

CONNECTED ANALYTICS



Information in this document is subject to change without notice. Companies, names and data used in examples are fictitious.

Copyright ©2024 by InEight. All rights reserved. No part of this document may be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose, without the express permission of InEight.

Microsoft Windows, Internet Explorer and Microsoft Excel are registered trademarks of Microsoft Corporation.

Although InEight Explore has undergone extensive testing, InEight makes no warranty or representation, either express or implied, with respect to this software or documentation, its quality, performance, merchantability, or fitness for purpose. As a result, this software and documentation are licensed "as is", and you, the licensee are assuming the entire risk as to its quality and performance. In no event will InEight be liable for direct, indirect, special, incidental or consequential damages arising out of the use or inability to use the software or documentation.

Release 24.3 Last Updated: 09 April 2024



CONTENTS

NAVIGATION AND STANDARD DASHBOARDS	7
1.1 Standard Dashboards	8
1.1.1 Dashboard Management	8
1.1 Step by Step 1 – Dashboard Management	9
1.1 Step by Step 2 – Navigate to Explore	10
1.1.2 Operations Dashboard	11
1.1 Step by Step 3 – Operations Dashboard	14
1.1.2.1 Operations Dashboard Current Visuals	18
Daily Plan Summary - Organization Selection Options	
1.1.3 Project Performance Dashboard	
1.1 Step by Step 4 – Project Performance Dashboard	
Performance Header Values	
1.1.4 Schedule Dashboard	
1.2 Explore Permissions	
1.3 Dashboard Folders	
1.3.1 Folder Creation	
1.3 Step by Step 1 – Create Dashboard Folders	
1.3.2 Move Dashboards to a Folder	
1.3 Step by Step 2 – Move a Dashboard into a Folder	
1.4 Dashboard Favorites	
1.5 Dashboard Sharing and Collaboration	
1.5.1 Set a Dashboard as Your Default	
1.5.2 Share a Dashboard with Others	
1.5 Step by Step 1 – Share a Customized System Dashboard	
1.5.3 Collaborate on a Shared Dashboard with Others	
1.5.4 Remove Sharing	
1.5 Step by Step 2 – Remove Sharing	
1.5.5 Embed External Content	40

1.5 Step by Step 3 – Set-up Adding External Content	
1.5.5.1 Deleting an Embedded Dashboard	
1.5 Step by Step 4 – Delete an Embedded Dashboard	43
1.5.6 Share External Content	43
1.5 Step by Step 5 – Share External Content with Others	43
1.6 Dashboard Examples	46
1.6 Step by Step 1 – Package Milesetone Dashboard	47
Package Milestone Header Values	50
Previewing Meta-data	51
1.7 API Documentation	53
1.7.1 API Documentation Overview	53
CUSTOM DASHBOARDS	55
2.1 Custom Dashboards	56
2.1.1 Edit Dashboard	56
2.1 Step by Step 1 – Edit a Dashboard	56
2.1.2 Dashboard Customization	58
2.1 Step by Step 2 – Create a Graph	60
2.1.3 Save Dashboard	68
2.1.4 Dashboard Printing	70
2.1.5 Add a Bookmark	70
2.1 Step by Step 3 – Add a Bookmark	71
2.2 Dashboard Filtering	74
2.2 Step by Step 1 – Filter a Dashboard, part 1	76
2.2.0.1 Filtering Options	78
2.2 Step by Step 2 – Filter a Dashboard, part 2	81
2.2.0.2 Page Filtering	88
2.2.0.3 Filter On All Pages	89
2.2.0.4 Go to the Next level in the Hierarchy	90
EXPLORE MOBILE	93
3.1 Mobile Application	94
3.1 Step by Step 1 – Pull up a dashboard	94
3.1.1 Manipulate a dashboard	95

STEP-BY-STEP PROCEDURES

1.1 Step by Step 1 – Dashboard Management	9
1.1 Step by Step 2 – Navigate to Explore	10
1.1 Step by Step 3 – Operations Dashboard	14
1.1 Step by Step 4 – Project Performance Dashboard	21
1.3 Step by Step 1 – Create Dashboard Folders	27
1.3 Step by Step 2 – Move a Dashboard into a Folder	30
1.5 Step by Step 1 – Share a Customized System Dashboard	34
1.5 Step by Step 2 – Remove Sharing	39
1.5 Step by Step 3 – Set-up Adding External Content	40
1.5 Step by Step 4 – Delete an Embedded Dashboard	43
1.5 Step by Step 5 – Share External Content with Others	43
1.6 Step by Step 1 – Package Milesetone Dashboard	47
2.1 Step by Step 1 – Edit a Dashboard	56
2.1 Step by Step 2 – Create a Graph	60
2.1 Step by Step 3 – Add a Bookmark	71
2.2 Step by Step 1 – Filter a Dashboard, part 1	76
2.2 Step by Step 2 – Filter a Dashboard, part 2	81
3.1 Step by Step 1 – Pull up a dashboard	94

This page intentionally left blank.





NAVIGATION AND STANDARD DASHBOARDS

InEight Inc. | Release 24.3

1.1 STANDARD DASHBOARDS

InEight Explore is available to all users in an organization that have been assigned the applicable role or permissions and is a separate application from those used in any given project level. You do not have to be signed in to a project to access Explore. The information provided is not in real time for any given project.

There are multiple out-of-the-box dashboards available in Explore, with each having its own refresh schedule as determined with the product groups:

- Advanced Work Package
- Change issue
- Control audit
- Connected analytics
- Contract
- Control
- Core project
- Estimate
- Manhour curves
- Material tracking
- Operations
- Package milestone
- Portfolio
- Project performance
- Work planning

NOTE Explore is accessible from the Main menu on the top navigation bar for any project. You do not have to be assigned to a particular project to access or use the Explore dashboards.

1.1.1 Dashboard Management

This Explore settings page lets administrators hide dashboards at the organization level, control the dashboard refresh schedule, and initiate a dashboard refresh on demand. You must have the role of

Organization Admin (or above) and the required permissions to view and access the Dashboard Management page.

Explore settings	Select all
Access explore settings	

1.1 Step by Step 1 — Dashboard Management

- 1. To manage dashboards, click the **Main menu** icon (**E**), and then select an organization.
- 2. Under Organization Settings, go to > Settings > Explore > Dashboard Management.

				DASHBOA	ARD MANAGEMENT				Save 🚺 🗄 🖸
Dashboard	Modified date	Modified by	Visibility	Last successful refresh	Refresh status	Schedule status	Next refresh	Average refresh time	Refresh schedule
Advanced Work Packaging Dashboard	06/02/2021 2:10:35 PM	Anitha Dooshety	Θ	06/04/2021 10:13:45 AM	Success	Active	06/05/2021 5:00:00 AM	1h, 41m	🖽 Set schedule
Change issue dashboard	05/26/2021 11:05:18 PM	System	0	06/02/2021 7:52:00 PM	Success	Disabled		30m	Set schedule
Connected analytics utilization	05/24/2021 5:17:43 PM	System	0	06/04/2021 2:02:40 AM	Success	Active	06/05/2021 2:00:00 AM	16m	Set schedule
Contract dashboard	05/24/2021 5:18:57 PM	System	\bigcirc	06/04/2021 3:54:21 AM	Success	Active	06/05/2021 1:00:00 AM	42m	🗂 Set schedule
Control Audit Dashboard	05/26/2021 2:48:06 PM	karen loftus	\odot	05/30/2021 5:37:47 AM	• Failed	Active	06/06/2021 5:00:00 AM	35m	🖽 Set schedule
Core Project Information	05/24/2021 5:20:06 PM	System	\odot	06/04/2021 11:58:56 AM	Success	Active	06/05/2021 6:00:00 AM	1h, 38m	Set schedule
InEight Compliance forms dashboard	05/26/2021 11:05:18 PM	System	\odot	06/02/2021 7:51:36 PM	Success	Disabled		13m	🗇 Set schedule
Manhour curves	05/24/2021 5:18:16 PM	System	\bigcirc	06/04/2021 2:48:07 AM	Success	Active	06/05/2021 12:00:00 AM	57m	🗂 Set schedule
Material tracking dashboard	05/24/2021 5:19:31 PM	System	\odot	06/04/2021 3:47:41 AM	Success	Active	06/05/2021 3:00:00 AM	25m	🖽 Set schedule
Operations dashboard	05/26/2021 11:05:17 PM	System	\odot	05/31/2021 3:44:15 PM	• Failed	Disabled		17m	Set schedule
Package milestone dashboard	05/24/2021 5:16:08 PM	System	\odot	06/03/2021 9:35:50 PM	Success	Active	06/04/2021 9:00:00 PM	27m	🗇 Set schedule
Portfolio Dashboard	05/28/2021 9:43:46 AM	System	\bigcirc		• Failed	Disabled			🖽 Set schedule
Project performance dashboard	05/27/2021 2:47:15 PM	System	0	06/03/2021 10:23:21 PM	Success	Active	06/04/2021 10:00:00 PM	53m	🖽 Set schedule
Work planning dashboard	05/24/2021 5:17:15 PM	System	\odot	06/03/2021 11:36:34 PM	Success	Active	06/04/2021 11:00:00 PM	43m	Set schedule

The page shows a list of the organization dashboards where you can:

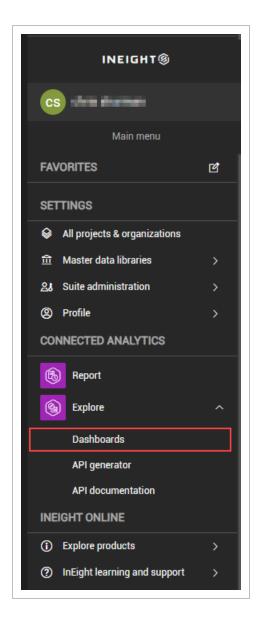
- · Set whether the dashboard is shown or hidden
- See the dashboard refresh status. If the status is Failed, click the link to view the error message
- See the average refresh time to help when adjusting schedules and to avoid having multiple dashboards refresh at the same time.
- 3. To define the refresh schedule, click **Set schedule**. The Dashboard refresh slide-out panel opens. At the top it shows the number of times per day that the dashboard can be refreshed.

	Demo 21.5 🕐 🗘	8	٢
		‡≣	Q
Next refresh			
06/05/2021 5:00:00 AM	Dashboard refresh 1 of 1 daily refreshes available		>
	Refresh schedule		\odot
06/05/2021 2:00:00 AM	Frequency		
06/05/2021 1:00:00 AM	Daily		•
06/06/2021 5:00:00 AM	Time zone (UTC-07:00) Mountain Time (US & Canada)		
06/05/2021 6:00:00 AM	Time		
	4 v 00 v AM	•	8
06/05/2021 12:00:00 AM	⊙ Add		
06/05/2021 3:00:00 AM			
06/04/2021 9:00:00 PM			
06/04/2021 10:00:00 PM			
06/04/2021 11:00:00 PM			

- 4. Set the Refresh schedule toggle to view and make changes to the settings.
 - You can click **Refresh now** to manually refresh the selected dashboard. A manual refresh does not count towards the available number of daily scheduled refreshes.
- 5. Click **Save** to set the refresh schedule.

1.1 Step by Step 2 — Navigate to Explore

- 1. From the home landing page, click the **Main menu** icon (**E**).
- 2. Click **Explore**, and then select **Dashboards**.



1.1.2 Operations Dashboard

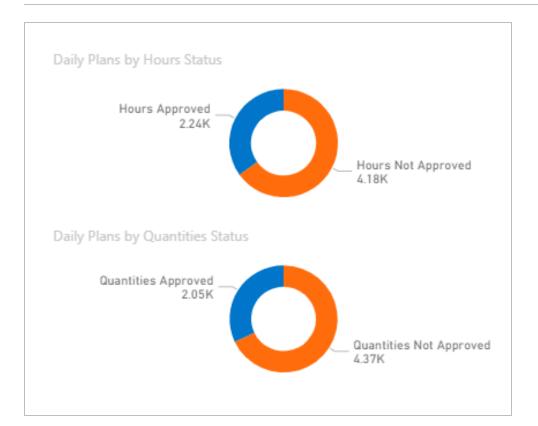
The Operations dashboard is a system-created standard dashboard available to all users and focuses on the "front office" statistics. This dashboard is permanently listed as an available dashboard; it cannot be deleted. In a later lesson, you will learn how to create a dashboard specific for your needs.

NOTE To make a dashboard your default, or primary, dashboard, click the **ellipses** of the dashboard you want, and then select **Set as Default**.

Explore	*							√ Filters
All (27) -	Search Q							P Search
				Average Daily Plans Created Per 24	Day Plans - In Planning 577		11ing Approval Total Daily Plan 578 7.006	
🖭 🚸 🗹 🛞 <		Daily Plan Summary -	Organization	24	577	2,334 1,0	7,000	Plan Date
Created by: System	*	Project	Top 10 Projects -	Daily Plans by Status		Daily Plans by Hours Stat		is (All)
Material tracking dashboard Last data refresh: 03/12/2020 12:08 AM Created by: System	1	All	/ Plan Status OApp	roved OAwaiting Approval OExecu	tion @Final - Processing complete ● In	Planning Hours Approved 2.48		Filters on all page
nat test Last data refresh: 03/11/2020 08:49 PM Created by: Natalie Takacs	1	Plan Status	2K - 9.4X				Hours Not Approve	IsActive is True
OGC - Quantity Reports Last data refresh: 03/12/2020 02:56 AM Created by: jakob sjuta-ptr	:	AI VE		0.5K				
Operations dashboard (Default) Last data refresh: 03/12/2020 02:56 AM Created by: System	1	Plan Date	0K 0.4K 103442 - 1	Oversi The testing!! Central		- 103505 - Guantities Approve MECT - 2.239		
Operations Dashboard - Catie Last data refresh: 03/12/2020 02:56 AM Created by: Catie Williams		(3, 3 ⁺ 13/2019 - 3/12/2020 ▶	Nays 7 North 0 Platform	lational Bentway - II R1 70 Serret Project HD Platform Replac	National Edge Childre., Center Cernet., One Hospital Design., Office - PY Building 2017	LACMTA Blue Line Signal	Quantities Not Appr	roved
Operations- my org New! Last data refreah: 03/12/2020 02:56 AM Created by: Natalie Takacs	< 1	Desire		III_Upd	Building 2017 Misc	Sys Re		
Package milestone dashboard Last data refresh: 03/12/2020 10:43 AM Created by: System	:	ицест	72692	SHIFT123 Execution		is Not Approved Hours Not Approved	Abb	bie Ladv dat sjda
Project Level Testing	:	11Report testingf1 - 11 R1 HD Platform Replacement 11,Upda	71894 pn 001	RRST SHIFT Final - Pro RRST SHIFT Execution	cessing complete 0 Quantitie	is Approved Hours Approved is Not Approved Hours Not Approved	goutham m .tsks vino	dat sida odkuma dat sida
Last data refresh: 03/11/2020 08:49 PM			71901	RIRST SHIFT Final - Pro	cessing complete 0 Quantitie cessing complete 0 Quantitie		goutham m Abb goutham m gou	ble Ladv utham m utham m
Created by: Catie Williams Project performance dashboard Last data refresh: 03/11/2020 08:49 PM	÷ :						y Buckner Johnathon Harper Ellie	e Barko e Barko odkuma
Created by: Catie Williams Project performance dashboard Last data refeet: 02/11/2020 08:49 PM Created by: System Sharing Test New!	*1		71910 71911	FIRST SHIFT Final - Pro				
Created by: Cate Williams Project performance dashboard Last data refersh 0.011 / 2020 06.49 PM Created by System Sharing Text Newl Last data refersh 0.021 / 2020 06.50 PM Created by Naale Takace Swadea hashboard coor	* =		71910 71911 71912 71921 71922	RRST SHIFT Final - Pro RRST SHIFT In Plannin RRST SHIFT In Plannin RRST SHIFT Availing J	g 0 Quantitie g 0 Quantitie Approval 0 Quantitie	is Not Approved Hours Not Approved vino is Not Approved Hours Not Approved sarge is Not Approved Hours Not Approved Auto	disumar m vino eevit Aust p Test12 111	stin Helc 11 111
Created by: Cate Williams Project performance das/board Last data retricted 100111/2020 68:48 PM Created by: System Sharing Test New! Last data reflectiv 0011/2020 65:50 PM Created by: Nable Takacs			71910 71911 71912 71922 71922 71922 71922 71923 0	RRST SHIFT Final - Pre RRST SHIFT In Plannin RRST SHIFT In Plannin RRST SHIFT Avablegi RRST SHIFT In Plannin RRST SHIFT Execution	g 0 Quantia g 0 Quantia Approval 0 Quantia g 0 Quantia 0 Quantia	is Not Approved Hours Not Approved vino is Not Approved Hours Not Approved tanji is Not Approved Hours Not Approved Auto in Not Approved Hours Not Approved Brian is Not Approved Hours Not Approved Sariji	dixumar m vino eesi t Aast o Testi2 111 1 Kommer Abig Besi t Aags	stin Helc II 111 gall Ma stin Helc
Created by Cate Williams Project performance databaard Last data erleant 3011 frazio de 48 PM Created by System Sharing Text New! Last data refeant 3011 frazio de 58 PM Created by Naile Takace Swardenh databaard copy Last data menin 3011 02020 de 59 PM			71910 73911 73912 73921 73923 73923 73930 73930 73930 73933 77	RRST SHIFT Final - Pro RRST SHIFT In Plannin RRST SHIFT In Plannin RRST SHIFT Availing / RRST SHIFT In Plannin	g 0 Quantis g 0 Quantis kproval 0 Quantis g 0 Quantis 0 Quantis 0 Quantis 0 Quantis	Is Not Approved Hours Not Approved vino Is Not Approved Hours Not Approved sargle Is Not Approved Hours Not Approved Auto Is Not Approved Hours Not Approved Srian	dixmar m vino exert Auto Test12 1111 Komer Abig exert Auto Test1 1111 Test1 1111	atin Helc 11.111 Igell Mar
Created by Cate Williams Project performance dashboard Last as an entron, 2011 2020 68 69 MA Consoling Vision 2020 68 69 MA Banding Teet Nami Banding Teet Nami Created by Namadan Analog Cate and Project 2011 Ac20 65 80 MA Consoling Visional Cate Acad Consoling Visional Cate Acad Consoling Visional Cate Acad Consoling Visional Cate Acad Cate Acad Acad Acad Cate Acad Acad Acad Cate Acad Acad Cate Acad Acad Cate Acad Acad Cate Acad Acad Cate Acad Acad Cate Acad Cate Acad Acad Cate Acad Acad Cate Acad Acad Cate Aca	< 1	*	71910 73911 73912 73921 73923 73923 73930 73930 73930 73933 77	RIST SHIFT Final - Re RIST SHIFT In Plannin RIST SHIFT In Plannin RIST SHIFT Availing RIST SHIFT Availing RIST SHIFT In Plannin RIST SHIFT In Plannin RIST SHIFT Evection RIST SHIFT Evection RIST SHIFT Evection	g 0 Quantis g 0 Quantis kproval 0 Quantis g 0 Quantis 0 Quantis 0 Quantis 0 Quantis	s Not Approved Hours Not Approved vino I Not Approved Hours Not Approved and/ is Not Approved Hours Not Approved Auto I Not Approved Hours Not Approved Sarij is Not Approved Hours Not Approved Auto I Not Approved Hours Not Approved Auto	dixmar m vino exert Auto Test12 1111 Komer Abig exert Auto Test1 1111 Test1 1111	etin Halic 11 111 Igail Mai din Halic 11 111 11 111

All available projects under your organization can be viewed in the Operations dashboard. Users can only see projects they have access to, as is the case for all of Explore.

The Explore color scheme for charts uses a blue tone to represent positive or well-favored data. Orange color is used to represent negative or ill-favored data, typically indicating it is something that someone needs to act upon.

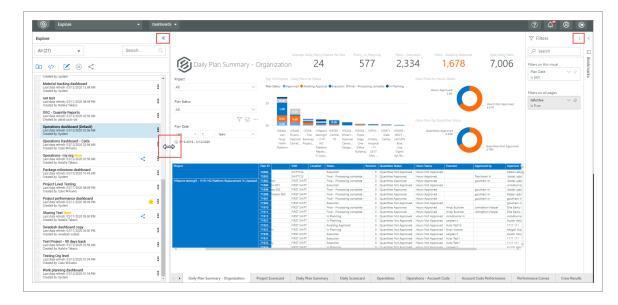


1.1 Step by Step 3 — Operations Dashboard

1. From the Dashboards page, select the **Operations** dashboard.

Ex	plore		<
A	II (9) 🗸	Search	Q
[+] 🖉 🛞 <		
	Change issue dashboard Last data refresh: 03/11/2020 05:42 PM Created by: System		:
	Connected analytics utilization Last data refresh: 03/11/2020 09:37 PM Created by: System		1
	Contract dashboard Last data refresh: 03/12/2020 01:18 PM Created by: System		
	InEight Compliance forms dashboard Last data refresh: 03/12/2020 01:16 PM Created by: System		:
	Manhour curves Last data refresh: 03/11/2020 11:35 PM Created by: System		:
	Operations dashboard (Default) Last data refresh: 03/12/2020 02:36 AM Created by: System	2	<u>∽</u> :
	Package milestone dashboard Last data refresh: 03/12/2020 10:13 AM Created by: System		:
	Project performance dashboard Last data refresh: 03/11/2020 07:38 PM Created by: System		:
	Work planning dashboard Last data refresh: 02/18/2020 05:44 AM Created by: System		

2. Expand or contract the size of the windows by moving the **handles** shown to the left or right.



• Select the **blue arrows** to collapse the side panel

• You can also click the blue arrows again to expand it



- 3. Under the Project drop-down title, click the (Select a Project) drop-down.
 - You can also scroll to search for a project or type in a project name in the search bar to select a project
- 4. In the search bar, type [your project name].
- 5. Ensure the box in front of your project name turns from an outline to completely filled in to select it.

All		~
Okasaa		
√ 10509	1	

- The summaries, graphs, and data presented here are specific to this project and the data is considered live
- You should see the project Daily Plan Summary Organization dashboard shown below
- If the report is blank, it may be that the time period shown is too restrictive

Project		Top 10 Projects - D	aily Plans by Status			Daily	Plans by Hours Status	
All	\sim	10						
		8						
Plan Status								
All	\checkmark	6						
	78					Daily	Plans by Quantities Status	
Plan Date	0	4						
Last \checkmark 1	Days ~							
m 10/8/2019 - 10/8/2019	Select	2						
	Days	0						
	Weeks	U I						
Project Plan ID Plan Name Shift		uantities Status He	ours Status Executor Ap	proved by Approver	1 Approver 2			
	Months							
	Months (Calendar)							
	Years							
	Years (Calendar)							

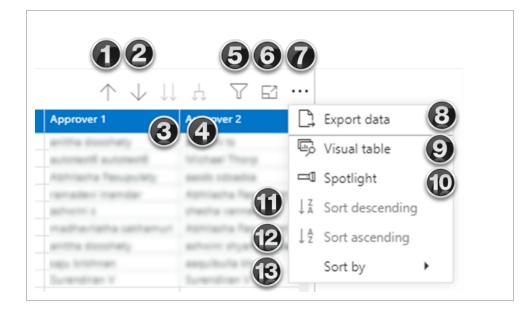
All dashboards contain options for the graphs, charts and tables displayed. Individual charts will use some combination of these functions:

Overview - Operations Dashboard Graph, Chart & Table Options

	Term	Definition
1	Drill Up	Drill up to next account code in hierarchy.
2	Drill Down	Drill down to next account code in hierarchy.
3	Go to Next Level	Go to the next level in the account code hierarchy.
4	Expand Level	Expand all down one level in the account code hierarchy.
5	Filter	Pares back data that affects the visual.
6	Focus Mode	Expand one visual in the dashboard.

Overview - Operations Dashboard Graph, Chart & Table Options (continued)

	Term	Definition
7	More Options	Opens options 8-13.
8	Export Data	Export data only to Excel (not visuals).
9	Show Data	Shows data/chart in a larger view.
10	Spotlight	Focuses dashboard on one specific visual.
11	Sort Descending	Sort data in descending order.
12	Sort Ascending	Sort data in ascending order.
13	Sort By	Allows you to sort by column.



NOTE The Filter option identifies the specific filters in use for the chart. In this case, CalendarDate and IsActive is True.

	Filters and	slicers affecting this vis	sual
			Jinda
	CalendarD	Jinda	
	2/4/2019 -	Jinda	
ved			Jinda
	IsActive	Inda	
	is True	Inda	
	is noe		Jinda
_		aannin argemaander	Jnda
		ashwini shyamsundar	ashwini shyamsunda

1.1.2.1 Operations Dashboard Current Visuals

The default view in this dashboard is the Daily Plan Summary – Organization. On this tab, preset headers are as follows:

- Average Daily Plans Created Per Day
- Plans In Planning
- Plans Execution
- Plans Awaiting Approval

• Total Daily Plans

Daily Plan Sun	nmary - Orga	anizatio	Average Daily Plans Created Per l	Day Plans - In Planning 723	Plans - Execution 2,895	Plans - Awaiting Approval 1,622	Total Daily Plans 7,564
Project	Т	op 10 Projects	- Daily Plans by Status		Daily F	Plans by Hours Status	
All	V P	'lan Status 🏼 🔍 Aj	pproved OAwaiting Approval OExecut	ion ●Final - Processing complete ● In	Planning	Hours Approved	
Plan Status			_				
All	2						Hours Not Approved 5.25K
All	~	0.9K	1.0K				
	0	0.6K	0.5K		Daily P	lans by Quantities Status	V E ··
Plan Date			103442 - 10336 103565 - !!AK-2	103424 - 103554 - KPPK1 103671 -	110083 -	Quantities Approved	
Last ∨ 1 Years	~	Riversi National	Van - The Central - R1 HD		OH KTG Get	2.14K	
E 2/4/2019 - 2/3/2020		Cemet	North Project Replac		Work		
			Platform	Design Office - FY Building 2017 Misc	Build	$\uparrow \downarrow$	_ Quantities Not Approved 5.42K
Project	Plan ID e	Shift	Platform Location Status	Building 2017		← ↓ Executor Approved by	5.42K
Project	71749	TC_430623		Building 2017 Misc Revision Quantities Status 0 Quantities Approved	Hours Status Hours Approved	Executor Approved by	5.42K ↓↓↓ ▽⊡・
Project	71749 71751	TC_430623 Middle Shif	Location Status Approved Approved	Building 2017 Misc Revision Quantities Status 0 Quantities Approved 0 Quantities Approved	Hours Status Hours Approved Hours Approved	Executor Approved by ashwini shyamsundar ashwini shyamsundar	5.42K Approver 1 Appr ashwini shyamsundar ashwini shyamsundar
Project	71749 71751 71754	TC_430623 Middle Shif Middle Shif	Location Status Approved Approved Approved	Building 2017 Misc Revision Quantities Status 0 Quantities Approved 0 Quantities Approved	Hours Status Hours Approved Hours Approved Hours Approved	Executor Approved by ashwini shyamsundar ashwini shyamsundar	5.42K Approver 1 App ashwini shyamsundar ashwini shyamsundar
Project	71749 71751 71754 71755	TC_430623 Middle Shif Middle Shif Middle Shif	Location Status Approved Approved Execution	Building 2017 Misc	Hours Status Hours Approved Hours Approved Hours Approved Hours Not Approved	Executor Approved by ashwini shyamsundar ashwini shyamsundar ashwini shyamsundar	5.42K Approver 1 App ashwini shyamsundar ashwini shyamsundar ashwini shyamsundar ashwini shyamsundar
Project	71749 71751 71754 71755 71756	TC_430623 Middle Shif Middle Shif Middle Shif Middle Shif	Location Status Approved Approved Execution Approved	Building 2017 Misc Revision Quantities Status 0 Quantities Approved 0 Quantities Approved 0 Quantities Not Approved 0 Quantities Proved	Hours Status Hours Approved Hours Approved Hours Not Approved Hours Not Approved	Executor Approved by ashwini shyamsundar ashwini shyamsundar ashwini shyamsundar ashwini shyamsundar	5.42K Approver 1 App ashwini shyamsundar ashwini shyamsundar ashwini shyamsundar ashwini shyamsundar ashwini shyamsundar
Project	71749 71751 71754 71755 71756 71757 d	TC_430623 Middle Shif Middle Shif Middle Shif Middle Shif Middle Shif	Location Status Approved Approved Execution Approved Approved	Building 2017 Misc Revision Quantities Approved Quantities Approved Quantities Approved Quantities Natherproved Quantities Approved Quantities Approved	Hours Status Hours Approved Hours Approved Hours Approved Hours Approved Hours Approved	Executor Approved by ashwini shyamsundar ashwini shyamsundar ashwini shyamsundar ashwini shyamsundar ashwini shyamsundar	5.42K Approver 1 App ashwini shyamsundar ashwini shyamsundar ashwini shyamsundar ashwini shyamsundar ashwini shyamsundar
Project	71749 71751 71754 71755 71756 71757 71757 d 71762 hours and qty	TC_430623 Middle Shif Middle Shif Middle Shif Middle Shif	Location Status Approved Approved Execution Approved	Building 2017 Mitsc., Revision Quantities Approved O Quantities Approved O Quantities Approved O Quantities Not Approved O Quantities Approved O Quantities Approved O Quantities Approved	Hours Status Hours Approved Hours Approved Hours Not Approved Hours Not Approved	Executor Approved by ashwini shyamsundar ashwini shyamsundar ashwini shyamsundar ashwini shyamsundar ashwini shyamsundar	5.42K Approver 1 App ashwini shyamsundar ashwini shyamsundar ashwini shyamsundar ashwini shyamsundar ashwini shyamsundar ashwini shyamsundar
Project	71749 71751 71754 71755 71756 71757 d	TC_430623 Middle Shif Middle Shif Middle Shif Middle Shif Middle Shif Middle Shif	Location Status Approved Approved Execution Approved Approved Approved	Building 2017 Misc Revision Quantities Approved Quantities Approved Quantities Approved Quantities Natherproved Quantities Approved Quantities Approved	Hours Status Hours Approved Hours Approved Hours Not Approved Hours Approved Hours Approved Hours Approved	Executor Approved by ashwini shyamsundar ashwini shyamsundar ashwini shyamsundar ashwini shyamsundar ashwini shyamsundar	5.42K Approver 1 App ashwini shyamsundar ashwini shyamsundar ashwini shyamsundar ashwini shyamsundar ashwini shyamsundar ashwini shyamsundar
Project	71749 71751 71754 71755 71756 71757 71757 71757 d 71762 hours and qty 71763 ntegration	TC_430623 Middle Shif Middle Shif Middle Shif Middle Shif Middle Shif Middle Shif Middle Shif	Location Status Approved Approved Execution Approved Approved Approved Approved	Building 2017 Misc Perision Quantities Approved Quantities Approved Quantities Approved Quantities Approved Quantities Approved Quantities Approved Quantities Approved Quantities Approved	Hours Status Hours Approved Hours Approved Hours Not Approved Hours Approved Hours Approved Hours Approved	Executor Approved by achivini shyamsundar achivini shyamsundar achivini shyamsundar achivini shyamsundar achivini shyamsundar achivini shyamsundar	5.42K
Project	71749 71751 71754 71755 71756 71756 71757 d 71762 hours and qty 71763 71764	TC_430623 Middle Shif Middle Shif Middle Shif Middle Shif Middle Shif Middle Shif Middle Shif Middle Shif	Location Status Approved Approved Biscution Approved Approved Approved Approved	Building 2017 Misc Revision Quantities Approved Quantities Approved Quantities Approved Quantities Approved Quantities Approved Quantities Approved Quantities Approved Quantities Approved Quantities Approved Quantities Approved	Hours Status Hours Approved Hours Approved Hours Approved Hours Approved Hours Approved Hours Approved Hours Approved	Executor Approved by ashivini shyamsundar ashivini shyamsundar ashivini shyamsundar ashivini shyamsundar ashivini shyamsundar ashivini shyamsundar ashivini shyamsundar	5.22K Approve 1 P P P P P P P P P P P P P P P P P P
Project	71749 71751 71755 71755 71756 71757 71758 71759 71750 71762 71765 71765 71765 71765 71765 71770	TC_430623 Middle Shif Middle Shif Middle Shif Middle Shif Middle Shif Middle Shif Middle Shif Middle Shif Middle Shif Middle Shif	Location Status Approved Approved Exaction Approved Approved Approved Approved Approved Approved Approved Approved	Building 2017 Misc Revision Quartities Aproved Quartities Approved Quartities Approved	Hours Status Hours Approved Hours Approved	Executor Approved by administ physical constraints administ physical constraints	5.22K Approver 1 Aop abiviti shyamundar abiviti shyamundar
Project	71740 71751 71755 71755 71755 71757 d 71758 71759 71760 71765 71765 71765 71765 71765 71765 71767 71767	TC_430623 Middle Shif Middle Shif	Location Status Approved Approved Becution Approved Approved Approved Approved Approved Approved Approved Approved Approved Approved Approved	Building 201 Misc. Net. Misc. Periodo Quantities Approved 0 Quantities Not Approved	Hours Satus Hours Approved Hours Approved Hours Approved Hours Approved Hours Approved Hours Approved Hours Approved Hours Approved Hours Approved Hours Approved	Executor Approved by achieved by a achieved by ansurant achieved by ansurant achieved by annurant achieved by annu	5.22% Approver 1 App abhini biyansundar abhini biyansundar
Project	71740 71751 71754 71755 71756 71757 71758 71759 71750 71763 71765 71765 71766 71767 71767 71770 71770 71772 71772	TC_430623 Middle Shif Middle Shif	Location Sense Approved App	Building 2017 Mitc	Hours Setue Hours Approved Hours Approved	Executor Approved by achievin stynamusca achievin stynamusca	5.22K
Project	11749 71751 71754 71755 71756 71757 8 71764 71765 71765 71766 71766 71766 71766 71766 71766 71766 71767 71770 71772 71772 71772 71778 71778	TC_430623 Middle Shif Middle Shif FiRST SHIFT FIRST SHIFT	Location Status Approved Approved Approved Exection Approved Approved Approved Approved Approved Approved Approved Approved Approved Approved Approved Approved Approved Approved	Building 2017 Misc Periodia Quarterise Approved Quarterise Kor Approves Quarterise Kor Approved Quarterise Kor Approved Quart	Hours Status Hours Approved Hours Approved	Executor Approved by achievin stynamusca achievin stynamusca	5.22K
Project	71740 71751 71754 71755 71756 71757 71758 71759 71750 71763 71765 71765 71766 71767 71767 71770 71770 71772 71772	TC_430623 Middle Shif Middle Shif	Location Sense Approved App	Building 2017 Mitc	Hours Status Hours Approved Hours Approved	Executor Approved by ashelin by parturdar ashelin by parturdar	5.22K

Daily Plan Summary – Organization Selection Options

The following table provides an explanation of each of the values in the Daily Plan Summary - Organization.

Overview – Daily Plan Summary Dashboard Graph, Chart and Table Options

	Term	Definition
1	Project	The specific projects being used for the analysis.
2	Plan Status	Defined at the organizational level, such as Approved, Awaiting Approval, Execution, Final - Processing Complete and In Planning.
3	Plan Date	The window of time designated for the graphs.

In addition to the default Daily Plan Summary – Organization tab, eight additional report/chart options are available to view and/or personalize.

Overview – Other Operations dashboard Reports/Charts

	Term	Included Graphs
1	Project Scorecard (G/L or PF)	 Top 10 Executors by Approved Top 10 Projects by Approved Approved Hours & Approved by Project Bottom 10 Executors by Approved Bottom 10 Projects by Approved
2	Daily Plan Summary	 Daily Plans by Status Top 10 Daily Plans by Location Daily Plans by Executor & Status Daily Plans by Hours Status Daily Plans by Quantities Status
3	Daily Scorecard	 Approved G/L by Executor Top 5 Executors by Approved G/L Approved Hours & PF by Executor and Approver Bottom 5 Executors by Approved G/L
4	Operations (G/L or PF)	 Planned, Approved, Earned MHrs by Location Top 5 Cost Items by Approved Planned, Approved, Earned MHrs by Executor Planned, Approved, Earned MHrs by Approver Bottom 5 Cost Items by Approved
5	Operations - Account Code (G/L or PF)	 Planned, Approved, Earned MHrs by Account Code Top 5 Account Codes by Approved Planned, Approved, Earned MHrs by Executor Approved Hours & Approved by Account Code Bottom 5 Account Codes by Approved
6	Account Code Performance	 Approved G/L by Daily Plan ID Approved Hours and PF by Daily Plan ID Planned, Approved, Earned MHrs, Approved and Planned G/L by Plan Date
7	Performance Curves (G/L or PF)	Cumulative Approved
8	Crew Results	 Approved G/L Top 5 Cost Items by Approved G/L

Overview – Other Operations dashboard Reports/Charts (continued)





On pertinent Dashboard reports, changing between Production Factor (PF) or Gain/Loss (G/L) reports is as simple as changing the dashboard toggle button. To use this function, click and drag the **toggle** button.

PF G/L	PF G G/L
Planned, Approved, Earned MHrs with G/L by Executor	Planned, Approved, Earned MHrs with PF by Executor
● Planned H ● Approved ● Earned M — Approved — Planned G/L (● Planned Hours ● Approved Hours ● Earned MHrs (CB — PF (CB Qty CB

1.1.3 Project Performance Dashboard

The Project Performance dashboard is a system-created standard dashboard available to all users and focuses on the field relevant performance statistics. This dashboard is always listed as an available dashboard; it cannot be deleted. In a later lesson, you will learn how to create a dashboard specific to your needs.

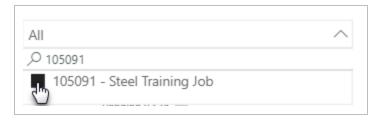
All available projects under your organization can be viewed in this Project performance dashboard.

1.1 Step by Step 4 — Project Performance Dashboard

- 1. From the Dashboards page, click the **Project performance dashboard**.
- 2. Under the Project Drop-down title, click the (Select a project) drop-down.
 - Note you may also scroll to search for a project or type in a project name in the Project search bar to select a project
- 3. In the search bar, type [project name].

Multiple selections	~
P 105091	
🔲 105091 - Steel Training Job	

4. Click [project name] to select it.



- The summaries, graphs and data presented here are specific to this project and the data is considered live
- You should see the Project Performance dashboard shown below

Pro	Project Perfor		lo-Date Total Cost									There aren't any filters to	o displa
Pro	🗿 Project Perfor	mance			rrent Budget Cos	t Current Estimate Cost	Forec	ast Cost	Forecast Remaini	ng Cost	Percent Complete	to	
Pro			-1.7bn	6	0.8br	268.4bn	236	.4bn	241.0	bn '	1237.19	%	
	ject	Date			Earned Cost vs.	Actual Cost		Earned MHr	s vs. Actual MHrs				
All	1	✓ Last ✓	3 Months	~		t	Cost		rs • CB Earned MHrs	CE Earned M	Hrs		
Cha	ange Order Type	11/4/20	19 - 2/3/2020		8bn			25bn		7		_	
All		\sim			6bn			20bn		/			
Stat	tus							15bn					
Mu	ultiple selections	\sim			4bn			10bn					
	e Change Orders by Status							lubn		/			
Activ	ve Change Orders by Status				2bn			Sbn	/	, 			
					0bn			0bn	/				
					Dec 2019	Jan 2020 Feb 2020		Dec 201	9 Jan 202	10	Feb 2020		
					CBS		Accour	nt Code					
					All	\sim	All			\sim			
					CBS	Description	CE %	C8 Percent	CE Final Cost	CE CPI	Forecast Final Cost	CE F	
							Complete (Cost)	Complete (Cost)				Cost	
Chan	nge Order Details						0.0%		3,806,505.25	0.00	3,806,505.25		
							0.0%	0.00%		0.00	856.225.35		
ID	Total Budget Total Budget	Total Contract Cost	Description Ty	npe Stat	0.10	Direct Cost Add-On Do Not Use or Delete (must = \$0)			908.649.68				
D	Total Budget Cost Adjustment MHr Adjustment	Total Contract Cost Adjustment	Description Ty	npe Stat	0.2	Do Not Use or Delete (must = \$0) Price % Add-On	0.0%	0.00%	103,590.42 81,242.57	0.00	91,166.55 80,836.57		
D	Cost Adjustment MHr	Total Contract Cost Adjustment	Description Ty	npe Stat	0.2 0.3 0.4	Do Not Use or Delete (must = \$0) Price % Add-On Job Financing	0.0%	0.00%	103,590.42 81,242.57 583,608.58	0.00 0.00 0.00	91,166.55 80,836.57 538,048.77		
ID	Cost Adjustment MHr	Total Contract Cost Adjustment	Description Ty	npe Stat	0.2 0.3 0.4 0.5	Do Not Use or Delete (must = \$0) Price % Add-On Job Financing Indirect Cost Escalation	0.0%	0.00%	103,590,42 81,242,57 583,608,58 302,940,38	0.00 0.00 0.00 0.00	91,166.55 80.836.57 538,048.77 299,359.69		
ID	Cost Adjustment MHr	Total Contract Cost Adjustment	Description Ty	npe Stat	0.2 0.3 0.4 0.5 0.6	Do Not Use or Delete (must = \$0) Price % Add-On Job Financing Indirect Cost Escalation Direct Cost Escalation	0.0% 0.0% 0.0% 0.0% 0.0%	0.00%	103,590.42 81,242.57 583,608.58 302,940.38 843,345.95	0.00 0.00 0.00 0.00 0.00	91,166.55 80,836.57 538,048.77 299,359.69 818,168.88		
D	Cost Adjustment MHr	Total Contract Cost Adjustment	Description Ty	npe Stat	0.2 0.3 0.4 0.5	Do Not Use or Delete (must = \$0) Price % Add-On Job Financing Indirect Cost Escalation	0.0%	0.00% 0.00% 0.00% 0.00% 0.00% 0.00% 0.00% 0.00% 0.00%	103,590.42 81,242.57 583,608.58 302,940.38 843,345.95	0.00 0.00 0.00 0.00	91,166.55 80.836.57 538,048.77 299,359.69		
D	Cost Adjustment MHr	Total Contract Cost Adjustment	Description Ty	npe Stat	0.2 0.3 0.4 0.5 0.6 0.7 0.8 0.9	Do Not Use or Delete (must = \$0) Price % Add-On Job Financing Indirect Cost Escalation Direct Cost Escalation Indirect Cost Add-On	0.0% 0.0% 0.0% 0.0% 0.0% 0.0% 0.0% 0.0%	0.00% 0.00% 0.00% 0.00% 0.00% 0.00% 0.00% 0.00% 0.00% 0.00%	103.590.42 81.242.57 583.608.58 302.940.38 843.345.95 1.535.323.10 2.865.412.96 866.982.26	0.00 0.	91,166.55 80,836.57 538,048.77 299,359.69 818,168.88 1.507,058.55 2,820,987,21 525,940,77		
D	Cost Adjustment MHr	Total Contract Cost Adjustment	Description Ty	npe Stat	0.2 0.3 0.4 0.5 0.6 0.7 0.8 0.9 1	Do Not Use or Delete (must = \$0) Price % Add-On Job Financing Indirect Cost Escalation Direct Cost Escalation Indirect Cost Add-On Job Management & Equipment	0.0% 0.0% 0.0% 0.0% 0.0% 0.0% 0.0% 0.0%	0.00% 0.00% 0.00% 0.00% 0.00% 0.00% 0.00% 0.00% 0.00% 0.00% 0.00%	103.590.42 81.242.57 583.608.58 302.940.38 843.345.95 1.535.323.10 2.865.412.96 866.982.26 124.469.483.477.70	0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.0	91,166.55 80,836.57 538,048.77 299,359.69 818,168.88 1,507,068.55 2,820,987.21 525,940.77 95,706,601,095.14		
D	Cost Adjustment MHr	Total Contract Cost Adjustment	Description Ty	npe Stat	0.2 0.3 0.4 0.5 0.6 0.7 0.8 0.9	Do Not Use or Delete (must = \$0) Price % Add-On Job Financing Indirect Cost Escalation Direct Cost Escalation Indirect Cost Add-On Job Management & Equipment	0.0% 0.0% 0.0% 0.0% 0.0% 0.0% 0.0% 0.0%	0.00% 0.00% 0.00% 0.00% 0.00% 0.00% 0.00% 0.00% 0.00% 0.00% 0.00%	103.590.42 81.242.57 583.608.58 302.940.38 843.345.95 1.535.323.10 2.865.412.96 866.982.26 124.469.483.477.70	0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.0	91,166.55 80,836.57 538,048.77 299,359.69 818,168.88 1.507,058.55 2,820,987,21 525,940,77		
ED C	Cost Adjustment Mike Adjustment	Total Contract Cost Adjustment	Description Ty	npre Start	0.2 0.3 0.4 0.5 0.6 0.7 0.8 0.9 1	Do Not Use or Delete (must = \$0) Price % Add-On Job Financing Indirect Cost Escalation Direct Cost Escalation Indirect Cost Add-On Job Management & Equipment	0.0% 0.0% 0.0% 0.0% 0.0% 0.0% 0.0% 0.0%	0.00% 0.00% 0.00% 0.00% 0.00% 0.00% 0.00% 0.00% 0.00% 272.05% 238.37%	103.590.42 81.242.57 583.608.58 302.940.38 843.345.95 1.535.323.10 2.865.412.96 866.982.26 124.469.483.477.70	0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.0	91,166.55 80,836.57 538,048.77 299,359.69 818,168.88 1,507,068.55 2,820,987.21 525,940.77 95,706,601,095.14	66,1	

IP	The Export data to Excel function only exports the data (not the graph or	char
	Export data Which data would you like to export? Summarized data O Underlying data File format: Ital (Excel) • Data exports with all applied filters. O Data exports with all applied filters.	×
	Export Cancel	

Performance Header Values

The following table provides an explanation of each of the header values at the top of the Project Performance dashboard.

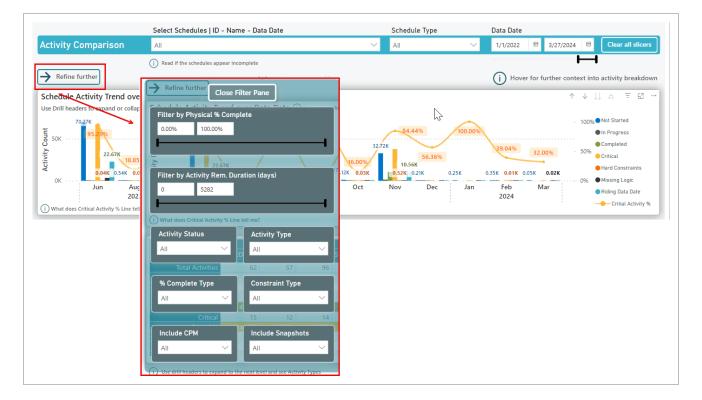
	Term	Definition
1	To-Date Total Cost	\$ spent to date
2	Current Budget Cost	Current Budget total \$
3	Current Estimate Cost	Current Estimate total \$
4	Forecast Cost	Total cost (to date) + Forecast remaining cost
5	Forecast Remaining Cost	Forecasted remaining \$
6	Percent Complete	Quantity complete to date/Forecast T/O quantity



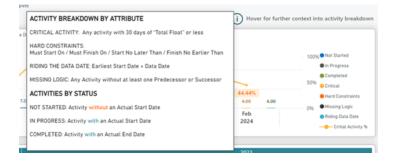
1.1.4 Schedule Dashboard

The Schedule dashboard lets you compare schedule and activity comparisons, perform float analysis, view resources, risk information and metric quality assessments.

To access, click on the schedule dashboard from the dashboard list. The **Refine further** icon opens a collapsible filtering pane with additional filtering criteria. To apply filters and close the side out, click the **Close Filter Pane**.



Click any of the Information icons placed throughout the tabs of the dashboard to provide you with additional context to the data that is being shown.



Preset tabs are as follows:

- Activity Comparison
- Schedule Comparison
- Float Analysis
- Resource Overview
- Risk Overview
- Risk Analysis
- Opportunity Analysis
- Event Register
- Mitigation Details
- · Schedule Quality

1.2 EXPLORE PERMISSIONS

To access dashboards and APIs, you must be assigned a role with applicable permissions, which are defined by a system administrator. Permissions are pre-assigned to roles that are based on functional areas, such as project management, construction management, field office, operations, finance, compliance, and administration that let you run reports tagged with the same permission assigned to one of the roles. For more details, refer to Roles and Permissions in InEight Platform. Permissions are configured in Suite Administration > Roles and permissions > Permissions > **Explore**.

Permission Name	Description	Level
View dashboards and embedded content	Allows you to view standard dashboards (data level permissions are allowed to the projects you are assigned to in Platform), custom dashboards that have been shared with you, add and edit external content, and view external content that has been shared	Base user

Permission Name	Description	Level
	with you. This permission also gives you access to create, edit, and delete your own folders (these folders are only available at the individual user level). This permission is the parent of all other permissions in Dashboards.	
View estimate dashboard	Allows you to view the InEight Estimate dashboard and any other custom derivatives of this dashboard that have been shared with you.	Base user
Edit and delete custom dashboards	Allows you to edit and save custom versions of the standard dashboards, this permission does not give sharing access. This permission is necessary for you to be added as a collaborator on a dashboard that is shared.	Base user
User level sharing	Allows you to share your custom dashboards and embedded content with other individual users.	Base user
Project level sharing	Allows you to share your custom dashboards and embedded content with all the users on a project. You can only do this for projects that are assigned to you in Platform.	Project Admin
Organization level sharing	Allows you to share your custom dashboards and embedded content with all the users in an organization. You can only do this for organizations that you are assigned to in Platform.	Org Admin
Reporting APIs	Allows you to access to all the data in the reporting APIs for the selected products.	Base user
View shared dashboards and embedded content only	Allows you to hide all standard dashboards and limits the list of dashboards and embedded content a user can see to only those that have been shared with them individually. The permission limits dashboards and embedded content shared with a user assigned to the project or organization level.	Org Admin

1.3 DASHBOARD FOLDERS

In Explore, you can create folders to organize the various types of dashboards you create. This can help to easily identify dashboards you may refer to on a weekly basis versus monthly basis or dashboards

you create for an executive level versus a field operations level. In a later lesson, you will learn how to modify and create these additional dashboards.

1.3.1 Folder Creation

The following Step by Step walks through the two ways you can create a dashboard folder.

1.3 Step by Step 1 — Create Dashboard Folders

Option 1:

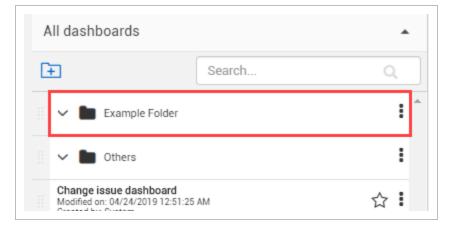
1. From the Dashboards page, click the Add Folder 庄 icon to add a folder.

A	II dashboards		•
Ģ		Search	٩
	Add folder		I
	Change issue dashb Modified on: 04/24/2019 Created by: System	oard 9 12:51:25 AM	☆ ▮

- · A dialog box opens and prompts you to name the folder
- 2. In the Save Folder As field, type **Example Folder**, and then click **Save**.

Save folder as	×
Example Folder Cancel Save	

• The new folder will now show on the left panel as shown below.

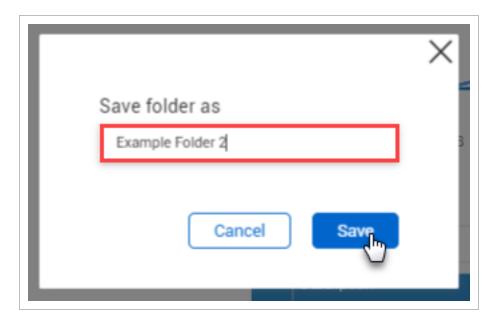


Option 2:

- 1. Click the three Ellipses Context menu icon to the right of the new Example Folder.
 - A slide-out panel opens
- 2. Click Add Folder.

Ŧ	Add folder	🗹 🛞 <	
	← M Example Folder	E Add folder	
	Change issue dashboard Last data refresh: 02/02/2020 08:12 PM Created by: System	E S Delete folder	
	Connected analytics utilization Last data refresh: 02/02/2020 10.56 PM Created by: System	Move into folder	
	Contract dashboard Last data refresh: 02/03/2020 01:19 PM	i Sect	

3. In the Save folder As field, type **Example Folder 2**, and then click **Save**.



• A sub-folder has been created

All dashboards		•
(+	Search	۹
🗄 🥆 🍃 Example Folder		:
🗄 🗸 🖿 Examp	le Folder 2	:

Besides adding folders, you can edit, share, move, set as the default dashboard or delete the dashboard via this same Context menu icon.

Example Folder 2		
Operations dashboard Last data refresh: 06/11/2020 02:54 AM Created by: System		
Ops Dashboard - KL Last data refresh: 06/11/2020 02:54 AM Created by: Karen Loftus	Ø	Edit dashboard
All Products () Created date: 06/08/2020 01:52 PM Created by: Natalie Takacs	14	Sharing
Change issue dashboard Last dara refresh: 06/10/2020 05:39 PM Created by: System		Move into folder Move out of folde
Connected analytics utilization Last data refresh: 05/17/2020 10:43 PM Created by: System	-	Set as default
Contract dashboard Last data refresh: 06/10/2020 08:40 PM Created by: System	-	Print
Contract Dashboard - KL Last data refresh: 05/10/2020 08:40 PM Created br. Xaren Loftus	\otimes	Delete dashboard

1.3.2 Move Dashboards to a Folder

TIP

The following steps walk you through how to move a dashboard into a folder.

1.3 Step by Step 2 — Move a Dashboard into a Folder

- 1. From the Dashboards page, click the **three-ellipses Context menu** icon of the Operations dashboard.
- 2. Click Move into Folder.

[÷	• <> I 🖉 🛞 <	Daily F
	Created by: System	Project
	Material tracking dashboard Last data refresh: 03/12/2020 12:08 AM Created by: System	All
	nat test Last data refresh: 03/11/2020 08:49 PM Created by: Natalie Takacs	Plan Status
	OGC - Quantity Reports Last data refresh: 03/12/2020 02:56 AM Created by: jakob sjuts-ptr	
	Operations dashboard (Default) Last data refresh: 03/12/2020 02:56 AM Created by: System	Edit dashboard
	Operations Dashboard - Catie Last data refresh: 03/12/2020 02:56 AM Created by: Catie Williams	Move into folder
	Operations- my org New! Last data refresh: 03/12/2020 02:56 AM Created by: Natalie Takacs	Print

• A dialog box opens with a drop-down list to select the folder for which you want to move the dashboard into

					X
Move	dasnboard	Operations	dashboard in	to tolder	
				•	
			Cancel	Save	

3. Click the drop-down arrow, and then select **Example Folder**.

Move dashboard Operations dashboard into folder		×
 Example Folder Example Folder 2 	*	201
n 🏲 Others	-	_

- 4. Click Save.
 - The Operations dashboard will now be located within the Example folder





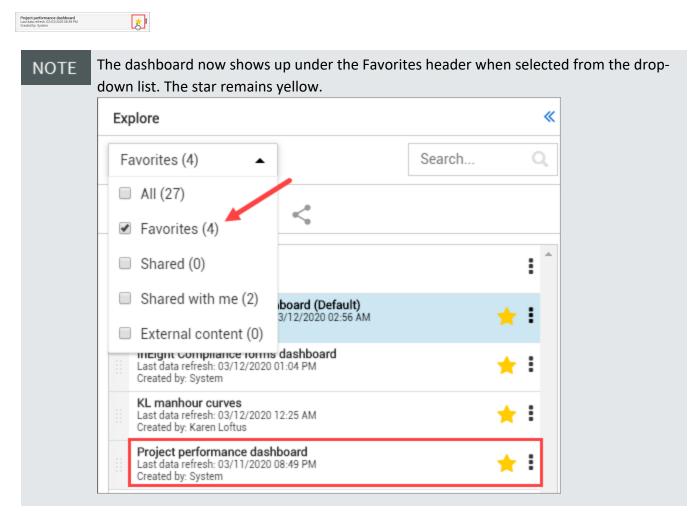
You can use the same Context menu icon to remove a dashboard from a folder.

Ex	plore			«	
A	II (22) 👻	Search		Q,	
(+	Add folder		\otimes	\leq	
	► 🖹 Example Folder			•	
	Example Folder 2			:	😥 Daily Plan Su
	Operations dashboard (Default) Last data refresh: 02/04/2020 02:36 AM Created by: System			•	
	Change issue dashboard Last data refresh: 02/03/2020 05:33 PM Created by: System				-
	Connected analytics utilization Last data refresh: 02/03/2020 09:50 PM Created by: System				
	Contract dashboard				

1.4 DASHBOARD FAVORITES

You can mark one or more dashboards as your favorite by clicking the **Favorites** icon on the right side of any dashboard. This can be done on the two system-created dashboards or any dashboards you create. This is a convenient way to access dashboards that you use often.

Click the Favorites icon next to the Project Performance dashboard.



1.5 DASHBOARD SHARING AND COLLABORATION

The concept behind sharing a dashboard evolved as a means to save time and energy for those working together who share similar data needs. Sharing a dashboard may be a perfect option when the original dashboard doesn't need to be edited by the person who is viewing the shared dashboard. Collaboration goes a step further by granting the person with whom the dashboard is shared, permission to collaborate on and edit the dashboard. Think of collaboration as a subset of sharing,

meaning you cannot collaborate on a dashboard until the dashboard is able to be shared. Only system dashboards that you personally have edited and renamed can be shared.

To share a system dashboard you must first save it as your default dashboard, re-save and re-name the dashboard, and then you can share or collaborate.

The word "Default" after the dashboard name represents your default dashboard, and Sharing is grayed out and unavailable as it is a default dashboard setting.

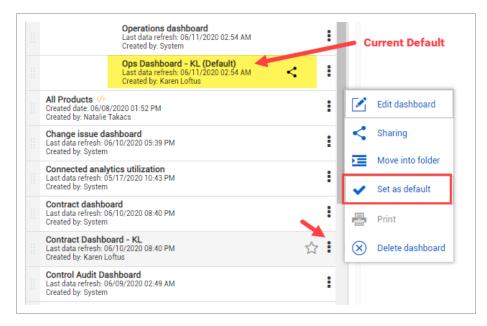
1.5.1 Set a Dashboard as Your Default

Initially, no single dashboard in InEight Explore is considered your default dashboard. Until you choose to share a dashboard, or collaborate with others, does it become an important function.

In order to share or collaborate with others on a dashboard <u>you initiate</u>, it must first be set as your default dashboard.

To set or change a dashboard as your default:

1. Click the **3-dot ellipses** on the right side of your desired dashboard.



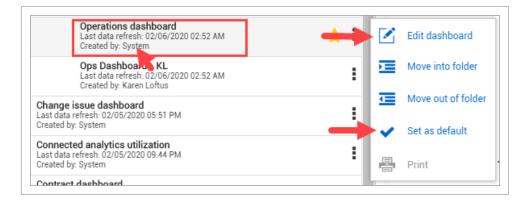
2. Select Set as default.

• You have now set (or changed) your default dashboard

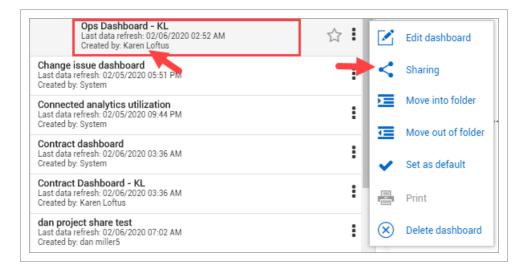
1.5.2 Share a Dashboard with Others

After a dashboard is shown as your default, the Sharing option becomes available to you.

The Operations Dashboard below does not have the Sharing option available as it is a System dashboard and it has not yet been set as the default and re-named.



Conversely, the personalized, re-named dashboard called Ops Dashboard – KL has the Sharing option available.



1.5 Step by Step 1 — Share a Customized System Dashboard

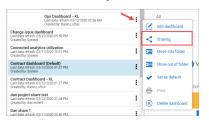
- 1. Select a system dashboard to share.
- 2. Click the 3 dot ellipses on the right side of the system dashboard name.
- 3. Click Set as Default.

	Operations dashboard Last data refresh: 02/06/2020 02:52 AM Created by: System			Edit dashboard
Change issue da: Last data refresh: 02 Created by: System		:	E	Move into folder
Connected analy Last data refresh: 02 Created by: System		:	⊡	Move out of folder
Contract dashbo Last data refresh: 02 Created by: System		:	∠	Set as default Print
Contract Dashbo	ard - KL (Default)			

- 4. Click the 3 dot ellipses again.
- 5. Click Edit Dashboard.
- 6. Make edits and go to File > Save As.
- 7. Re-name the dashboard.
- 8. Click Save.

Save this das	hboard as	×
Ops Dashboard	- KL	
	Cancel Save	

9. From the newly named dashboard, click the **Sharing** option.



10. Select with whom you would like to share the dashboard by selecting an option from the drop-down list. Options include:

- Organization
- Project
- Person

ashboard Ops Dashboard KL	
Person	4
Organization Users who have access to the organization	
Project Users who have access to the project	
Person Users who have access to the system	
Projects	
No shares selected	
Organizations	
No shares selected	
urrent selections	

• For example, if you choose to add a person, you can begin typing the name of a person's email address to be guided to select an individual. A similar concept is

available for Project and Organization

Dashboard Ops Dashboard KL	•		
paul.be	Q,		
Paul.bennion@ineight.com	*		
Users	Can edit		
No shares selected			
Projects			
No shares selected			
Organizations			
No shares selected			
Current selections			

11. Click Share.

- A Dashboard Shared notification will briefly appear on the top of your screen
- Now, the Shared icon is visible to the right of the dashboard name

 Ope Dashboard - KL.
 Cashboard - KL.

 Landsau winker, Northon
 Cashboard

 Deskage milestone dashboard Landsau winker, Northon
 You are sharing this dashboard

 Tate dama winker, Northon Dashboard
 Tate dama winker, Northon Dashboard

12. NOTE Elevated permissions are required to share at the project and org level.
 NOTE Use caution when using the Organization option, as all individuals will see this new dashboard option upon their next sign-on to Explore.

With each new log in to Explore, newly shared dashboards will show the yellow **New!** tag next to the dashboard name. Afterward, the New indicator will not show. Hovering over the **Share** icon indicates if the dashboard is being shared with you, or if you are sharing the dashboard with others.

A black **Share** icon indicates a dashboard is shared by you.



A blue Share icon indicates a dashboard is shared with you.

 Collaboration - Catie Testing Last data refresh: 01/31/2020 04:02 AM Created by: Catie Williams	This dashboard is being shared to you
 collaboration Test Last data refresh: 01/31/2020 12:46 AM Created by: Natalie Takacs	

Click the blue **Sharing** icon to view the Sharing details for that specific shared dashboard. Click **Close** to return to the dashboard.

While you cannot edit others' dashboards, you can save your own copy of it and make your own modifications to it. When changes are made by you, others whom you share the dashboard with will also see your changes.

1.5.3 Collaborate on a Shared Dashboard with Others

Collaborating on a dashboard gives the person with whom the dashboard is shared not only the permission to view it, but also to edit the file. Any changes made will be visible to all parties who have access to the shared dashboard.

Using the process above, once you have gotten to the step of selecting who the dashboard will be shared with, in our example, we'll be sharing the dashboard with just one person.

Checking the **Can Edit** box and then clicking **Share** provides the person, project or organization the ability to collaborate with you on the shared dashboard.

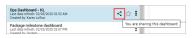
Dashboard Ops Dashboard - KL	
Person	-
	Q
Type a person's name	
SHARE WITH	
Users	Can edit
Paul.bennion@ineight.com	_lm ⊖
Projects	
No shares selected	
Organizations	
No shares selected	
Current selections	

1.5.4 Remove Sharing

For any dashboard you create and share, you may also remove sharing. By hovering over the **Sharing** icon, you can identify the reports you have shared with others.

1.5 Step by Step 2 – Remove Sharing

1. Click the black Sharing icon.



2. Either select **Remove all sharing** to remove all people from sharing mode, or the click the **Remove Sharing** red circles next to the names of those to remove.

Person	
	-
ype a person's name	
HARE WITH	
Users Can	edit
Paul.bennion@ineight.com	
Natalie.Takacs@INEIGHT.COM	9 e
Projects	
No shares selected	
Organizations	
No shares selected	
urrent selections	

- This change is instantaneous
- · A dialog box will briefly appear to confirm the removal has occurred

1.5.5 Embed External Content

Embedding external content in InEight Explore means you can expose dashboards you have on your Power BI service or Tableau server in the InEight Explore application.

While your organization is still responsible for maintaining security and maintenance of the dashboards and data behind them, you can have all your dashboards in one place and it eliminates the need to bounce around different windows to look at dashboards that may contain more than just InEight Application data.

1.5 Step by Step 3 — Set-up Adding External Content

1. Click the Add External Content icon.

合 Explore	•	Dashboards	
Explore		*	
All (28) -	Search	Q	
E			

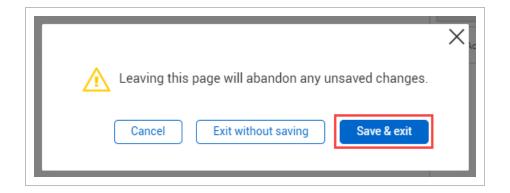
- 2. In the dialog box, add the **name** for the new report, in addition to the **Source** for the external content.
- 3. Click Save.

Name	Source
	https://www.ineight.com
	Hint: please provide a url beginning with https://
managed by InEigh operation of links r	of external links including the sites or tools the links relate to ("links") are not supported or it. InEight is not responsible for content on or access to links. Issues with content or need to be referred to the link owner. InEight assumes no legal liability or responsibility limitation non-infringement) as to the operation, use or content of links.

- TIP Click the **Instruction** icon to be taken to the Guide for embedding content in Explore.
- The resulting saved report appears alphabetically in your list of reports. The External Content identifier is also shown.

[+	∢> 🗹 ⊗ <		
	Last data refresh: 03/12/2020 03:02 PM Created by: dan miller5	:	*
	Embed Test	:	
	InEight Compliance forms dashboard Last data refresh: 03/12/2020 03:02 PM Created by: System	★ I	

- Clicking on this dashboard takes you to the https:// Source page shown above
- 4. Before leaving the page, and in the event you need to save this new report, click the **Save** & Exit button.



5. This allows you to type in a **dashboard name**, and then click **Save**.

	Х
Save this dashboard as	
DB with Embedded External Content	
Cancel	

6. Search for the resulting dashboard, again alphabetically.



1.5.5.1 Deleting an Embedded Dashboard

As with other dashboards, dashboards with embedded external content can be deleted.

1.5 Step by Step 4 — Delete an Embedded Dashboard

- 1. From the list of dashboards, click on the desired dashboard to delete.
- 2. Click the Delete Dashboard icon.



3. You will be asked to confirm the deletion. Click Yes.

	\times
u Are you sure you want to delete Embed Test 2?	
Yes No	

1.5.6 Share External Content

Sharing embedded content allows you to have one place to view all reporting and ensures that everyone in your organization is looking at the same reporting.

1.5 Step by Step 5 — Share External Content with Others

1. To share external content that you have already embedded into Explore, click the **Sharing** icon, and then the **vertical ellipses** for the external content.

Control Audit Dashboard Last data refresh: 06/09/2020 02:49 AM Created by: System	:		Edit external content
dan project share test Last data refresh: 06/11/2020 09:22 PM Created by: dan miller5	:	<	Sharing
ddd Last data refresh: 06/11/2020 09:22 PM Created by: dan miller5	:	 ✓ 	Move into folder Set as default
Embedded content Created date: 06/12/2020 05:54 AM Created by: Karen Loftus	☆ :	\otimes	Delete external content
Embedded sharing $<\!$	< 1		

2. Then in the dialog box, select the appropriate Organization, Project or Person from the drop-down list to apply sharing.

Dashboard Ops Dashboard - KL	
Person	
Organization Users who have access to the organization	
Project Users who have access to the project	
Person Users who have access to the system	
Projects	
No shares selected	
Organizations	
No shares selected	
Current selections	

3. When a dashboard is shared with you, if you already have a Power BI login, click **Sign-In**.



Please sign in to view this report



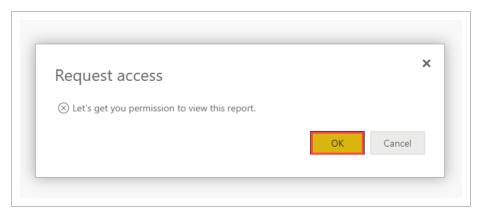
4. To request access to a shared report, click the Request access button.



To view this report, ask the author for access



5. Depending on your authorization level, you may get another dialog box to request access. Click **OK**.



6. You can add a personal note, and then click **Send request**.

Request access	>
Submit a request below.	
Add a note (optional)	
	Send request Cancel
	Send request

NOTE Clicking the **Sharing** icon of any dashboard that has been shared with you results in a dialog box indicating the source, owner and created date for the share.

Sharing deta	ans
Source	https://app.powerbi.com/reportEmbed?reportId=ab983255-5899-47d5- 8707-112da38ea971&groupId=ca9a65a5-7bd5-4a27-84ad- 530f05854209&autoAuth=true&ctid=bd552577-889f-46d7-9b56- f1220279c9c0&config=eyJjbHVzdGVyVXJsIjoiaHR0cHM6Ly93YWJpLXd lc3QtdXMtcmVkaXJIY3QuYW5hbHIzaXMud2luZG93cy5uZXQvIn0%3D
Owner	Natalie Takacs
Created date	03/20/2020 09:27 AM
	Close

1.6 DASHBOARD EXAMPLES

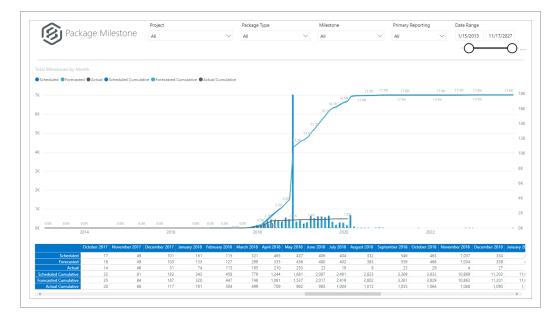
The Package Milestone dashboard lets you see information about user-defined milestones in the procurement process over time. A second tab details bid package information at the line item level with the ability to link back to InEight products.

1.6 Step by Step 1 — Package Milesetone Dashboard

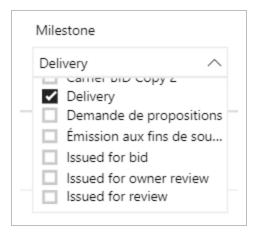
1. From the Dashboards page, click the **Package Milestone dashboard**.



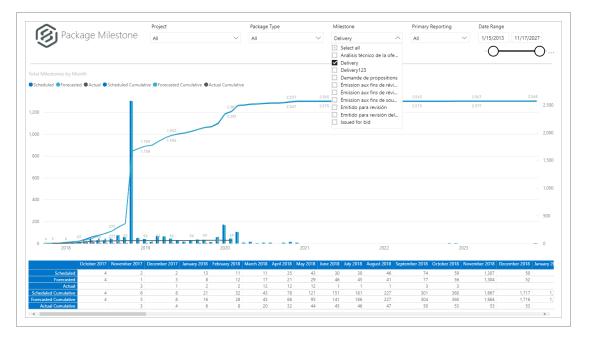
- 2. Select a **Project drop-down** title.
 - Note you may also scroll to search for a project or type in a project name in the search bar to select a project
- 3. Click Select All.
- 4. Close the Dashboards panel.
 - The summaries, graphs and data presented here are specific to this project
 - You should see the updated Package Milestone dashboard as shown below



5. From the Milestone drop-down list, deselect all but the Delivery item.



6. The graph now changes:



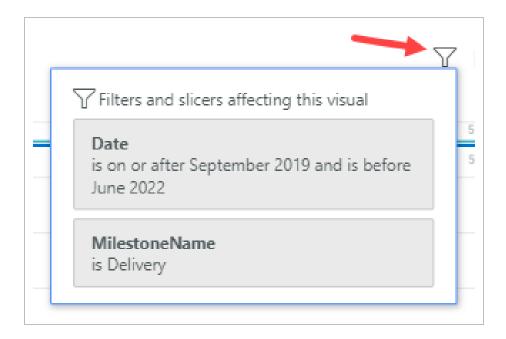
- 7. Change the Date Range to a shorter period of time.
- 8. Click the light blue colored **Forecasted Cumulative column for the tallest month**. Your report should look like something like this:



- 9. Click the **Focus** \square icon for a better view of the graph.
- 10. Click < Back to Report to return to the main view.



- 11. Click the **Filter**, icon, on the upper right side of the graph.
- 12. Notice now the two filters that appear, Date and MilestoneName. Click **outside the box** to close the dialog box.



Package Milestone Header Values

The following table provides explanation of scheduled, forecasted, actual and cumulative (scheduled, forecasted and actual) packages at user-defined milestones.

Term	Definition
Project	Identifies the project.
Package Type	Identifies the project options.
Milestone	Identifies the user-defined step in the project.
Date Range	Dates, as selected in the calendar.

Project		Package Type		Milestone		Primary Repor	ting	Date Range	
All	\sim	All	\sim	Delivery	\sim	All	\sim	9/30/2019	6/11/2022
									\sim

Click the **Schedule Detail** tab at the bottom of the page.

G	Packag	e Milestone Graph All	\checkmark	Package Type All	\sim	Delivery		te Range /30/2019 6/11	1/2022	_
ate	Package Id	URL	Description	Status	Package Type	Milestone	Discipline	Scheduled Completion	Forecasted Completion	^
		projectid=54#/addBidPackage/overviewPackage/3939		review						
		/AppContract/Packages? projectId=3#/addBidPackage/overviewPackage/4046								
			Anchor Bolts / Embeds		Permanent material					
inuary 2020	4276	/AppContract/Packages? projectId=3#/addBidPackage/overviewPackage/4276	Anchor Bolts / Embeds	Issued for owner review	Permanent material	Delivery	Concrete	01/28/2020	1/28/2020	
			Thiru-bid	Issued for owner review				01/29/2020	1/29/2020	-
		projectId=75#/addBidPackage/overviewPackage/4351 /AppContract/Packages? projectId=10889#/addBidPackage/overviewPackage/436 1								
		/AppContract/Packages? projectId=10689#/addBidPackage/overviewPackage/436								
		/AppContract/Packages? projectId=3#/addBidPackage/overviewPackage/4363								
		/AppContract/Packages? projectId=3#/addBidPackage/overviewPackage/4371								
					Permanent material					
		/AppContract/Packages? projectId=3#/addBidPackage/overviewPackage/4367			Permanent material					
		/AppContract/Packages? projectId=82#/addBidPackage/overviewPackage/685				Delivery				
		/AppContract/Packages? projectId=54#/addBidPackage/overviewPackage/3895	Heat Exchangers - Plate and Frame							
		/AppContract/Packages? projectId=54#/addBidPackage/overviewPackage/3910	Fuel Gas Ball Valves							
					Permanent material					~
C									>	

• In this view, line item level detail is available with the ability to link back to other InEight applications. Filtering, sorting and adjusting column width are options available for further ease in analysis.

Previewing Meta-data

Right-click on any header, and then select **Visual table** to view the meta-data further.



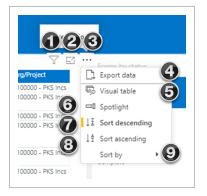
Detailed data will appear:

bate, Package Id, URL, Description, Status, Package Type, Milestone, Discipline, Scheduled Completion, Forecasted Completion, Actual Date, Available Float	Remain
Actober 2019, 170, /AppContract/Packages?projectid=73#/addBidPackage/overviewPackage/170, HV/MV Terminations and Transformer Oli Fill, Letter of Intent/Award, Subcontract, Delivery, Subcontracts, 10/01/2019, 10/1/2019, 10	
2ctober 2019, 171, /AppContract/Packages?projectld=73#/addBidPackage/overviewPackage/171, Fiber Optic Cable Giand and Termination, Letter of intent/Award, Subcontract, Delivery, Subcontracts, 10/01/2019, 10/1/2019, 0	
Detober 2019, 174, /AppContract/Packages?projectId=73#/addBidPackage/overviewPackage/174, Lube Oil Flushing, Letter of intent/Award, Subcontract, Delivery, Subcontracts, 10/01/2019, 10/1/2019, 0	
Actober 2019, 1057, /AppContract/Packages?projectid=73#/addBidPackage/overviewPackage/1057, Site/Yard FW/Fitting Coating, Issued for review, Subcontract, Delivery, Subcontracts, 10/01/2019, 10/1/2019, 0	
Detober 2019, 3823, /AppContract/Packages?projectid=1#/addBidPackage/ovenviewPackage/3823, TestPane, Issued for owner review, Engineered equipment, Delivery, Building, 10/01/2019, 10/1/2019, 29	
Actober 2019, 3824, /AppContract/Packages?projectid=1#/addBidPackage/overviewPackage/3824, Tesrt, Issued for owner review, Engineered equipment, Delivery, Building, 10/01/2019, 10/1/2019, 30	
Detober 2019, 3833, /AppContract/Packages?projectId=3#/addBidPackage/overviewPackage/3833, testing spanish 1, Issued for owner review, Permanent material, Delivery, 10/01/2019, 10/1/2019, 10/1/2019, 39	
Actober 2019, 3838, /AppContract/Packages?projectid=229#/addBidPackage/overviewPackage/3838, bid1, Issued for owner review, Freight, Delivery, , 10/01/2019, 10/1/2019, 12	
Detober 2019, 3843, /AppContract/Packages?projectId=1#/addBidPackage/overviewPackage/3843, 18-10-HVT_Test, Issued for owner review, Engineered equipment, Delivery, Building, 10/01/2019, 10/1/2019, 0	
Actober 2019, 3836, /AppContract/Packages?projectid=234#/addBidPackage/overviewPackage/3836, TestTooltip, Issued for owner review, Engineered equipment, Delivery, , 10/06/2019, 10/6/2019, , 4	
Detober 2019, 3842, /AppContract/Packages?projectid=3#/addBidPackage/overviewPackage/3842, Test KT 17/10, Proposal received, Engineered equipment, Delivery, Change Orders, Contract Allowances and Back charges, 10/06/2019, 10/6/2019, 0	
Detober 2019, 3835, /AppContract/Packages?projectId=3#/addBidPackage/overviewPackage/3835, Test_Bidpackage_Milestonestatus, Letter of intent/Award, Rental Agreement, Delivery, , 10/07/2019, 10/7/2019, 0	
>>tober 2019, 3854, /AppContract/Packages?projectid=3#/addBidPackage/overviewPackage/3854, smoke OCT30 project, Issued for owner review, Professional services, Delivery, , 10/08/2019, 10/8/2019, 10	
Detober 2019, 3825, /AppContract/Packages?projectid=12342#/addBidPackage/overviewPackage/3825, ferfef, Issued for owner review, Engineered equipment, Delivery, , 10/09/2019, 10/9/2019, , 8	
Detober 2019, 3826, /AppContract/Packages?projectId=3#/addBidPackage/overviewPackage/3826, Test, Issued for owner review, Buyout reserve, Delivery, 10/09/2019, 10/9/2019, 16	
Detober 2019, 3827, /AppContract/Packages?projectid=1#/addBidPackage/overviewPackage/3827, Testlag_20px, Issued for owner review, Engineered equipment, Delivery, Building, 10/09/2019, 10/9/2019, 0	
Detober 2019, 3828, /AppContract/Packages?projectId=3#/addBidPackage/overviewPackage/3828, 20px_test, Issued for owner review, Engineered equipment, Delivery, Building, 10/09/2019, 10/09/2019, , 8	
Actober 2019, 3829, /AppContract/Packages?projectld=3#/addBidPackage/overviewPackage/3829, US Testing_251, Issued for owner review, Engineered equipment, Delivery, 10/09/2019, 10/9/2019, 10/9/2019, 10/9/2019	
Dectober 2019, 4096, /AppContract/Packages?projectid=3#/addBidPackage/overviewPackage/4096, T-Line Procurement - OH Cable and OPGW, Issued for owner review, Permanent material, Delivery, Electrical, 10/09/2019, 10/9/2019, 108	~

Press <Back to report to return to the default view.

While some dashboard graphs offer the ability to Drill Up, Drill Down, Go to the Next Level of the Hierarchy, and Expand all down one level in the Hierarchy, most other graphs include the following options:

	Term	Definition
1	Filter	Filters and slices data in a visual.
2	Focus mode	Expand one visual in the dashboard.
3	More options	Opens additional options.
4	Export Data	Export data only to Excel (not visuals).
5	Show as a Table	Shows data/chart in a larger view.
6	Spotlight	Focuses dashboard on one specific visual.
7	Sort descending	Sort data in descending order.
8	Sort ascending	Sort data in ascending order.
9	Sort by	Allows you to sort by status or form.



1.7 API DOCUMENTATION

1.7.1 API Documentation Overview

From the home landing page, click the **Main menu** icon (**E**), and then click Explore > **API Documentation**.

INEIGHT®	
CS Chris	
Main menu	
FAVORITES	ď
S100000 - PKS Inc	>
SETTINGS	
All projects & organizations	
<u>命</u> Master data libraries	>
요 Suite administration	>
Ø Profile	>
CONNECTED ANALYTICS	
Report	
Explore	^
Dashboards	
API documentation	
INFIGHT ONLINE	

A new browser window opens to the InEight Knowledge Library <u>Explore Resources tab</u>. In the API Documentation section under the InEight product are the documents that represent each data endpoint InEight offers for self-service reporting.

To access a report, in the API Documentation section, click the + icon for the product to expand the list, and then select a file name. The document opens in a new browser window. Each API document

includes an Overview of the selected API, a table of Relationships and Dependencies, Details, Supported Filters, API Fields and Field Descriptions, along with a Sample and Data Validation when applicable.





CUSTOM DASHBOARDS

2.1 CUSTOM DASHBOARDS

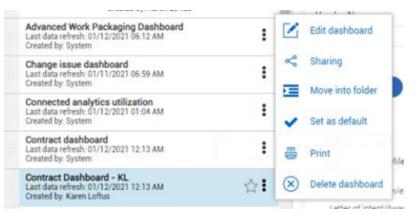
In Explore, you can edit the standard dashboards in order to create new custom dashboards and visualizations by modifying standard dashboards to meet the needs of your project. You cannot create dashboards from scratch, but you can edit the standard dashboards and save them as new custom dashboards.

2.1.1 Edit Dashboard

The following steps walk you through how to edit an existing dashboard to create a new dashboard.

2.1 Step by Step 1 — Edit a Dashboard

- 1. From the Dashboards page, click the **Context menu** ellipses next to the Operations dashboard.
- 2. Select Edit dashboard.



- 3. The Visualization and Fields slide-out panels open on the right side of the screen.
 - A yellow New page icon appears next to the page number at the bottom of the screen
- 4. Click the **New page** icon to add a new tab.



• Your screen will now look something like this

¥					(2)	¢ " ⊗
cplore	«	File \checkmark View \checkmark	Ask a question 🖏 Explore	✓ A Text box Q Shape	s 🗸 📼 Buttons 🗸 🕞 Visu	al interactions $\vee - C$
All (27) 👻	Search Q,		\forall Filters \diamond >	bookmarks \times	VISUALIZATIONS >	FIELDS
• 🚸 🗹 🛞 <			∠P Search	Report bookmarks		,⊅ Search
Example Folder	:		Filters on this page	Default State (G/L)		→ AccountCode
Example Folder 2			Add data fields here	PF State	🕞 🔳 Py 📑 🐴	→ 📰 Costitem
Operations dashboard			Filters on all pages	Account Code Page P 📮 🔤	DailyPlanSumma. PlanProjectProgr.	
Last data refresh: 03/12/2020 02:56 AM Created by: System Change issue dashboard	* 1		IsActive is True	Account Code Perfor Account Code Perfor	Values	Project
Last data refresh: 03/11/2020 05:50 PM Created by: System	:		Add data fields here	Project Scorecard GL Project Scorecard PF	Add data fields here	
Connected analytics utilization Last data refresh: 03/11/2020 10:31 PM Created by: System				Curves GL On Curves PF On	DRILL THROUGH	
Contract dashboard (Default) Last data refresh: 03/12/2020 01:27 PM Created by: System	☆ :			carves or on	off O —	
Contract Dashboard - KL Last data refresh: 03/12/2020 01:27 PM Created by: Karen Loftus	< 1				Keep all filters	
dan project share test Last data refresh: 03/12/2020 03:02 PM Created by: dan miller5						
Dan share 1 Last data refresh: 03/11/2020 05:50 PM Created by: dan miller5	:					
ddd Last data refresh: 03/12/2020 03:02 PM Created by: dan miller5	1		_			
InEight Compliance forms dashboard Last data refresh: 03/12/2020 03:02 PM Created by: System	★ 1					
KL - Contract Dashboard Last data refresh: 03/12/2020 01:27 PM Created by: Karen Loftus	1					
KL manhour curves Lact data refresh: 03/12/2020 12:25 AM Created by: Karen Loftus	* 1					
man hours Last data refresh: 03/12/2020 02:56 AM Created br: Karen Loftus	1			Learn how to create and edit		
Manhour curves		← > rend x ₀ Account Code PF Trend x ₀ Cost Item PF Trend x ₀ Project PF Trend x ₀ Project GL Trend x ₀ Exec	outor PF Trend Page 1 🔸	bookmarks		

- 5. Double-click on the default page name and type in **man hours**.
 - Your tab will now look like this:



6. From the drop-down menu, click File > **Save as**.

«	▼ File ∨	Dashboards ▼ View ∨		
. Q	P	Save as Save a copy of th	his report	
		ual	Save this dashboard as	×
		:he	Ops Dashboard KL	

7. In the dialog box, name the custom dashboard, and then click **Save**.

2.1.2 Dashboard Customization

From the Visualizations and Fields slide-out panels, you can add chart, graph and card visualizations to your dashboard and populate them with the appropriate data fields.

You cannot change the data source for the dashboard. The dashboard comes pre-connected to a dataset you may use to edit or add visualizations and filters.

Visualizations and Field slide-out panels are utilized for the following unique purposes:

	Term	Definition
1	Filters slide-out panel	Various ways to cut the data using selections from the Fields slide- out.
2	Bookmarks slide-out panel	Customizable saved dashboard views to quickly access frequent dashboards.
3	Visualizations slide-out panel	Charts, Graphs, and Cards selection for dashboard tab.

Overview - Filters, Bookmarks, Visualizations and Fields Slide-Out Panels

Overview - Filters, Bookmarks, Visualizations and Fields Slide-Out Panels (continued)

	Term	Definition
4	Charts/Graphs	Various charts, graphs, an PowerApps for PowerBI.
5	Fields, Format, Analytics	Format provides page information. Fields allows for adding value data fields and drill through capability. Analytics modifies the lines (min, max, average, etc.) shown in the selected chart or graph.
6	Fields slide-out panel	Contains data fields to add to your visualizations to report on in your dashboard.
7	Data Fields	Data from InEight Project Suite to add to fields such as Axis, Legend, Values, etc. under the Visualizations slide-out panel.

\forall Filters \bigcirc \diamond $>$	Bookmarks 2	< Visualizations 3	Fields 6
✓ Search	Report bookmarks		✓ Search
Filters on this page	☐ Add ☐ View Default State (G/L)		✓ AccountCode ✓ Calendar
Add data fields here	PF State		∨ ፹ CostItem
Filters on all pages	Account Code Page P Account Code Page G	<u> </u>	 ✓
IsActive is True	Account Code Perfor Account Code Perfor	✓ Search	∨ ⊞ Project
Add data fields here	Project Scorecard GL Project Scorecard PF	✓ Page information	1
	Curves GL On Curves PF On	 Page size Page background 	_
		\checkmark Page alignment	
		\checkmark Wallpaper	
		✓ Filter pane	
		\checkmark Filter cards	

The following Step by Step walks you through adding a graph visualization to your dashboard reporting on Project Progress and man hours.

2.1 Step by Step 2 — Create a Graph

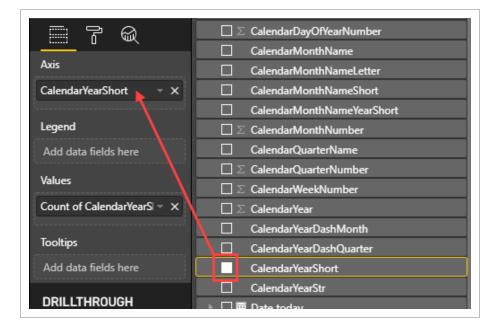
- 1. Under the tab you created in Step by Step above, on the Visualizations slide-out panel select the Line chart visualization.
- 2. To make more space, hide the **Dashboards** slide-out panel, **Filters** slide-out panel and close **Bookmarks**.

»	File 🗸 🛝	ĩew ∨						Shapes 🗸 🖂 Buttons 🗸 🕞 Visi	
Operations dashboard *		ier ∨					BOOKMARKS Report bookmarks Defails State (5/1) Defails State (5/1) H State Account Code Page #1 PagetS Scoread # CO PagetS Scoread #1 CO Come Code Come	X VISUALIZATIONS > ■	FIELDS >
	< → alts	R Cost Item Trend R Account Code Trend	Executor Trend	्र Cost Item PF Trend रह Project	t PF Trend 저는 Project GL Trend	∞ Executor PF Trend man hours	Learn how to create and e	slit	

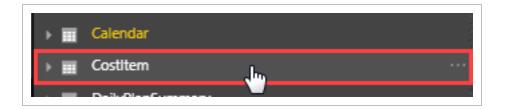
3. Enlarge the Fields slide-out panel by sliding the **left border** toward the left to increase the Fields selection area.

VISUALIZATIONS >	FIELDS >
🔟 🐺 🖄 🌖 🗒 🖽	AccountCode
🕀 👯 🔿 🕮 📑 🔛	∡
🔄 🧮 🔳 Ру 📑 场	▶ 🗌 🗮 CalendarDate
	$\Box \Sigma$ CalendarDayOfMonthNumber
	$\Box \Sigma$ CalendarDayOfYearNumber
······· ······························	CalendarMonthName
Art	CalendarMonthNameLetter
CalendarYearShort 🗸 🗸	CalendarMonthNameShort
()	CalendarMonthNameYearShort
Legend	$\Box \Sigma$ CalendarMonthNumber
Add data fields here	CalendarQuarterName
	$\Box \Sigma$ CalendarQuarterNumber

4. Under the Fields slide-out panel, navigate to the Calendar and click the **CalendarYearStr check box**, and the selection will populate in the Axis.



5. Close the Calendar Field and scroll down and open the **CostItem** Field side arrow.



6. In the Search bar under Fields type C B-.

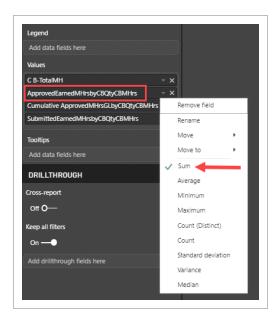
FIELDS	>
С в	
a 📰 Costitem	
C B-Currency	
□ Σ CB-TotalCost	
<mark>(Ih</mark> ∑ <mark>CB</mark> -TotalMH	
□ ∑ CB-TotalQty	

- 7. Select the **C B TotalMH check box** to add it to the Values section of the Visualizations slide-out.
- 8. Clear the Search bar and close the CostItem field.
- 9. Open the Daily Plan Summary Field and select **ManHoursApprovedDate**. Modify the Date Hierarchy to match this:

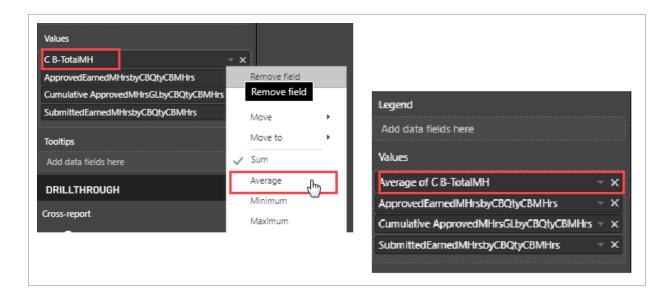
ManHoursApprovedDate
🔺 🔄 🎦 Date Hierarchy
Year
Quarter
Month
Day

- 10. Close the DailyPlanSummary field.
- 11. Expand the graph size by pulling the lower right corner of the graph downward.
- 12. Open PlanProjectProgressand select the following fields:

- a. ApprovedEarnedMHrsbyCBQtyCBMHrs
- b. Cumulative ApprovedMHrsGLbyCBQtyCBMHrs
- C. SubmittedEarnedMHrsbyCBQtyCBMHrs
- On the dashboard on the left, the graph displays your submitted earned man hours and compares that against approved earned man hours
- 13. By clicking each **Values** drop-down fields, you will see each is intuitively using the mathematical sum function.



14. On the C B-TotalMH drop down, change the selection from Sum to **Average**. Notice how the field name changes.



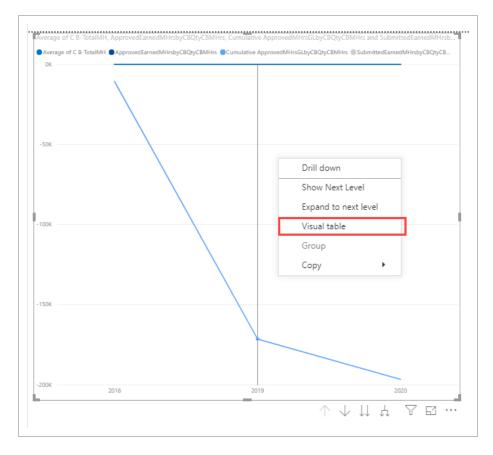
15. Open the Filter slide-out.

VISUALIZATIONS >
<u> </u>
Axis
ManHoursApprovedDate ×
Year ×
CalendarYearShort ×
Legend
Add data fields here
· · · · · · · · · · · · · · · · · · ·
Values
Average of C B-TotalMH ×
ApprovedEarnedMHrsbyCBQtyCBMHrs ×
Cumulative ApprovedMHrsGLbyCBQtyCBMHrs ×
SubmittedEarnedMHrsbyCBQtyCBMHrs ×
Tooltips
Add data fields here
DRILLTHROUGH
Cross-report
off O—
Keep all filters
On —●
Add drillthrough fields here
·······

Expand the CalendarYearStr field by clicking on the drop down. Using Basic filtering, select years
 2018, 2019 and 2020 to abbreviate the reporting years chart.

	endarYearStr 018, 2019, or 3	2020
Filt	er type 🛈	
Ba	sic filtering	•
R)	
	2017	SUJ
\checkmark	2018	365
✓	2019	365
\checkmark	2020	366
	2021	365
	2022	365
	2023	365
	2024	286
	Require single	e selection

17. Right-click inside your chart and select Visual table.



• Your chart should look similar to this:

1		7	√ Filters		VISUALIZATIONS	>	FIELDS
K Back to report			Filters on this visual		ing ing the life ing 🔽	اندا	
Average of C B-TotalMH	oprovedEarnedMHrsby Cumulativ	e Appro SubmittedEarne	[
ок			ApprovedEarnedMHr is (All)	sby		. 🧶	AccountCode
			IS (MII)				
			Average of C B-Total!	4IV	🔄 💷 💷 Py 📑 场 🖓	j 📼	> 📰 Calendar
-50K			is (All)				F Costitem
	\backslash		CalendarYearStr				DailyPlanSummary
-100K			is 2018, 2019, or 2020		878		PlanProjectProgress
	\sim		Filter type ①				_ · ·
					Axis		AccountCodeDescription
150K			Basic filtering		CalendarYearStr	- x	AccountCodeDisplay
			Q				AccountCodeld
200K			2017	365	Legend		∑ ApprovedEarnedMHrsbyCBQtyCBMHrs
2018	2019	2020	2018	305			ApprovedEarnedMHrsbyCBQtyCBMHrs running total in Cal.
			2019	366 -	Values		□ ∑ ApprovedEarnedMHrsbyCBQtyCEMHrs
CalendarYearStr Average of C	B-TotalMH ApprovedEarnedMHrsby	CBQtyCBMHrs Cumulative A	2021	365			ApprovedEarnedMHrsbyCBQtyCEMHrs running total in Cal.
2018	0.00	0.00	2022	365	Average of C B-TotalMH	~ ×	□ ∑ ApprovedEarnedMHrsbyCEQtyCBMHrs
2019	0.00	0.00	2023	365	ApprovedEarnedMHrsbyCBQtyCE	MHi⊻ ×	ApprovedEarnedMHrsbyCEQtyCBMHrs running total in Cal. ApprovedEarnedMHrsbyCEQtyCEMHrs
2020	0.00	0.00	- 2024	286	Cumulative ApprovedMHrsGLbyC	BQt,∽×	ApprovedEamedMHrsbyCEQtyCEMHrs ApprovedEamedMHrsbyCEQtyCEMHrs running total in Cal.
			Require single sel	ection	SubmittedEarnedMHrsbyCBQtyCl	мн⊸х	ApprovedEamedMHrsbyCEQtyCEMHrs running total in Cal. E ApprovedHours
					·····		ApprovedHours
			Cumulative Approved	IMF	Tooltips		Approved HirsGLbyCBQtyCBMHrs
			is (All)		Add data fields here		ApprovedMHrsGLbyCBQtyCBMHrsIndicator
			SubmittedEarnedMH	rsbj			Approved MHrsGLbyCBQtyCEMHrs
			is (All)		DRILLTHROUGH	_ (ApprovedMHrsGLbyCBQtyCEMHrs
					Cross-report		□ ∑ ApprovedMHrsGLbyCEQtyCBMHrs
			Add data fields	here	Off O-		ApprovedMHrsGLbyCEQtyCBMHrsIndicator

- 18. Click < Back to Report.
- 19. In the upper left corner, note the View options available in the drop-down. Change the Show smart guides toggle to **On**.
 - Doing so makes a vertical bar appear each time it bisects a point in the graph
 - Clicking on the bisected point brings up the data, as shown below

File ∨	View 🗸		
	🗔 Fit to page		
	► Fit to width		
	11 Actual size		
Average o	High-contrast colors	>	mulative ApprovedMHrsSLbyCBCbyCBMHrs and SubmittedEamedMHrsb
OK	🗄 Show smart guides 🦲	On On	user Anexand MHrsGLbyCBQtyCBMHrs @SubmittedEarnedMHrsbyCBQtyCB
		Off	
	⊞ Snap to grid ●	◯ Off	
	🔒 Lock objects 💽	Off	
-50K	Selection pane	Off	
	🗍 Bookmarks pane 🌘	Off	
	⊖ Sync slicers pane ●	Off	
-100K	\backslash		2019 Average of C B-TotalMH 0.00
-150K			ApprovedEarnedMHrsbyCBQtyCBMHrs 0.00 Cumulative ApprovedMHrsGLbyCBQtyCBMHrs -171,426.84 SubmittedEarnedMHrsbyCBQtyCBMHrs 0.00
-200K	2018		2019 2020

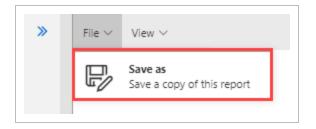
20. From the View drop-down, turn the Bookmarks Pane toggle to **On**.

2.1.3 Save Dashboard

There are two ways to save a dashboard.

First, if you are leaving a newly created report where you have modified data, you will receive a pop-up where you can confirm your desire to save your change.

Click the **File > Save As** drop down.



If Yes in selected, save with a new dashboard name and click **Save**.

Save this dashboard as	\times
man hours	
Cancel Save	

• Your dashboard will appear on the left slide-out panel alongside your other dashboard

🔨 📂 Example Folder	:
🗸 🖿 Example Folder 2	:
Operations dashboard Last data refresh: 12/18/2019 08:09 AM Created by: System	습 🛙
Change issue dashboard Last data refresh: 12/17/2019 08:10 PM Created by: System	습 :
Connected analytics utilization Last data refresh: 12/18/2019 12:12 AM Created by: System	습 :
Contract dashboard Last data refresh: 12/18/2019 01:36 PM Created by: System	☆ :
Contract dashboard - KL Last data refresh: 12/18/2019 01:36 PM Created by: Karen Loftus	★ I
dan project share test Last data refresh: 12/18/2019 01:03 PM Kew! Created by: dan miller5	☆ :
ddd Last data refresh: 12/18/2019 01:03 PM Created by: dan miller5	습 :
 InEight Compliance forms dashboard Last data refresh: 12/18/2019 01:03 PM Created by: System	습 :
 man hours Last data refresh: 12/18/2019 08:09 AM Created by: Karen Loftus	☆ :
Manhour curves Last data refresh: 12/18/2019 03:43 AM Created by: System	☆ :

Alternatively, if you are leaving an existing report where you have modified data, you will receive a pop-up where you can confirm your desire to save a copy of your change.

Click the **File > Save As** drop-down.

Add a name for the new dashboard and click **Save**.

File \checkmark View \checkmark	
Save Save this report	
Save as Save a copy of this report	Save this dashboard as Operations - 1 year Cancel

2.1.4 Dashboard Printing

To print a dashboard, select the three dot ellipses next to a dashboard you created.

Advanced Work Packaging Dashboard Last data refresh: 01/12/2021 05:12 AM Created by: System			Edit dashboard	
Change issue dashboard Last data refresh: 01/11/2021 06:59 AM Created by: System	1	~	Sharing Move into folder	
Connected analytics utilization Last data refresh: 01/12/2021 01:04 AM Created by: System	1	~	Set as default	
Contract dashboard Last data refresh: 01/12/2021 12:13 AM Created by: System	:	6	Print	-
Contract Dashboard - KL Last data refresh: 01/12/2021 12:13 AM Created by: Karen Loftus	☆:	\otimes	Delete dashboard	1

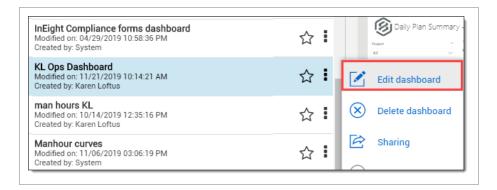
- The dashboard print settings will default the orientation to Portrait. At times, selecting Landscape will provide a more full page view
 - TIP To determine what fields are in a given report, click the Report, look at the Fields pull-out, and open the yellow colored drop-down. Search through the listing for the field(s) with a solid check-box.

2.1.5 Add a Bookmark

From an edited dashboard, you are able to further personalize your dashboard by adding a new field. In our example, Approver 1, Ajay GK is a frequent approver. We want to quickly view projects specific to him. We will do that by adding a new field onto the dashboard then adding a new Bookmark tied to him. That way, we can quickly see that view as easily as the default mode, or by clicking on other default Bookmarks. Let's see how we did it.

2.1 Step by Step 3 – Add a Bookmark

1. Ensure you are in the Edit dashboard mode of a saved, renamed dashboard.



2. Close the Dashboard pane by clicking the double blue arrows.

		×
📌 Favorites		•
All dashboards		•
F -1	Search	

- 3. Search the Fields pane drop-down lists to locate the field to add, in our case under the DailyPlanSummary, we selected **Approver 1**.
- 4. Drag that field onto the dashboard.



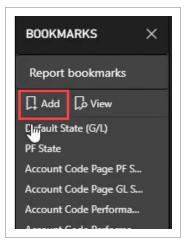
5. Using the gray colored handles that surround each attribute, move and re-size it and/or other attributes until the dashboard fits to your liking.

<u>^</u>		Average Daily Plans Create	d Per Day Plans	In Planning	Plans - Execution	Plans - Awaiting Approv	al Total Daily Plans
😥 Daily Plan Summary	/ - Organizatior	n 1		0	1	0	1
oject Approver 2	Top 10 Projects - Daily Pla Plan Status O Approved O	ns by Status Awaiting Approval	Appro	over 1	-1	Daily Plans by Hours Status	
an Status	5		Aravir bhave Bhuva	ndhbabu M na gupta aneshwari Siva			
All V			Naze	ajan sathasivan ar Siddique-PK kumar m		Daily Plans by Quantities Sta	Hours Not Approved
an Date .ast V 1 Days V	- First -	1 12402 PK90 - Project Tir - ProKu Project Cer	iter				
11/21/2019 - 11/21/2019	Project Ledcor Pro	ogress for Te Web Testing Proj Tir cer Test	ect - ne ter			Quantities Not Appr	
ject Plan ID Plan Name Shift	Location Status Re	evision Quantities Status	Hours Status	Executor	Approved by Ap	prover 1 Approver 2	
90 - ProKumar 34659 testplan-TSD Swing Shift	Edit b5 Execution	0 Quantities Not Approv	ed Hours Not Approve	d jensunil siluvaimi	uthu na	garajan sathasivan	

6. Highlight the desired Approver 1, in our case Ajay GK.

Approver 1				
Ajay GK				
Aravindhbabu M				
bhavna gupta				
Bhuvaneshwari Siva				
nagarajan sathasivan				
Nazeer Siddique-PK				
vinodkumar m		1		

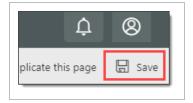
7. On the Bookmarks pane, click the **Add** icon, which will place a re-nameable bookmark at the bottom of the Bookmark pane.



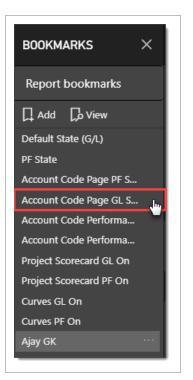
8. Double-click the new Bookmark to re-name it.



9. Save your dashboard by clicking the Save icon.



10. Toggle to another bookmark on the Bookmarks tab.



11. Then **toggle back** to your newly added Bookmark. Not only will that Approver 1 be selected, but all reports and data are filtered to those projects where he is the Approver 1.

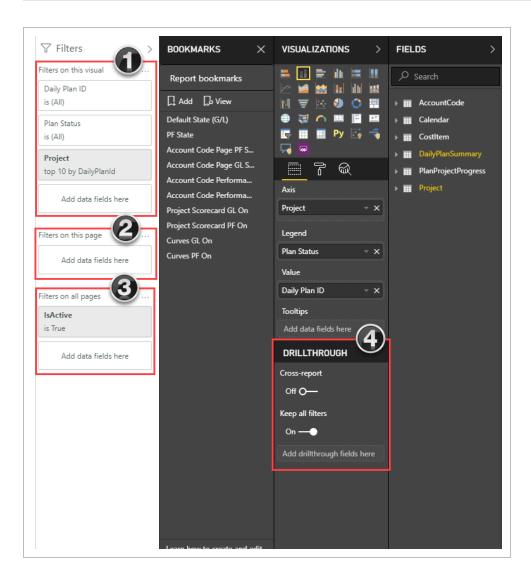
							Filters on this page	Report bookmarks
~		Average Daily Plans Created Per Day	Plans - In Planning	Plans - Execution	Plans - Awaiting Approval	Total Daily Plans	- Add data fields here	Add 🕞 View
reject ser Status ser Status	Top 10 Projects - Daly Plan Plan Status Approved 5 0 25002. Ledow. W Prigtz. Ledow. W Prigtz. Ledow. W	s by Status Weating Approval Essection	Approver 1 Alay of Anonchibataku M Bhurvaneshwali Ska nagarapa namanian Nasaer Siddigua-PC vielodiumar m		Daily Plans by Hours Status Heart Approved Daily Plans by Quantifies Status Daily Plans by Quantifies Status	Hears Net Approved	Filters on all pages ISActive is True Add data fields here	Default State (G/L) PF State Account Code Page RF S Account Code Page GL S Account Code Performa Account Code Performa Project Scorecard GL On Project Scorecard PF On Curves GL On Curves GL On

2.2 DASHBOARD FILTERING

The dashboards in Explore have advanced filtering abilities to make viewing easier and more customized.

You can filter the information on your dashboards on four different levels:

Filter	Definition
Visual Level	Filters a single visual on a dashboard. You can select the date range, account codes, approvers, etc. that you want shown.
Page Level	Filters all the visuals on a single page. You can use this to filter by areas on the project, date range, executor, etc.
Report Level	Filters all pages in a report. You can use this to filter a report by project, date range, remaining MHrs, etc.
Drillthrough	Used to focus on one aspect of the project. Any other page or visual that contains this drillthrough value can be redirected to this drillthrough page for a more focused and up-close view.



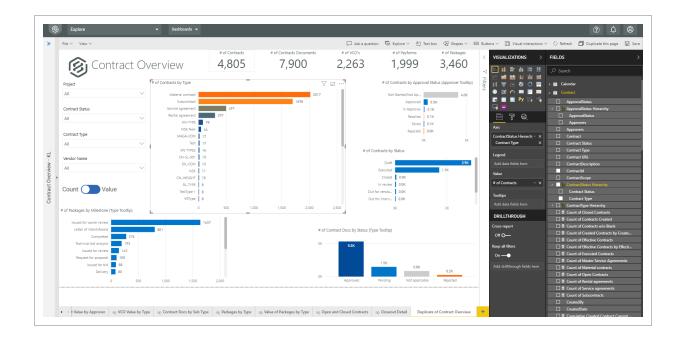
Drilling down on report data to the meta-data level, can assist in your analysis. Most of the visualizations on the dashboards display data at a summary level. Drilling down into the visualizations allows you to see the data at the detail level.

To enable us to view filtering and drill down data better, complete these preliminary steps.

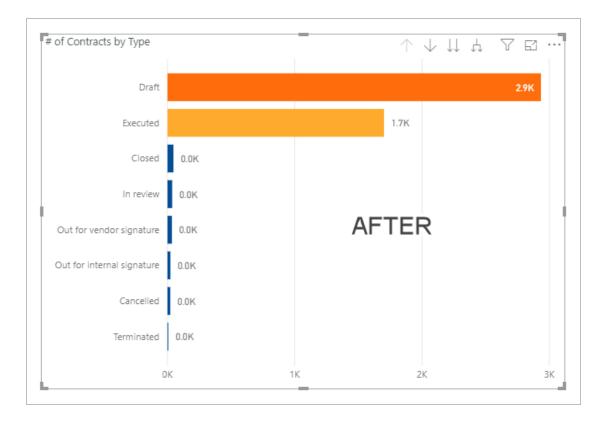
2.2 Step by Step 1 — Filter a Dashboard, part 1

- 1. Navigate to the Contract Dashboard, and then select Edit Dashboard from the Context Menu (...) icon.
- 2. Save your new dashboard using File > Save As appending the Contract Dashboard file name with your initials.
- 3. Close the **Dashboards** and **Bookmarks** slide-out panels to give yourself more room to work.
- 4. Select a Project.
- 5. Select a Contract Status of All.
- 6. Select a Contract Type of All.
- 7. Select a Vendor Name of All.
- 8. Right-click on the Contract Overview tab, and then select Duplicate Page.
- 9. On the duplicate page, delete the following charts:
- # of Contracts by ERP Sync Status
- # of VCO's by Status
- # of Payforms by Request Status
- 10. By either:
 - Clicking the ellipses, and then selecting Remove, or
 - Clicking on the chart, and then pressing the Delete button on your keyboard
- 11. Expand the width of the Fields panel.
- 12. Expand the # Contracts by Type chart.

13. Click on each remaining chart to view Fields used.



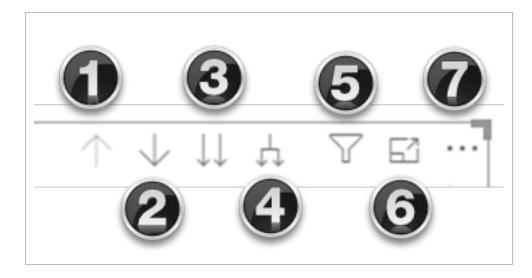
14. On the # Contract by Type chart, click the **Contracts** Field panel, and then add **Status Hierarchy > Contract Status**. Notice how the chart changes.



15. Specifically, with the field added, you now have greater ability to filter the data.

2.2.0.1 Filtering Options

#	Filtering Option
1	Drill Up
2	Drill Down
3	Go to Next Level in the Hierarchy
4	Expand all Down one level in the Hierarchy
5	Filter
6	Focus Mode
7	More Options



Navigate to the dashboard that you just created and select **Edit dashboard** from the Context menu icon.

1		Edit dashboard
:	\otimes	Delete dashboard
:	Ø	Sharing
1	\ominus	Remove sharing
		Move into folder
:	Ū	Move out of folder
:	~	Set as default
:	8	Print

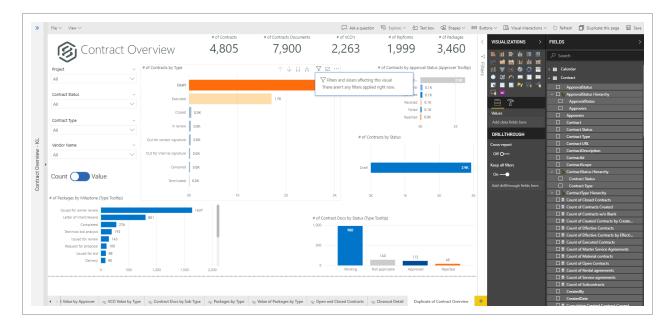
• Note the four types of filters:

Filter Type	Definition
1. Visual Level	Filters on an individual visual.
2. Page Level	Filters on every visual on the report page.
3. Report Level	Filters on all pages in the report.
4. Drillthrough	Filters on a single entity in the report.

NOTE For the remainder of this section, data will be represented by the **Number of Contracts**. Alternatively, by moving the toggle in the other direction, all data would be shown by **Contract Value**. Similar functioning toggles exist in other types of reports for ease in viewing data in an alternate format.

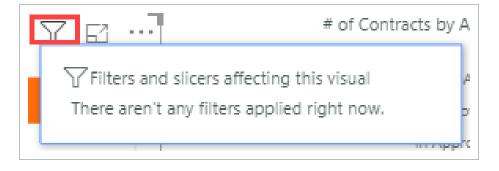


Having followed the previous steps, your screen should now look similar to this:

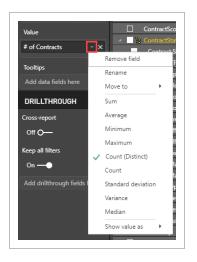


2.2 Step by Step 2 — Filter a Dashboard, part 2

- 1. Open the **Filters** panel.
- 2. Click on the # of Contracts by Type stacked bar chart.
- 3. Click on the **Filters** icon and notice you have no filters applied right now.



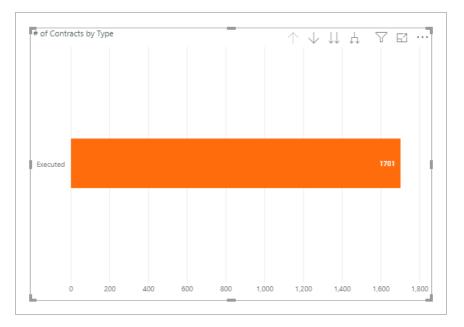
4. Under the Visualizations slide-out panel, click on the **# of Contracts** drop-down to view details of that filter.



5. On the Visual Filters, click on the **Contract Status** drop-down, select **Executed** to apply the filter.

is Executed 🔬 📀						
Filt	er type 🛈					
Ba	asic filtering	•				
ρ)					
	Select all					
	(Blank)					
	Cancelled	22				
	Closed	47				
	Draft	2934				
\checkmark	Executed Am	1701				
	In review	37				

Notice how this chart changes



- 6. Change the Contract Status to Select All.
- 7. Collapse the Contract Status filter.

Contract Status is Executed

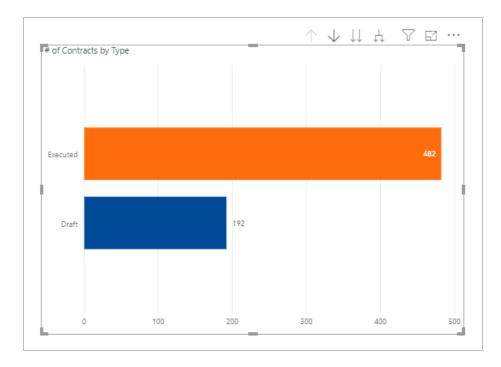
- 8. Under the filter Contract Type, select 2 options from your drop-down.
- 9. Within the chart, right-click and select Visual Table.

[‡] of Contracts by Type				$\uparrow \downarrow \downarrow$	ι ή	Y	63
Draft							1370
Executed				741			
Out for vendor signature	26						
In review	22						
Out for internal signature	16		Sho	w Next Level			
Cancelled	н		Expa	and to next le	evel		
Closed	6		Visu	al table		1	
Terminated	3		Grou		•		
	D	500		1,0	000		

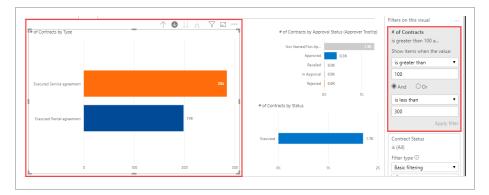
- The # of Contracts by Type chart now only appears, with the actual data for those two contract types shown.
- 10. Add a third Contract Type, and see how the chart and data changes again.
- 11. Click Back to Report.

Sack to report	# OF CONTRACTS	BY TYPE					$\uparrow \downarrow \downarrow \downarrow \downarrow$	0
Draft								1370
Executed					741			
Out for vendor signature	26							
In review	22							
Out for internal signature	16							
Cancelled	11							
Closed	6							
Terminated	3							
	0	200	400	600	800	1,000	1,200	1,40
Contract Status	# of Contracts							
Draft	1370							
Executed	741							
Out for vendor signature	26							
In review	22							
Out for internal signature	16							
Cancelled	11							
Closed	6							
Terminated	3							

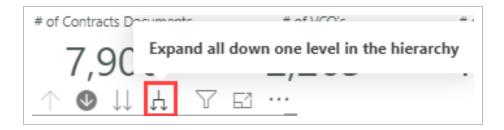
- 12. Close the Contract Type filter.
- 13. Click **File > Save** to save this dashboard.
- 14. Open the **# of Contracts** filter.
- 15. Show items that are greater then 100 and less than 300.
- 16. Click Apply Filter.
 - The newly filtered chart appears. In this case, Executed is greater than 300. Why do 482 Executed Contracts appear? Let's drill down further to find out



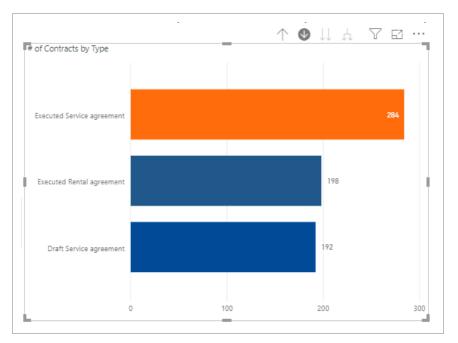
- 17. Click the **Drill down** icon.
- 18. Then click on the orange **Executed** row.
 - The chart changes to Executed Service Agreements and Executed Rental Agreements, both under 300



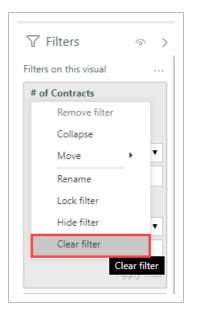
19. Click the Expand All Down One Level in the Hierarchy button.



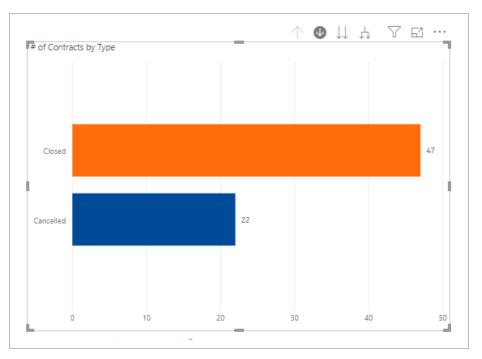
 Now the chart changes to all Executed Contract Types greater than 100 and less than 300



- 20. Right-click on the image and click **Drill up**.
- 21. Right-click on the # of Contracts Filter and select Clear filter.

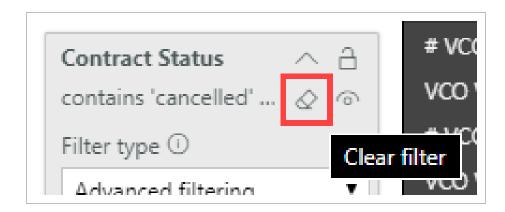


- 22. Under the Contract Status filter, change the drop down from Basic Filtering to Advanced filtering.
- 23. Under Show Items when the value > contains type in **cancelled or contains closed**.
- 24. Click Apply filter.



The chart now shows only Cancelled or Closed statuses

25. Click the Contract Status Clear filter icon.

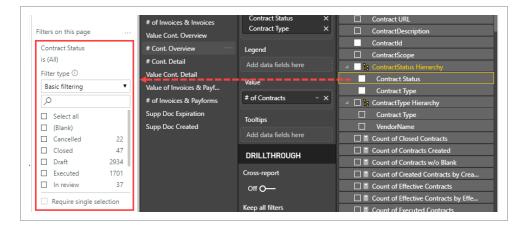


26. Click File > Save.

2.2.0.2 Page Filtering

Two options of page filtering exist in Explore. The first is filtering on just this page (tab.)

From the Contract Fields panel, drag the checked Contract Status field onto Filters on this Page.



Select **Closed** from the Basic Filtering drop-down list.

- # of VCO's # of Pavform # of Packao 𝖓 Filters 47 79 22 22 3,460 Contract Overview ● II Å ▼ 🖬 … O And Or E of Contracts by Typ # of Contracts by Approval Status (A Project All contains closed Contract Statu Contract Type Contract Type is (All) All # of Contracts by Statu: Add data fields here All Filters on this page Count 🕥 Value Contract Status is Closed Filter type 🛈 Basic filtering # of Contract Docs by Status (Type Tooltip Q Select all (Blank) Cancelled 22 47 Draft 2934 Executed 1701 37 In review Require single selection
- Now all reports on this page only show contracts that have been Closed

Select the **Remove Filter X** icon.

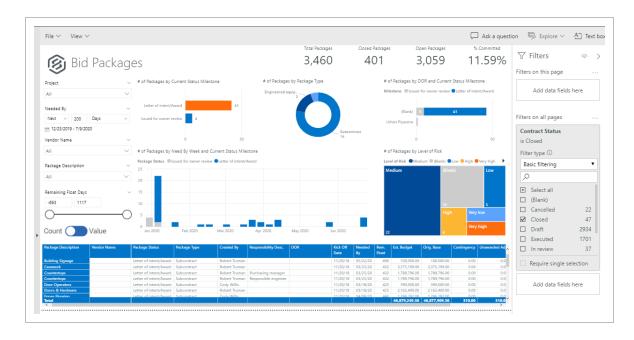
2.2.0.3 Filter On All Pages

The second type of page filter applies a filter across all pages (tabs).

Drag the same **Contract > Contract Status** data field onto Filters On All Pages.

Filters on this page	# of Invoices & Invoices Value Cont. Overview	Contract Type X	ContractDescription
Add data fields here	# Cont. Overview	Legend	ContractId
	# Cont. Detail Value Cont. Detail	Add data fields here	A ScontractStatus Hierarchy
Filters on all pages	Value of Invoices & Payf	Value	Contract Status Contract Type
Add data fields heContract S	atus of Invoices & Payforms	# of Contracts V	A D : ContractType Hierarchy
	Supp Doc Expiration Supp Doc Created	Tooltips	Contract Type VendorName

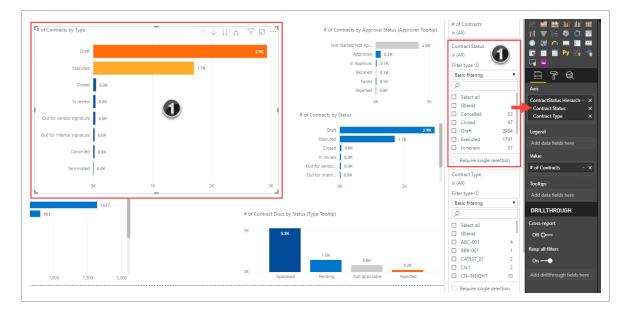
Again choose the option of **Closed** from the drop-down list. Nothing will look different on this tab, only when you select another tab will the change be obvious. For example, this is the Bid Packages tab, where all charts only represent Closed projects.



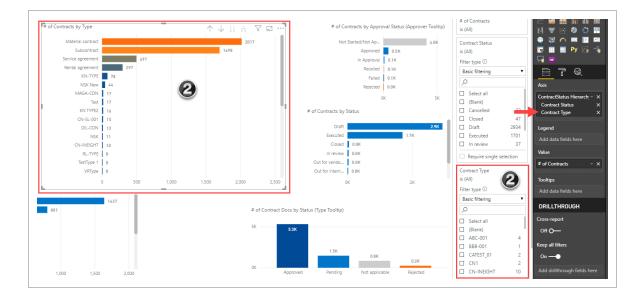
2.2.0.4 Go to the Next level in the Hierarchy

The final icon when filtering is the **Go to Next level in the Hierarchy** icon. When in a report and this icon is clicked, the table filters down to the next level in the Hierarchy as shown in this Visualization:

Initially, data will be represented by Contract Status.



When the **Go to Next level in the Hierarchy** icon is selected, the chart will change to # of Contracts by Contract Type.

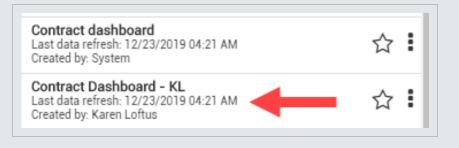


TIP

Throughout the Explore dashboard, there are multiple instances where you can hover over a data-point to obtain a Type Tooltip pop-up showing drill down data.

Contract Type		# of Packages	by Type		
All	\sim	Subcontract			Permanent mate.
Vendor Name					
All	\sim				
		0			
Count 🕖 Valu	e				
		115			
		Engineered e			49 Profession
# of Packages by Milestone (T	/pe Tooltip)				Profession
Issued for owner review					
Letter of intent/Award		68			16
Completed	276	_			
Technical bid analysis	193				
Issued for review	143				
Request for proposal	100				
Issued for bid	88				
Delivery	80				
0	500	1,000	1,500	2,000	

NOTE Last Data Refresh: A time-stamp in the dashboard list indicates when the data in that dashboard was last refreshed. This helps minimize the confusion about why some records may or may not be present in your dashboard.







EXPLORE MOBILE

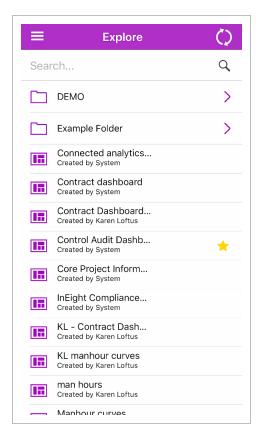
InEight Inc. | Release 24.3

3.1 MOBILE APPLICATION

The Explore mobile application gives you access to your reports and the ability to view dashboards from a mobile device. This added convenience lets you analyze reporting data from anywhere, which allows you to make informed and timely decisions.

After you log in to the application, the screen opens to show an alphabetical listing of the dashboards.

• All folders and favorites added in the web application also show in Explore mobile.



The following step-by-step shows how to pull up the Explore mobile dashboard.

3.1 Step by Step 1 — Pull up a dashboard

- 1. Tap the Refresh icon to sync any changes you made in the web application.
- 2. Scroll through the list of dashboards and folders or use the Search function at the top to find the dashboard you need.

- 3. Tap a dashboard to open it.
 - The screen will turn from portrait to landscape.

3.1.1 Manipulate a dashboard

In the dashboard, you can refresh the screen, zoom in and out, select different tabs, and modify filters to personalize your view.

<			C	ore Pro	ject	t Info	orm	ation			(i)	
^						Active Pr	ojects	Closed	Projects	Total Projects	Active Employe	ees
Pr	oject D	etails				4,9	97	2	2	5,019	17K	
Org Name, Projec	t	Status				Inactive Em	ployees	Total Er	mployees	Assigned Equipmen	t Assigned Use	rs
All				\sim		1,6	69	10	9К	54K	6,828	2
						1,0	05	1.			0,020	ر
Project Start &	End Dates								Project L			
		**							Project	!Report testi ●! RandomD ●! F	andonDat IkandonDat	2
Project		p20					20	30	a pro-	CAR V		
!!!Report testing!!!!!	-New Project									NORTH AMERICA	BEUROPE	AS
! RandomData.uniqu	eName(7) nnns-! Rand	omData.unique							Pacific	Atlantic	0	
! RandonData.unique	Name(4)-! RandonDat	a.uniqueName(Ocean	Ocean		
	Name(5) sds-! Randon	Data.uniqueNa									AFRICA	1
000001111100000no										SOUTHAMERIC		
000111kfjhsdhsudsd	ısdusdusdsdisdisidsid-'	Test Project_Edit Today							Bing	• •	Ocea	
									• 5	© 2020 Tom Tom © 2020 HERE,	© 2020 Microsoft Corporation Terms	
Project ID	External Project ID	Project Name	Project Status	Org Name	Start Date	End Date	Duration (Days)	Notes		Country	Region C	iity 🔨
IIIReport testing!!!!!!	External project ID	New Project	Closed	dec org 123 90 890	11/3/2019	12/31/2022	1 154	Project;ldssaddsa				
IRandomData.uniq ueName(7)]nnns	991456454124123	IRandomData.uniqueName (7)		SA1000-Kiewit	2/3/2020	1/26/2021		9876540-98765p;			P	'nοŧ
! RandonData.uniqu eName(4)	! RandonData.uniq ueName(4) 110	! RandonData.uniqueName(10) 6ds	Active	MR OBS A9	4/16/2019	3/14/2020	333	Project Notes				
! RandonData.uniqu eName(5) sds	! RandonData.uniq ueName(7) sds	! RandonData.uniqueName(5)	Closed	TestOrgStructure1701	6/25/2019	12/20/2030	4,196					
uniqueName(235) 1	! uniqueName(235) 1! uniqueName(2	! uniqueName(235) ! unique Name(235)	Active	S100000 - PKS Inc								
	35)											

NOTE

You cannot share or edit dashboards in the mobile application.

- Tap the **Information** icon to show additional information about the dashboard, such as the owner of the dashboard and last data refresh time.
- Tap the **ellipses**, and then the **Favorite** icon to make the dashboard a favorite. This also makes the dashboard a favorite in the web application.
- Tap the **Menu** icon. You can toggle between the dashboard and your account information or sign out of the mobile application.

NOTE

The Sharing icons are visible but can only be activated in the web application.