CAP INTELLIGENCE

CAP·PLN · Planning, Estimating & Materials

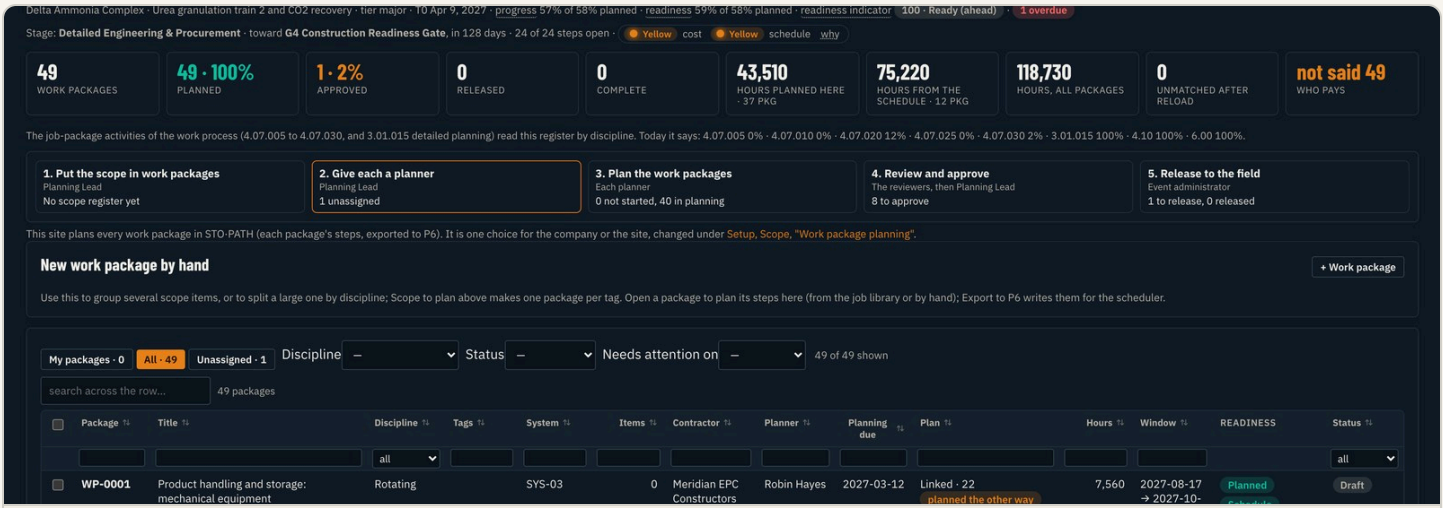
A MODULE OF CAP·PATH, THE CAPITAL PROJECT MANAGEMENT PLATFORM

Data-driven. Field-proven.

Every work face planned. Every class earned. Every part on its date.

One build-up: the packages, the estimate, and the materials.

CAP·PLN turns the Level 3 schedule into construction work packages by area and discipline, plans the installation work packages a crew can finish, reads them as the estimate at the class each gate asks for, and derives each material's order-by date from the step it feeds. One build-up.



The planning register on a project: construction and installation work packages. ILLUSTRATIVE DEMO DATA

THE PROBLEM

The work face opens before the package is ready, and the estimate never hears about it.

FRONTS OPENED UNREADY

A crew on a work face with a drawing, a spool, or a scaffold missing

A CLASS ON THE SLIDE

A Class 4 number presented at a Class 3 gate

PAID HOURS NOBODY STATED

Direct hours, schedule hours, and paid hours blurred into one number

LONG LEAD FOUND LATE

The order-by date passed before the package was planned

01 PACKAGE THE WORK FACE

Construction work packages from the schedule, and installation work packages a crew can finish.

CONSTRUCTION WORK PACKAGES FROM THE WBS

One construction work package per area and discipline, seeded from the Level 3 schedule's own structure and linked to the activities beneath it, so the contractor's schedule stays the plan. It is the owner's slice of that schedule, in the vocabulary of advanced work packaging.

INSTALLATION WORK PACKAGES A CREW CAN FINISH

Under each sits the installation work packages: one crew, one rotation, planned as steps with crew, duration, logic, crafts, and equipment. The page warns when one grows past a thousand hours, because a package a crew cannot finish is a package nobody can close.

CONSTRAINTS CLEARED BEFORE RELEASE

Each package carries a dated checklist: engineering, materials, equipment, scaffold and access, permits, prerequisite packages, simultaneous operations, checksheets, vendor support, turnover documents, the safety plan. Each line has an owner and a due date. Release over an open constraint is refused unless an administrator records why.

A PACKAGE IS A DOCUMENT

The first tab says what the pack must contain: the issued-for-construction drawings, the specification, the material take-off, the inspection plan and checksheets, the lift plan, work-face photos. A review round of named seats sets it reviewed, never a button, and the platform builds the pack as a revisioned PDF.

02 PRICE IT AT THE GATE'S CLASS

The estimate is the plan read as money, at the class each gate asks for. It is not a second tool.

CLASS 5 TO CLASS 1, TIED TO THE GATES

The AACE classes on your gate ladder, with Class 3 as the sanction estimate. Each is a dated snapshot priced through the rate table in force, with a coverage line stating what still carries no rate. Issuing writes the figure to the portfolio. The control estimate freezes at Class 2 or 1.

A CLASS IS EARNED, NOT DECLARED

A deliverables register on the structure of AACE 18R-97 holds the maturity of each front-end deliverable. A class reads as achieved only when every row reaches the level that class needs, so the class on the gate slide is the class the record supports.

PAID HOURS AND A RESOURCE PLAN

Each calendar states paid, productive, and scheduled hours. Field indirects, construction facilities and equipment, the owner's team, and commissioning support are planned by day. Each contractor hands in its plan, and the estimate prices the accepted version only.

TRENDS BEFORE CHANGES

A trend is raised when it is first seen, becomes a change notice, and is approved or rejected on the record. An approved change counts in the control budget. Contingency reads from the risk register, with the owner's confidence level beside it, and management reserve is held outside the total.

03 GET THE MATERIALS ON THEIR DATES

Order-by dates that come from the plan, and a long-lead list that is released first.

A BILL OF MATERIALS FROM THE PIPING SPEC

Lines come from the piping spec the line number names, an equipment set, or your catalogue. An exception takes a reason and an engineering signature, and release is refused while one is unsigned.

DATES DERIVED, NOT GUESSED

Need-by is the step's start less your staging lead. Order-by is need-by less the lead time, with a buffer on a long-lead line. Move the plan and the dates move. A promise that lands after the step it feeds lights the lamp.

LONG LEAD GOES FIRST

A threshold by project tier marks the long-lead lines, and they release ahead under their own number with the order-by frozen at release, so trigger dates met is a measured figure. An early buy on undecided scope asks who authorized it. Scope deferred later says cancel or hold the order.

QUOTES BY ITEM, ORDERS BY YOU

A quote request carries one row per item, and a recorded quote prices every line that uses it. The release list goes out in your layout and carries the order into your purchasing system. Nothing is ordered here.

04 PLAN WHAT HOLDS THE WORK

The inspection plan, the turnaround window, and clean files for the systems around it.

THE INSPECTION AND TEST PLAN

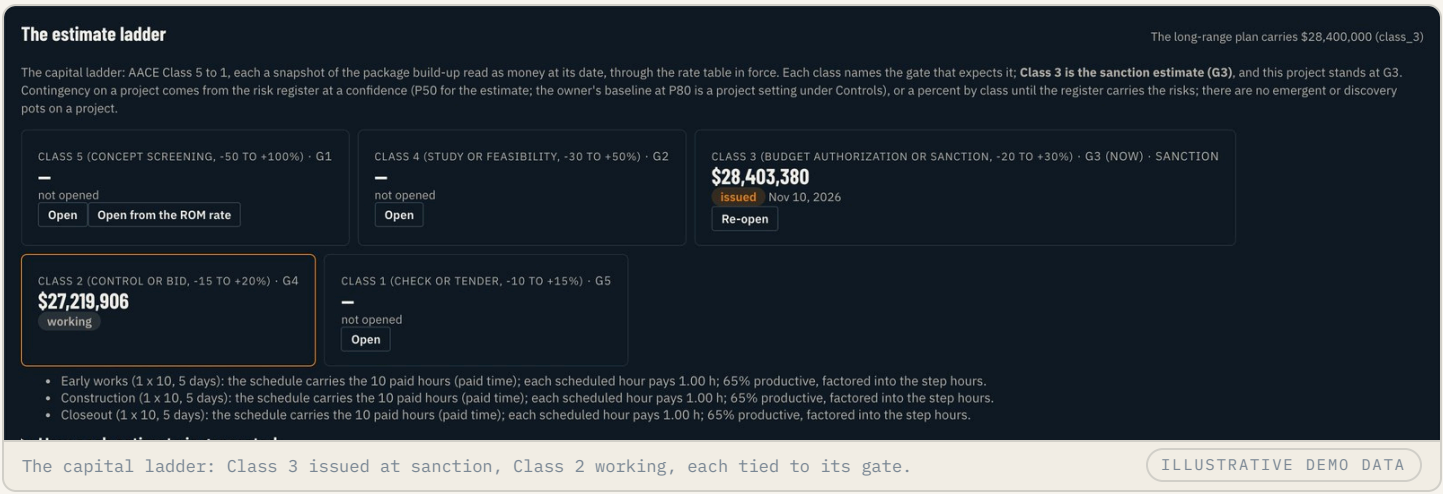
A named inspector owns the plan and issues it by revision. Quality is not planned until it is issued, every hold point sits on a step, and the hours for the examination land on that step so the planner carries them.

RIDING A TURNAROUND WINDOW

A package in the window takes the turnaround's own milestones as constraints: the job pack, the materials, the pre-work. Tie-ins sit on a register the turnaround manager sees too, the turnaround's dates govern, and a late inclusion needs the steering team's recorded acceptance.

FILES FOR THE SCHEDULER AND YOUR CMMS

Packages planned here export to the scheduling tool with stable codes, and progress goes back as a file. A documented API with company keys and signed webhooks carries the same records to anything you build.



The capital ladder: Class 3 issued at sanction, Class 2 working, each tied to its gate.

ILLUSTRATIVE DEMO DATA

WHERE THE LINE SITS

It plans with you. It does not plan for you.

- **The contractor's schedule decides.** Levelling, logic, and the critical path stay in the scheduling tool. The platform checks against it and runs no second critical path.
- **It never invents hours.** A missing rate is shown as missing, never assumed, and nothing above the first class issues until the labor basis is set.
- **It records, it does not order.** The release list carries the order. There is no inventory, no warehouse, and no bidding here.
- **No model writes the plan.** Every figure is arithmetic on your own records. The coach can explain a screen; it never plans, prices, or approves.

WHAT CHANGES

PLANNED THE USUAL WAY

- × Work fronts opened with a constraint still open
- × An estimate class declared on the gate slide
- × Field indirects carried as a percentage
- × Long-lead items identified after their order-by date

PLANNED IN CAP·PLN

- ✓ A dated constraints checklist that gates every release
- ✓ A class that follows the maturity of the deliverables
- ✓ A resource plan by day and accepted contractor plans
- ✓ Order-by dates derived from the plan, long lead released first

One add-on, three modules. CAP·SCP (Scope Management), CAP·PLN (Planning, Estimating & Materials) and CAP·EXE (Execution & Field Quality) are one add-on to the CAP·PATH subscription, per site, and one add-on covers both the capital and the turnaround door a site holds. The gated work process, the portfolio, governance, risk, cash forecasting, lessons, the readiness indicator, and the role guides are in the base platform.

Bring your Level 3 schedule and your last estimate.

We seed the construction work packages from your schedule, plan the first installation packages with your team, and show the estimate read from your own steps.

Book a walkthrough

capintelligence.ai

Call or text +1 832 900 2592

STO Intelligence LLC · CAP Intelligence is its capital-projects practice · Veteran-owned, U.S. Army · Owner-side experience across refining, petrochemicals, industrial gas, LNG, and power · Public-framework methods (AACE, CII front-end planning practice, PMI, DCMA, and GAO) · Screens show the live product with illustrative demonstration data.