/03/2015 13:56	Delete

The newly attached file will be displayed in the table.

Selecting the File Name will load the file in a new window.

There are two routes into the 'Pictures & Attachments' screen: Order sub-menu and Operation sub-menu. Files can be attached to an order or operation.

All files that have been attached to the order or its associated operations will be displayed at the order level. Only files attached to the operation will be displayed at the operation level.

To remove an attachment, select the 'Delete' button associated with the file. You will be asked to confirm its deletion before removal.

## 9. [Job Cards](#)

The 'Job Cards' screen can be located by selecting the  icon from the Operation sub-menu.

A job card will add activity-specific detail to an operation. For example, a scaffold job card will contain details of the scaffold activity.

To add a job card, select the type of job card from the Add Job Card menu.



## Job Cards

New Job Card

Add Job Card ▾

- Chemical Clean
- Cranage
- Fabrication
- HP Jet Wash
- IE Support
- Lagging
- Lighting
- Painting
- Scaffold
- Valve
- Machining

A scaffold job card template will load.

Complete the form fields as required, and select the 'Save' button to commit any changes.

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/ Events / [Routine Maintenance] / Orders / [030031606986] / Operations / [0020] / Job Cards

### Job Cards Save

**Scaffold**

<b>Location</b> <input type="text"/>	<b>Contractor</b> <input type="text"/>	<b>Work Order Number</b> <input type="text"/>
<b>Specification</b> <input type="text"/>	<b>On Hire Date</b> <input type="text"/>	<b>Off Hire Date</b> <input type="text"/>
<b>Issue Date</b> <input type="text"/>	<b>Issue</b> <input type="text"/>	<b>Asbestos Present?</b> <input type="checkbox"/>
<b>Entry Permit Required?</b> <input type="checkbox"/>	<b>Remove Prior to Startup?</b> <input type="checkbox"/>	<b>Job Card Complete?</b> <input type="checkbox"/>

**Additional Notes**

**Notes**

Once saved, you can remove the job card by selecting the 'Delete' button at the top of the screen.

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Job Cards
Delete
Save

Scaffold

Location
Contractor
Work Order Number

Specification
On Hire Date
Off Hire Date

Issue Date
Issue
Asbestos Present?

Entry Permit Required?
Remove Prior to Startup?
Job Card Complete?


Additional Notes

Notes

You will be asked to confirm the deletion before the job card is removed.

An operation can only have one job card.

## 10. [Estimate Approval](#)

The 'Estimate Approval' screen can be located by finding the correct order in the orders grid and selecting the  icon from the Order sub-menu.

The estimate approval workflow enables the following:

- Order is sent to an estimate approver for review
- Estimate is approved/rejected by the estimate approver
- Estimate can be unapproved by the estimate approver (if no actuals have been assigned)

### 10.1. [Ready for Approval](#)

Before an estimate can be sent for approval, it should be marked as 'Ready for Approval'. This signifies that the order is fully scoped/estimated and is now ready for approval.

Each operation within an order should be marked as 'Ready for Approval'; only then can the estimate be sent for approval.

To mark an operation as 'ready for approval', navigate to the operations form.

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Home Events Scaffold Reports Administration

/ Events / [A4 TAR 2014] / Orders / [030031548568] / Operations

Event: A4 TAR 2014 | Order: 030031548568 - Unapproved Save

**Operation Details**

**Operation Number**  
0030

**Variation**

**Operation Description**  
Replace Lagging

**Work Type**

**Work Centre**  
Centre Insul Scoped

**Scoped?**  
☒

**Trade**  
C-INSUL - Lagger

**Estimate**

**Duration**  
0

**Priority**  
B

**Number of Resources**  
0

**Sum Of Costs**  
0

**Additional Notes**  
☐ Estimate Complete (ready for approval)

**UoM**  
H

**Work**  
0

**Operation Key Description**

**Control Key**  
0020

Check the 'Estimate Complete' checkbox.

Select the 'Save' button to commit any changes.

When all operations within an order are marked as 'Estimate Complete', the order will appear in the 'Ready for Approval' status on the orders grid.

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/ Events / [Routine Maintenance] / Orders

All	14020	Unapproved	1	Ready for Approval	3	Awaiting Approval	1	Approved	14015	Rejected	0
<b>Orders</b>											
Order Nu...	Order Des...	#Scoped	#Unscoped	Priority	Project Type	Functional...	Win Num...	Approval Stat...	Order Cre...	Order Mo...	
030031573235	R01-K1 TAR 2015 E-4008 RE-TUBE ( CEP	2	0	F	Shutdown	4733-K1PL-LS-Z3-K1_S	37524	Ready for Approval	03/10/2014	31/03/2015	
030031574353	R02-A4CO Steam Tracing Leaking underneath	3	0	C	Routine Maintenance	4733-A4CO-9L-Z3-NPE_	41712	Ready for Approval	03/10/2014	31/03/2015	
030031602577	INTEG:2853H: Minor VISUAL/ELECT...	1	1	C	Shutdown	4733-A4CO-9T-Z3-H_28	2853H	Ready for Approval	22/01/2015	31/03/2015	

From there, orders can be sent for approval.

## 10.2. [Send Estimate for Approval](#)

The first part of the estimate approval process is to send the estimate to an estimate approver for review and approval.

The 'Estimate Approval' screen contains all costs grouped by operation and service for the order.

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[Estimate Approval](#)

Estimate Approval - Status: Unapproved

Approver

Please Select

Submit for Approval

Options

Group By

☒ Operation
 ☐ Service

Order - 030031606986 (2394915-CARRY OUT INTEG INSP TO REPORT F)

Total: £119.62

0020 - 2394915-CARRY OUT INTEG INSP TO REPORT F	Sub Total: £119.62
10 - LABOUR	£119.62
20 - BOUGHT IN MATERIALS	£0.00
30 - BOUGHT IN SERVICES	£0.00
40 - PLANT HIRE	£0.00
50 - PREMIUM TIME	£0.00
60 - OVERHEAD	£0.00


To send the estimate to an estimate approver, select the ‘Approver’ from the drop-down list provided (please note – only authorised estimate approvers will appear in this list). Select the ‘Submit for Approval’ button.

The estimate approver will receive an email informing them that an estimate in iPlan is awaiting their review.

### 10.3. [Approve/Reject the Estimate](#)

Estimate approvers have the authority to approve/reject an estimate that has been sent for approval.

There are multiple ways an estimate approver can navigate to the ‘Estimate Approval’ screen to review an order:

- An estimate approver will receive an email informing them that an estimate requires their approval. The approver can select the link within the email to open.
- The Dashboard (homepage) contains a widget that lists links to all estimates awaiting approval for the logged-in user. Select the link to open.
- Navigate to the order awaiting approval [see ‘[Orders Grid](#)’], and select the  icon from the Order sub-menu.

Once within the ‘Estimate Approval’ screen, the user can see the breakdown of costs.

<b>Order - 030031574353 (R02-A4CO Steam Tracing Leaking underneath)</b>		<b>Total: £1,273.15</b>
0010 - DT: FABRICATION OPERATION		Sub Total: £1,234.51
10 - LABOUR		£1,234.51
20 - BOUGHT IN MATERIALS		£0.00
30 - BOUGHT IN SERVICES		£0.00
40 - PLANT HIRE		£0.00
50 - PREMIUM TIME		£0.00
60 - OVERHEAD		£0.00

To approve the estimate, select the 'Approve' button.

To reject the estimate, select the 'Reject' button. A 'Rejection Reason' screen will load. Select the 'Reason' from the drop-down list provided, and enter a comment describing why the estimate has been rejected.

Select the 'Reject' button to confirm the decision.

The user who sent the estimate for approval will receive an email informing them of the decision.

#### 10.4. [Unapprove the Estimate](#)

After an estimate has been approved, there may be a requirement to retract the estimate and make some modifications to it. It is possible to do this by 'unapproving' the estimate. This feature is only available if there are no actuals recorded against the estimate (work has not started).

To unapprove an estimate, navigate to the ‘Estimate Approval’ screen for the order [see ‘[Orders Grid](#)’]. Please note – this action can only be performed by the original estimator or the estimate approver.

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/ Events / [Routine Maintenance] / Orders / [030031574353] / Estimate Approval

Estimate Approval - Status: Approved

Approver

Richard Walker

Unapprove

Options

Group By

Operation

Service

Order - 030031574353 (R02-A4CO Steam Tracing Leaking underneath)

Total: £1,273.15

0010 - DT: FABRICATION OPERATION

Sub Total: £1,234.51

10 - LABOUR

20 - BOUGHT IN MATERIALS

30 - BOUGHT IN SERVICES

40 - PLANT HIRE

50 - PREMIUM TIME

60 - OVERHEAD

£1,234.51

£0.00

£0.00

£0.00

£0.00

£0.00

Select the ‘Unapprove’ button to change the estimate approval status back to ‘Unapproved’.

11. Variations

Variations are operations that have been added to the estimate post-approval.

An operation can be sent from Sap to iPlan against an order that has already been approved. If this happens, a ‘variation’ is created in iPlan.

The variation can be viewed/edited from the ‘Operations’ screen [see ‘[Operations](#)’].

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/ Events / [Routine Maintenance] / Orders / [030031571845] / Operations

Event: Routine Maintenance | Order: 030031571845 - Approved (Variation 1 - Unapproved)

Operations										
Operation N...	Operation D...	Work Centre	Scoped	Duration	Number of R...	Priority	Sum of Costs	Estimate Co...	Variation	
▶ 0010	DT: SCAFFOLD ERECT OPERATION	Centre Access Scoped	Yes	0	0	B	0	Yes		
▶ 0015	CVI 11546 ROB CAVILL 17 HRS	Centre Access Scoped	Yes	0	0	B	0	Yes		
▶ 0020	DT: SCAFFOLD DISMANTLE OPERATION	Centre Access Unscoped	No	0	0	B	0			
▶ 0040	DT: ANALYSER OPERATION	Centre Access Unscoped	Yes	0	0	A	0	No	Variation 1	

◀ ◁ 1 ▷ ▶

25 items per page

1 - 4 of 4 items

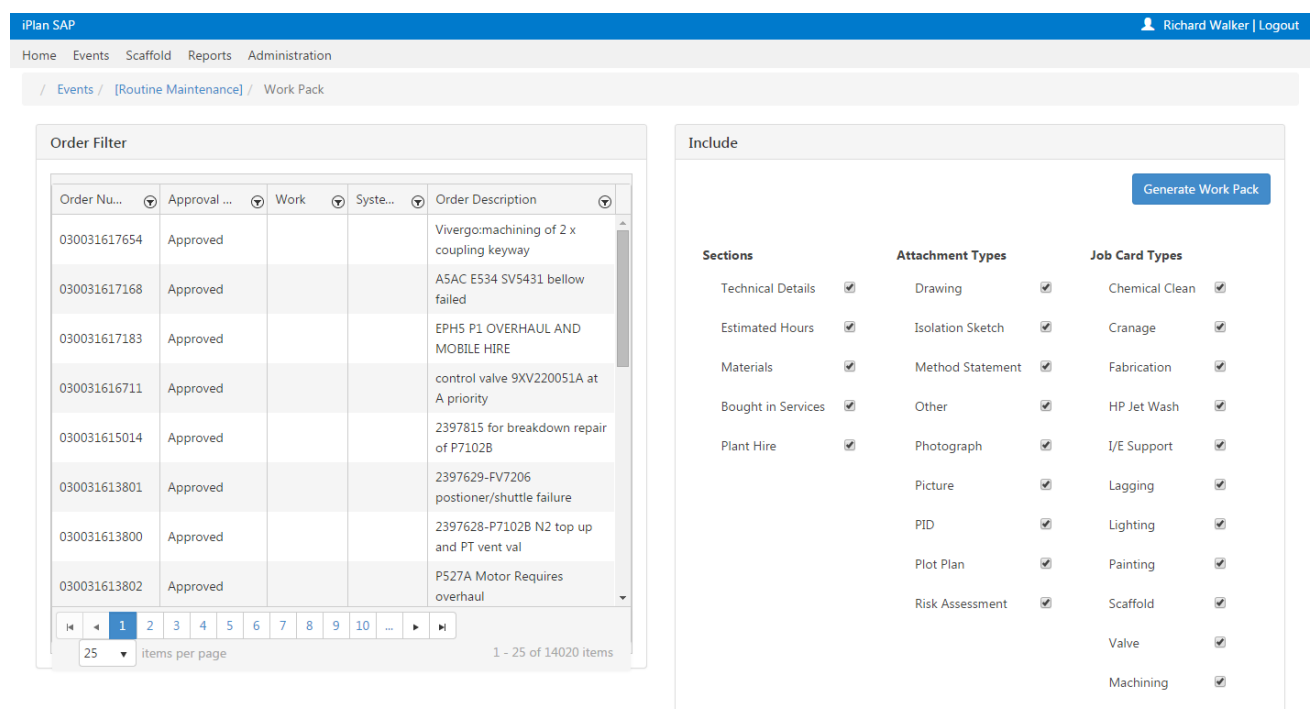
The variation is distinguished by a yellow background, and the Variation column will contain the variation's name. Estimate the variation in the same way an operation is estimated [see ['Operations'](#)].

Once fully estimated (and marked as 'Ready for Approval'), send the variation for approval [see ['Estimate Approvals'](#)].

## 12. Work Pack

The 'Work Pack' screen can be located by selecting the  icon from the Events sub-menu.

A work pack combines the scope and estimates of selected orders into a detailed document that describes the work to be undertaken.



**Order Filter**

Order Nu...	Approval ...	Work	Syste...	Order Description
030031617654	Approved			Vivergomachining of 2 x coupling keyway
030031617168	Approved			ASAC E534 SV5431 bellow failed
030031617183	Approved			EPH5 P1 OVERHAUL AND MOBILE HIRE
030031616711	Approved			control valve 9XV220051A at A priority
030031615014	Approved			2397815 for breakdown repair of P7102B
030031613801	Approved			2397629-FV7206 postioner/shuttle failure
030031613800	Approved			2397628-P7102B N2 top up and PT vent val
030031613802	Approved			P527A Motor Requires overhaul

**Include**

Generate Work Pack

Sections	Attachment Types	Job Card Types
Technical Details <input checked="" type="checkbox"/>	Drawing <input checked="" type="checkbox"/>	Chemical Clean <input checked="" type="checkbox"/>
Estimated Hours <input checked="" type="checkbox"/>	Isolation Sketch <input checked="" type="checkbox"/>	Cranage <input checked="" type="checkbox"/>
Materials <input checked="" type="checkbox"/>	Method Statement <input checked="" type="checkbox"/>	Fabrication <input checked="" type="checkbox"/>
Bought in Services <input checked="" type="checkbox"/>	Other <input checked="" type="checkbox"/>	HP Jet Wash <input checked="" type="checkbox"/>
Plant Hire <input checked="" type="checkbox"/>	Photograph <input checked="" type="checkbox"/>	I/E Support <input checked="" type="checkbox"/>
	Picture <input checked="" type="checkbox"/>	Lagging <input checked="" type="checkbox"/>
	PID <input checked="" type="checkbox"/>	Lighting <input checked="" type="checkbox"/>
	Plot Plan <input checked="" type="checkbox"/>	Painting <input checked="" type="checkbox"/>
	Risk Assessment <input checked="" type="checkbox"/>	Scaffold <input checked="" type="checkbox"/>
		Valve <input checked="" type="checkbox"/>
		Machining <input checked="" type="checkbox"/>

The 'Work Pack' screen is split into two sections: 'Order Filter' and 'Include'.

### 12.1. [Order Filter](#)

The 'Order Filter' is a grid that contains all orders to be included in the work pack. By default, all orders within the selected event are displayed. The user can choose the orders to include in the work pack by filtering the grid [see ['Filtering Grids in iPlan Sap'](#)]. Orders can be filtered by order number, approval status, work type, system and order description.

All orders that are displayed in this grid will be included in the work pack.

### 12.2. [Include](#)

'Include' section allows the user to decide what detail should be included in the work pack.

The user should select the checkbox's of the items to include.

For example, there are five sections to a work pack [Technical Details, Estimated Hours, Materials, Bought-in Services and Plant Hire]; check the box of the sections to include. This should be repeated for Attachment Types and Job Card Types.

### 12.3. [Generate Work Pack](#)

Once the 'Order Filter' and 'Include' sections have been defined, select the 'Generate Work Pack' button.

The work pack will load in a new window as a pdf document.

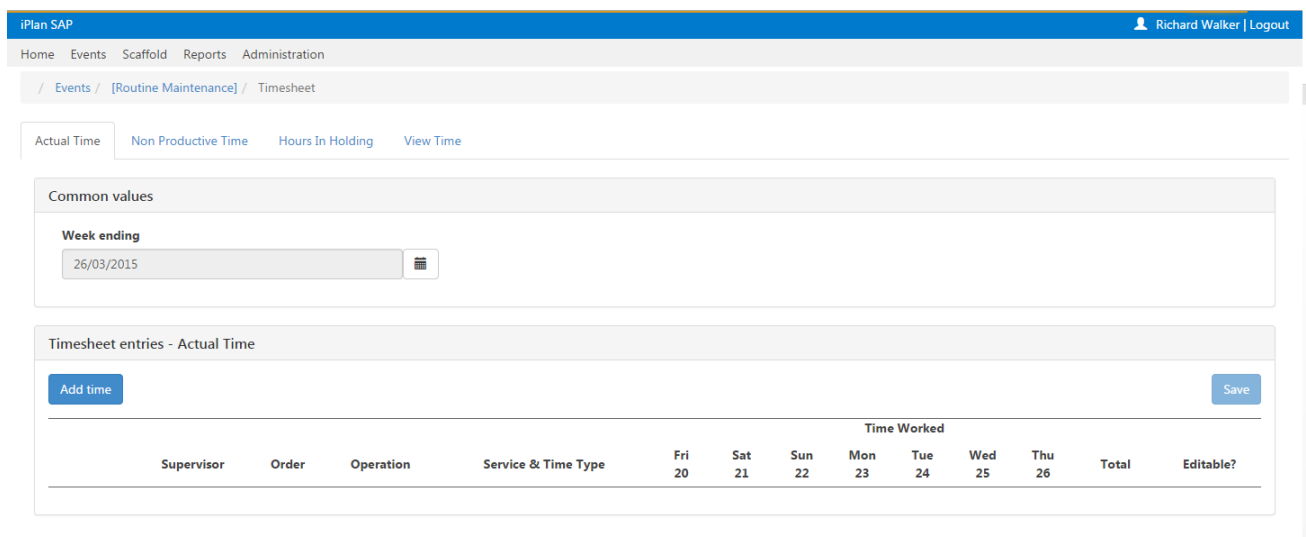
This document can be viewed, saved, emailed or printed as appropriate.

## 13. [Actual Time](#)

The 'Actual Time' screen can be located by selecting the  icon from the Events sub-menu.

The 'Actual Time' tab is selected by default.

This screen is used to enter actual hours worked for a given order/operation/service.



Supervisor	Order	Operation	Service & Time Type	Time Worked							Total	Editable?
				Fri 20	Sat 21	Sun 22	Mon 23	Tue 24	Wed 25	Thu 26		

### 13.1. [Add/Edit Time Entry Record](#)

To add/edit a time entry record, select a week ending date using the date picker (last week's week ending date will be selected by default).

Select the 'Add Time' button.



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/ Events / [Routine Maintenance] / Timesheet

Actual Time Non Productive Time Hours In Holding View Time

Common values

Week ending  
26/03/2015

Timesheet entries - Actual Time

Add time Save

				Time Worked								
Supervisor	Order	Operation	Service & Time Type	Fri 20	Sat 21	Sun 22	Mon 23	Tue 24	Wed 25	Thu 26	Total	Editable?
<div>+</div> <div>-</div> <div>Please Select..</div>		Please Sele..	<div>Please Select Service.</div> <div>Please Select Time Ty</div>									<div>🔒</div>

Select a supervisor from the drop-down list provided.

Enter an order number. A list of all the order's operations will load into the 'Operation' drop-down list.

Select an operation. The Labour and Premium Time services will load in the 'Service' drop-down list.

Select a service. The time type(s) will load for the selected service.

Select a time type.

Any existing time against the service/time type for the selected week ending date will load in the grid. An empty grid will load if time entry records do not exist.

Timesheet entries - Actual Time

Add time Save

				Time Worked								
Supervisor	Order	Operation	Service & Time Type	Fri 20	Sat 21	Sun 22	Mon 23	Tue 24	Wed 25	Thu 26	Total	Editable?
<div>+</div> <div>-</div> <div>Richard \</div>	03003161605	0010 - permit request to rep.	<div>10 - Labour</div> <div>Normal</div>									✓

For new records, enter the hours worked into the timesheet for the selected week ending date.

For existing records, modify the Time Worked fields within the timesheet for the selected week ending date.

Select the 'Save' button to commit any changes.

Timesheet entries - Actual Time

[Add time](#) [Save](#)

Supervisor	Order	Operation	Service & Time Type	Time Worked							Total	Editable?
				Fri 20	Sat 21	Sun 22	Mon 23	Tue 24	Wed 25	Thu 26		
<a href="#">+</a> <a href="#">-</a> Richard \	03003161605	0010 - permit request to rep.	10 - Labour Normal	4	5	3	8	4	5	6	35	✓

Once saved, the supervisor cannot be changed.

### 13.2. [Supervisor/Trade Mismatch](#)

When saving actual time, iPlan will check to see if the supervisor is linked to the trade of the service [see '[Supervisors](#)'].

If the supervisor is linked to the trade, the timesheet will save.

If the supervisor does not have the trade of the service, a 'Supervisor Trade Mismatch' dialog will load.

**Supervisor Trade Mismatch**

The selected supervisor does not have the required trade for the operation.

[Save anyway](#) [Cancel](#)

This is a warning message. You are still permitted to save (select 'Save Anyway' button) or cancel (select 'Cancel' button) to discard the change.

### 13.3. [Duplicate Time Entry Record](#)

To duplicate the time entry row, select the '+' icon on the row you would like to duplicate.

Timesheet entries - Actual Time

[Add time](#) [Save](#)

Supervisor	Order	Operation	Service & Time Type	Time Worked							Total	Editable?
				Fri 20	Sat 21	Sun 22	Mon 23	Tue 24	Wed 25	Thu 26		
<a href="#">+</a> <a href="#">-</a> Richard \	03003161605	0010 - permit request to rep.	10 - Labour Normal	4	5	3	8	4	5	6	35	✓
<a href="#">+</a> <a href="#">-</a> Richard \	03003161605	0010 - permit request to rep.	10 - Labour Normal									✓

Modify the duplicated row accordingly.


Select the 'Save' button to commit any changes.

#### 13.4. [Remove Time Entry Record](#)

To remove the time entry record, select the '-' icon on the row you would like to remove.

Select the 'Save' button to commit any changes.

#### 13.5. [Add Time Entry at Service Level](#)

You can also access the 'Actual Time' screen by selecting the  icon from the Service sub-menu.

The 'Actual Time' tab is selected by default.

The timesheet will load with the order/operation/service/time type selected.

Ensure that the week ending date is selected, and enter the hours for that week.

Select the 'Save' button to commit any changes.

Entering time at the service level is good for individual time entry records; for multiple records across different orders/operations, it is more efficient to enter actual time at the event level (faster data entry).

#### 13.6. [Time Entry Validation Rules](#)

There are a number of rules to prevent actual time being entered incorrectly.

- Actual time cannot be entered against orders that are not approved.
- Actual time cannot be added if the operation control key is not 0020.
- Actual time cannot be added if the order status is CLSD.

If you attempt to assign time to an order/operation/service that falls into one of the above categories, a validation message will be displayed and data entry will be prohibited.

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/ Events / [A4 TAR 2014] / Timesheet

Actual Time
Non Productive Time
Hours In Holding
View Time

Actual time cannot be added as the Estimate is not Approved.

Common values

Week ending  
26/03/2015


Timesheet entries - Actual Time

Add time
Save

				Time Worked								
Supervisor	Order	Operation	Service & Time Type	Fri 20	Sat 21	Sun 22	Mon 23	Tue 24	Wed 25	Thu 26	Total	Editable?
<div>+</div> <div>-</div> Please Sele	030031548568	0010 - Multi test	Please Select Ser Please Select Tin									

A padlock will be displayed next to the row, and all timesheet fields will be greyed out.

## 14. Non-productive Time

The 'Non-productive Time' screen can be located by selecting the  icon from the Events sub-menu.

Select the 'Non-productive Time' tab.

This screen is used to enter non-productive hours for a given order/operation.

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Scaffold
Reports
Administration

/ Events / [A4 TAR 2014] / Timesheet

Actual Time
Non Productive Time
Hours In Holding
View Time

Common values

Week ending  
26/03/2015

Timesheet entries - Non Productive Time

Add time
Save

				Time Worked								
Supervisor	Order	Operation	Code	Fri 20	Sat 21	Sun 22	Mon 23	Tue 24	Wed 25	Thu 26	Total	Editable?

### 14.1. Add/Edit Non-productive Time Entry Record

To add/edit a non-productive time entry record, select a week ending date using the date picker (last week's week ending date will be selected by default).

Select the 'Add Time' button.

Select a supervisor from the drop-down list provided.

Enter an order number. A list of all the order's operations will load into the 'Operation' drop-down list.

Select an operation. The non-productive time codes will load in the 'Code' drop-down list.

Select a code.

Any existing non-productive time against the service/time type for the selected week ending date will load in the grid. An empty grid will load if non-productive time entry records do not exist.

For new records, enter the non-productive time into the timesheet for the selected week ending date.

For existing records, modify the non-productive time within the timesheet for the selected week ending date.

Select the 'Save' button to commit any changes.

Timesheet entries - Non Productive Time

[Add time](#) [Save](#)

					Time Worked								
Supervisor	Order	Operation	Code		Fri 20	Sat 21	Sun 22	Mon 23	Tue 24	Wed 25	Thu 26	Total	Editable?
<a href="#">+</a> <a href="#">-</a>	Richarc	030031617i	0010 - Vivergo:machining	A01 - Safety	3	4	5	4	4	3	3	26	✓

Once saved, the supervisor cannot be changed.

#### 14.2. [Duplicate Non-productive Record](#)

To duplicate the non-productive time entry row, select the '+' icon on the row you would like to duplicate.

Timesheet entries - Non Productive Time

[Add time](#) [Save](#)

					Time Worked								
Supervisor	Order	Operation	Code		Fri 20	Sat 21	Sun 22	Mon 23	Tue 24	Wed 25	Thu 26	Total	Editable?
<a href="#">+</a> <a href="#">-</a>	Richarc	030031617i	0010 - Vivergo:machining	A01 - Safety	3	4	5	4	4	3	3	26	✓
<a href="#">+</a> <a href="#">-</a>	Richarc	030031617i	0010 - Vivergo:machining	A01 - Safety									✓

Modify the duplicated row accordingly.


Select the 'Save' button to commit any changes.

#### 14.3. [Remove Non-productive Record](#)

To remove the non-productive record, select the '-' icon on the row you would like to remove.

Select the 'Save' button to commit any changes.

#### 14.4. [Add Non-productive Time at Service Level](#)

You can also access the 'Non-productive Time' screen by selecting the  icon from the Service sub-menu.

Select the 'Non-productive Time' tab.

The timesheet will load with the order/operation selected.

Ensure that the week ending date is correct.

Select a non-productive code.

Enter the non-productive hours for the week.

Select the 'Save' button to commit any changes.

Entering non-productive time at the operation level is good for individual non-productive time entry records; for multiple records across different orders/operations, it is more efficient to enter non-productive time at the event level (faster data entry).

#### 14.5. Non-productive Time Validation Rules

There are a number of rules to prevent non-productive time being entered incorrectly.

- Non-productive time cannot be entered against orders that are not approved.
- Non-productive time cannot be added if the operation control key is not 0020.
- Non-productive time cannot be added if the order status is CLSD.

If you attempt to assign non-productive time to an order/operation that falls into one of the above categories, a validation message will be displayed and data entry will be prohibited.

iPlan SAP Richard Walker | Logout

Home Events Scaffold Reports Administration

/ Events / [Routine Maintenance] / Timesheet

Actual Time Non Productive Time Hours In Holding View Time

This data cannot be modified as the Control Key is not 0020.

Common values

Week ending  
16/04/2015


Timesheet entries - Non Productive Time

Add time Save

Supervisor	Order	Operation	Code	Fri 10	Sat 11	Sun 12	Mon 13	Tue 14	Wed 15	Thu 16	Total	Editable?
+ - Please Se	012345678995	0010 - Placeholder	A01 - Safety									🔒

A padlock will be displayed next to the row, and all timesheet fields will be greyed out.

#### 15. Hours in Holding

The 'Hours Holding' screen can be located by selecting the  icon from the Events sub-menu.

Select the 'Hours Holding' tab.

This screen is used to enter hours into a holding area within iPlan until the hours can be transferred to the appropriate order/operation/service.

There are various reasons hours may be put into holding (e.g., Awaiting Estimate, Digits Missing, Incorrect Order Number etc.).

iPlan SAP
Richard Walker | Logout

Home
Events
Scaffold
Reports
Administration

/ Events / [Routine Maintenance] / Timesheet

Actual Time
Non Productive Time
Hours In Holding
View Time

Common values

Week ending  
26/03/2015

Timesheet entries - Actual Time

Add time
Save

Supervisor	Order	Operation	Service & Time Type	Time Worked							Total	Editable?
				Fri 20	Sat 21	Sun 22	Mon 23	Tue 24	Wed 25	Thu 26		

By default, all hours in holding will load into the timesheet for the selected week ending date.

Timesheet entries - Hours Holding

Add time
Save

Supervisor	Order	Operation	Reference & Reason	Time Worked							Total	Editable?	
				Fri 20	Sat 21	Sun 22	Mon 23	Tue 24	Wed 25	Thu 26			
<div> + - </div> Richard Walker	03003029	0010	ref123 Awaiting Estimate	1	0	0	0	0	0	0	0	1	✓

### 15.1. Add/Edit Hours Holding Time Entry Record

To add/edit an hours holding record, select a week ending date using the date picker (last week's week ending date will be selected by default).

The timesheet will update to display all hours in holding within iPlan for the selected week ending date.

Timesheet entries - Hours Holding

Add time
Save

Supervisor	Order	Operation	Reference & Reason	Time Worked							Total	Editable?	
				Fri 20	Sat 21	Sun 22	Mon 23	Tue 24	Wed 25	Thu 26			
<div> + - </div> Richard Walker	03003029	0010	ref123 Awaiting Estimate	1	0	0	0	0	0	0	0	1	✓

Modify the time entry row accordingly.

Select the 'Save' button to commit any changes.

To add a new record, select the 'Add Time' button. A new time entry row will load.



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Home
Events
Scaffold
Reports
Administration

/ Events / [Routine Maintenance] / Timesheet

Actual Time
Non Productive Time
Hours In Holding
View Time

Common values

Week ending  
26/03/2015

Timesheet entries - Hours Holding

Add time
Save

				Time Worked								
Supervisor	Order	Operation	Reference & Reason	Fri 20	Sat 21	Sun 22	Mon 23	Tue 24	Wed 25	Thu 26	Total	Editable?
<div>+</div> <div>-</div> Please Select...			Please Select Reas									

Select a supervisor from the drop-down list provided.

Enter the order number (if available).

Enter the operation number (if available).

Enter a reference. This must be a unique reference to identify the hours holding record.

Select a reason the hours are in holding.

Enter the hours into the timesheet for the selected week.

Select the 'Save' button to commit any changes.

Timesheet entries - Hours Holding

Add time
Save

				Time Worked								
Supervisor	Order	Operation	Reference & Reason	Fri 13	Sat 14	Sun 15	Mon 16	Tue 17	Wed 18	Thu 19	Total	Editable?
<div>+</div> <div>-</div> Richard Walki	0372636766	0010	Ref123 Awaiting Estimate	0	3	3	3	3	0	0	12	✓

Once saved, the supervisor cannot be changed.

## 15.2. Duplicate Hours Holding Record

To duplicate the hours holding time entry row, select the '+' icon on the row you would like to duplicate.

Timesheet entries - Hours Holding

Add time

Save

				Time Worked									
Supervisor	Order	Operation	Reference & Reason	Fri 03	Sat 04	Sun 05	Mon 06	Tue 07	Wed 08	Thu 09	Total	Editable?	
<div>+</div> <div>-</div> <div>Richard Walker</div>	0372636766	0010	<div>Red123</div> <div>Awaiting Estimate</div>	0	3	3	3	3	0	0	12	✓	
<div>+</div> <div>-</div> <div>Richard Walker</div>	0372636766	0010	<div></div> <div>Please Select Reason</div>									🔒	

Modify the duplicated row accordingly.

Select the 'Save' button to commit any changes.

15.3. [Remove Hours Holding Record](#)

To remove the hours holding record, select the '-' icon on the row you would like to remove.

Select the 'Save' button to commit any changes.

15.4. [Transfer Hours Holding](#)

There are two ways to transfer hours to an order:

- Manual transfer
- Automated transfer on approval

15.5. [Manual Transfer](#)

To manually transfer hours out of holding to an order, select the 'View Time' tab.

A grid of all time entered in the last month (all hours in holding) will be displayed.

iPlan SAP

Richard Walker | Logout

Home
Events
Scaffold
Reports
Administration

/ Events / [Routine Maintenance] / Timesheet

Actual Time

Non Productive Time

Hours In Holding

View Time

Timesheet Entries

Notify Supervisors

Time Type	Order Number	Operation	Service	Supervisor	Week Ending...	Code	Reason	Total Time (h)	
Hours Holding	0372636766	0010		Richard Walker	09/04/2015	Red123	Awaiting Estimate	12	Transfer Hours
Hours Holding	0300	0010		Richard Walker	26/03/2015	ref123	Awaiting Estimate	1	Transfer Hours
Actual	030031617654	0010 - Vivergo:machining of 2 x coupling keyway	10	Gemma Coulman	26/03/2015	N/A	N/A	35	
Actual	030031617654	0010 - Vivergo:machining of 2 x coupling keyway	10	Richard Walker	26/03/2015	N/A	N/A	14	
Actual	030031616056	0010 - permit request to repair S88 fan bearing	10	Richard Walker	26/03/2015	N/A	N/A	35	
Actual	030280049240	0010 - DT: SCAFFOLD ERECT	10	Admin User	26/03/2015	N/A	N/A	2	

1

2

3

4

5

6

7

8

9

10

...

25

items per page

1 - 25 of 1798 items

Time grid displays Actual and Non Productive time entered in the last month and all existing Hours in Holding.

Locate the record you would like to transfer [see ‘[Filtering Grids in iPlan Sap](#)’].

Select the ‘Transfer Hours’ button next to the time record.

A form will load containing details of the hours in holding.

## Hours Holding Time

Transfer Details

Reference

255662

Reason

Awaiting Estimate

Week Ending Date

Thu Mar 19 2015 00:00:00 GMT+0000 (GMT Standard Time)

Supervisor

Admin User

Order Number

030031600557

Find Order

Operation Number

Please Select...

Service Number

Please Select...

Hours Worked

Fri 13

0

Sat 14

0

Sun 15

0

Mon 16

20

Tue 17

0

Wed 18

0

Thu 19

0

If an order number has been entered (and the order is within iPlan), then a list of operations will load in the ‘Operation Number’ drop-down list.

Select an operation number.

A list of services (Labour and Premium Time) will load in the ‘Service Number’ drop-down list.

Select a service number.

## Hours Holding Time

Transfer



Transfer Details	Hours Worked
<b>Reference</b> 255662	<b>Fri 13</b> 0
<b>Reason</b> Awaiting Estimate	<b>Sat 14</b> 0
<b>Week Ending Date</b> Thu Mar 19 2015 00:00:00 GMT+0000 (GMT Standard Time)	<b>Sun 15</b> 0
<b>Supervisor</b> Admin User	<b>Mon 16</b> 20
<b>Order Number</b> 030031600557 <span>Find Order</span>	<b>Tue 17</b> 0
<b>Operation Number</b> 0020 - Erect - 200 - 17.0 (K6601)	<b>Wed 18</b> 0
<b>Service Number</b> 10 - Labour	<b>Thu 19</b> 0


Once an order, operation and service have been selected, select the 'Transfer' button. This will move the hours out of holding and against the relevant service.

### 15.6. [Automated Transfer on Approval](#)

Any hours in holding that have been assigned an order and operation will be automatically transferred to the operation's labour service on approval.

Please note – both the order and operation must be entered for auto transfer to work.

## 16. [View Time](#)

The 'View Time' screen can be located by selecting the  icon from the Events sub-menu.  
Select the 'View Time' tab.

iPlan SAP

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HomeEventsScaffoldReportsAdministration

/ Events / [Routine Maintenance] / Timesheet

Actual TimeNon Productive TimeHours In HoldingView Time

Timesheet Entries

Notify Supervisors

Time Type	Order Number	Operation	Service	Supervisor	Week Ending...	Code	Reason	Total Time (h)	
Hours Holding	0372636766	0010		Richard Walker	09/04/2015	Red123	Awaiting Estimate	12	Transfer Hours
Hours Holding	0300	0010		Richard Walker	26/03/2015	ref123	Awaiting Estimate	1	Transfer Hours
Actual	030031617654	0010 - Vivergo:machining of 2 x coupling keyway	10	Gemma Coulman	26/03/2015	N/A	N/A	35	
Actual	030031617654	0010 - Vivergo:machining of 2 x coupling keyway	10	Richard Walker	26/03/2015	N/A	N/A	14	
Actual	030031616056	0010 - permit request to repair SB8 fan bearing	10	Richard Walker	26/03/2015	N/A	N/A	35	
Actual	030280049240	0010 - DT: SCAFFOLD ERECT	10	Admin User	26/03/2015	N/A	N/A	2	

12345678910...>

25 items per page

1 - 25 of 1798 items

\* Time grid displays Actual and Non Productive time entered in the last month and all existing Hours in Holding.

\* Time grid displays Actual and Non Productive time entered in the last month and all existing Hours in Holding.

A grid of all actual and non-productive time entered in the last month (for the selected event) will be displayed, as well as all existing hours in holding.

You can sort/filter the grid to locate a time record [see ‘[Filtering Grids in iPlan Sap](#)’].

## 17. [Expenditure](#)

The ‘Expenditure’ screen can be located by selecting the  icon from the Events sub-menu.

The ‘Enter Expenditure’ tab will be selected by default.

This screen is used to enter actual expenditure spent for a given order/operation/service.

### 17.1. [Add/Edit Expenditure Record](#)

To add/edit an expenditure record, select a week ending date using the date picker (last week’s week ending date will be selected by default).

Select the ‘Add New Expenditure’ button.

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Home Events Scaffold Reports Administration

/ Events / [Routine Maintenance] / Actual Expenditure

Enter Expenditure View Expenditure

Common values

Week ending (Thursday)  
09/04/2015

Expenditure entries

Add new expenditure Save

	Order	Operation	Service	Description	Cost (£)
+		Please Select...	Please Select...		

Enter an order number. A list of all the order's operations will load into the 'Operation' drop-down list.

Select an operation. The services will load in the 'Service' drop-down list.

Select a service.

Any existing expenditure against the service for the selected week ending date will load in the grid. An empty grid will load if expenditure records do not exist.

For new records, enter a description and cost for the selected week ending date.

For existing records, modify the description and cost for the selected week ending date.

Enter Expenditure View Expenditure

Common values

Week ending (Thursday)  
09/04/2015

Expenditure entries

Add new expenditure Save

	Order	Operation	Service	Description	Cost (£)
+	030031571838	0010 - DT: MECHANICAL OPERATION	10 - Labour	Bought in services	100

Select the 'Save' button to commit any changes.

## 17.2. Duplicate Expenditure Record

To duplicate the expenditure row, select the '+' icon on the row you would like to duplicate.

Expenditure entries

[Add new expenditure](#) [Save](#)

	Order	Operation	Service	Description	Cost (£)
<a href="#">+</a> <a href="#">-</a>	030031571838	0010 - DT: MECHANICAL OPERATION <input checked="" type="checkbox"/>	30 - Bought In Services <input checked="" type="checkbox"/>	Bought in services	150
<a href="#">+</a> <a href="#">-</a>	030031571838	0010 - DT: MECHANICAL OPERATION <input checked="" type="checkbox"/>	30 - Bought In Services <input checked="" type="checkbox"/>		

Modify the duplicated row accordingly.


Select the 'Save' button to commit any changes.

### 17.3. [Remove Expenditure Record](#)

To remove the expenditure record, select the '-' icon on the row you would like to remove.

Select the 'Save' button to commit any changes.

### 17.4. [Add Expenditure at Service Level](#)

You can also access the 'Expenditure' screen by selecting the  icon from the Service sub-menu.

The 'Enter Expenditure' tab is selected by default.

The grid will load with the order/operation/service selected.

Ensure that the week ending date is selected, and enter the description and cost.

Select the 'Save' button to commit any changes.

Entering expenditure at the service level is good for individual expenditure records; for multiple records across different orders/operations, it is more efficient to enter expenditure at the event level (faster data entry).


### 17.5. [Expenditure Validation Rules](#)

There are a number of rules to prevent expenditure being entered incorrectly.

- Expenditure cannot be entered against orders that are not approved.
- Expenditure cannot be added if the operation control key is not 0020.
- Expenditure cannot be added if the order status is CLSD.
- Expenditure cannot be added if the operation is scoped.

If you attempt to assign expenditure to an order/operation/service that falls into one of the above categories, a validation message will be displayed and data entry will be prohibited.

## 17.6. [View Expenditure](#)

The 'View Expenditure' screen can be located by selecting the  icon from the Events sub-menu.

Select the 'View Expenditure' tab.

A grid of all expenditures entered in the last month (for the selected event) will be displayed (if you view expenditure at the service level, all costs for the selected service will be displayed in the grid).

You can sort/filter the grid to locate an expenditure record [see '[Filtering Grids in iPlan Sap](#)'].

To edit the expenditure record, select the 'Edit' button. The selected record will load in the 'Enter Expenditure' tab ready for edit.



To delete the expenditure record, select the 'Delete' button. After confirming the deletion, the selected record will be removed from the grid.

## 18. [Progress](#)

The 'Progress' screen can be located by selecting the  icon from the Events sub-menu.

The 'Enter Progress' tab will be selected by default.

This screen is used to enter actual progress achieved for a given order/operation/service.



## 18.1. [Add/Edit Progress Record](#)

To add/edit a progress record, select a week ending date using the date picker (last week's week ending date will be selected by default).

Select the 'Add New Progress' button.

The screenshot shows the 'iPlan SAP' interface. At the top, there's a navigation bar with 'Home', 'Events', 'Scaffold', 'Reports', and 'Administration'. Below this is a breadcrumb trail: '/ Events / [Routine Maintenance] / Actual Progress'. The main content area has two tabs: 'Enter Progress' (active) and 'View progress'. Under 'Enter Progress', there's a 'Common values' section with a 'Week ending (Thursday)' date picker set to '16/04/2015'. Below this is the 'Progress entries' section, which contains an 'Add new progress' button and a 'Save' button. The main form area has five columns: 'Supervisor', 'Order', 'Operation', 'Service', and 'Complete (%)'. Each column has a dropdown menu. The 'Supervisor' dropdown is currently open, showing a list of names. The 'Operation' and 'Service' dropdowns are currently set to 'Please Select...'. The 'Complete (%)' column has a text input field.

Select a supervisor from the list.

Enter an order number. A list of all the order's operations will load into the 'Operation' drop-down list.

Select an operation. The services will load in the 'Service' drop-down list.

Select a service.

Any existing progress against the service for the selected week ending date will load in the grid. An empty grid will load if progress records do not exist.

For new records, enter a % complete for the selected week ending date.

For existing records, modify the % complete for the selected week ending date.

This screenshot shows the same 'Add/Edit Progress Record' form, but with data entered. The 'Supervisor' dropdown is set to 'Admin User', the 'Order' dropdown is set to '030031571987', the 'Operation' dropdown is set to '0020 - ERECT SCAFFOLD to access trap isolations', the 'Service' dropdown is set to '10 - Labour', and the 'Complete (%)' text input field contains the value '70'. The 'Add new progress' and 'Save' buttons are still visible.

Select the 'Save' button to commit any changes.

## 18.2. [Duplicate Progress Record](#)

To duplicate the progress row, select the '+' icon on the row you would like to duplicate.

Progress entries

[Add new progress](#) [Save](#)

	Supervisor	Order	Operation	Service	Complete (%)
<a href="#">+</a> <a href="#">-</a>	Admin User	030031571987	0020 - ERECT SCAFFOLD to access trap isolations	10 - Labour	70
<a href="#">+</a> <a href="#">-</a>	Admin User	030031571987	0020 - ERECT SCAFFOLD to access trap isolations	10 - Labour	

Modify the duplicated row accordingly.


Select the 'Save' button to commit any changes.

### 18.3. [Remove Progress Record](#)

To remove the progress record, select the '-' icon on the row you would like to remove.

Select the 'Save' button to commit any changes.

### 18.4. [Add Progress at Service Level](#)

You can also access the 'Progress' screen by selecting the  icon from the Service sub-menu.

The 'Enter Progress' tab is selected by default.

The grid will load with the order/operation/service selected.

Ensure that the week ending date is selected, and enter the supervisor and % complete.

Select the 'Save' button to commit any changes.

Entering progress at the service level is good for individual progress records; for multiple records across different orders/operations, it is more efficient to enter progress at the event level (faster data entry).


### 18.5. [Progress Validation Rules](#)

There are a number of rules to prevent progress being entered incorrectly.

- Progress cannot be entered against orders that are not approved.
- Progress cannot be added if the operation control key is not 0020.
- Progress cannot be added if the order status is CLSD.
- Progress cannot be added if the operation is unscoped.

If you attempt to assign progress to an order/operation/service that falls into one of the above categories, a validation message will be displayed and data entry will be prohibited.

## 18.6. [View Progress](#)

The 'View Progress' screen can be located by selecting the  icon from the Events sub-menu.

Select the 'View Progress' tab.

iPlan SAP

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HomeEventsScaffoldReportsAdministration

/ Events / [Routine Maintenance] / Actual Progress

Enter ProgressView progress

Progress Entries									
Order	Operation	Service	Week Ending D...	Supervisor	Complete (%)	Baselined?	Date Recorded		
030031571987	0020	10	16/04/2015	Admin User	70	No	16/04/2015	Edit	Delete
030031571933	0010	10	19/03/2015	Barry Senior	100	Yes	24/03/2015		
030031571933	0010	20	19/03/2015	Barry Senior	0	Yes	24/03/2015		
030031571933	0010	30	19/03/2015	Barry Senior	0	Yes	24/03/2015		
030031571933	0010	40	19/03/2015	Barry Senior	100	Yes	24/03/2015		
030031571987	0010	10	19/03/2015	Barry Senior	75	Yes	24/03/2015		
030031571987	0010	20	19/03/2015	Barry Senior	75	Yes	24/03/2015		
030031571987	0010	30	19/03/2015	Barry Senior	75	Yes	24/03/2015		
030031571987	0010	40	19/03/2015	Barry Senior	75	Yes	24/03/2015		
030031571987	0020	10	19/03/2015	Barry Senior	100	Yes	24/03/2015		
030031571987	0020	20	19/03/2015	Barry Senior	0	Yes	24/03/2015		
030031571987	0020	30	19/03/2015	Barry Senior	0	Yes	24/03/2015		

12345678910...>

25 items per page

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\* Grid displays Actual Progress entered in the last month.

A grid of all progress entered in the last month (for the selected event) will be displayed (if you view progress at the service level, all progress for the selected service will be displayed in the grid).

You can sort/filter the grid to locate a progress record [see '[Filtering Grids in iPlan Sap](#)'].

To edit the progress record, select the 'Edit' button. The selected record will load in the 'Enter Progress' tab ready for edit.



To delete the progress record, select the 'Delete' button. After confirming the deletion, the selected record will be removed from the grid.

## 19. [Scaffold](#)

The 'Scaffold' screen can be located by selecting 'Scaffold' from the top menu.

A grid will load of all scaffold structures for the site(s) to which you have access.

You can filter/sort the grid by any of the headers [Scaffold Id, Site, Event, Order Number, Erect Operation, Erect Date, On Hire Date, Off Hire Date, Dismantle Operation, Dismantle Date and Charge for Hire?] [See '[Filtering Grids in iPlan Sap](#)'].

iPlan SAP

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HomeEventsScaffoldReportsAdministration

F91 - Scaffold Dates

Add Scaffold Dates

Scaffold Id	Site	Event	Order Nu...	Erect Op...	Erect Date	On Hire ...	Off Hire ...	Dismantl...	Dismantl...	Charge for ...	
03003158056...	Saltend	Routine Maintenance	030031580569	0020	11/01/2015	12/01/2015	13/02/2015	0040	13/02/2015	Yes	<div>EditDelete</div>
03028004921...	Saltend	Routine Maintenance	030280049214	0010	18/09/2014	19/09/2014	11/12/2014	0020	04/11/2014	Yes	<div>EditDelete</div>
03028005020...	Saltend	Routine Maintenance	030280050206	0010	18/02/2015	19/02/2015	11/03/2015	0030	11/03/2015	Yes	<div>EditDelete</div>
03028004978...	Saltend	Routine Maintenance	030280049782	0010	07/12/2014	08/12/2014	17/02/2015	0030	17/02/2015	Yes	<div>EditDelete</div>
03003157614...	Saltend	Routine Maintenance	030031576141	0010	18/09/2014	19/09/2014	11/12/2014	0020	01/10/2014	Yes	<div>EditDelete</div>
03028004876...	Saltend	Routine Maintenance	030280048761	0010	18/09/2014	19/09/2014	11/12/2014	0020	14/10/2014	Yes	<div>EditDelete</div>
03028004980...	Saltend	Routine Maintenance	030280049802	0115	01/02/2015	02/02/2015		0120		Yes	<div>EditDelete</div>
03003157558...	Saltend	Routine Maintenance	030031575585	0010	18/09/2014	19/09/2014		0030		Yes	<div>Edit</div>

12345678910...>

25

items per page

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## 19.1. [Add Scaffold Dates](#)

To add a new scaffold structure, select the 'Add Scaffold Dates' button.

A scaffold form will load.

iPlan SAP												Richard Walker   Logout	
Home Events <b>Scaffold</b> Reports Administration													
<b>Scaffold Dates</b>												Save	
Site and Event													
Scaffold Id				Site				Event					
<input type="text"/>				Please Select...				Please Select...					
Order and Operations													
Order Number				Erect Operation				Dismantle Operation					
<input type="text"/>				Please Select...				Please Select...					
Dates							Charging						
Erect Date			On Hire Date			Charge for hire?			Erect Weekly Charge (£)				
<input type="text"/>			<input type="text"/>			<input checked="" type="checkbox"/>			<input type="text"/>				
Off Hire Date			Dismantle Date						Dismantle Weekly Charge (£)				
<input type="text"/>			<input type="text"/>						<input type="text"/>				

Complete the form as appropriate.

Select the site. A list of events for the selected site will load in the 'Event' drop-down list.

Select an event.

Enter an order number. A list of scaffold erect operations will load in the 'Erect Operation' drop-down list. A list of scaffold dismantle operations will load in the 'Dismantle Operation' drop-down list.

Select a scaffold erect operation.

Select a scaffold dismantle operation.

Enter the following dates: erect, on hire, off hire, dismantle.

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Home Events **Scaffold** Reports Administration

### Scaffold Dates

Save

**Site and Event**

Scaffold Id Site Event

Saltend Routine Maintenance

**Order and Operations**

Order Number Erect Operation Dismantle Operation

030031571845 0010 DT: SCAFFOLD ERCT OPERATION (DTACCSC) 0020 DT: SCAFFOLD DISMANTLE OPERATION (DTACCUS)

**Dates**

Erect Date On Hire Date

02/02/2015 03/02/2015

Off Hire Date Dismantle Date

14/04/2015 15/04/2015

**Charging**

Charge for hire? Erect Weekly Charge (£)

☒

Dismantle Weekly Charge (£)

Select the 'Save' button to commit any changes. On save, the scaffold id is generated by iPlan. This is a combination of the order number and the erect operation number.

Please note – you can only save one scaffold structure per operation. A warning message will be displayed if the user attempts to save a structure against an order/operation that is already assigned a structure.

## 19.2. [Edit Scaffold Dates](#)

To edit a scaffold structure, locate the record in the scaffold grid [see '[Filtering Grids in iPlan Sap](#)'].

Select the corresponding 'Edit' button. The scaffold dates form will load with the form's fields filled out and ready for edit.

Modify the form appropriately.

Select the 'Save' button to commit any changes.

The Erect Weekly Charge and Dismantle Weekly Charge fields are calculated fields based on the labour estimate (unscoped) or actual time worked (scoped).

### 19.3. [Delete Scaffold Dates](#)

To delete a scaffold structure, locate the record in the scaffold grid [see '[Filtering Grids in iPlan Sap](#)'].

Select the corresponding 'Delete' button. After confirming the deletion, the structure will be removed from the grid.

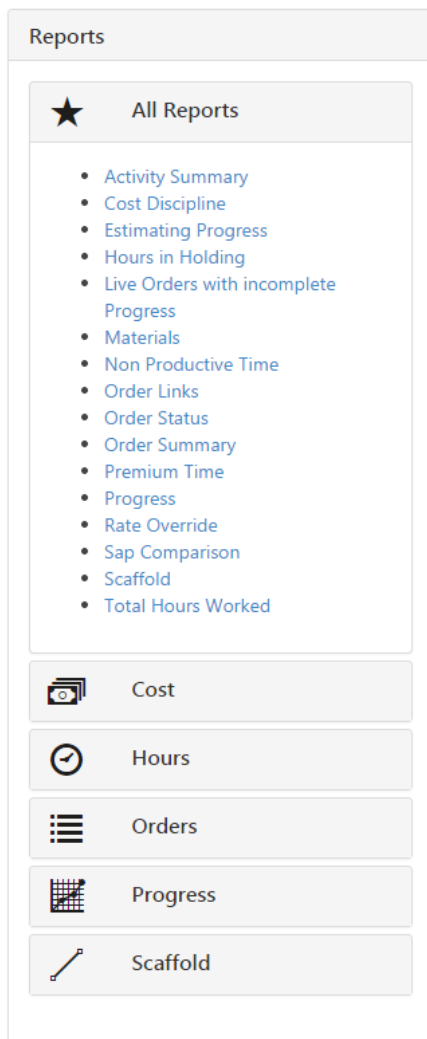
## 20. [Reports](#)

The 'Reports' section can be located by selecting 'Reports' from the top menu.

iPlan provides a number of reports to query the data and produce meaningful analysis.

The screenshot shows the iPlan SAP web application interface. At the top, a blue header bar contains the text 'iPlan SAP' on the left and a user profile 'Richard Walker | Logout' on the right. Below the header is a navigation bar with links: 'Home', 'Events', 'Scaffold', 'Reports' (highlighted in blue), and 'Administration'. The main content area is divided into two panels. The left panel, titled 'Reports', contains a list of report categories: 'All Reports' (with a star icon), 'Cost' (with a document icon), 'Hours' (with a clock icon), 'Orders' (with a list icon), 'Progress' (with a bar chart icon), and 'Scaffold' (with a pencil icon). The right panel, titled 'Report Filter:', contains three dropdown menus labeled 'Site', 'Client', and 'Event', each with the text 'Please Select...' and a downward arrow. Below these dropdowns is a blue button labeled 'Run Report' with a small downward arrow.

Each report is categorised [Cost, Hours, Orders, Progress and Scaffold]. The 'All Reports' category displays all reports (regardless of category) in alphabetical order.



To run a report, select a report from the 'Reports' pod.

The 'Report Filter' will update to display all filters applicable for the selected report.

A description of the report will also be displayed.

Report Filter: Activity Summary

**Site**  
Please Select...

**Client**  
Please Select...

**Event**  
Please Select...

**Orders**  
All

**Approval Status**  
Awaiting Approved  
Approved  
Rejected  
Unapproved

**Scoped**  
Scoped  
Unscoped

*>Returns Estimated Hours and Job Card count for Orders, grouped by Trade.*

Run Report

Select a site from the 'Site' drop-down list.

Select a client from the 'Client' drop-down list.

Select an event from the 'Event' drop-down list.

The remaining selections are optional and vary from report to report.

In this example (Activity Summary Report), select all orders to include in the report – to include all, leave blank.



Report Filter: Activity Summary

Site
Saltend

Client
Client 1

Event
Routine Maintenance

Orders
030031617654 x 030031615014 x  
030031613801 x 030031613802 x  
030031613519 x 030031613525 x

Approval Status
Awaiting Approved  
Approved  
Rejected  
Unapproved

Scoped
Scoped  
Unscoped

*>Returns Estimated Hours and Job Card count for Orders, grouped by Trade.*

Run Report

Select the approval status – to include all, leave blank.

Select a scoped flag – to include all, leave blank.

Select the arrow on the ‘Run Report’ button. A list of report formats will be displayed [Excel, Word and pdf]. Select the report format of choice.

A report will be generated. Select the report to open.

## 21. [Administration](#)

The ‘Administration’ section can be located by selecting ‘Administration’ from the top menu.

This section manages all of the data that drives iPlan as well as restricted information such as trade rates. User accounts and roles are controlled from ‘Administration’.

Administration

Baseline Actuals

Manage Drop Down Lists

Manage File Import Mappings

Manage Trades

Manage Trade Rates

Manage Work Centres

Refactor Trade Rates

Roles

Supervisors

Users

Valuations

View File Import/Export History

## 21.1. [Baseline Actuals](#)

'Baseline Actuals' is available from the Administration menu.

This feature allows the user to close the actual time, expenditure and progress for the selected week ending date. This will essentially prevent that record from being modified after baseline. Some reports/valuations require the records to be baselined.

Baseline Actuals

Site

Saltend

Clients

	Name	Week Ending	Last Baseline W/E	New Baseline W/E	
<input type="checkbox"/>	Client 1	Thursday	02/04/2015	09/04/2015	

Show open actuals

Show baseline history

Select a site from the 'Site' drop-down list. A list of clients for that site will load.

Select the checkbox next to the client(s) you would like to baseline.

Choose the week ending date to baseline.

Select the 'Show Open Actuals' button to view a table of all actuals for the selected site/client/week ending date.

Open Actuals to be Baselined								
Client: Client 1								<a href="#">Baseline clients</a> <a href="#">Back</a>
Event	Order	Operation	Service	Week Ending	Total Expenditure (£)	Total Actual Time (h)	Total Lost Time (h)	Latest Progress (%)
A4 TAR 2014	030031548568	0010		09/04/2015			20	
A4 TAR 2014	030031548568	0010	10	09/04/2015	£2,500.00	68		
A4 TAR 2014	030031548568	0010	30	09/04/2015	£6,000.00			
A4 TAR 2014	030031548568	0020	10	09/04/2015		60		50
A4 TAR 2014	030031548568	0020	30	09/04/2015				20

Select the 'Baseline Clients' button to close the week.

Open Actuals to be Baselined								
Client: Client 1								<a href="#">Baseline clients</a> <a href="#">Back</a>
This client has been baselined.								

The client(s) will now be baselined for the selected week.

## 21.2. [Manage Drop-down Lists](#)

'Manage Drop-down Lists' is available from the Administration menu.

This feature allows the user to update the data in drop-down lists throughout iPlan.

The following lists can be updated: 'Clients', 'Resources', 'Non-productive Codes', 'Hours Holding Reasons' and 'Plant Systems'.

Select a list from the left-hand menu; in this example, we have selected 'Clients'.

A grid of all existing items in the drop-down list will load.

iPlan SAP

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Home Events Scaffold Reports Administration

Drop Down Lists

Clients

Resources

Non Productive Codes

Hours Holding Reasons

Plant Systems

Clients

Add

Save

Name	Code	Site	Week Ending Day	Scaffold Erect Factor	
Client 1		Saltend	Thursday	0.7	<div>Delete</div>

To add a new record, select the 'Add' button.

**Drop Down Lists**

- Clients
- Resources
- Non Productive Codes
- Hours Holding Reasons
- Plant Systems

**Clients**

Name	Code	Site	Week Ending Day	Scaffold Erect Factor	
Client 1		Saltend	Thursday	0.7	<input type="button" value="Delete"/>
				1	<input type="button" value="Delete"/>

A blank entry will be displayed.

Complete the form fields as appropriate. For clients, enter a name, code, site, week ending day and scaffold erect factor.

Once all fields are complete, select the 'Save' button to commit any changes.

To modify an existing record, change the data of the row as appropriate. Select the 'Save' button to commit any changes.

### 21.2.1. [Delete Drop-down List Item](#)

To remove an item from the list, select the 'Delete' button next to the record you wish to delete.

A message will be displayed asking you to confirm the deletion. Select 'Ok'.

**Drop Down Lists**

- Clients
- Resources
- Non Productive Codes
- Hours Holding Reasons
- Plant Systems

**Clients**

Name	Code	Site	Week Ending Day	Scaffold Erect Factor	
Client 1		Saltend	Thursday	0.7	<input type="button" value="Delete"/>
Test client	TEST	Saltend	Thursday	0.8	<input type="button" value="Delete"/>

The deleted record will be greyed out.

Select the 'Save' button to commit any changes. The deleted record will now be removed.

## 21.3. [Manage File Import Mappings](#)

'Manage File Import Mappings' is available from the Administration menu.

This feature allows the user to update the mappings between Sap and iPlan. There are two mappings that can be updated: 'Priority to Trade Rate Type' and 'Service Numbers to Service Types'.

## File Import Mappings

Client

Client 1

Priority to Trade Rate Type

Save

Priority	Unscoped	Scoped	T1	T2	Unmapped
A	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
B	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
C	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
D	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
F	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

Note that unmapped priorities will fall-back to the associated Work Centre:

- If the Work Centre is Scoped, then the Scoped rate will be used.
- If the Work Centre is Unscoped, then the Unscoped rate will be used.

Service Numbers to Service Types

Add Service Type

Service Type	Number	Edit	Delete
Labour	000000000100015211	Edit	Delete
Labour	000000000100015483	Edit	Delete
Labour	000000000100015510	Edit	Delete
Labour	000000000100015527	Edit	Delete
Materials	000000000100015212	Edit	Delete
Materials	000000000100015486	Edit	Delete
Materials	000000000100015513	Edit	Delete

21.3.1. Priority to Trade Rate Type

This mapping defines the trade rate that is assigned to an operation (on import) based on its priority.

Priority to Trade Rate Type

Save

Priority	Unscoped	Scoped	T1	T2	Unmapped
A	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
B	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
C	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
D	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
F	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

Note that unmapped priorities will fall-back to the associated Work Centre:

- If the Work Centre is Scoped, then the Scoped rate will be used.
- If the Work Centre is Unscoped, then the Unscoped rate will be used.

To change the mapping, select the appropriate rate type for each priority [A, B, C, D & F]. Select 'Unmapped' if the priority does not have a rate type. Please note – if left 'unmapped', the importer will use the rate type from the work centre [Scoped/Unscoped].

Select the 'Save' button to commit any changes.

### 21.3.2. Service Numbers to Service Types

This mapping links service types to a service number.

Sap assigns services a service number; each service can have one or many service numbers.

iPlan needs to interpret the service number as a service type. Service types in iPlan are as follows: Labour, Materials, Bought-in Services, Plant Hire, Overhead and Premium Time.

This mapping will link each service type to any of the service numbers that Sap sends to iPlan in the import.

All existing mappings will load in the table.

Service Numbers to Service Types		
		<a href="#">Add Service Type +</a>
Service Type	Number	
Labour	000000000100015211	<a href="#">Edit</a> <a href="#">Delete</a>
Labour	000000000100015483	<a href="#">Edit</a> <a href="#">Delete</a>
Labour	000000000100015510	<a href="#">Edit</a> <a href="#">Delete</a>
Labour	000000000100015527	<a href="#">Edit</a> <a href="#">Delete</a>
Materials	000000000100015212	<a href="#">Edit</a> <a href="#">Delete</a>
Materials	000000000100015486	<a href="#">Edit</a> <a href="#">Delete</a>
Materials	000000000100015513	<a href="#">Edit</a> <a href="#">Delete</a>
Materials	000000000100015528	<a href="#">Edit</a> <a href="#">Delete</a>

To add a new service type, select the 'Add Service Type' drop-down button and select a service type.

A blank row will appear in the table.

Enter the service number to which the service type is to be connected.

Service Numbers to Service Types

Add Service Type ▾

Service Type	Number		
Labour	<input type="text"/>	Save	Delete
Labour	000000000100015211	Edit	Delete
Labour	000000000100015483	Edit	Delete
Labour	000000000100015510	Edit	Delete
Labour	000000000100015527	Edit	Delete
Materials	000000000100015212	Edit	Delete
Materials	000000000100015486	Edit	Delete
Materials	000000000100015513	Edit	Delete

Select the 'Save' button to commit any changes.

To modify a service mapping, select the 'Edit' button for the corresponding record.

Service Numbers to Service Types

Add Service Type ▾

Service Type	Number		
Labour	<input type="text" value="000000000100015211"/>	Save	Delete
Labour	000000000100015483	Edit	Delete
Labour	000000000100015510	Edit	Delete
Labour	000000000100015527	Edit	Delete
Materials	000000000100015212	Edit	Delete
Materials	000000000100015486	Edit	Delete
Materials	000000000100015513	Edit	Delete
Materials	000000000100015528	Edit	Delete

The service number will become editable for the selected service type. Make the changes as required.

Select the 'Save' button to commit any changes.

To delete a mapping, select the 'Delete' button for the corresponding record.

A message will be displayed asking you to confirm the deletion. Select 'Ok'.

The deleted record will now be removed.

## 21.4. Manage Trades

'Manage Trades' is available from the Administration menu.

This feature allows the user to view all trades as well as view/update the resources associated with trades.

iPlan SAP				Richard Walker   Logout
Home	Events	Scaffold	Reports	Administration
Trades				
Code	Name	Number of Resources		
C-ANALYS	Analyst	2	Edit	
C-BLDG	Building	1	Edit	
C-CIVIL	Civils	2	Edit	
C-ELEC	Electrician	2	Edit	
C-FAB	Fabricator	2	Edit	
C-INST	Instrumentation	1	Edit	
C-INSUL	Lagger	2	Edit	
C-MECH	Mechanical Fitter	2	Edit	
C-PAINT	Painter	2	Edit	
C-RIGGER	Rigger	2	Edit	
C-ACCESS	Scaffolder	2	Edit	

To view/edit a trade record, double-click the row or select the 'Edit' button.

There are two resource lists: 'Associated Resources' and 'Available Resources'.



iPlan SAP

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[Home](#)
[Events](#)
[Scaffold](#)
[Reports](#)
[Administration](#)

## Trades

Details

Code

C-ANALYS

Name

Analyst

Associated Resources

Unassociated selected

	Code	Description
<input type="checkbox"/>	IES ANA	Analysar Tech
<input type="checkbox"/>	IES TBC	Placeholder

Available Resources

Associate selected

	Code	Description
<input type="checkbox"/>	IES CV	Civils
<input type="checkbox"/>	IES EL	Electrical
<input type="checkbox"/>	IES PF	Pipe Fitter
<input type="checkbox"/>	IES LG	Lagging
<input type="checkbox"/>	IES MF	Mechanical Fitter
<input type="checkbox"/>	IES PT	Painter
<input type="checkbox"/>	IES RG	Rigger
<input type="checkbox"/>	IES SC	Scaffolder

‘Associated Resources’ is a list of all resources currently associated with the trade.

‘Available Resources’ is a list of all resources within iPlan.

To associate a resource to the trade, select the resource(s) from the ‘Available Resources’ list. Select the ‘Associate Selected’ button. The resources will now be displayed under the ‘Associated Resources’ list.

Similarly, to remove a resource from the associated resources, select the resource(s) from the ‘Associated Resources’ list. Select the ‘Unassociated Selected’ button. The resources will now be displayed under the ‘Available Resources’ list.

## 21.5. [Manage Trade Rates](#)

‘Manage Trade Rates’ is available from the Administration menu.

This feature allows the user to create a new set of rates as well as update the most recent trade rates. Older sets of trade rates are also available for reference.

iPlan SAP

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[Home](#)
[Events](#)
[Scaffold](#)
[Reports](#)
[Administration](#)

## Trade Rates

Trade Rate Periods

Site

Saltend

Client

Please Select...

Effective Date

Trade Rate Periods

Please Select...

View Rates

Trade Rate Period Name

Create New Period

Update Period

### 21.5.1. [Create Trade Rates](#)

To create a new set of trade rates, select a site from the 'Sites' drop-down list.

Select a client from the 'Clients' drop-down list.

Choose an effective date and end date (leave the End Date field blank if required, as it will be automatically populated when a new set of rates is created for the client).

Enter a trade rate period name.

Trade Rate Periods

Site

Saltend

Client

Client 1

Trade Rate Periods

Please Select...

View Rates

Effective Date

22/04/2015

End Date

Trade Rate Period Name

Rates for 2015

Create New Period

Update Period

Select the 'Create New Period' button to create a new rate period.

A form will load containing a list of all trades and a blank set of rates.

Update the rates for each trade as required.

Trade Rates - Client Rates for 2015

Trade	Unscoped	Scoped	T1	T2
Analyst	39.49	35.58	39.49	39.49
Building	20.69	18.71	21.41	21.05
Civils	20.69	18.71	21.41	21.05
Electrician	32.8	29.98	33.83	33.32
Fabricator	33.74	30.72	34.85	34.28
Instrumentation	32.8	29.98	33.83	33.32
Lagger	33.28	30.1	34.44	33.86
Mechanical Fitter	33.74	30.72	34.85	34.28
Painter	22.13	20.01	22.9	22.51
Rigger	33.74	30.72	34.85	34.28
Scaffolder	28.33	25.62	29.32	28.82

Save Rates

Select the 'Save Rates' button to commit any changes.

Please note – creating a new set of rates for a client will archive the previous set (no longer editable); however, the new rates will only take effect from the effective date specified in the rate period definition.

### 21.5.2. [View/Edit Rates](#)

To view a set of rates, select a site from the 'Sites' drop-down list.

Select a client from the 'Clients' drop-down list.

Select a set of rates from the 'Trade Rate Periods' drop-down list.

Select the 'View Rates' button.

A list of all rates for the selected period will be displayed in a table.

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Home Events Scaffold Reports Administration

### Trade Rates

**Trade Rate Periods**

**Site**  
Saltend

**Client**  
Client 1

**Trade Rate Periods**  
Client Rates for 2015 View Rates

**Effective Date**  
05/01/2015

**End Date**

**Trade Rate Period Name**  
Client Rates for 2015

Create New Period Update Period

**Trade Rates - Client Rates for 2015**

Trade	Unscoped	Scoped	T1	T2
Analyst	39.49	35.58	39.49	39.49
Building	20.69	18.71	21.41	21.05
Civils	20.69	18.71	21.41	21.05
Electrician	32.8	29.98	33.83	33.32
Fabricator	33.74	30.72	34.85	34.28
Instrumentation	32.8	29.98	33.83	33.32
Lagger	33.28	30.1	34.44	33.86
Mechanical Fitter	33.74	30.72	34.85	34.28
Painter	22.13	20.01	22.9	22.51
Rigger	33.74	30.72	34.85	34.28
Scaffolder	28.33	25.62	29.32	28.82

Save Rates

Update the rates for each trade as appropriate.

Select the 'Save Rates' button to commit any changes.

Please note – only the latest set of trade rates (most recent) can be modified. Older sets are available for reference but cannot be updated.

## 21.6. Manage Work Centres

'Manage Work Centres' is available from the Administration menu.

Work centres define the type of activity to be performed (per operation).

This feature allows the user to view, create and modify work centres within iPlan.

A grid of all work centres within iPlan will be displayed. Filter the grid to locate a particular work centre [see 'Filtering Grids in iPlan Sap'].

iPlan SAP							Richard Walker   Logout
Home Events Scaffold Reports Administration							
Work Centres							
Add Work Centre							
Code	Description	Scoped?	Include in File Exports?	Associated Trade	Default Resource		
ASLCHAR	ASL Environmental	No	No			Edit	
ASLDEVL	ASL Development	No	No			Edit	
ASLENV	ASL Environmental	No	No			Edit	
ASLGC	ASL GC	No	No			Edit	
ASLROUTN	ASL Routine	No	No			Edit	
CLEAN	Cleaning Crew	No	No			Edit	
CRAFTENG	Manufacturing Craft Engineer	No	No			Edit	
DESIGN	Site Drawing Office & Design	No	No			Edit	
DTACCSC	Centre Access Scoped	Yes	Yes	Scaffolder (C-ACCESS)	Scaffolder (IES SC)	Edit	
DTACCUS	Centre Access Unscoped	No	Yes	Scaffolder (C-ACCESS)	Scaffolder (IES SC)	Edit	
DTANASC	Centre Analyser Scoped	Yes	Yes	Analyst (C-ANALYS)	Analysar Tech (IES ANA)	Edit	
DTANAUS	Centre Analyser Unscoped	No	Yes	Analyst (C-ANALYS)	Analysar Tech (IES ANA)	Edit	
DTBLDSC	Centre Bldg Serv Scoped	Yes	Yes	Building (C-BLDG)		Edit	
<div> <div>1</div> <div>2</div> <div>3</div> <div>4</div> <div>5</div> <div>6</div> <div>7</div> <div>25</div> <div>items per page</div> </div>							1 - 25 of 161 items

### 21.6.1. Create/Edit Work Centre

To create a new work centre, select the 'Add Work Centre' button.

A blank form will load.

iPlan SAP							Richard Walker   Logout
Home Events Scaffold Reports Administration							
Work Centres							Save
<div> <div>Details</div> <div> <div>Code</div> <div></div> </div> <div> <div>Description</div> <div></div> </div> <div> <div>Scoped?</div> <div><input type="checkbox"/></div> </div> <div> <div>Include in File Exports?</div> <div><input type="checkbox"/></div> </div> <div> <div>Associated Trade</div> <div></div> </div> <div> <div>Default Resource (limited by trade)</div> <div></div> </div> </div>							

Enter a code and description.

Select the 'Scoped' checkbox if the work centre is scoped (leave unchecked for unscoped).

Select the 'Include in File Exports' checkbox if the work centre should be included in exports from iPlan to Sap.

Select an appropriate trade from the 'Associated Trade' drop-down list.

Select an appropriate resource from the 'Default Resource' drop-down list.

Select the 'Save' button to commit any changes.

To modify a work centre, locate the work centre in the work centres grid. Double-click the row or select the 'Edit' button.

Update the work centre definition as appropriate.

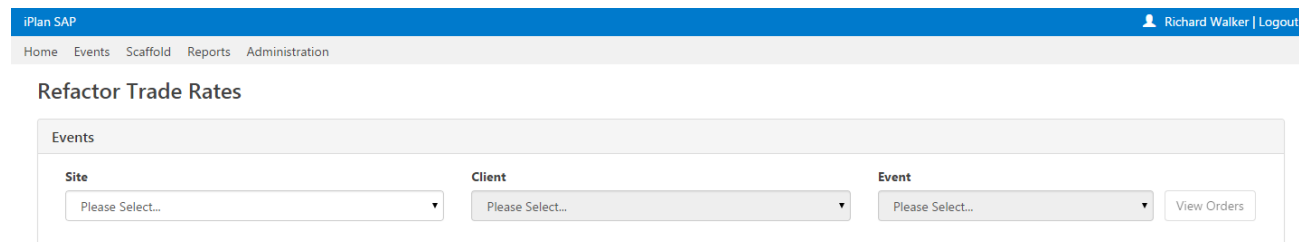
Select the 'Save' button to commit any changes.

## 21.7. [Refactor Trade Rates](#)

'Refactor Trade Rates' is available from the Administration menu.

This feature allows the user to retrospectively bulk update the trade rates applied to an event/order.

Only unapproved orders can be updated in this way.



To refactor trade rates, select a site from the 'Site' drop-down list.

Select a client from the 'Client' drop-down list.

Select an event from the 'Event' drop-down list.

Select the 'View Orders' button.

A form containing all unapproved orders within the selected event will load. Orders are grouped by trade.

## Refractor Trade Rates

**Events**

**Site**  
Saltend

**Client**  
Client 1

**Event**  
A4 TAR 2014

View Orders

**Orders by Trade**

Trade

Unscoped

Scoped

T1

T2

Save

Electrician

**Order Number**  
030031548999  
030031548595

**Order Description**  
Closed test  
test. Volume test L

**Equipment**  
A5 I/E ENG  
A5 ACID MECHANICAL

**Maintenance Activity**  
Corrective  
Corrective

**Update Rates?**  
☐  
☐

Rigger

**Order Number**  
030031548595  
030031548595

**Order Description**  
test. Volume test L  
test. Volume test L

**Equipment**  
A5 ACID MECHANICAL  
A5 ACID MECHANICAL

**Maintenance Activity**  
Corrective  
Corrective

**Update Rates?**  
☐  
☐

Enter the correct trade rates for each rate type (leave blank if no updates are required).

Select the 'Update Rates?' checkbox for each order that should be included in the update. For example, to update the electrician rate for order number 030031548999, select the 'Update Rates?' checkbox associated to that order (under the 'Electrician' section).

## Refractor Trade Rates

**Events**

**Site**  
Saltend

**Client**  
Client 1

**Event**  
A4 TAR 2014

View Orders

**Orders by Trade**

Trade

Unscoped

Scoped

T1

T2

Save

Electrician

34.5

21.12

**Order Number**  
030031548999  
030031548595

**Order Description**  
Closed test  
test. Volume test L

**Equipment**  
A5 I/E ENG  
A5 ACID MECHANICAL

**Maintenance Activity**  
Corrective  
Corrective

**Update Rates?**  
☒  
☐

Rigger

**Order Number**  
030031548595  
030031548595

**Order Description**  
test. Volume test L  
test. Volume test L

**Equipment**  
A5 ACID MECHANICAL  
A5 ACID MECHANICAL

**Maintenance Activity**  
Corrective  
Corrective

**Update Rates?**  
☐  
☐

Select the 'Save' button to apply that rate change.

Please note – only selected orders will be updated; all unchecked orders will remain unchanged.

## 21.8. [Roles](#)

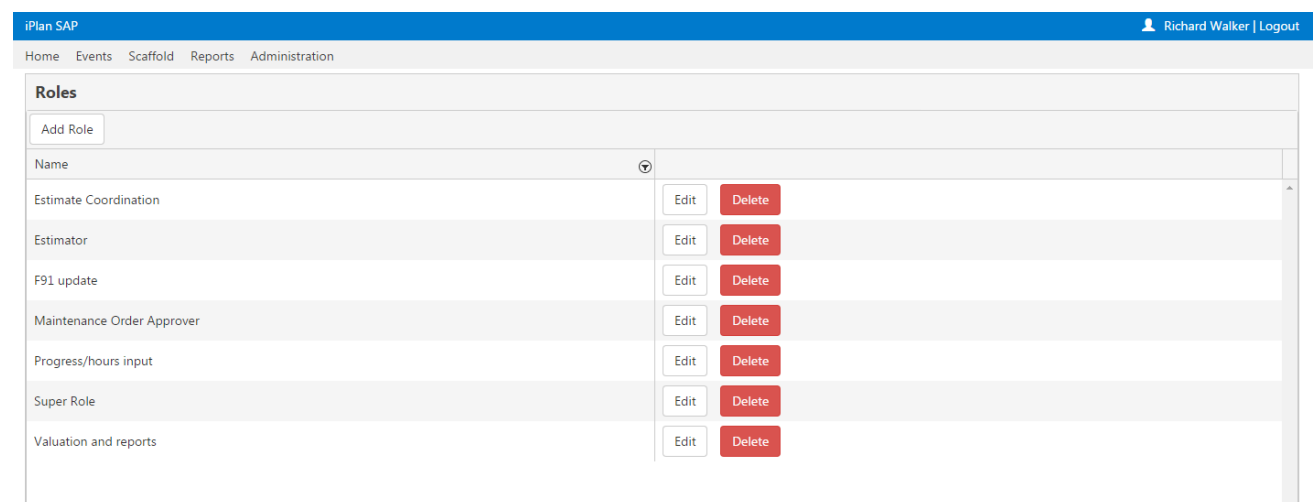
'Roles' is available from the Administration menu.

A role within iPlan defines a user's access rights. A role is made up of a series of access features. Each feature permits a task. For example, 'Edit an Operation' is a feature that permits the modification of operations in iPlan.

Roles should mirror a user's role within iPlan. For example, an estimator role will be made up of a series of features that enable estimators to perform estimation tasks within iPlan.

A user can be assigned multiple roles. A single role can be assigned to multiple users.

The 'Roles' section allows the user to create, edit and delete roles.



Roles	
<a href="#">Add Role</a>	
Name	
Estimate Coordination	<a href="#">Edit</a> <a href="#">Delete</a>
Estimator	<a href="#">Edit</a> <a href="#">Delete</a>
F91 update	<a href="#">Edit</a> <a href="#">Delete</a>
Maintenance Order Approver	<a href="#">Edit</a> <a href="#">Delete</a>
Progress/hours input	<a href="#">Edit</a> <a href="#">Delete</a>
Super Role	<a href="#">Edit</a> <a href="#">Delete</a>
Valuation and reports	<a href="#">Edit</a> <a href="#">Delete</a>

### 21.8.1. [Create/Edit Roles](#)

To create a new role, select the 'Add Role' button. A blank form will load.

To view/edit a role record, double-click the row or select the 'Edit' button. A form will load containing the existing role selections.

There are two feature lists: 'Associated Features' and 'Available Features'.

‘Associated Features’ is a list of all features currently associated with the role (this will be blank when creating a new role).

‘Available Features’ is a list of all features within iPlan.

To associate a feature to the role, select the feature(s) from the ‘Available Features’ list. Select the ‘Associate Selected’ button. The features will now be displayed under the ‘Associated Features’ list.

Similarly, to remove a feature from the associated features, select the feature(s) from the ‘Associated Features’ list. Select the ‘Unassociated Selected’ button. The features will now be displayed under the ‘Available Features’ list.

Select the ‘Save’ button to commit any changes.

### 21.8.2. [Delete a Role](#)

To delete a role, select the ‘Delete’ button next to the role from the ‘Roles’ grid view.

Name	Edit	Delete
Estimate Coordination	Edit	Delete
Estimator	Edit	Delete
F91 update	Edit	Delete
Maintenance Order Approver	Edit	Delete
Progress/hours input	Edit	Delete
Super Role	Edit	Delete
Valuation and reports	Edit	Delete



A message will be displayed asking you to confirm the deletion. Select 'Ok'.

The deleted role will now be removed.

## 21.9. Supervisors

'Supervisors' is available from the Administration menu.

Within the 'Users' section of Administration, a user can be assigned supervisor privileges [see 'Users']. Supervisors are named individuals who are responsible for a team of workers. Within iPlan, supervisors are recorded against actual time and progress entry.

Each supervisor will be responsible for one or more trades.

The 'Supervisor' section permits the association of trades to supervisors. This is especially useful when recording time. When time is recorded against an order, iPlan will check whether the supervisor is assigned responsibility for the trade of that order.

Code	Name
<input type="checkbox"/> Analyst	C-ANALYS
<input type="checkbox"/> Building	C-BLDG
<input type="checkbox"/> Civils	C-CIVIL
<input type="checkbox"/> Electrician	C-ELEC
<input type="checkbox"/> Fabricator	C-FAB
<input type="checkbox"/> Instrumentation	C-INST
<input type="checkbox"/> Lagger	C-INSUL
<input type="checkbox"/> Mechanical Fitter	C-MECH

To view/modify the trade association for a supervisor, select a supervisor from the 'Supervisor' drop-down list.

There are two lists: 'Associated Trades' and 'Available Trades'.

'Associated Trades' is a list of all trades currently associated with the supervisor.

'Available Trades' is a list of all trades within iPlan.

To associate a trade to the supervisor, select the trade(s) from the 'Available Trades' list. Select the 'Associate Selected' button. The trades will now be displayed under the 'Associated Trades' list.

Similarly, to remove a trade from the associated trades, select the trade(s) from the 'Associated Trades' list. Select the 'Unassociated Selected' button. The trades will now be displayed under the 'Available Trades' list.

Select the 'Save' button to commit any changes.

## 21.10. [Users](#)

'Users' is available from the Administration menu.

The creation and modification of iPlan users is controlled via this section.

A grid of all users is displayed [see '[Filtering Grids in iPlan Sap](#)'].

iPlan SAP					Richard Walker   Logout
Home	Events	Scaffold	Reports	Administration	
All Users					
Add User					
Forename	Surname	User Name	Email Address		
Kevin	Baister	kb	kevin.baister@cpd-limited.com	Edit	
Dave	Chilman	dchilman	dave.chilman@uk.bp.com	Edit	
Gemma	Coulman	gc	gemma.coulman@cpd-limited.com	Edit	
Matt	Foster	mfoster	matthew.foster@uk.bp.com	Edit	
Matt	Frost	mfrost	matt.frost@uk.bp.com	Edit	
Sean	Garner	sgarner	sean.garner@uk.bp.com	Edit	
Craig	Gregson	cgregson	craig.gregson@uk.bp.com	Edit	
Andy	Holmes	aholmes	andy.holmes2@uk.bp.com	Edit	
Kirsty	Martin	kmartin	kirsty.martin@uk.bp.com	Edit	
Clair	Moss	cmoss	clair.moss@uk.bp.com	Edit	
Dave	Parker	dparker	dave.parker@uk.bp.com	Edit	
Garry	Saul	gsaul	garry.saul@uk.bp.com	Edit	
Barry	Senior	bsenior	barry.senior@uk.bp.com	Edit	

### 21.10.1. [Create/Edit Users](#)

To create a new user, select the 'Add User' button. A blank form will load.

To view/edit a user record, double-click the row or select the 'Edit' button. A form will load containing the existing user selections.

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Home Events Scaffold Reports Administration

Save ☰

### User Details

**Username**

**Forename**

**Surname**

**Email Address**

**Site** **Clients**

**Types**

Supervisor ☐

Estimate Approver ☐

Lead Planner ☐

Event Manager ☐

Lead Inspector ☐

Contracts Manager ☐

### Roles

**Available Roles**

**Assigned Roles**

There are currently no roles associated to this user.

### Password

Enter the desired password for the user.

**New Password**

### Features

As a result of the assigned user roles, the user will have access to the following features.

**No features are available**

### 'User Details' Pod

Complete the form fields in the 'User Details' pod:

- Provide a distinct user name (used for login)
- Enter the user's forename
- Enter the user's surname
- Enter the user's email address
- Select a site from the 'Sites' drop-down list
- Choose the clients to which this user has access
- Select any appropriate user types (e.g., supervisor, estimate approver). Each user may have no or multiple user types

### 'Roles' Pod

Select a role(s) from the 'Available Roles' drop-down list.

Select the 'Add' button to assign the role to the user.

User Details	Roles	Features
<b>Username</b> <input type="text" value="gc"/>	<b>Available Roles</b> <div> Please select... Add </div>	<b>Features</b> As a result of the assigned user roles, the user will have access to the following features. <ul style="list-style-type: none"> <li>Admin <ul style="list-style-type: none"> <li>Placeholder</li> </ul> </li> <li>Attachment <ul style="list-style-type: none"> <li>Delete attachment</li> <li>Add attachment</li> </ul> </li> <li>Baseline Actuals <ul style="list-style-type: none"> <li>Baseline actuals</li> <li>View Baseline</li> </ul> </li> <li>Drop Down Lists <ul style="list-style-type: none"> <li>Edit resource</li> <li>Delete plant system</li> <li>Edit non productive code</li> <li>Edit hours holding reason</li> <li>Delete resource</li> <li>Delete non productive code</li> <li>Delete hours holding reason</li> <li>Edit plant system</li> <li>Delete client</li> <li>Edit client</li> <li>View</li> </ul> </li> <li>Estimate Approval <ul style="list-style-type: none"> <li>Send Estimate Approval</li> <li>Approve Estimate Approval</li> <li>UnApprove Estimate Approval</li> <li>View estimate approval</li> </ul> </li> </ul>
<b>Forename</b> <input type="text" value="Gemma"/>	<b>Assigned Roles</b> <div> Super Role - </div>	
<b>Surname</b> <input type="text" value="Coulman"/>	<b>Password</b> To reset the user's password, enter the desired password. Leave it blank to keep the password as is.	
<b>Email Address</b> <input type="text" value="gemma.coulman@cpd-limited.com"/>	<b>New Password</b> <input type="text"/>	
<b>Site</b> <div> Saltend </div>	<b>Clients</b> <div> Client 1 <input checked="" type="checkbox"/> </div>	
<b>Types</b> <div> Supervisor <input checked="" type="checkbox"/> </div> <div> Estimate Approver <input checked="" type="checkbox"/> </div> <div> Lead Planner <input checked="" type="checkbox"/> </div> <div> Event Manager <input checked="" type="checkbox"/> </div>		

Each user can have one or multiple roles assigned.

The features for each role added will be displayed under the ‘Features’ pod [see ‘Roles’ for more details on role definition].

To delete a role from a user, select the ‘-’ button next to the ‘Assigned Role’. The role will be removed from the ‘Assigned Roles’ section, and the ‘Features’ pod will update to remove the features for that role.

### ‘Password’ Pod

Enter a password into the New Password field. This password will be used to login to iPlan.

Once all fields and selections have been made, select the ‘Save’ button to commit any changes.

## 21.11. [Valuations](#)

‘Valuations’ is available from the Administration menu.

This section enables users to run valuation reports as well as view previous reports.

iPlan SAP
Richard Walker | Logout

Home Events Scaffold Reports Administration

### Run Valuation Report

Site
Saltend

Run up to
21/04/2015

Run valuation

Site	Requested By	Requested On	Ran up to	Finalised On	Finalised By	
Saltend	Richard Walker	31/03/2015 13:53:04	19/03/2015	31/03/2015 13:53:23	Richard Walker	Download View
Saltend	Richard Walker	31/03/2015 13:52:43	19/02/2015	31/03/2015 13:53:04	Richard Walker	Download View
Saltend	Richard Walker	31/03/2015 13:52:22	22/01/2015	31/03/2015 13:52:43	Richard Walker	Download View
Saltend	Richard Walker	31/03/2015 13:52:03	01/01/2015	31/03/2015 13:52:21	Richard Walker	Download View
Saltend	Richard Walker	31/03/2015 13:51:43	11/12/2014	31/03/2015 13:52:03	Richard Walker	Download View
Saltend	Richard Walker	31/03/2015 13:51:22	20/11/2014	31/03/2015 13:51:43	Richard Walker	Download View
Saltend	Richard Walker	31/03/2015 13:51:01	16/10/2014	31/03/2015 13:51:22	Richard Walker	Download View

1
25 items per page
1 - 7 of 7 items

To run a new valuation, select a site from the ‘Site’ drop-down list.

Choose a date from the ‘Run up to’ date picker to limit the data to be included in the report.

Select the ‘Run Valuation’ button to generate the report.

### Run Valuation Report

Site
Saltend

Run up to
21/04/2015

Run valuation

Site	Requested By	Requested On	Ran up to	Finalised On	Finalised By	
Saltend	Richard Walker	22/04/2015 13:05:12	21/04/2015			Download View Delete Finalise
Saltend	Richard Walker	31/03/2015 13:53:04	19/03/2015	31/03/2015 13:53:23	Richard Walker	Download View
Saltend	Richard Walker	31/03/2015 13:52:43	19/02/2015	31/03/2015 13:53:04	Richard Walker	Download View
Saltend	Richard Walker	31/03/2015 13:52:22	22/01/2015	31/03/2015 13:52:43	Richard Walker	Download View
Saltend	Richard Walker	31/03/2015 13:52:03	01/01/2015	31/03/2015 13:52:21	Richard Walker	Download View
Saltend	Richard Walker	31/03/2015 13:51:43	11/12/2014	31/03/2015 13:52:03	Richard Walker	Download View
Saltend	Richard Walker	31/03/2015 13:51:22	20/11/2014	31/03/2015 13:51:43	Richard Walker	Download View

1
25 items per page
1 - 8 of 8 items

A new row will be generated in the ‘Valuation History’ table.

The following buttons are available:

- ‘Download’ the valuation report (Excel file generated)
- ‘View’ the valuation report (html page)
- ‘Delete’ the valuation report
- ‘Finalise’ the valuation report (baseline and keep the valuation)

## 21.12. [View File Import/Export History](#)

‘View File Import/Export History’ is available from the Administration menu.

This screen displays all imports from Sap to iPlan in the last seven days as well as any exports from iPlan to Sap in the last seven days.

iPlan SAP

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HomeEventsScaffoldReportsAdministration

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
22/04/2015 10:53:06	Estimate	2015422_3193_IMPORT_EST_iPlanocom_21042015.010008

Manual Triggers

Click the relevant button below to start the corresponding export process.

Approved Estimates

File Export History

Exports for the last 7 days are shown below.

Date Exported	Success	File Name	Status
22/04/2015 13:32:23	Yes	iPlanicom_22042015.133223364	

### 21.12.1. [File Import](#)

To view any file imported over the last seven days, select the file name in the ‘File Import History Overview’ pod.

A detailed description of what was imported as well as any error messages that were generated on import will be displayed.

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HomeEventsScaffoldReportsAdministration

File Import History Detail

Back

Summary

File Name

2015422\_3193\_IMPORT\_EST\_iPlanocom\_21042015.010008

File Type

Estimate

Date Imported

22/04/2015 10:53:06

Orders

28 Added

0 Updated

0 Deleted

0 Failed To Save

Operations

83 Added

0 Updated

0 Deleted

0 Failed To Save

Services

414 Added

0 Updated

0 Deleted

0 Failed To Save

Materials

13 Added

15 Updated

0 Deleted

0 Failed To Save

Itemised

Import Started: 22/04/2015 10:53:06:073

- LINE 1: Order - 030031587298 R05-A4AC Z502S REPAIR & INSPECTION - New
  - LINE 1: Operation - 0010 ISSUE 8 TYPE PERMIT AND ISOLATE - New
    - LINE 1: Material - 000000000090257449 RUPTURE DISC Z502 A4 - New
    - LINE 2: Material - 000000000090257450 GASKET RUPTURE DISC. Z502 A4 - New
    - LINE 3: Material - 000000000090257449 RUPTURE DISC Z502 A4 - Update
    - LINE 4: Material - DRAW MANDREL CP-105-03-34 - New
    - LINE 5: Material - GRIPPER SET CP-1000-01-34-22 - Update
    - LINE 6: Material - NOSE PIECE CP-105-06A-34 - Update
    - LINE 7: Material - PUSH CUTTER 3/4" X 14-22G 42.PC-190 - Update
    - LINE 8: Material - PULLER MAND 3/4" X 18-24G 17.6022 - Update
    - LINE 9: Material - OIL CHANGE JAVELIN POWER PACK - Update
    - LINE 10: Material - 3/4" OD X 18 SWG C/W 1 1/2" ROLLS TR 829 - Update
    - LINE 11: Material - 7/8"OD X 13 SWG C/W 1 1/2" ROLLS TR 833 - Update
    - LINE 12: Material - CARRIAGE - Update
    - LINE 13: Material - 000000000090252369 ROUND BAR 3/4" BRIGHT CS - New
  - LINE 14: Operation - 0020 ERECT SCAFFOLDS - New
    - LINE 14: Service - 10 LABOUR - New
    - LINE 15: Service - 20 BOUGHT IN MATERIALS - New
    - LINE 16: Service - 30 BOUGHT IN SERVICES - New
    - LINE 17: Service - 40 PLANT HIRE - New
    - LINE 18: Service - 50 PREMIUM TIME - New
    - LINE 19: Service - 60 OVERHEAD - New
  - LINE 20: Operation - 0030 REMOVE INSTRUMENTATION ON END COVERS INC - New
    - No default resource for work centre DTICEUS, not setting resource
    - LINE 20: Service - 10 LABOUR - New
    - LINE 21: Service - 20 BOUGHT IN MATERIALS - New
    - LINE 22: Service - 30 BOUGHT IN SERVICES - New
    - LINE 23: Service - 40 PLANT HIRE - New
    - LINE 24: Service - 50 PREMIUM TIME - New
    - LINE 25: Service - 60 OVERHEAD - New
  - LINE 26: Operation - 0040 REMOVE END COVERS & SPOOLS - New
    - LINE 26: Service - 10 LABOUR - New
    - LINE 27: Service - 20 BOUGHT IN MATERIALS - New
    - LINE 28: Service - 30 BOUGHT IN SERVICES - New
    - LINE 29: Service - 40 PLANT HIRE - New
    - LINE 30: Service - 50 PREMIUM TIME - New
    - LINE 31: Service - 60 OVERHEAD - New

The 'Import Detail' screen should be referred to when looking for any problems with the import (missing data). A summary of each error generated is displayed in red.

The 'Summary' pod details the file name, file type (estimate or status), date and time of import as well as a breakdown of the number of rows (Orders, Operations, Services and Materials) added, updated, deleted and failed to save.

The 'Itemised' pod displays a description of each row imported into iPlan.

### 21.12.2. [File Export](#)

The 'File Export History' pod displays all exports to Sap that have run over the last seven days.

File Export History			
Exports for the last 7 days are shown below.			
Date Exported	Success	File Name	Status
22/04/2015 13:32:23	Yes	iPlanicom_22042015.133223364	

The date exported, success, file name and status are displayed for each export.

### 21.12.3. [Manual Triggers](#)

The 'Manual Triggers' pod enables the user to manually run the 'Approved Estimates' export. This export runs automatically overnight.

However, if you would like to run the export manually, select the 'Approved Estimates' button (this will not affect the overnight export).

**Manual Triggers**

Click the relevant button below to start the corresponding export process.

Approved Estimates

A file will be generated and stored on the iPlan server. If you would like a copy of the file, contact IAM Tech Service Desk at [support@iamtech.com](mailto:support@iamtech.com).

## 22. [Filtering Grids in iPlan](#)

iPlan has a number of 'grids' that are used to display large amounts of data.

The grids enable data to be filtered, sorted and organised in a standardised way.

All grids work in the same way. Data is displayed in a table format. The number of items per page can be specified by the user; for example, show me 100 items per page. All grids have a 'pager' at the bottom of the grid to move between screens.

All	14020	Unapproved	2	Ready for Approval	1	Awaiting Approval	2	Approved	14015	Rejected	0
<b>Orders</b>											
Order Nu...	Order Des...	#Scoped	#Unscoped	Priority	Project Type	Functional...	Win Num...	Approval Stat...	Order Cre...	Order Mo...	
030031571838	CHALWYN : PM - INSP. 1YRLY	0	1	C	Routine Maintenance	4733-CHEM-Z4- Z3-00_C	CHALWYN	Approved	03/10/2014	31/03/2015	
030031571839	CHALWYN : PM - INSP. 1YRLY	0	1	C	Routine Maintenance	4733-CHEM-Z4- Z3-00_C	CHALWYN	Approved	03/10/2014	31/03/2015	
030031571840	R01-**PM Non conformance**... replace	0	1	C	Shutdown	4733-JETY-6U- Z2-PA_5	54224	Approved	03/10/2014	31/03/2015	
030031571841	AT100 requires new laser unit fitting (d	0	1	C	Routine Maintenance	4733-MBLD-7B- Z0-AT_1	78877	Approved	03/10/2014	31/03/2015	
030031571842	AT100 NIR communication faults (time out	0	1	C	Routine Maintenance	4733-MBLD-7B- Z0-AT_1	78877	Approved	03/10/2014	31/03/2015	
030031571843	R01-6 MONTHLY INSPECTION	0	1	C	Shutdown	4733-MBLD-7B- Z0-AT_1	78877	Approved	03/10/2014	31/03/2015	
030031571844	AUDIT OF A4ACID RBI OPERATIONAL LIMITS	0	1	C	Routine Maintenance	4733-A4AC-9M- Z3-A4AA	72122	Approved	03/10/2014	31/03/2015	
030031571846	4m Scaffold Tower Required Above Sample	2	0	B	Routine Maintenance	4733-A4AC-9M- Z3-A4AA	72122	Approved	03/10/2014	31/03/2015	
<div> <div>1 2 3 4 5 6 7 8 9 10 ... 25</div> <div>items per page</div> <div>1 - 25 of 14015 items</div> </div>											

To 'sort' the grid, select the column heading for the type of data you would like to sort by.

In this example, to sort by priority, select the Priority column heading to sort by priority in ascending order. Select the column again to sort in descending order.

To filter the grid (reduce the number of items displayed), select the filter icon on the column heading you wish to filter by.

All	14020	Unapproved	2	Ready for Approval	1	Awaiting Approval	2	Approved	14015	Rejected	0
<b>Orders</b>											
Order Nu...	Order Des...	#Scoped	#Unscoped	Priority	Project Type	Functional...	Win Num...	Approval Stat...	Order Cre...	Order Mo...	
030031571838	CHALWYN : PM - INSP. 1YRLY	0	1	C	Routine Maintenance	4733-CHEM-Z4- Z3-00_C	CHALWYN	Approved	03/10/2014	31/03/2015	
030031571839	CHALWYN : PM - INSP. 1YRLY	0	1	C	Routine Maintenance	4733-CHEM-Z4- Z3-00_C	CHALWYN	Approved	03/10/2014	31/03/2015	
030031571840	R01-**PM Non conformance**... replace	0	1	C	Shutdown	4733-JETY-6U- Z2-PA_5	54224	Approved	03/10/2014	31/03/2015	

A filter popup will be displayed. By default, 'Contains' is selected. This type of filter will return any records that contain the search result entered.

Other filter types are as follows: 'Does Not Contain', 'Is Equal To', 'Is Not Equal To', 'Starts With' and 'Ends With'.

Once a file type is selected, enter a search term in the free text field provided.

Select the 'Filter' button to apply the filter and update the grid.

Multiple filters across any grid column can be applied at a time.



This is a powerful tool to return a very specific set of data.

To clear a filter, select the filter icon next to the filtered column. A filter popup will be displayed. Select the 'Clear' button to remove the filter and update the grid results.