PROGRESS USER GUIDE

Advanced

FIELD EXECUTION MANAGEMENT

INEIGHT

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Release 21.1
Last Updated: 18 February 2021

InEight®
PROGRESS

CONTENTS

STEP-BY-STEP PROCEDURES

LESSON 1 – ADVANCED OPTIONS

Lesson Duration: 90 minutes

Lesson Objectives

After completing this lesson, you will be able to:

- Adjust daily plan settings for advanced options
- Input daily plan hours using reason codes
- Assign a premium to employee hours
- Link an employee's hours to equipment hours

Lesson Topics

1.1 ADVANCED OPTION OVERVIEW

1.1.1 Organization Settings

NOTE The configuring of the project-wide settings for Progress as described below, are set up by your company's administrative user(s).

The organization settings for the additional daily planning codes available to be used should already be established for the company. In the project settings section below, you will be able to identify which of these settings you wish to activate and use on the project. If there is a needed code outside of what is already available, you will need to submit this request to the appropriate administrator within your company to have it added at the organizational level.

1.1.2 Overview

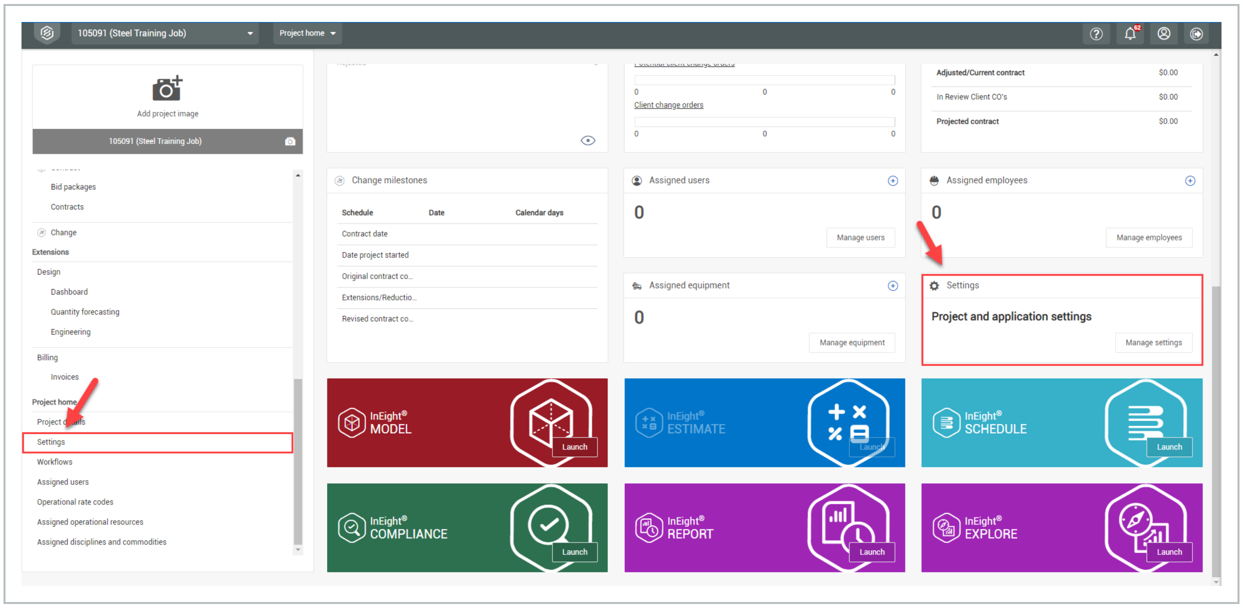
The advanced settings covered in this section can be used for both the Progress web and mobile applications.

- Reason codes are categories set up in your Organization and Project settings to provide options to assign hours. These categories can be set up as anything that would be helpful for payroll, such as Work, Bank time off, Vacation, PTO, etc.
- Premiums are assigned on an hourly basis and are used to ensure employees receive the correct pay for the work that is done. For example, if someone works on something outside their normal job duties and is awarded more money for those specific hours, a premium would be used
- The employee and equipment linking option allows an employee to be assigned to operate a piece of equipment

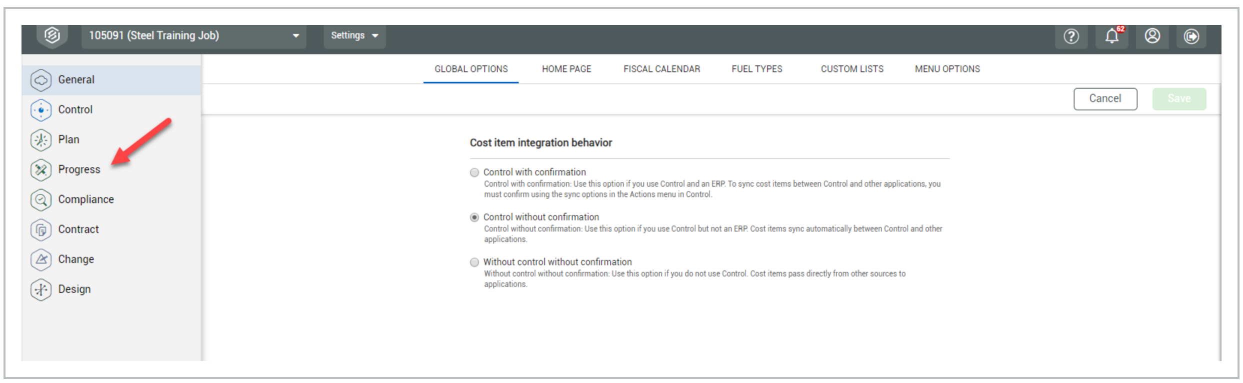
The Step by Step below walks you through how to turn on these advanced options for your daily plans.

Project Settings in InEight Progress

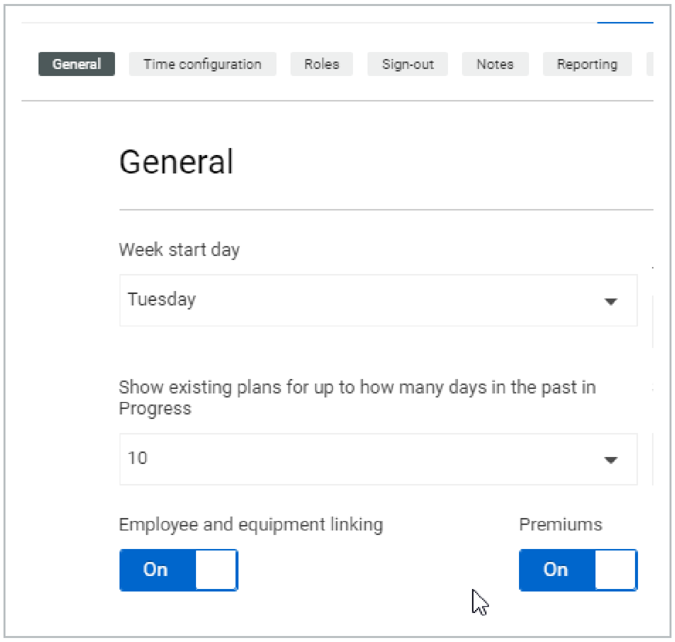
1. From your project homepage, select the **Settings** tile at the bottom right (you may have to scroll) or select **Settings** from the menu on the left.



2. Under project settings, click the **Progress** icon on the left.

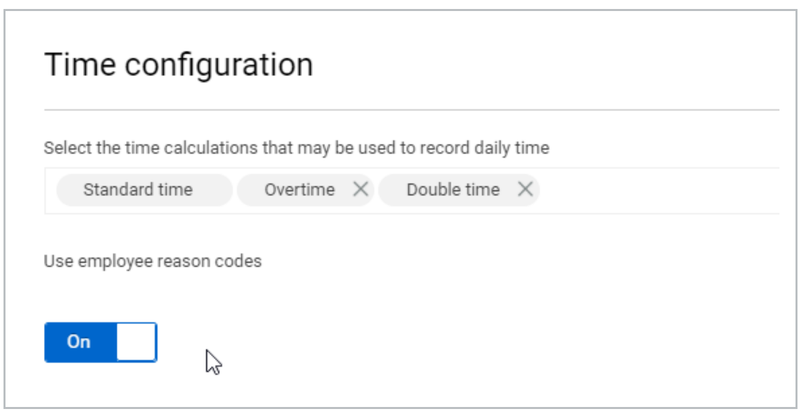


3. Navigate to the **General** tab.
4. Change the toggle buttons to **On** to allow employee and equipment linking on the project and to allow premiums on the project.

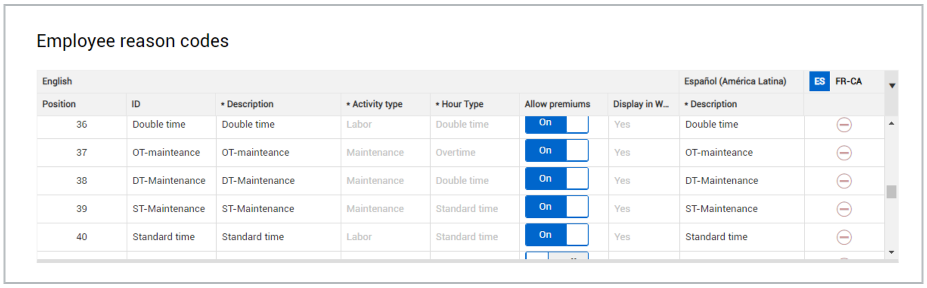


NOTE Employee and equipment linking settings cannot be disabled once plans exist. Premium settings can only be modified when no plans exist.

5. Navigate to the **Time Configuration** tab and jump down to the settings for the employee reason codes and premiums.
6. To use the employee reason codes in Progress, toggle the button to **On**.



7. The **Employee reason codes** and **Employee premiums** you see available are the ones set up in the organization settings.



Employee reason codes

English							Español (América Latina)	ES FR-CA
Position	ID	* Description	* Activity type	* Hour Type	Allow premiums	Display in W...	* Description	
36	Double time	Double time	Labor	Double time	On	Yes	Double time	
37	OT-mainteance	OT-mainteance	Maintenance	Overtime	On	Yes	OT-mainteance	
38	DT-Maintenance	DT-Maintenance	Maintenance	Double time	On	Yes	DT-Maintenance	
39	ST-Maintenance	ST-Maintenance	Maintenance	Standard time	On	Yes	ST-Maintenance	
40	Standard time	Standard time	Labor	Standard time	On	Yes	Standard time	

Employee premiums

English					Français	ES FR-CA
Position	ID	* Description	* Activity type	Required	* Description	
01		Foreman	Labor	Yes	Contremaître	
02		Lead hand	Labor	Yes	Chef d'équipe	
03		Night	Labor	Yes	Nuit	
04		First Aid	Labor	Yes	Premiers soins	

- Each code listed is available to be listed in English, Spanish, French, Portuguese, and Dutch. Use the toggle in the upper-right of the table to change your display language in addition to English

8. Use the **Add** and **Remove** icons on the right to add or remove the code for your project to use.
9. Use the on/off toggle under **Allow Premiums** to identify which codes would allow a premium as set up in your ERP system.

1.2 REASON CODES

1.2.1 Reason Codes

Reason codes are categories set up in your Organizational and Project settings to provide more options that are useful to assign hours to. These categories can be set up as anything that would be helpful for payroll tracking, such Work, Approved Time Off, Vacation, or PTO, which can be associated with standard time, overtime, and double time.

1.2.2 Premiums

When assigning hours to your reason codes, you can also indicate a premium rate. Premiums are assigned on an hourly basis and are used to ensure employees receive the correct pay for the work that is done. If someone works something outside their normal job duties and are awarded more money for those specific hours, a premium would be used. For example, one of your employees may work at a regular labor rate for 6 hours and as a welder for 2 hours. You can have two reason codes for that employee, one for 6 hours and one for 2, and you can assign a premium code, such as “HSS Welder” to the 2 hours. This will ensure the correct rate gets accounted for when the information goes to payroll.

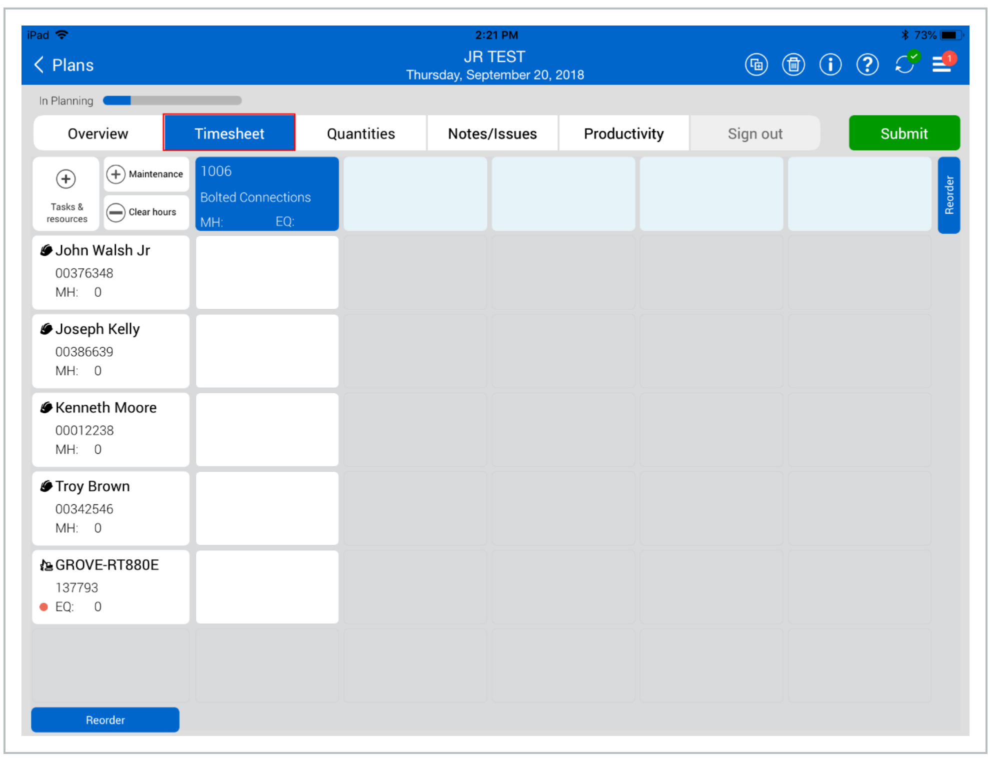
The following steps assume that Reason codes were already set up by an administrator in your Organization settings and enabled in your Project settings (see section 10.1) and walk you through how to assign hours to reason codes on your daily plans.

TIP	The Step by Step examples in this lesson use the Progress mobile application. You would use the same functionality for the Progress web application.

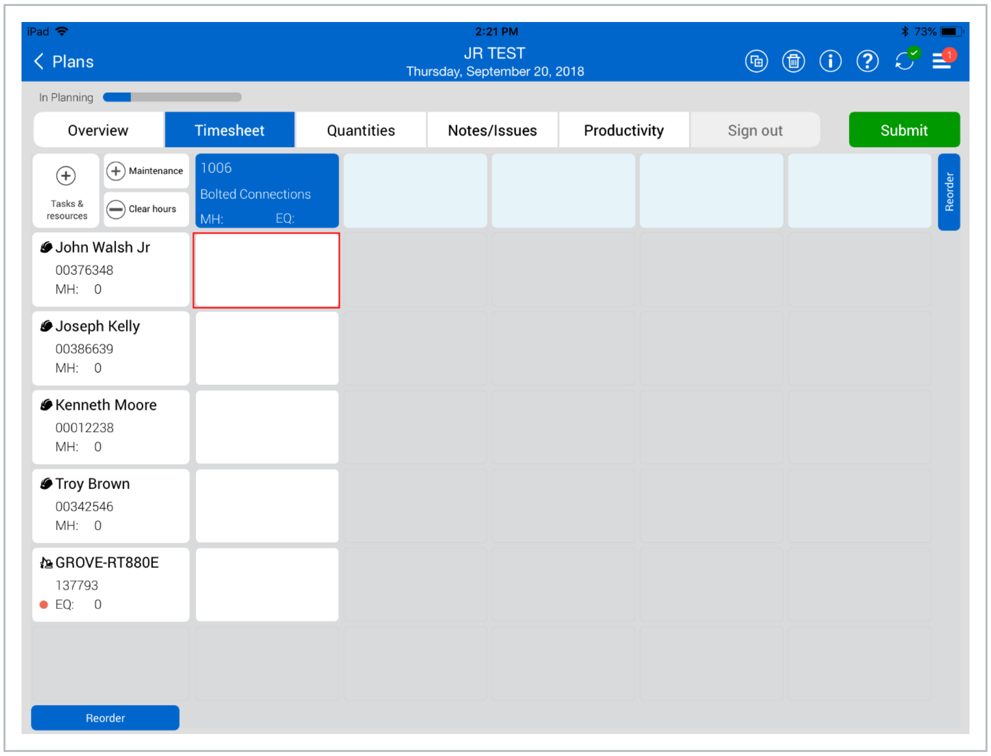
Assign Hours Using Reason Codes

This practice can be used for both the web and mobile versions of **Daily Planning**.

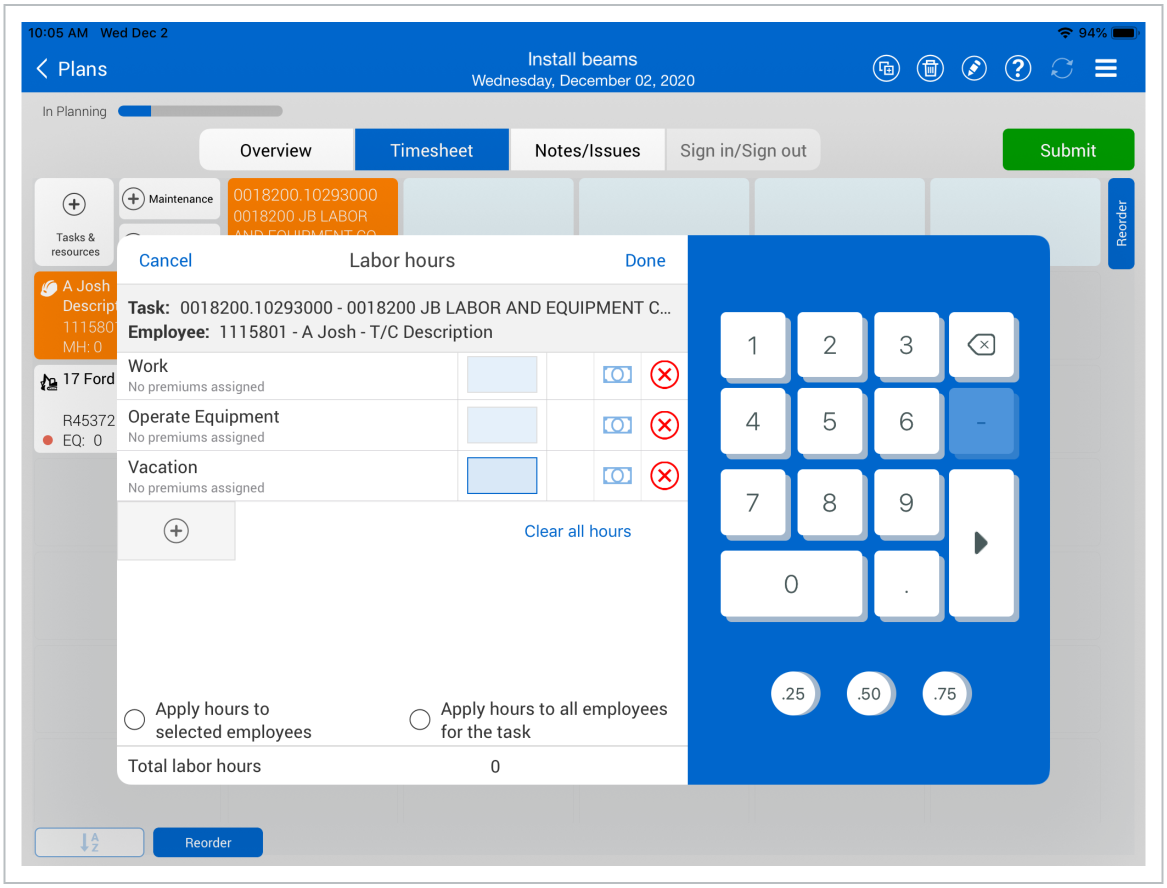
1. Open the daily plan you are working in and navigate to the **Timesheet** tab.



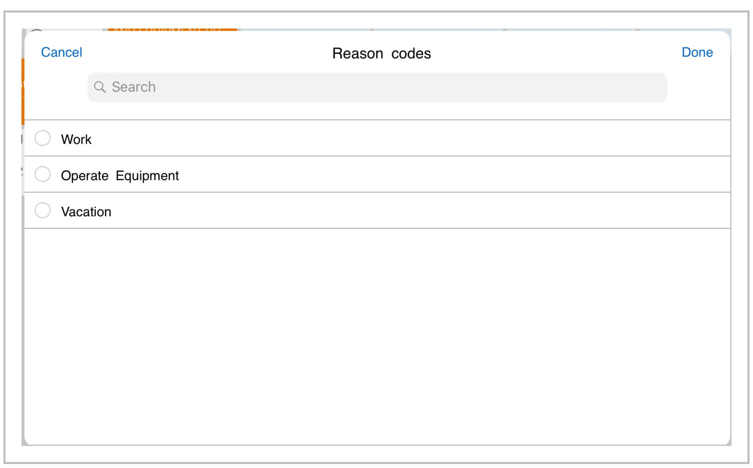
2. Select the tile next to an employee.



- Notice that instead of Standard time, Overtime, and Double time, you now have reason codes

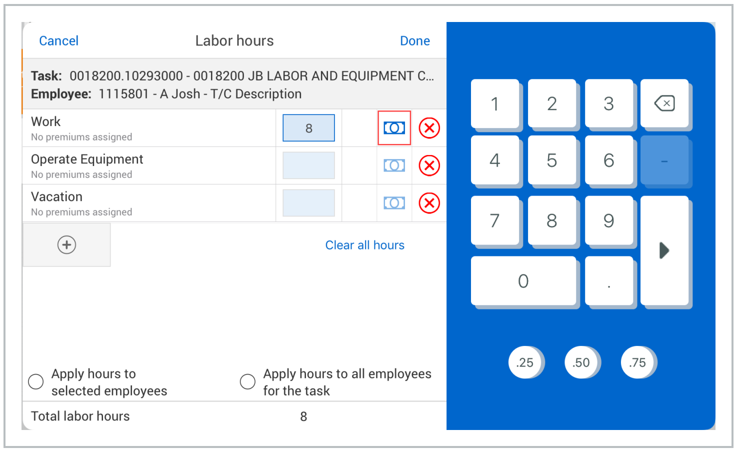


3. Select the **Add** icon to see more examples of reason codes.
   - These categories can be set up in the Organization settings as anything that would be helpful for payroll, such as, Work, time off, Vacation, PTO, etc



4. In the blank field, enter your employee's hours.

5. Select the **Premium** icon to the right of the hours..



6. Select a premium from the list, and then select **Done**.
7. Select **Done** in the Labor Hours dialog box.
8. Select the white box next to another employee.
9. Select the **Add** icon.
10. Select a reason code.
    - Now the reason code appears as a field to enter hours
11. Enter your employee's time under the reason code for the employee.
12. Select **Done**.

NOTE	If you change the reason code on an employee that has a premium assigned to it, the premium will be removed, unless the previously assigned premium is valid for the new reason code as well.

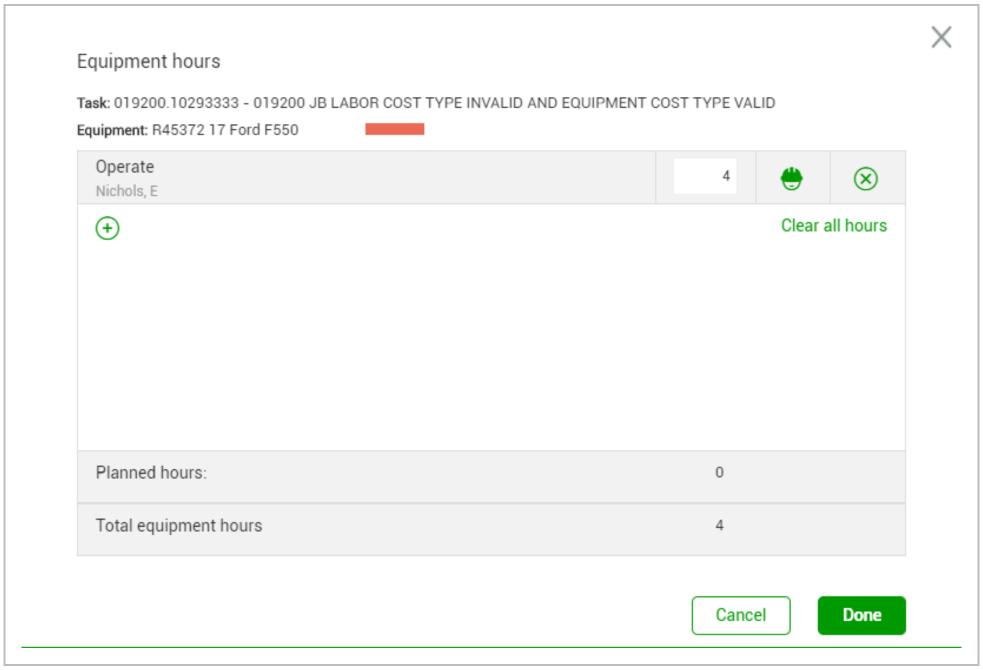
1.3 EMPLOYEE EQUIPMENT LINKING

Scenario

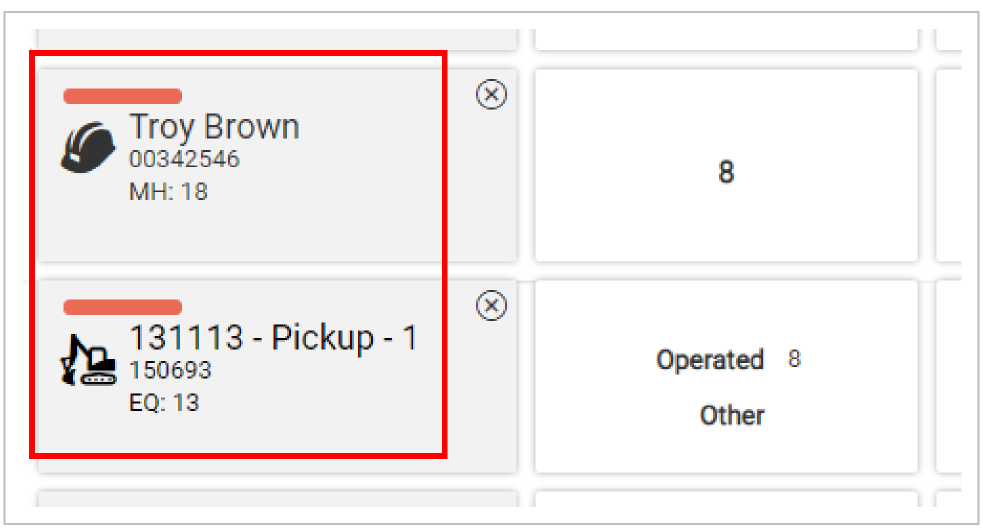
> You are the field engineer responsible for tracking what employee has been operating specific equipment and for how long. You can link the employee to equipment in the daily plan and input the hours they were operating vs labor.

With the employee and equipment linking option turned on in project settings, you can link employees and equipment on the time sheet, so you can see which employee is assigned to operate each piece of equipment.

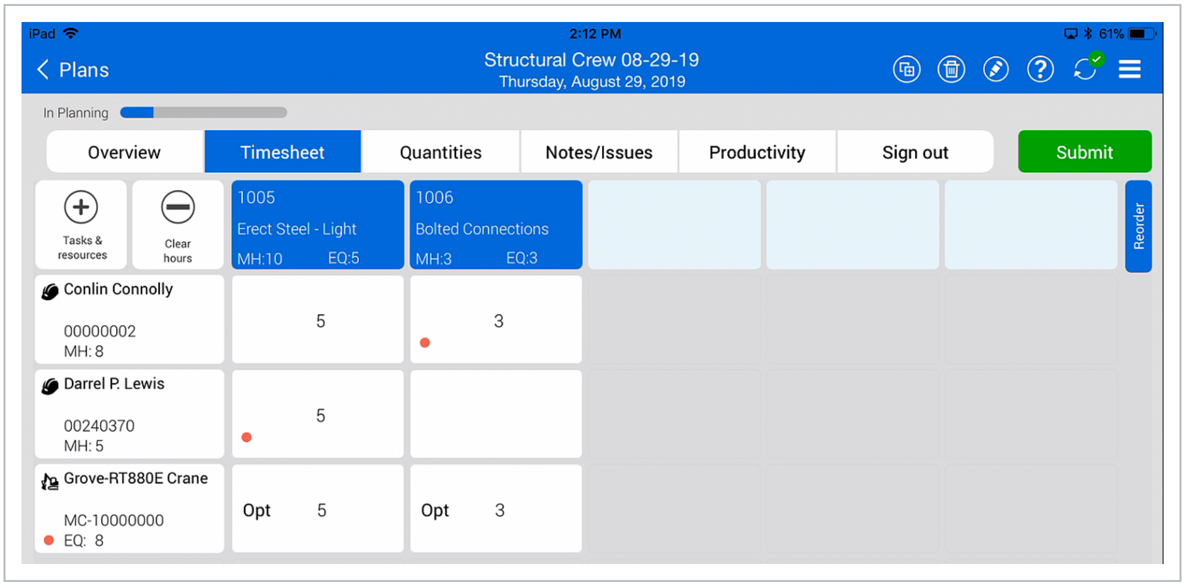
With employee equipment linking enabled, when you enter hours for an employee, you can also specify the equipment they operate and their hours.



With employees and equipment linked, you then see a color-coded bar on the tile of the crew member and its associated equipment.



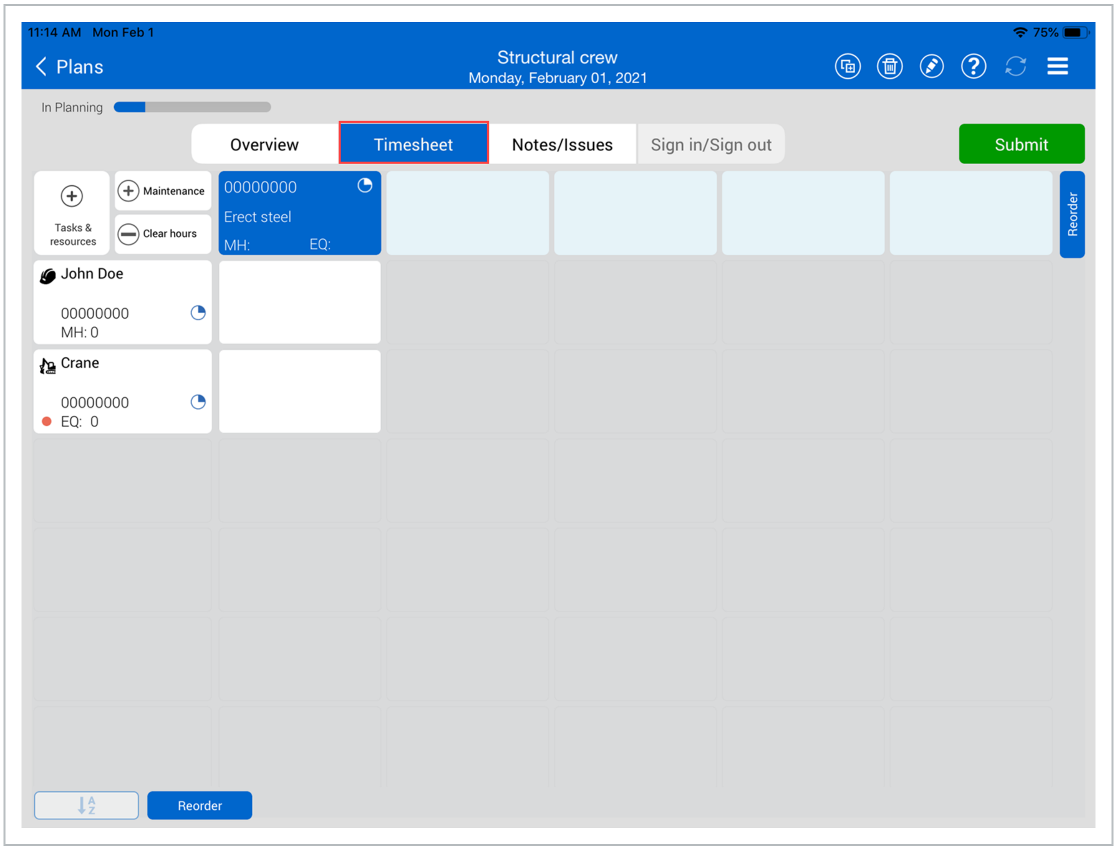
In the Progress mobile application, employee and equipment links are indicated by dots.



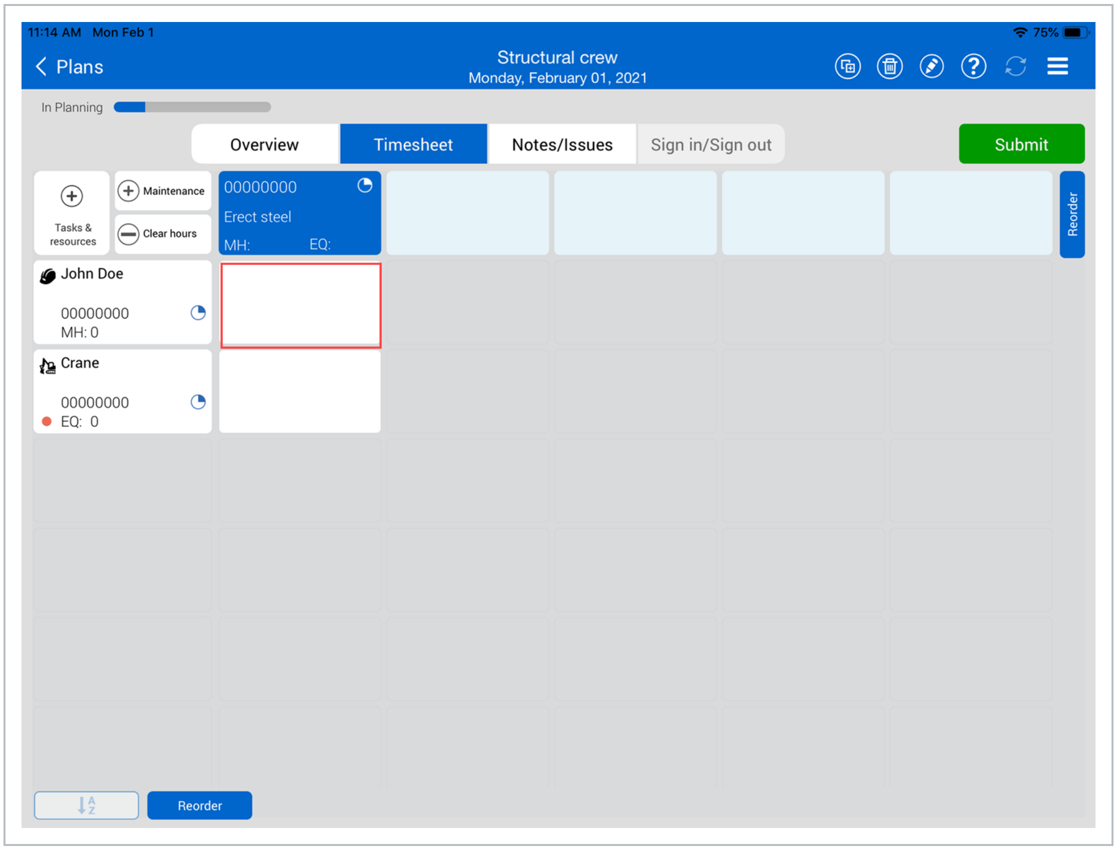
The following steps walk you through linking an employee to equipment on the Timesheet tab of a daily plan. The images in this Step by Step are from the Progress mobile application.

Linking Employees and Equipment

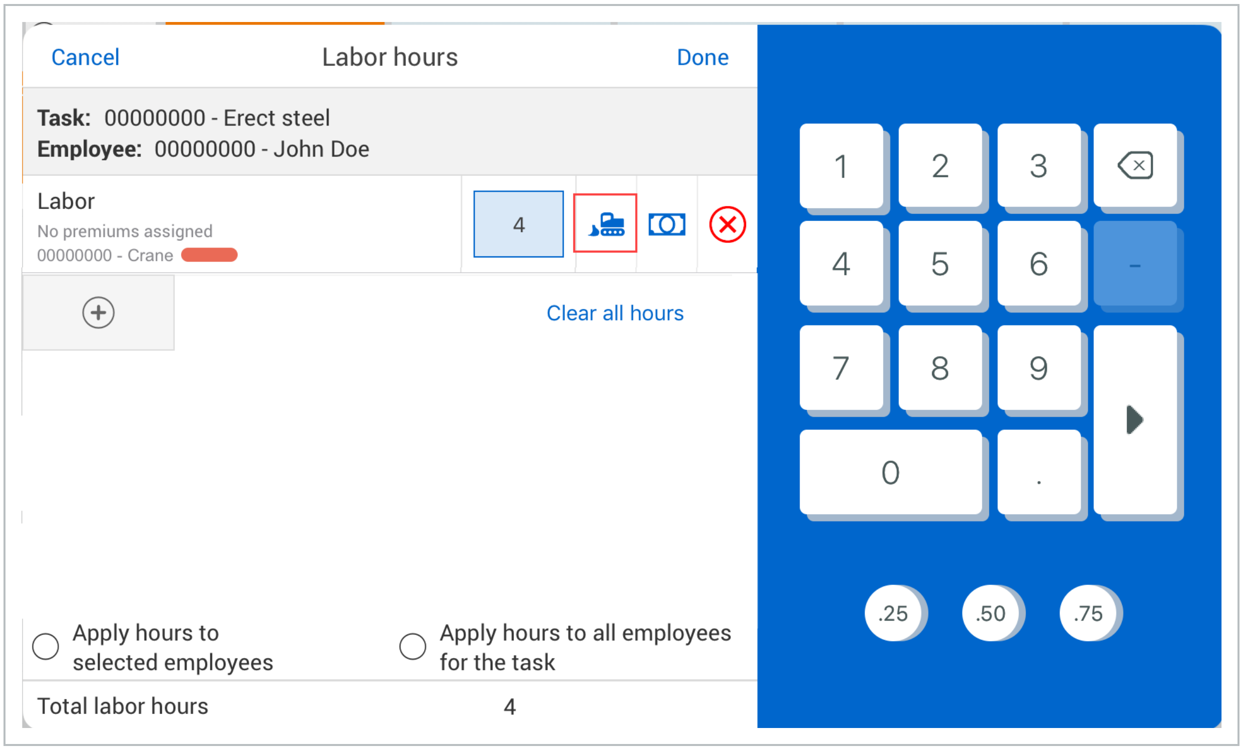
1. Open the daily plan you are working in, and then go to the **Timesheet** tab.



2. Select the **white tile**next to an employee tile.

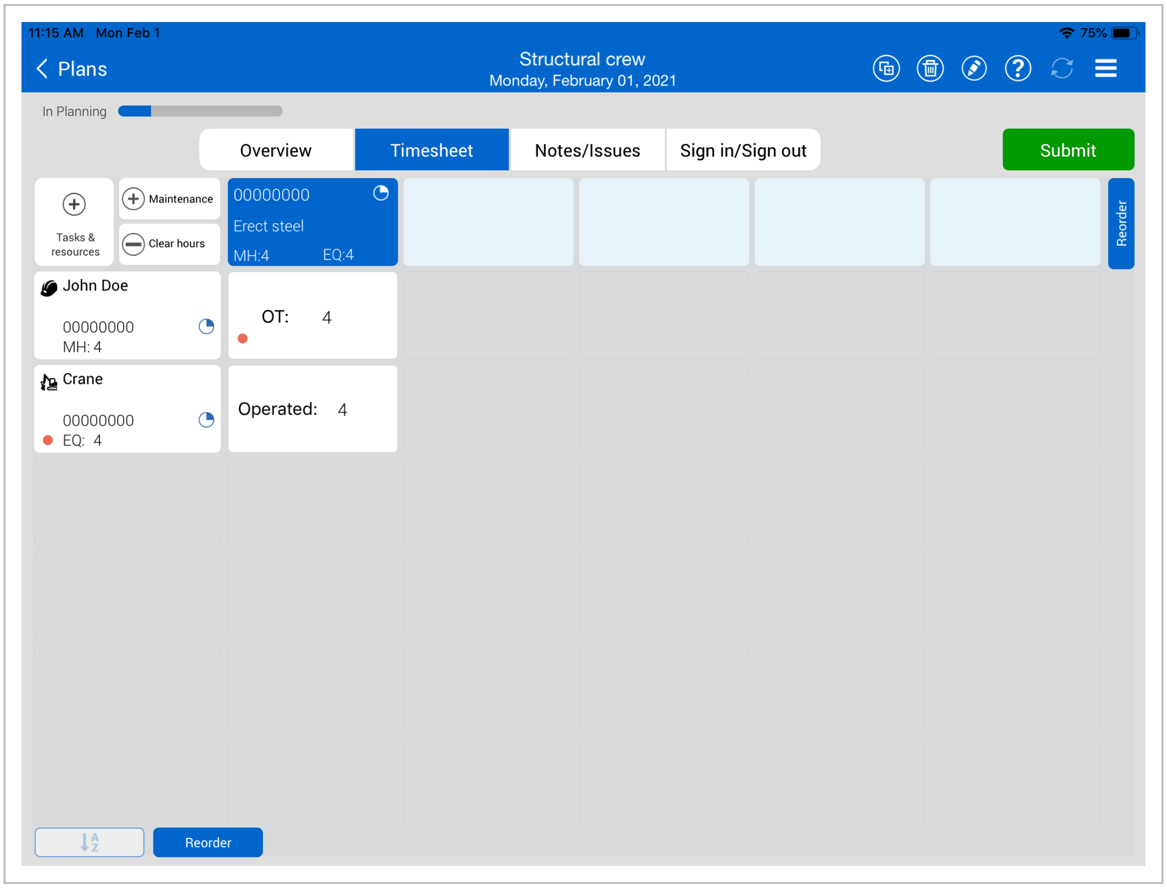


3. Enter the labor hours of the employee into the blank field.
4. Click the **Equipment** icon, and then select a piece of equipment.



5. Click **Done**.
   - Note how the hours auto-populated for the equipment you specified and the colored dot next to the equipment and employee are the same color. This is showing them linked

together


11:15 AM Mon Feb 1
75%
Plans
Structural crew
Monday, February 01, 2021
In Planning
Overview
Timesheet
Notes/Issues
Sign in/Sign out
Submit
Tasks & resources
Maintenance
Clear hours
00000000
Erect steel
MH:4
EQ:4
Reorder
John Doe
00000000
MH: 4
OT: 4
Crane
00000000
EQ: 4
Operated: 4
Reorder

Lesson 1 Review

1. The employee reason codes can be used to assist payroll to define what types of categories?
   a. Staff Employees
   b. Vacation
   c. Both b and d
   d. Sick

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2. Premiums are assigned on what time basis?
   a. Weekly
   b. Daily
   c. Monthly
   d. Hourly

---

3. What would you select to add equipment to the Time Sheet?
   a. Crew member's name
   b. Add tasks and resources
   c. Add maintenance

Lesson 1 Summary

As a result of this lesson, you can:

- Adjust daily plan settings for advanced options
- Input daily plan hours using reason codes
- Assign a premium to employee hours
- Link an employee’s hours to equipment hours

LESSON 2 – MAINTENANCE WORK ORDERS

Lesson Duration: 15 minutes

Lesson Objectives

After completing this lesson, you will be able to:

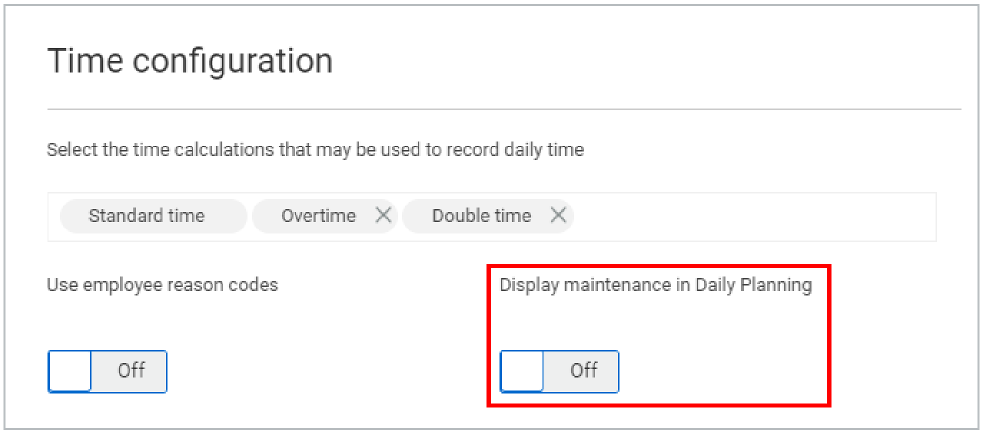
- Add maintenance work orders to a time sheet
- Assign employee work hours to a maintenance work order

Lesson Topics

2.1 MAINTENANCE WORK ORDER OVERVIEW

2.1.1 Organization Settings

There is an optional setting in the **Progress** tab of the Organization settings for tracking maintenance work orders on the Timesheet tab of a daily plan.



If the maintenance work order feature isn't available in **Progress**, you will need to submit this request to the appropriate administrator within your company to have it added at the organizational level.

2.1.2 Overview

The tracking of maintenance-related work orders covered in this section can be used for both the web and mobile versions of Daily Planning.

- Maintenance work orders allow you to log employee hours against the maintenance work orders that are generated in your ERP system
- Work orders are created in your ERP system and brought into the InEight Project Suite via integration

2.2 UTILIZING MAINTENANCE WORK ORDERS

Daily planning tracks work related tasks, but you also may need to track maintenance related work orders. With the option to display maintenance turned on, you can use InEight Progress to log employee hours against your maintenance work orders.

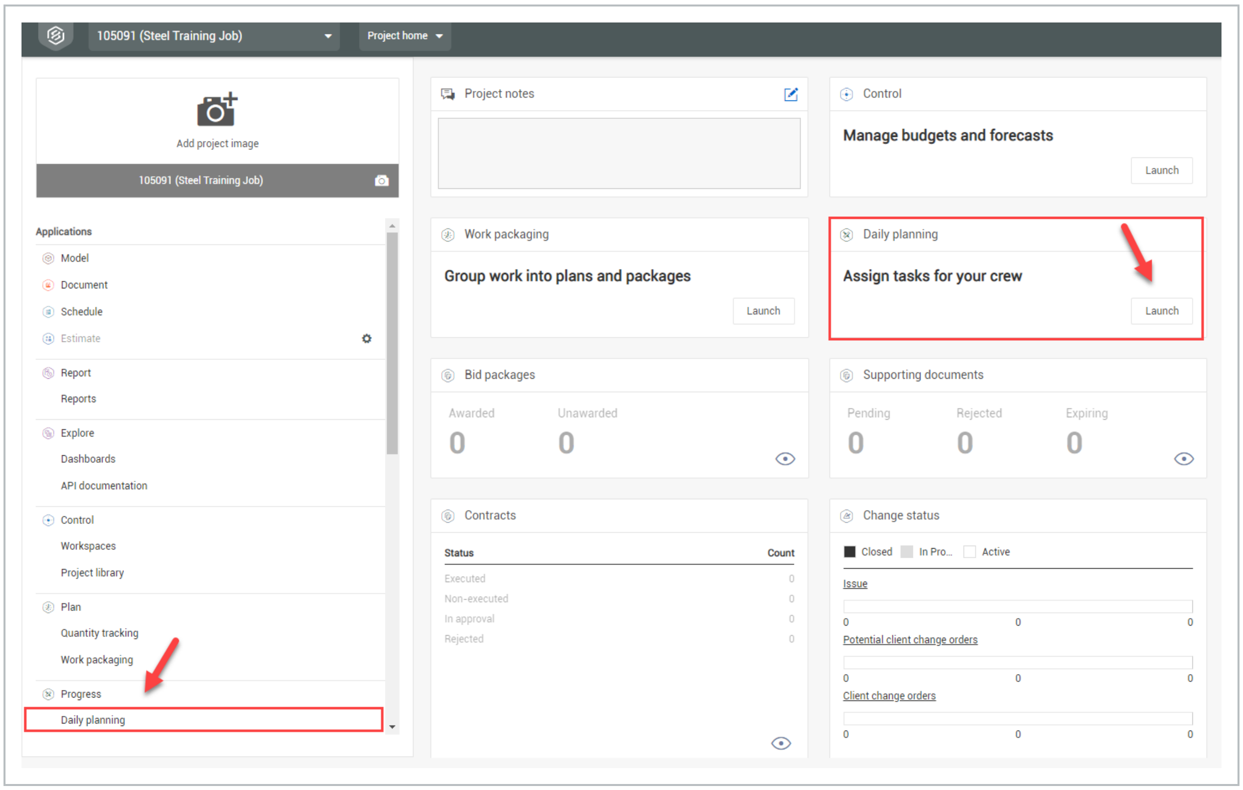
- The option **Add Maintenance** in the daily plan will default to **By Work Orders**

TIP	The Step by Step examples in this lesson use the Progress web application. You would use the same functionality for the Progress web application.

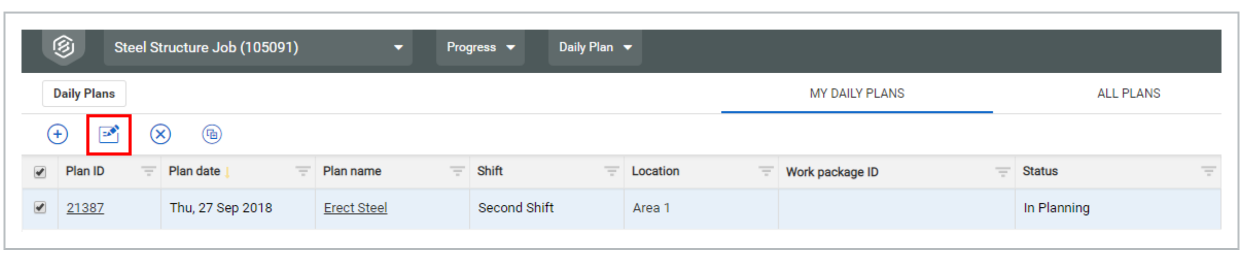
Add Maintenance Work Order to Time Sheet

This practice can be used for both the web and mobile versions of **Daily Planning**.

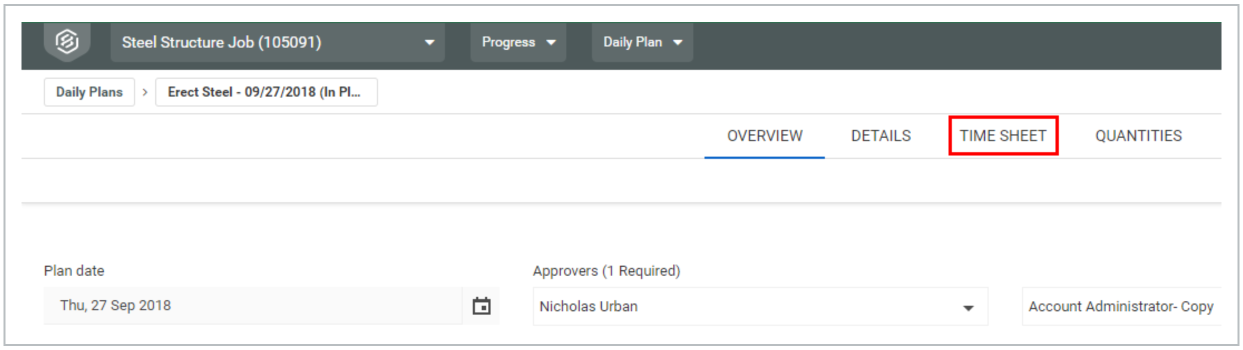
1. On the project dashboard, select the **Daily Planning** module under **Progress**.



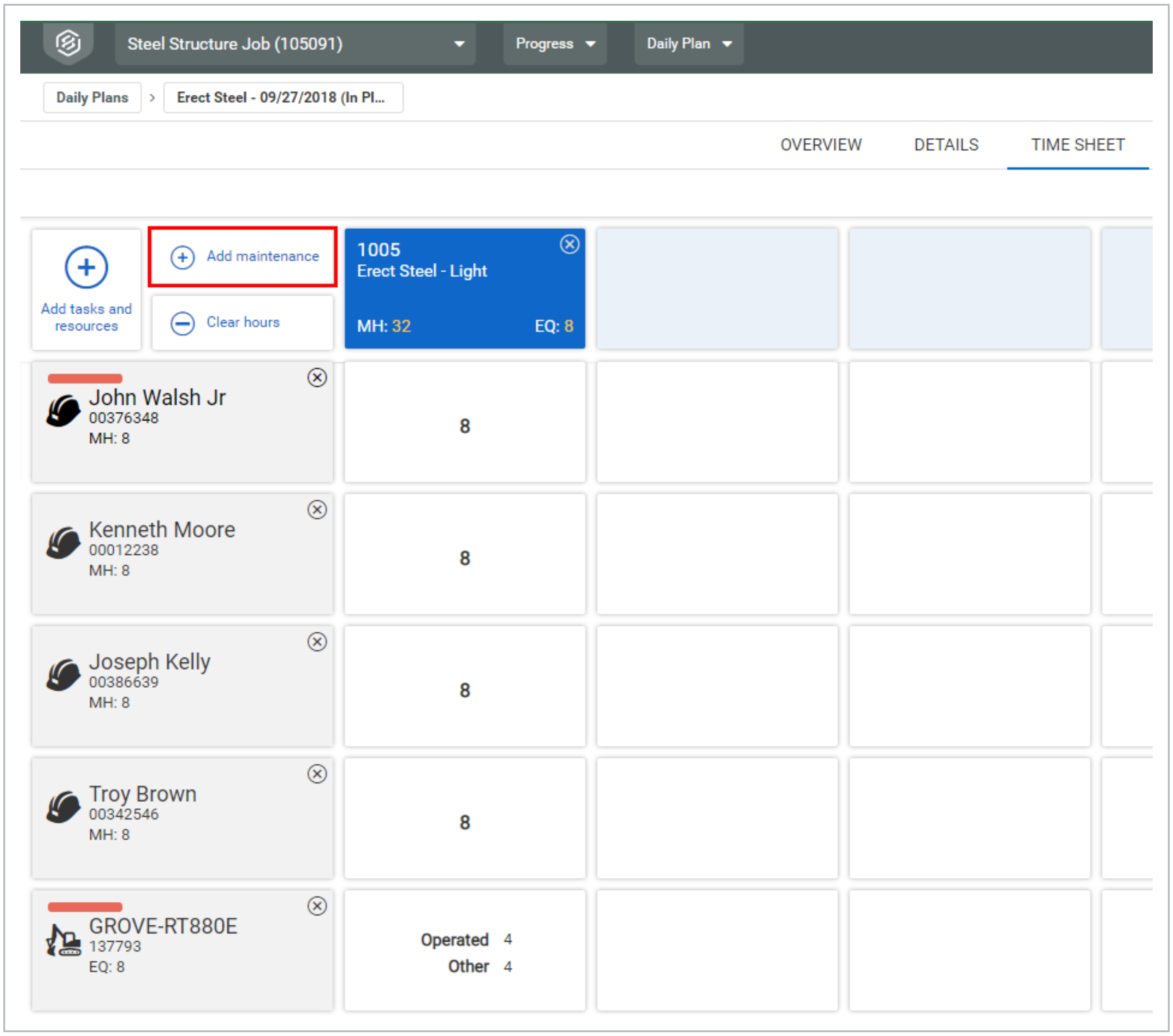
2. In Daily Planning, check your daily plan and click the **edit** icon.



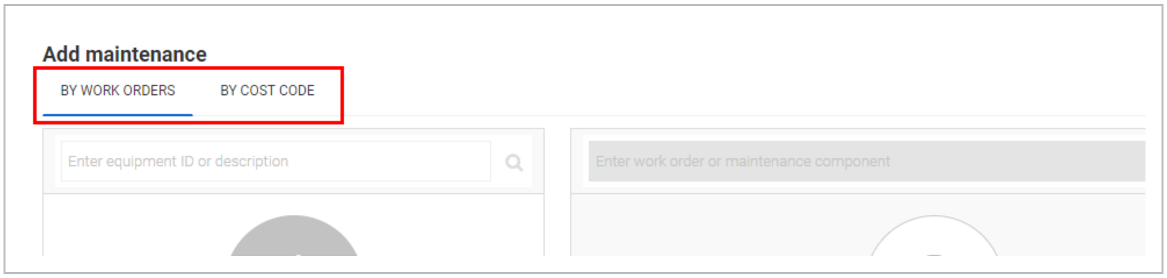
3. Navigate to the **Timesheet** tab.



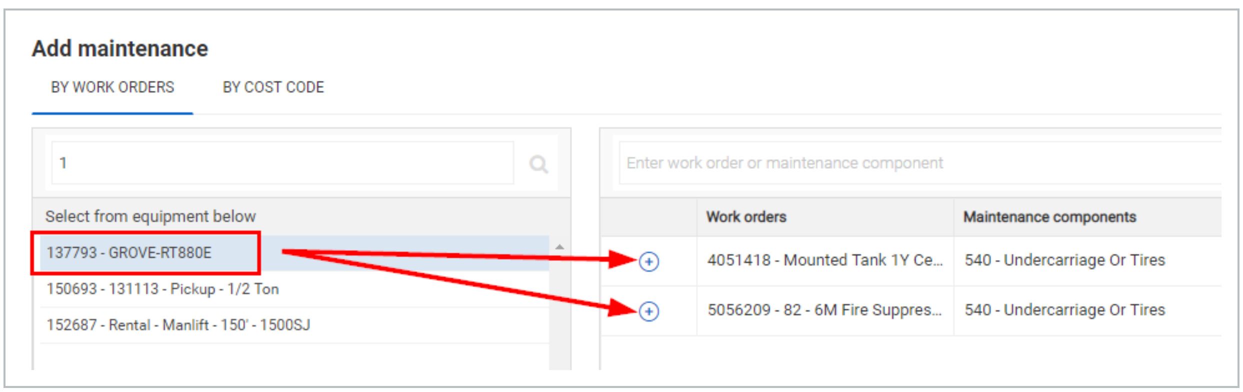
4. Click the **+ Add Maintenance** button.



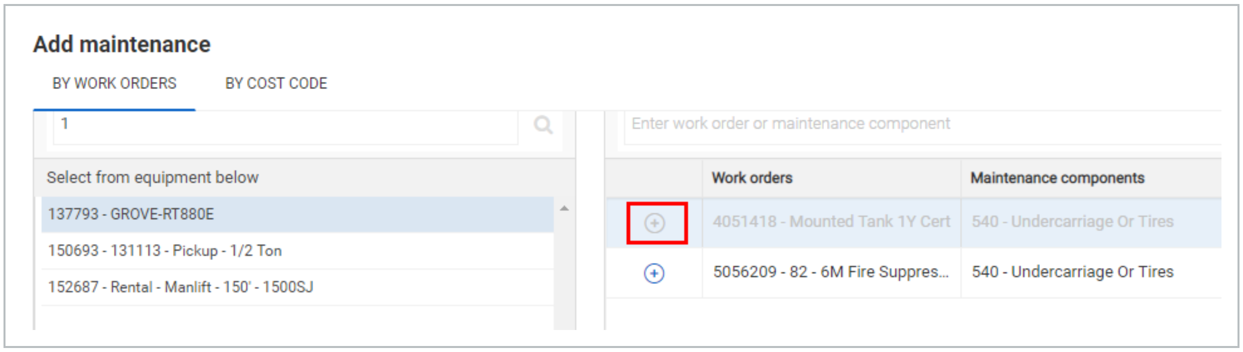
- An **Add maintenance** slide out panel appears
- Note that you can add a maintenance task under one of two categories:
  - **By Work Orders** allows you to select the equipment being maintained and then assign the related work order created in the ERP system
  - **By Cost Code** allows you to select a related cost code instead of a “temporary work order” so that maintenance-related hours can be tracked



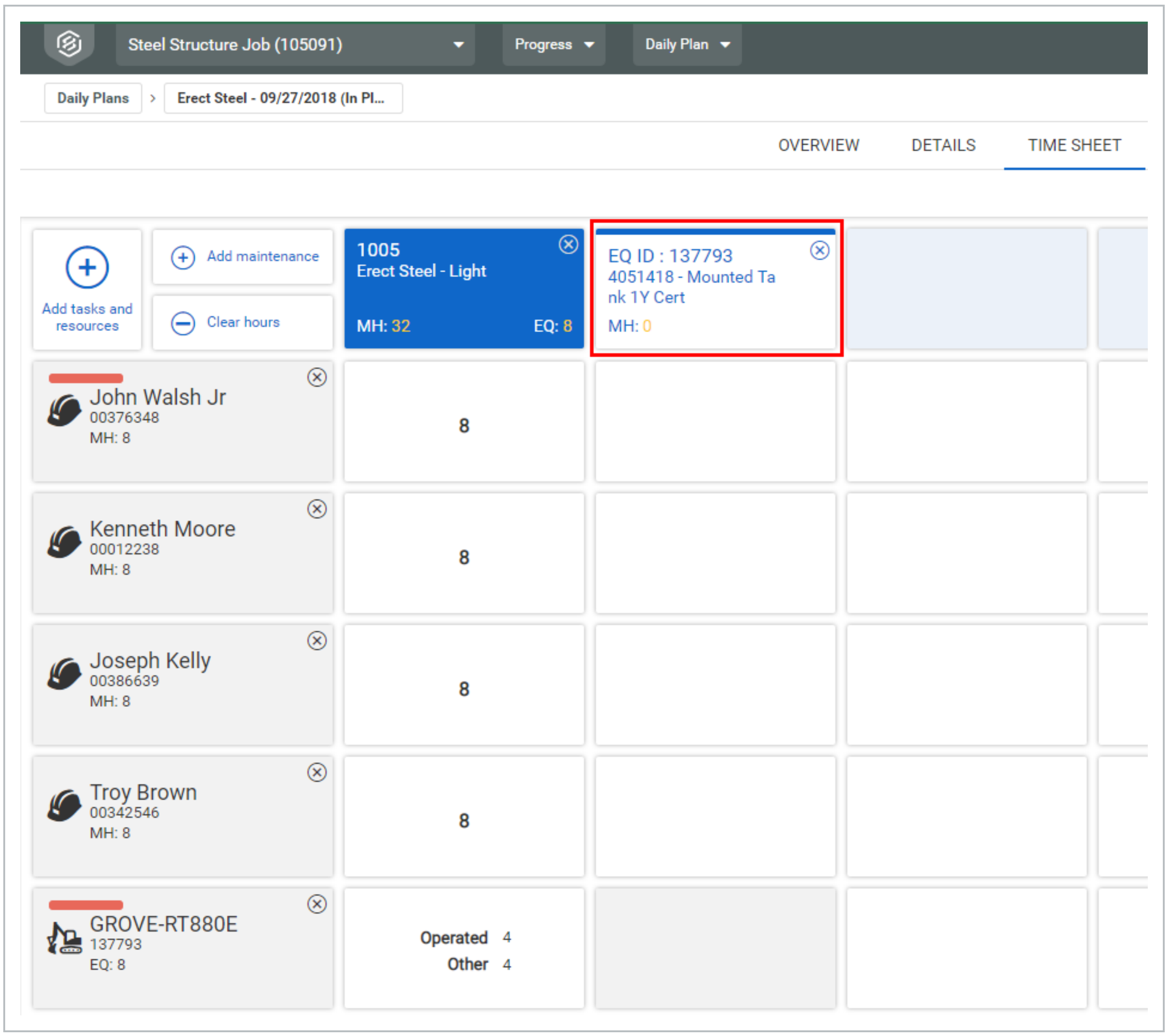
5. Start typing an equipment code or equipment type in the search bar.
6. Select the piece of equipment from your plan and notice that the available work orders appear in the adjacent window.



7. Click the **+** to add the work order.



8. Notice that the work order displays in the Time Sheet tab. The colors are inverted from the task code blocks.



- For work orders added by work order, the tile displays the cost center, work order number, and work order description
- Only labor hours can be added to work orders, not equipment hours. Note in the above the equipment-related tile is greyed out to reflect this
- You can then add labor hours to any given employee related to the maintenance work order through the typical time sheet process

Lesson 2 Review

1. Maintenance Work Orders originate from which software application?
   a. InEight Progress
   b. ERP System
   c. InEight Plan
   d. InEight Control

---

2. In daily plans, what can you add to maintenance work orders?
   a. Employee hours
   b. Equipment hours
   c. Claimed Quantity
   d. Both a & b

---

3. What do you select on the Time Sheet tab to select a work order to track time against?
   a. Add Tasks and Resources
   b. Add Maintenance
   c. Add Temporary Task
   d. Add Temporary Equipment

Lesson 2 Summary

As a result of this lesson, you can:

- Add maintenance work orders to a time sheet
- Assign employee work hours to a maintenance work order

LESSON 3 – WEEKLY TIME SHEET

Lesson Duration: 20 minutes

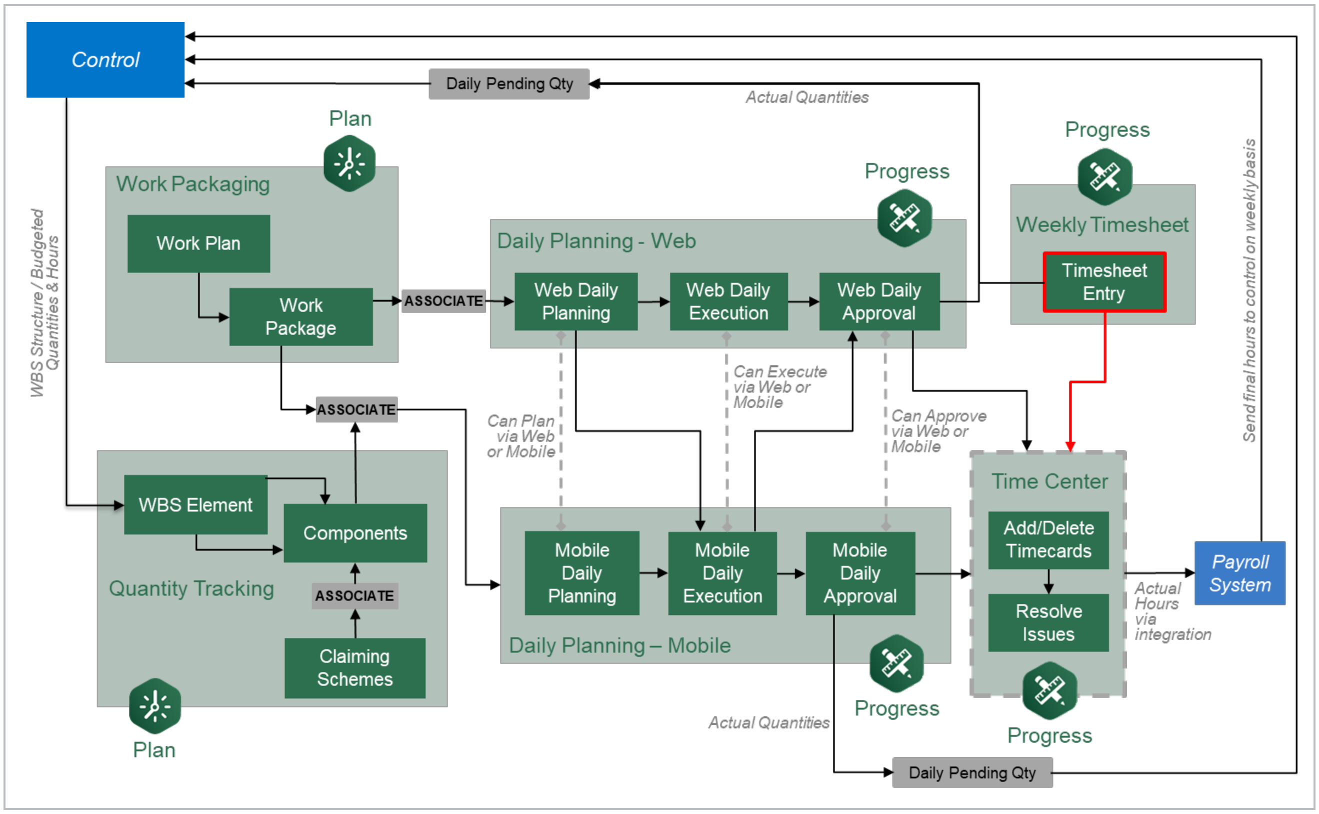
Lesson Objectives

After completing this lesson, you will be able to:

- Navigate to Weekly time sheets
- Edit, create, and send weekly time sheets

Lesson Topics

3.1 INEIGHT PROGRESS WORKFLOW - WEEKLY TIMESHEET



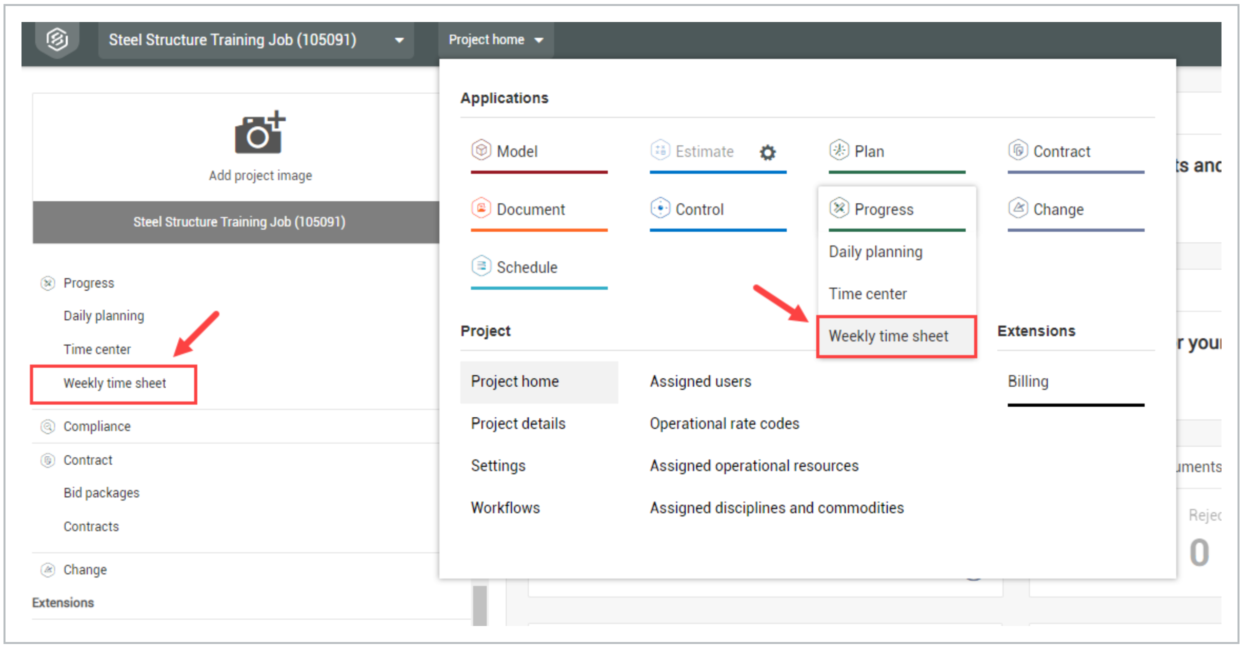
3.2 WEEKLY TIMESHEET NAVIGATION

3.2.1 Overview

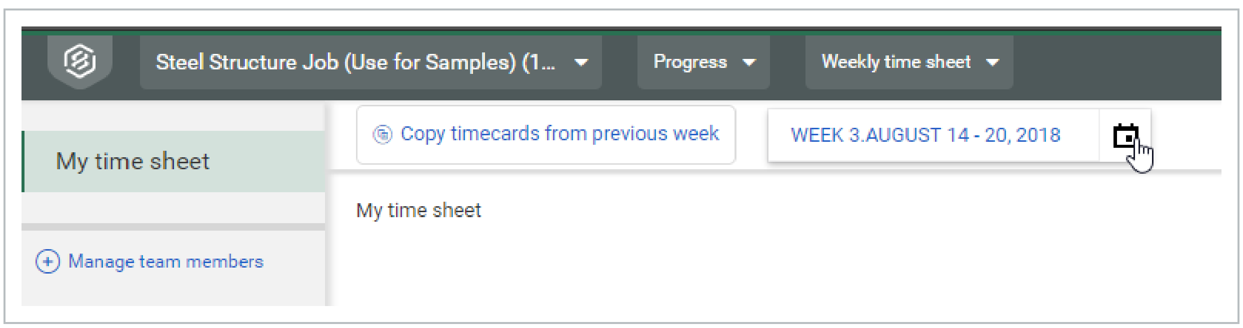
Weekly Time Sheet is a module in the InEight Progress application that allows you to see the weekly time that is entered for a project team. The time can be allocated to a single project or across multiple projects. The time that is entered either comes from daily plans or can be entered on the Weekly time sheet page, allowing for indirect personnel to enter time without being on a daily plan. Weekly Time Sheet also shows all allowances that are associated to the employee's time per week, and all equipment that was linked to the employee, giving the supervisor a one stop shop to review all time entry information that is associated to him and his team.

Navigate Weekly Time Sheet

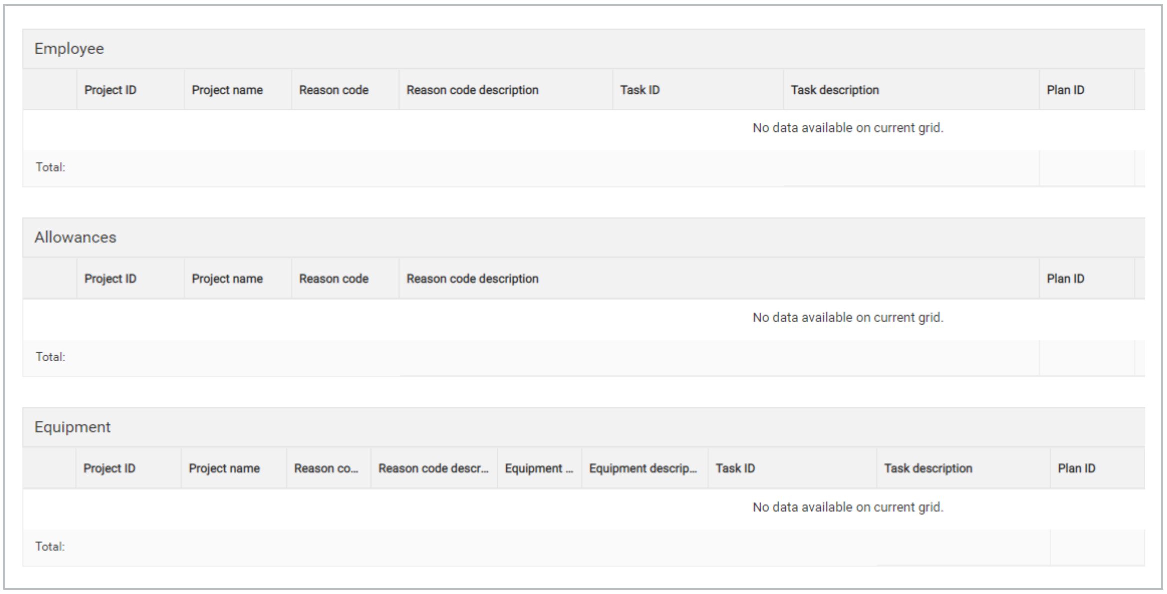
1. From the Steel Structure Job home page, on the applications menu side bar, select **Weekly time sheet** under Progress.



2. On the Weekly time sheet page, select the corresponding week by clicking on the **calendaricon**.



- There are three sections on the Weekly Time Sheet: the employee members of the team, the allowances and the associated equipment



3.3 WEEKLY TIME SHEET CREATION

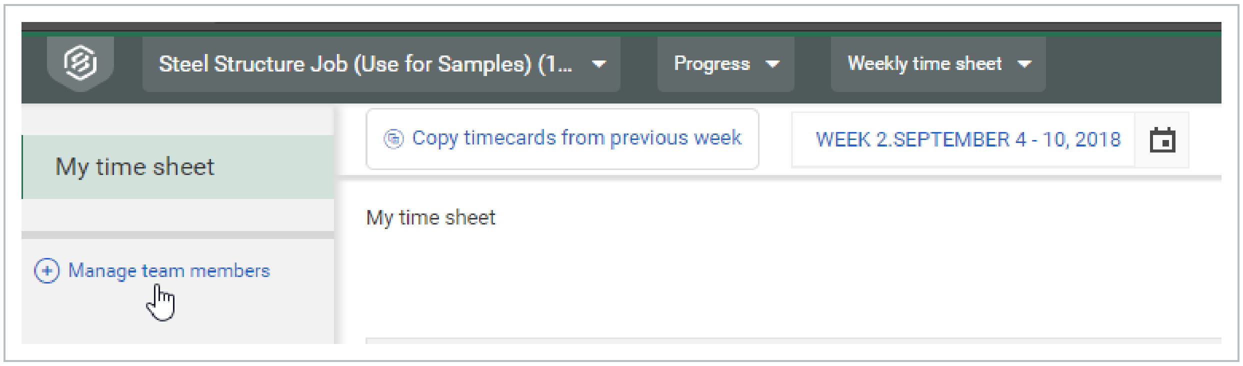
3.3.1 Set Up Members

On the Weekly time sheet page, members are the employees you are tracking time for on the weekly time sheet.

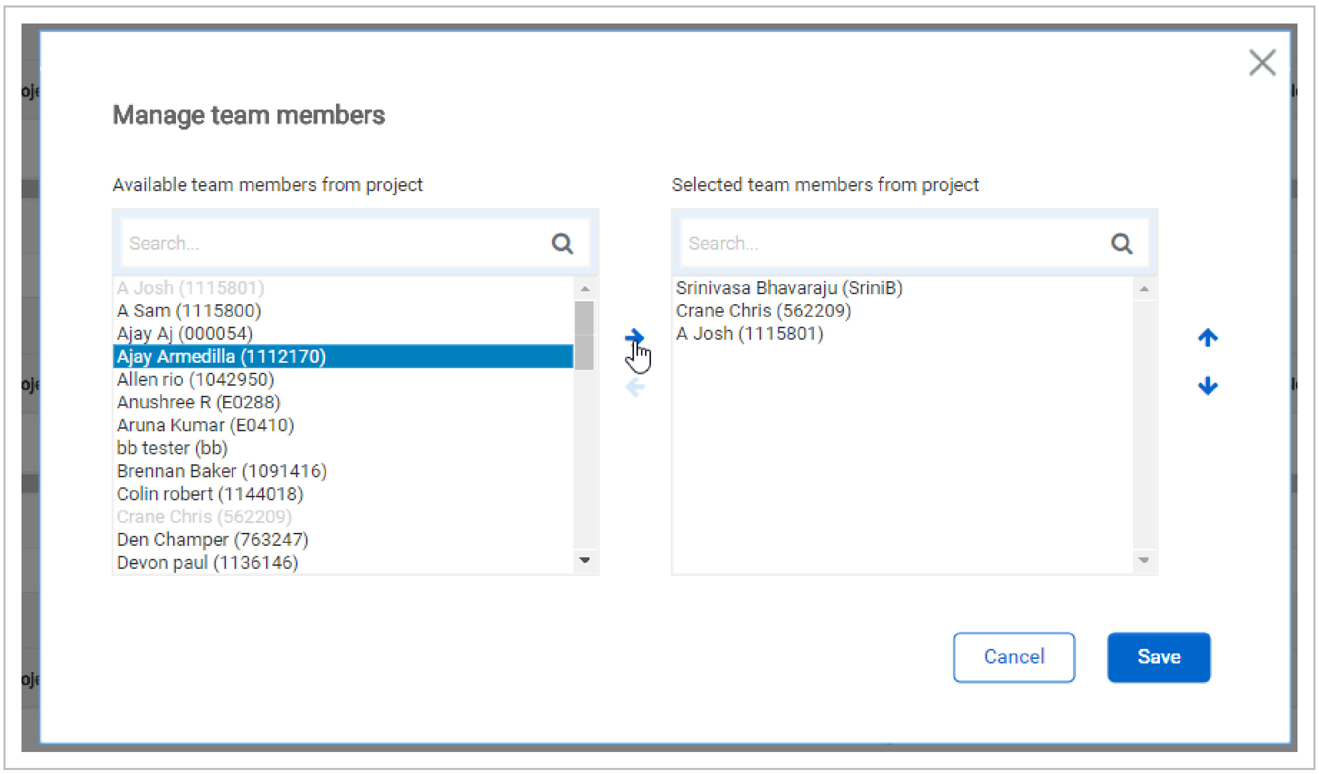
The following steps walk you through how to set up members in Weekly Time Sheet.

Add Members to Weekly Time Sheet

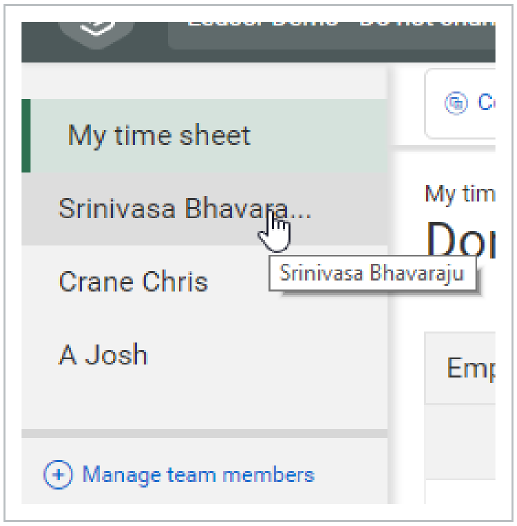
1. From the Weekly time sheet page, select **+ Manage team members**.



2. On the resulting Manage team members window, highlight the name of the member you want to add.
3. Click on the **side arrow** to move the highlighted member from Available team members from project to Selected team members from project.

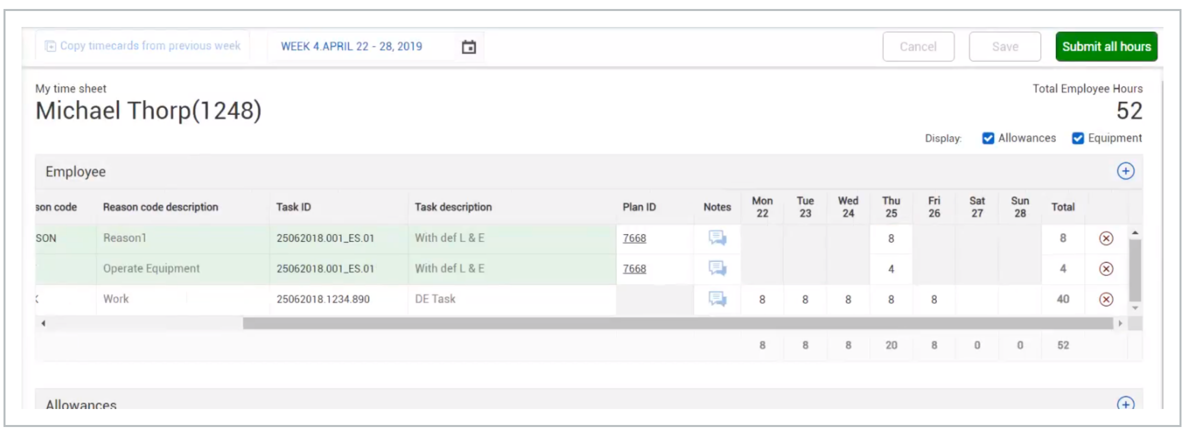


4. Once selected, the team members' names show under My time sheet on the left



3.3.2 Input Time

Once all the members are added to the Weekly time sheet page, you can input their hours for the week. When you select the member on the left, all activities for the week will show along with any allowances or equipment.

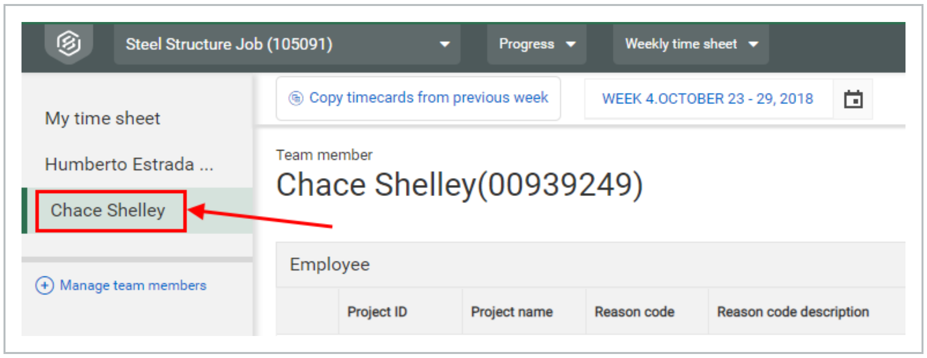


TIP	Any time that has come from a daily plan will be shaded green, whereas any time directly entered in the Weekly time sheet module will be white.

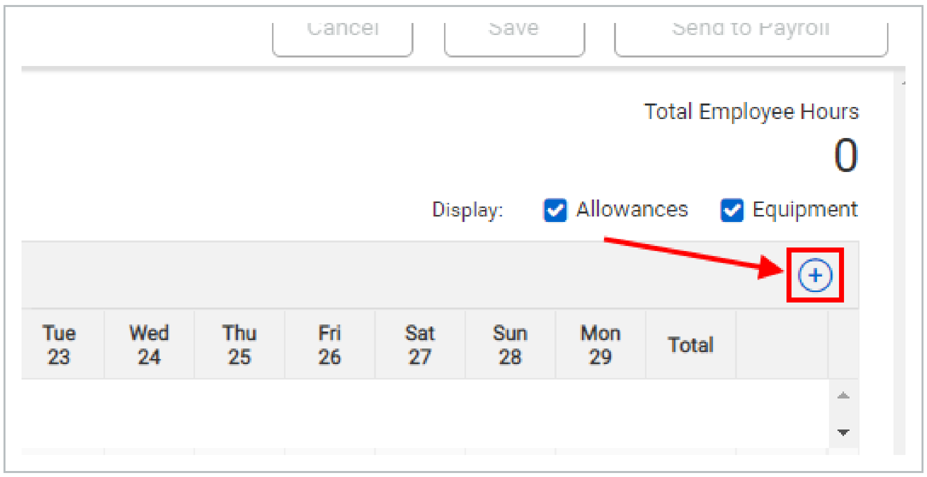
The following steps walk you through adding hours for a member on the Weekly time sheet page.

Input Time on Weekly Time Sheet

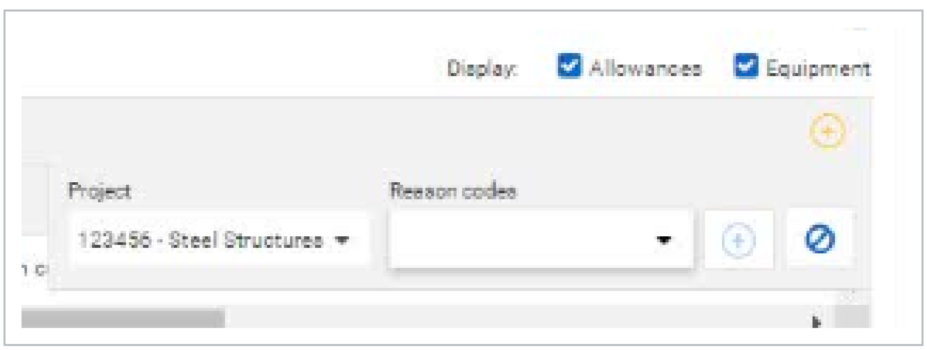
1. From the Weekly time sheet page, select the member whose hours you need to enter.



2. On the Employee grid, select the **Add** icon on the right.

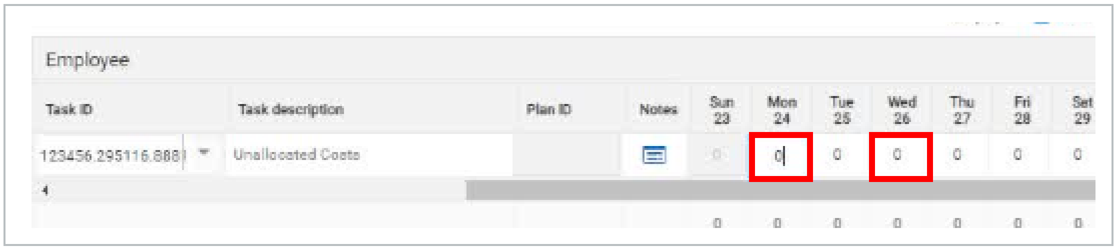


3. Ensure that you have chosen the correct project from the Project drop-down menu.



4. Selet a **Reason code** from the drop-down menu.

5. Enter that employee's time wherever necessary.

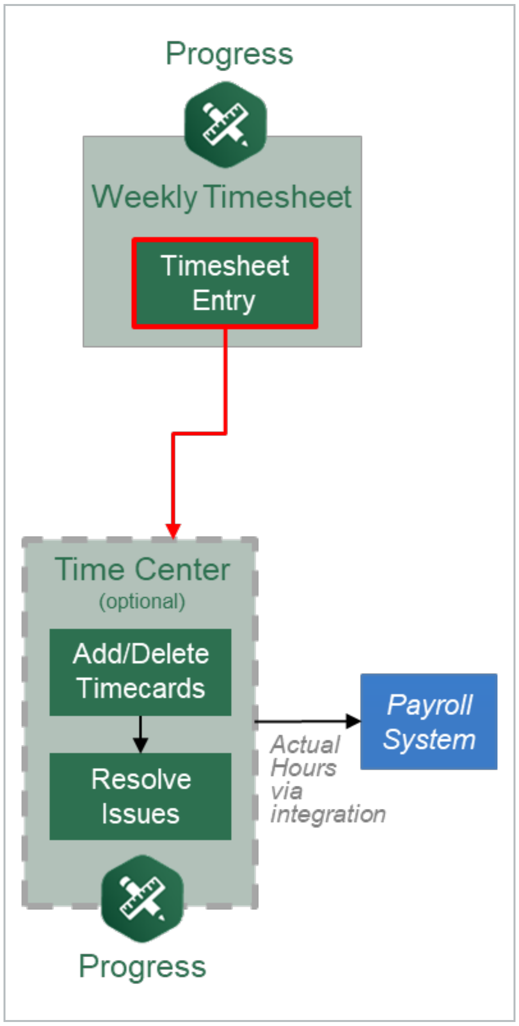


- Once hours have been entered or changed for your personnel, you must click Save for them to be captured and recorded

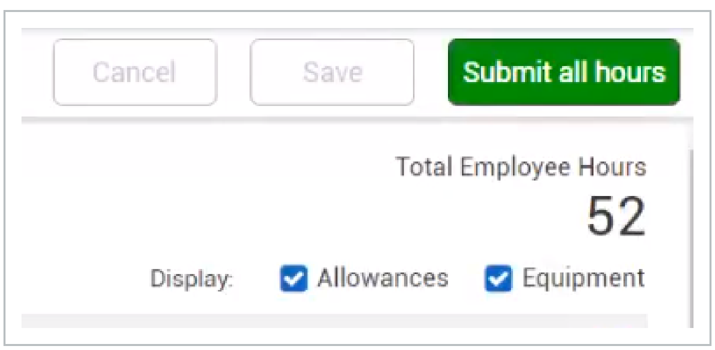
6. Click **Save**.

3.3.3 Submit Hours

Once all hours are input for the week, you can submit them to Time Center for final review before they go to your payroll system.



You submit hours to Time Center by clicking on the **Submit all hours button**.



Lesson 3 Review

1. What three sections are available for entering hours on the Weekly time sheet page?
   a. Employee
   b. Allowances
   c. Equipment
   d. All of the above

---

2. What can you do with Weekly Time Sheets? (Select all that apply.)
   a. Edit
   b. Create
   c. Send
   d. Sync with Control

---

3. What color are the time sheet entries that come from a daily plan?
   a. White
   b. Green
   c. Blue
   d. Gray

Lesson 3 Summary

As a result of this lesson, you can:

- Navigate to Weekly time sheets
- Edit, create, and send weekly time sheets

LESSON 4 – TIME CENTER

Lesson Duration: 20 minutes

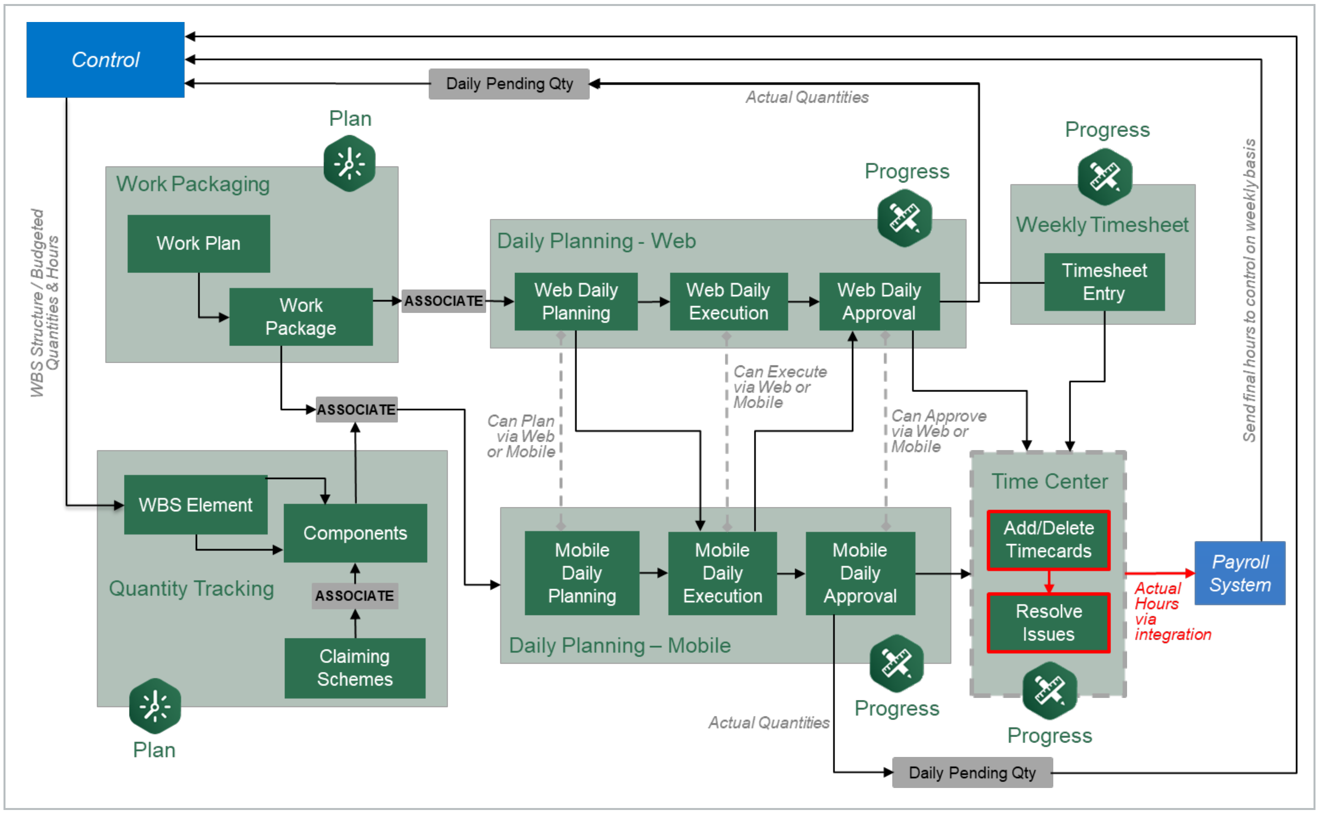
Lesson Objectives

After completing this lesson, you will be able to:

- Navigate the Time Center module
- Create, edit, and send timecards

Lesson Topics

4.1 INEIGHT PROGRESS WORKFLOW - TIME CENTER

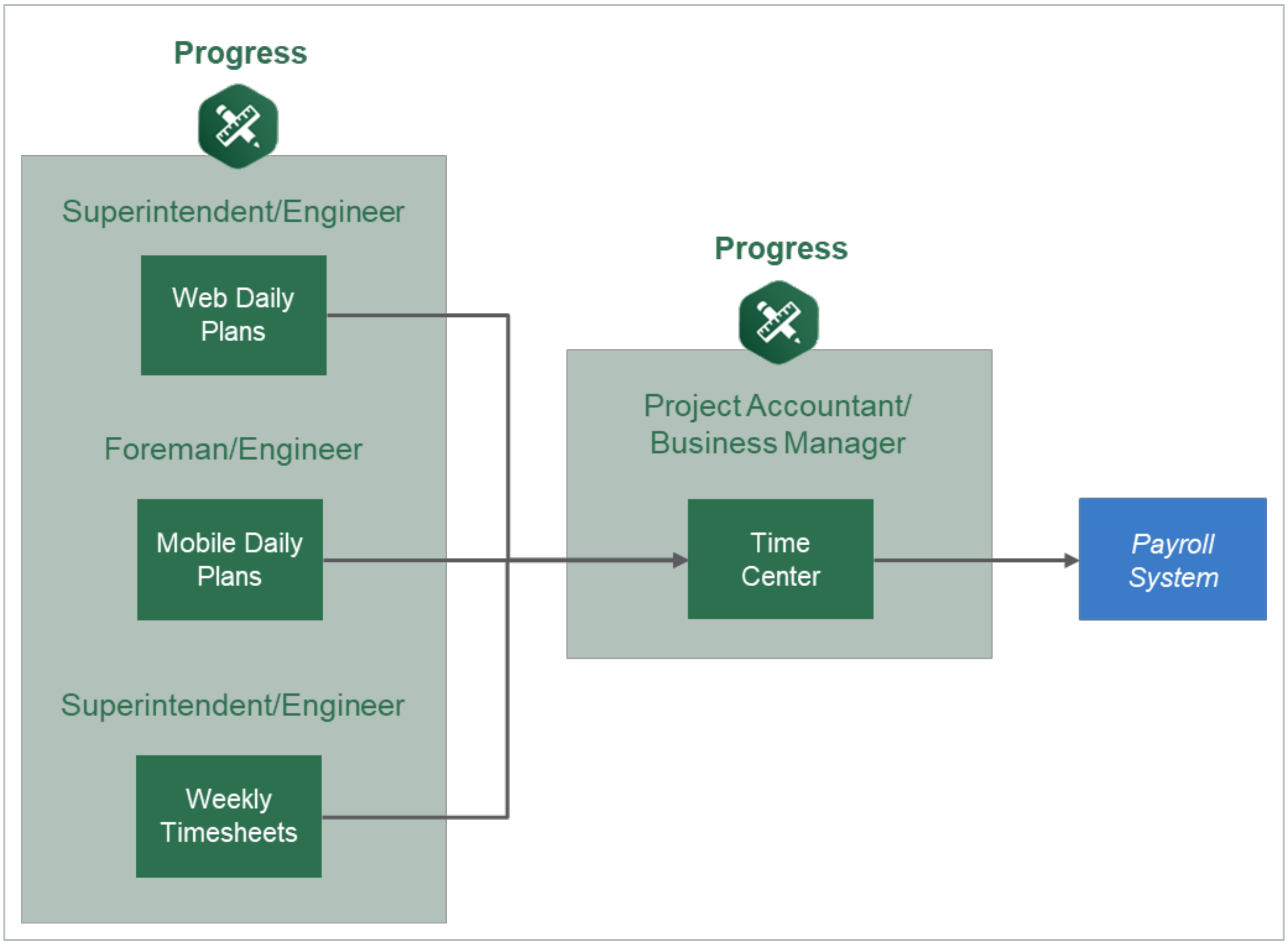


4.2 TIME CENTER NAVIGATION

4.2.1 Time Center Overview

Time Center serves as a final repository to review and correct timesheet information before it imports into your payroll system. Time Center allows you to review entries, called **timecards**, brought in from:

- Daily plans approved within the Progress Daily Planning (Web and Mobile) application
- Progress Weekly Timesheet module



4.2.1.1 Time Center Purpose

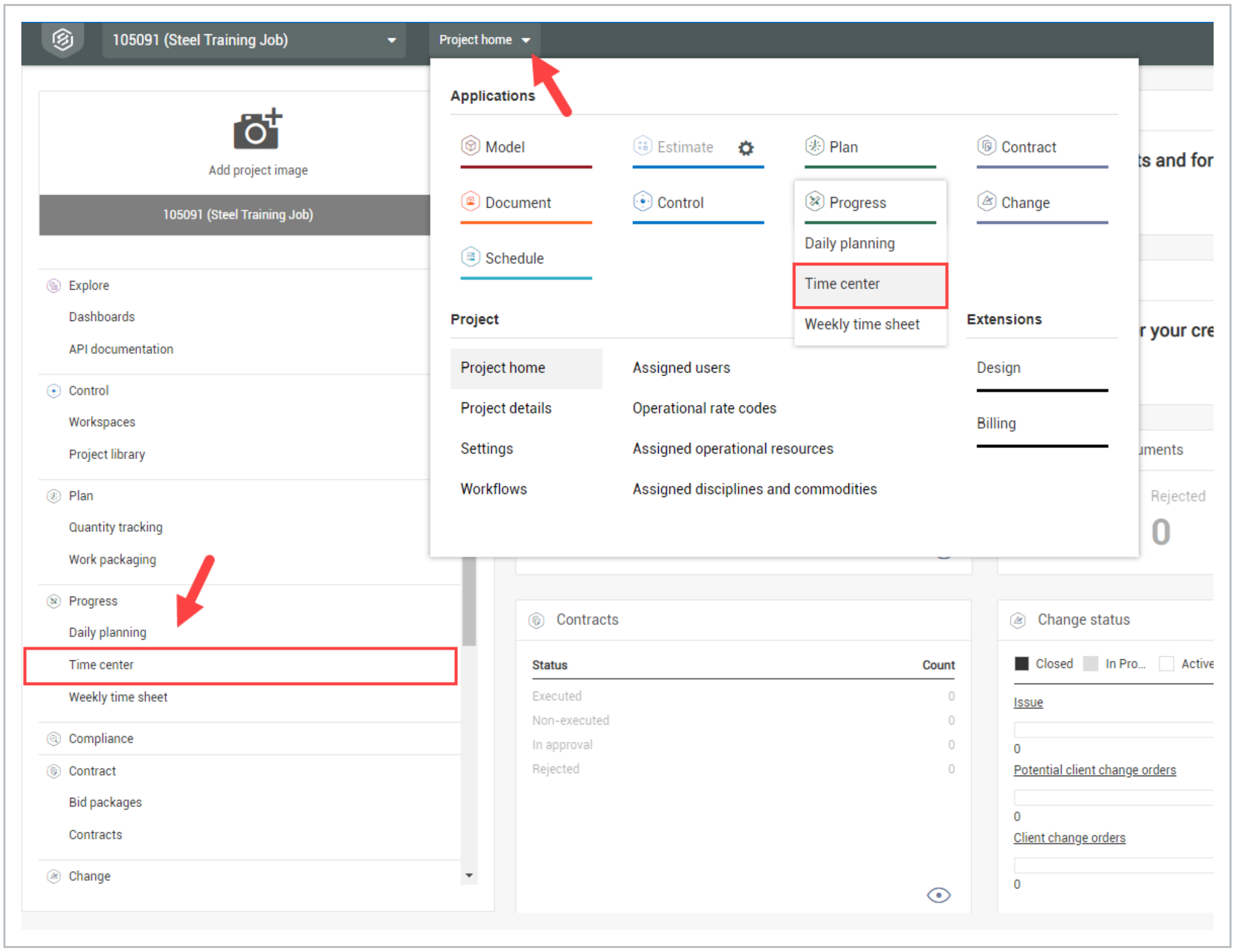
The purpose of Time Center is to:

- Review the daily plans (timecards) received from Plan and Progress
- Ensure timecards have the correct properties and data elements
- Edit and correct any potential errors
- Send the reviewed and corrected timecards to your payroll system to process for payment
- Eliminate the need to edit timecards via payroll system database tables or side spreadsheets exported from Excel

4.2.1.2 Time Center Access

You access Time Center from the Project Home page by selecting one of the following:

- 2nd Level Menu > Progress > Time Center
- Time Center from the Project Home page left side menu

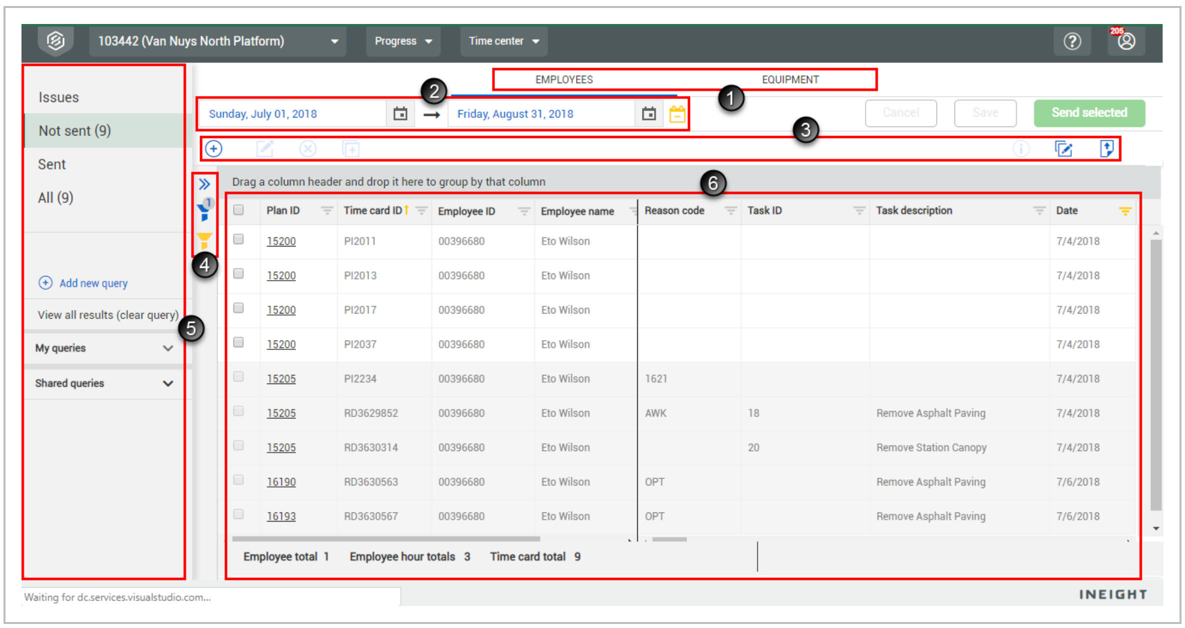


Overview – Time Center Register Page

Title		Description
1	Employee / Equipment Tabs	Select the appropriate tab to view the timecards for either employees or equipment.
2	Date Filter	Select the date to filter using the field on the left or click the add date icon to search by a date range.
3	Toolbar	Add, edit, delete or copy timecards using the toolbar on the left. View summary information, make bulk edits, and export timecards using the toolbar on the right.

Overview – Time Center Register Page (continued)

	Title	Description
4	Query Shortcut Icons	The double arrow is a shortcut to expand the Query builder slide out panel. The blue filter icon indicates how many queries are applied. Yellow filter icons appear for each filter applied.
5	Side Panel	The upper portion contains preset filters to view just timecards with issues, timecards not sent, timecards sent, or all timecards. The lower portion contains the Query builder to create queries to search for specific timecards. You can save your queries under My queries, and access Shared queries.
6	Timecard register	Contains rows and columns that house all timecard data imported from daily plans and weekly timesheets.



4.2.2 Time Center Register Columns

The Time Center register contains all the information captured using the Progress application for your daily plans in the field, as well as weekly timesheets from the Weekly timesheets module. The register columns fixed to the left are pertinent for identifying the timecards and include the Plan ID, Time card ID, Employee ID, Employee name and Labor/Equipment hours columns. The columns on the right contain additional data brought in from InEight Progress for you to review for issues.

The following table lists the columns available in the Time center register. You will edit these fields as needed to make corrections to your timecards. Fields not editable in Time Center can be edited in either InEight Progress or in your Payroll application, depending on the field.

Column	Editable in Time Center?
Plan Level Fields	
Plan Status	No
Daily Plan name	No
Date	No
Approver 1 ID	Automatic
Approver 1 name	Yes
Approver 1 Role	Yes-Conditional
Approver 2 ID	Automatic
Approver 2 name	Yes
Approver 2 Role	Yes-Conditional
Labor hour type	No
Client approver name	No
Executor name	Yes
Executor ID	Automatic
Executor Role	Yes
Shift	Yes
Employee Fields	
Employee ID	Yes-Conditional
Employee Name	No
Labor Hours	Yes
Reason Code	Yes

Column	Editable in Time Center?
Reason Description	Automatic
Trade ID	No
Trade description	No
Employee Fields (Continued)	
Craft ID	No
Craft description	No
Override trade	Automatic
Override trade description	Automatic
Override craft	Yes
Override craft description	Automatic
Union code	No
Billing class	No
Uplift	No
Uplift override	Yes
Employer company	No
Premium 1-6	Yes
Timesheet Entry Fields	
Timecard ID	No
Task ID	Yes
Task description	Automatic
Budget Code - Segment 1 (e.g., Cost Center)	Automatic
Budget Code - Segment 2	Automatic
Budget Code - Segment 3	Automatic
Budget Code - Segment 4	Automatic

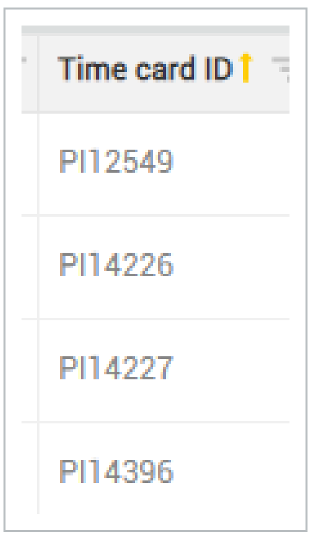
Column	Editable in Time Center?
Timecard Type	No
Labor Cost type	Yes
Equipment cost type	Yes
Notes	No
Equipment Fields	
Equipment ID	Yes
Equipment description	Automatic
Equipment hours	Yes
Equipment reason code	Yes
Equipment reason code description	No
Equipment location	No
Maintenance Fields	
Work order	Yes
Work order description	Automatic
Equipment repair number	Yes
Equipment repair description	Automatic
Status Fields	
Modified by	Automatic
Modified date	Automatic
Integration status	Automatic
Timecard status	Automatic
Validation issue?	Automatic
Employee shift start	Yes
Employee shift end	Yes

Column	Editable in Time Center?
Plan shift start	Yes
Plan shift end	Yes

NOTE The Integration status indicates whether the timecards have been sent to the payroll system.

4.2.2.3 Sort Columns

You can sort in ascending or descending (both for alpha and numeric fields) on any column's header. Click once to sort the column in ascending order (A-Z, 1-10). A yellow arrow displays on the column header pointing upward.



Click a second time on the column header to sort in descending order (Z-A, 10-1), and the arrow will point downward. Click a third time to reset the column to its default state.

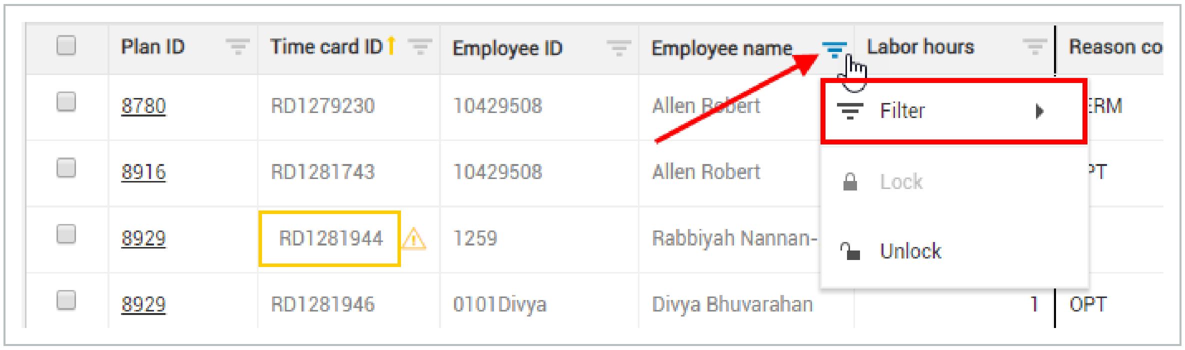
4.2.2.4 Move Columns

You can move columns using drag and drop to rearrange them as needed and the system will remember the column order the next time you log in.

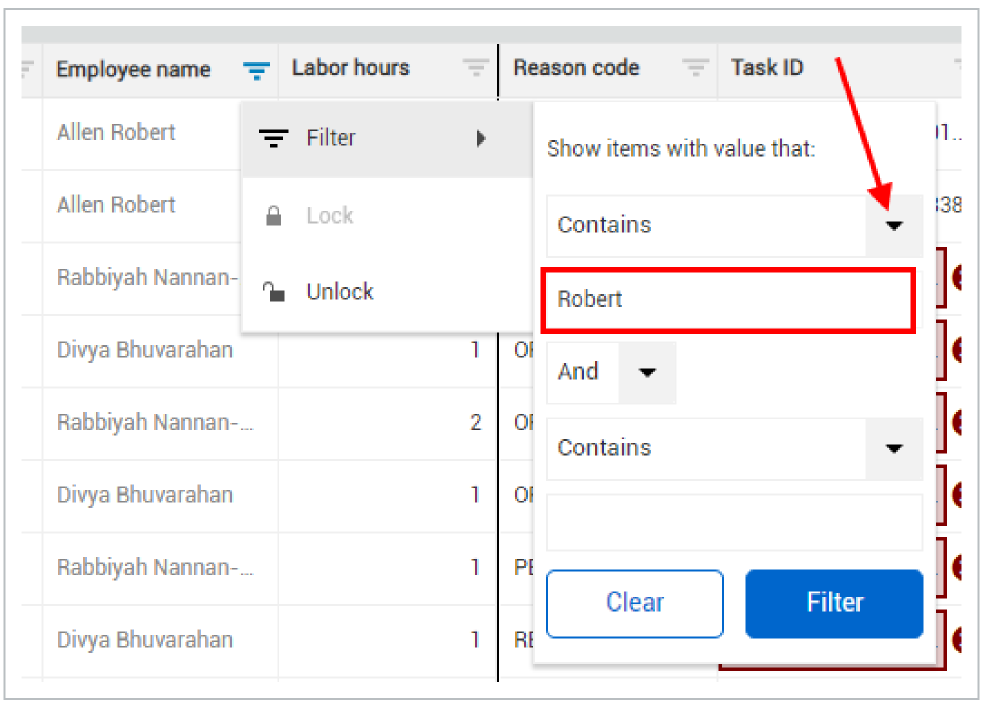
4.2.2.5 Filter columns

Depending on the project, you may have thousands of timecards to sift through. You can filter your timecards using column filters to drill down by date, employee, or whatever other criteria you need.

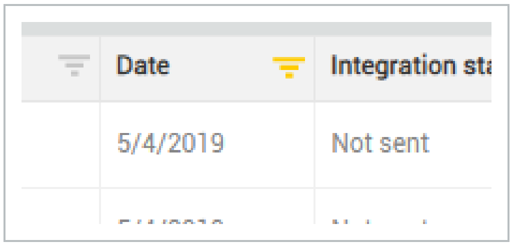
To filter on a column, select the filter icon on the column's header, then hover over the Filter menu option.



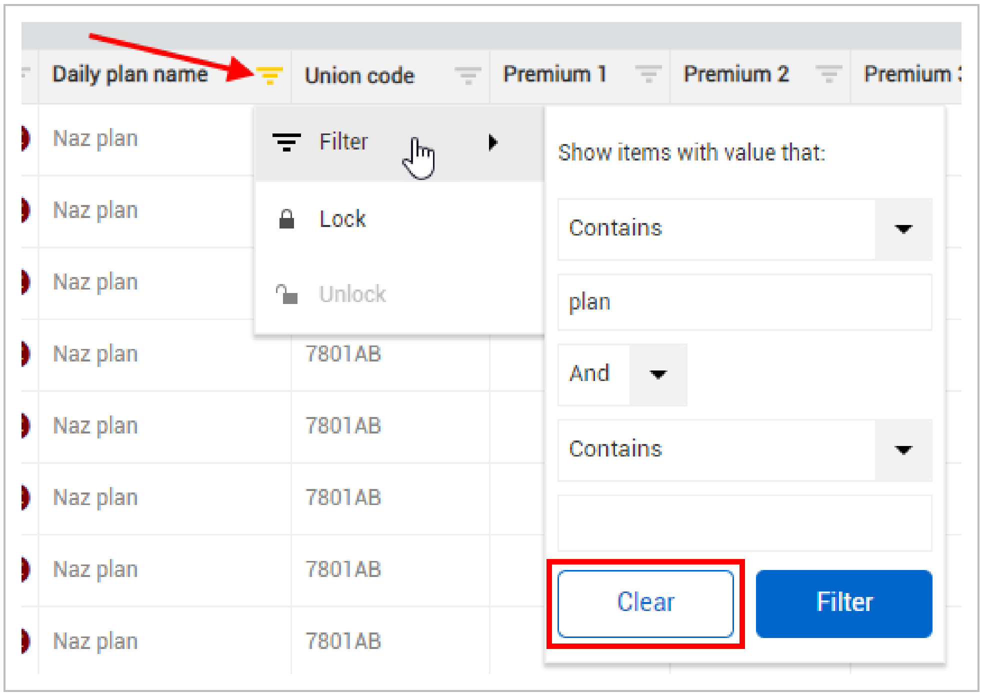
On the resulting Filter window, you can select an operator and value to filter by.



The register now filters your timecards by the filter value you selected, and the filter icon on the column header is yellow to indicate the column is being filtered.



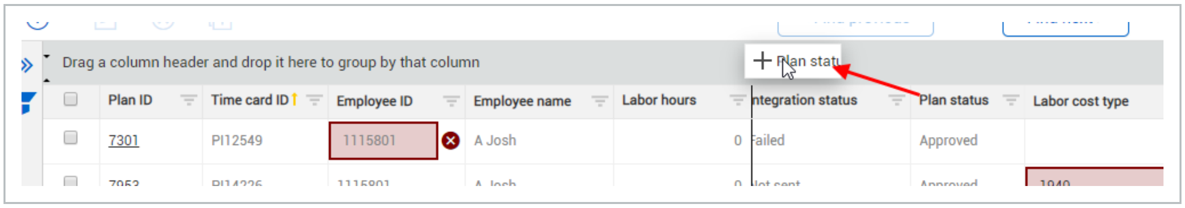
To clear the filter, you would click on the columns filter icon and select Clear.



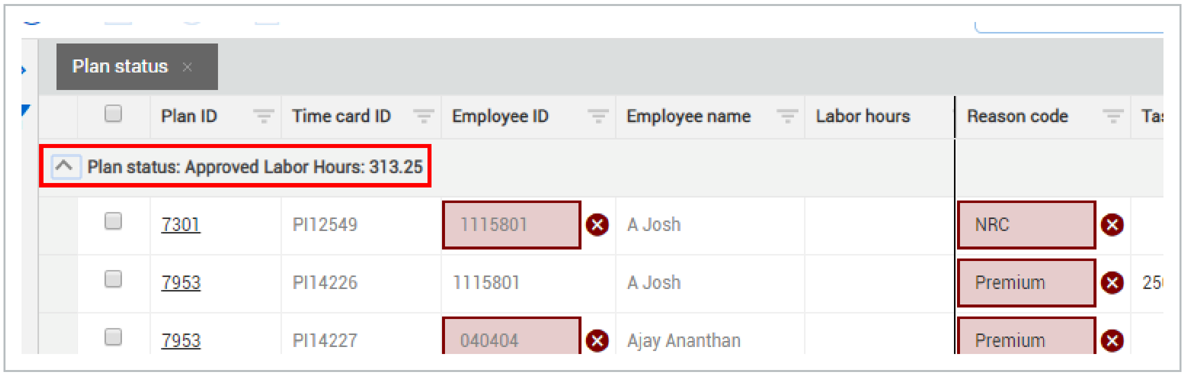
4.2.2.6 Group Columns

With column grouping, you can organize your timecards into groups by the values of a selected column. By organizing timecards into groups, you can review timecards more efficiently. Grouping columns lets you group information most applicable to your process, and you can group by any column without affecting any of the timecard data.

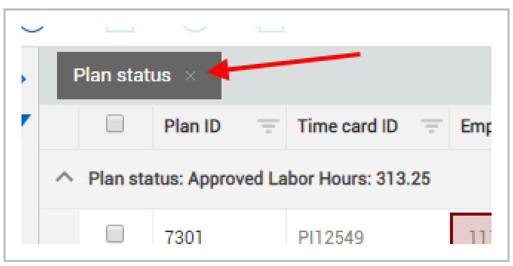
To group by a column, click on the column’s header and drag it into the grey area just above the column headers.



Your timecards are now organized into groups based on the values within the column. Each group is collapsible and subtotals the labor or equipment hours of the timecards within each group.



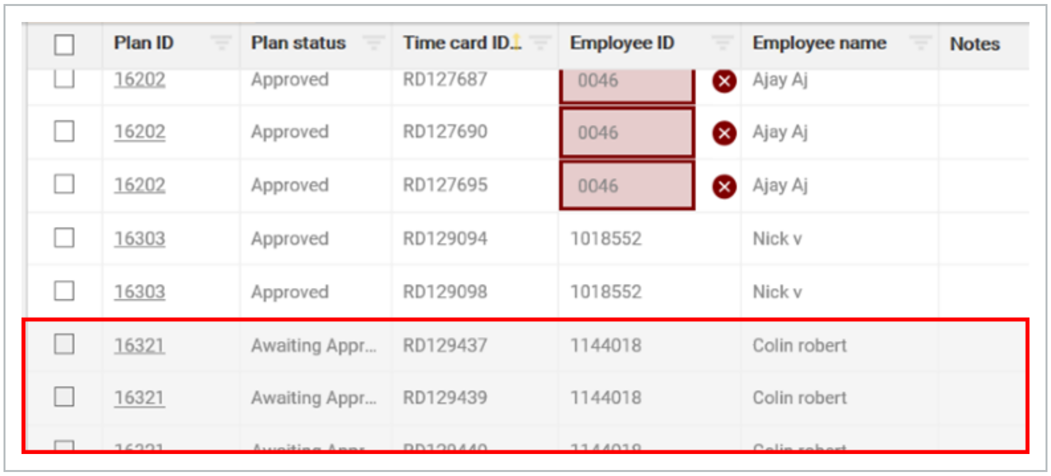
To remove a grouping, click the x on the grouped column header within the grouping area.



The column will return to its placement within the register.

4.2.3 Unapproved Timecards

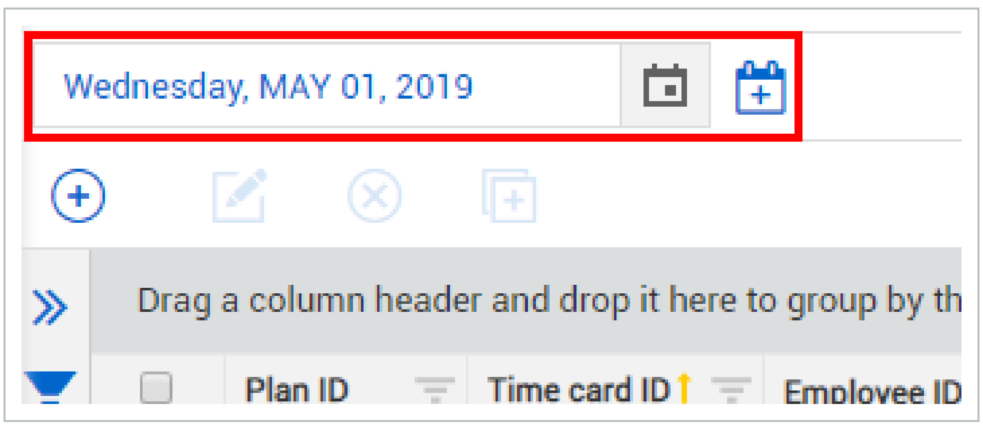
Note that timecards that have not yet been approved and are still in Execution or Awaiting Approval status are not editable within the Time Center register. You can only edit approved timecards.



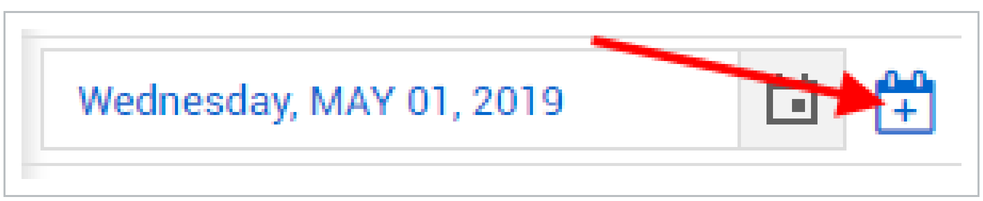
	Plan ID	Plan status	Time card ID	Employee ID	Employee name	Notes
	16202	Approved	RD127687	0046	Ajay Aj	
	16202	Approved	RD127690	0046	Ajay Aj	
	16202	Approved	RD127695	0046	Ajay Aj	
	16303	Approved	RD129094	1018552	Nick v	
	16303	Approved	RD129098	1018552	Nick v	
	16321	Awaiting Appr...	RD129437	1144018	Colin robert	
	16321	Awaiting Appr...	RD129439	1144018	Colin robert	
	16321	Awaiting Appr...	RD129440	1144018	Colin robert	

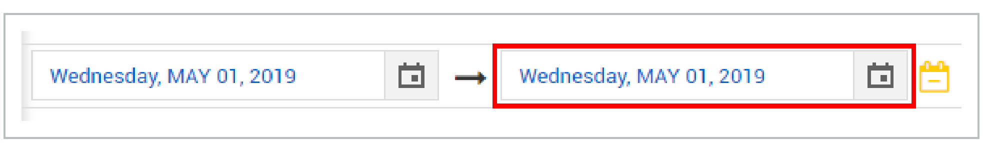
4.2.4 Date Filter

You can specify what date to filter your timecards to by either typing the date in the Date field or by selecting the date from the calendar icon.



To select a date range, click the add date icon and select an end date.

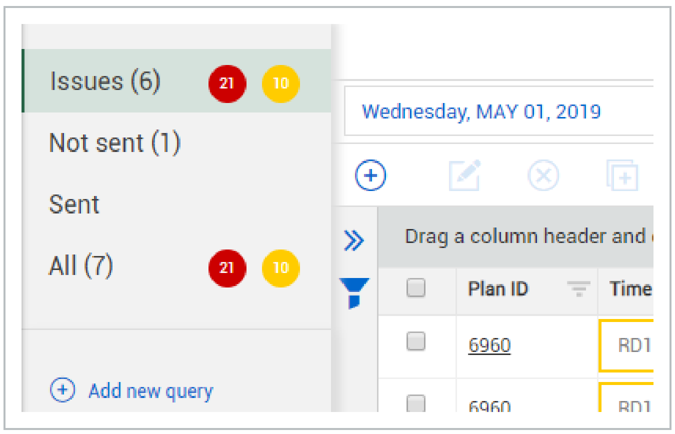




4.2.5 Timecard Pre-Set Filters

The upper portion of the left side panel contains pre-set filters to help you focus on the timecards that need review. You have four pre-set filter options you can select from:

- **Issues** – Timecards that have information on them tagged as issues
- **Not sent** – Filters to timecards that have an Integration status of Not sent, or timecards that have not been sent to Payroll
- **Sent** – Filters to timecards that have an Integration status of Sent, or timecards that have been sent to Payroll
- **All** – Shows all timecards within the selected date(s)



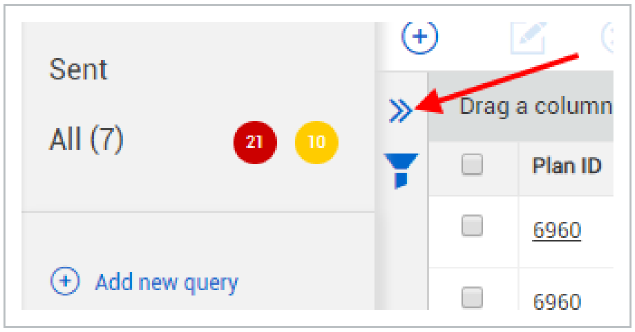
4.2.6 Query Builder

In addition to the filters you can set on individual columns, you can also add filters using the Query Builder. The following steps walk you through creating a query using the Query Builder.

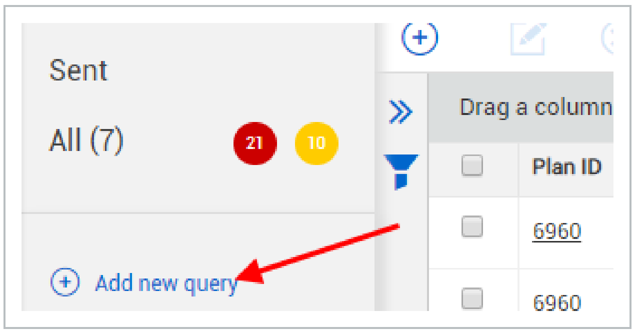
Create a Query

1. From the Time Center register, do one of the following to open the Query Builder:

- Click on the **double arrows** next to the left side bar.



- Click the **Add new query** link on the left side bar.



2. Type the name of the query in the New query name field.
3. Select **Plan ID** from the Column drop-down list.
4. Select **Equal** from the Operator drop-down list.
5. Type a Plan ID value into the Value field.
6. Click **Apply**.
   - The query applies to the timecards on the left
7. Click on the **Save query** icon to save the query.

- Your query will now show up under **My queries**. No one will be able to see this query unless you share it
- The Share query icon appears. You can share your saved queries with others, so they can use the queries as well

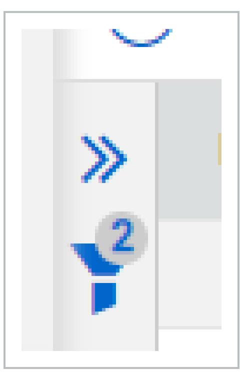
8. Select the **Share query** icon.

- The query will now show up under Shared queries

NOTE	Once you share your query, you cannot edit it until you unshare it.

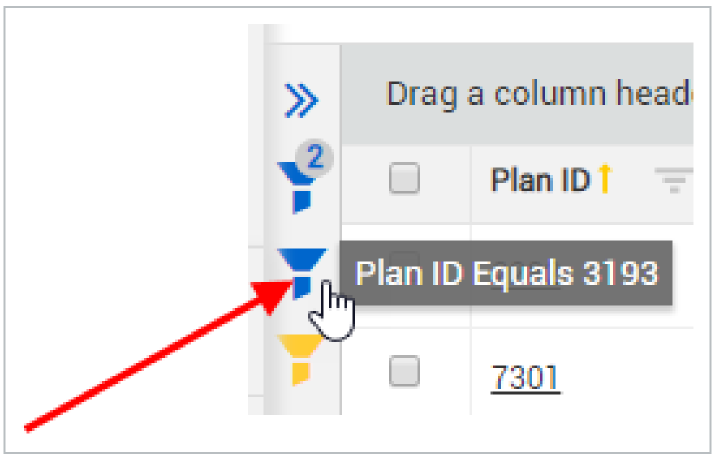
4.2.6.7 Filter Indicators

The number next to the top filter indicator shows how many queries have been applied.



An additional filter indicator displays in yellow for each filter applied.

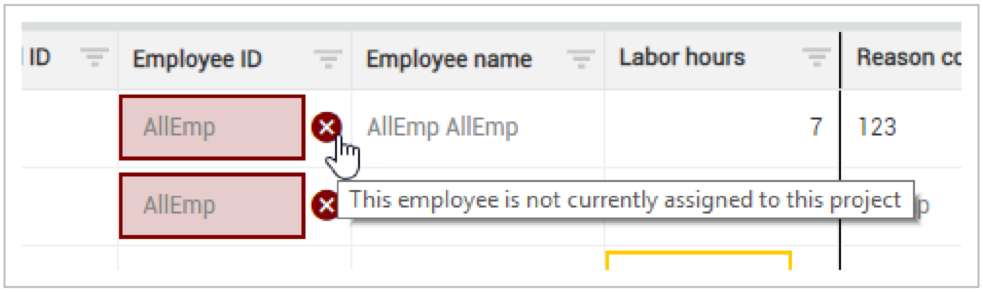
You can hover over the indicator of each applied filter to see the filter name, and you can click on each indicator to remove them from being applied.



4.2.7 Error Indicators

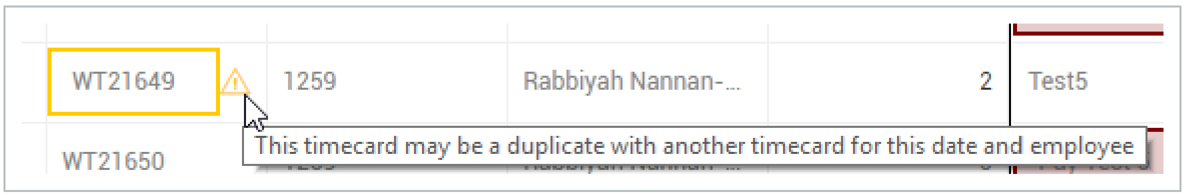
4.2.7.8 Errors

Fields that appear in red indicate an error with information on the timecard. Timecards with red error indicators cannot be sent to Payroll. Hovering over the X will give you the reason for the error, so you can correct information as needed.



4.2.7.9 Warnings

Fields that appear in yellow indicate a warning. Timecards with warnings can still be sent to Payroll, but it is recommended that they be fixed to avoid possible confusion or issues with timecards. You can hover over the warning indicator symbol to see the reason for the warning, so you can make corrections.



4.3 TIMECARD MANAGEMENT

4.3.1 Timecard Management Overview

As one who oversees payroll for the project, such as a Project Accountant or Business Manager, you will use the Time Center page to ensure that the timecard entries you received from the Progress application contain the correct information before passing them on to your accounting system for processing payroll.

Prior to editing timecards in Time Center, your company will have already established options which should be available on your timecards, such as for unions, reason codes, allowances, and premiums, based on your payroll needs.

4.3.2 Timecard Review

Within the Time Center register, you can validate your timecard data, reviewing each timecard for issues, and resolving them as needed. Most issues are highlighted in red with an X, such as the Employee ID fields in the example below.

These Employee IDs may be invalid for reasons such as:

- They may not be assigned to this project
- May have an inactive status during this project

4.3.2.1 Data Validation Errors

Below is a list of timecard errors and their causes. Errors must be resolved before they can be sent to Payroll.

Error	Causes
Invalid Work Order Number	Work Order status is not active and is assigned to the Equipment Repaired Number. Work Order status is active and is not assigned to the Equipment Repaired Number.
Invalid Equipment Repaired Number	Equipment status is not active. Equipment status is active, but not assigned to current project.
Invalid Allowances	Employee has an allowance assigned that is not valid for that type of employee or for the union it belongs to.
Invalid Employees	Timecard date is not between the employee start and end dates. Employee status is not active. Employee status is set to not report time. Employee is not currently assigned to the project. Timecard has an operated equipment reason code and the Employee ID is blank.
Invalid Equipment	Equipment status is not active. Equipment is not assigned to the project. Employee reason code is "operated", but Equipment ID is blank.
Invalid Task ID	Task is closed for either employees or equipment. The task is a TEMP (temporary) task. Cost code is not active. Cost code is a TEMP (temporary) cost code. Cost code is not active.
Invalid Labor Cost Type and Invalid Equipment Cost Type	Cost Type value is not found in the list of available cost types for the Task ID.

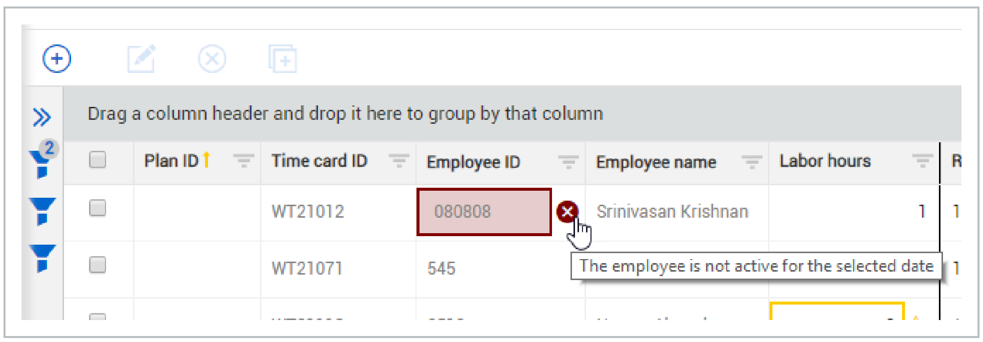
Error	Causes
Invalid Reason Code - Maintenance Record	Reason code is something other than the AWK (Work) reason code.

Depending on the root cause of the error, you may need to make changes in:

- The Time Center register
- InEight Progress
- InEight Suite Administration
- Your payroll system

4.3.2.2 Correcting Issues Outside of Time Center

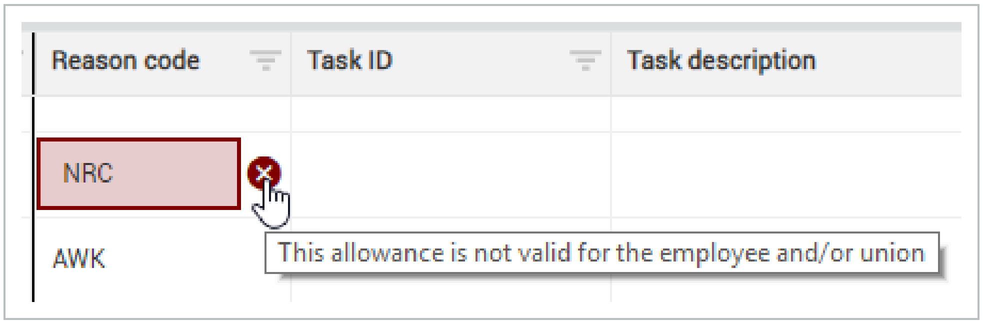
The error message displayed below indicates that the “employee is not active for the selected plan date.”



This means the employee was not contracted during the period of time of the project. The employee would need to be edited within Suite Administration (accessed from the 1st Level Menu from the project’s Home page), to be active during the date of the timecard. Once corrected, this error would be removed.

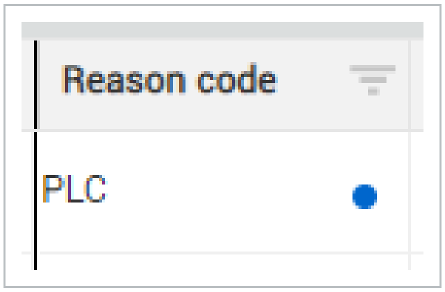
4.3.2.3 Correcting Issues in Time Center

Many of the fields within Time Center are editable. Errors can therefore be corrected directly in Time Center. For example, perhaps a Reason Code is used on a timecard that is associated with an allowance that is not available.



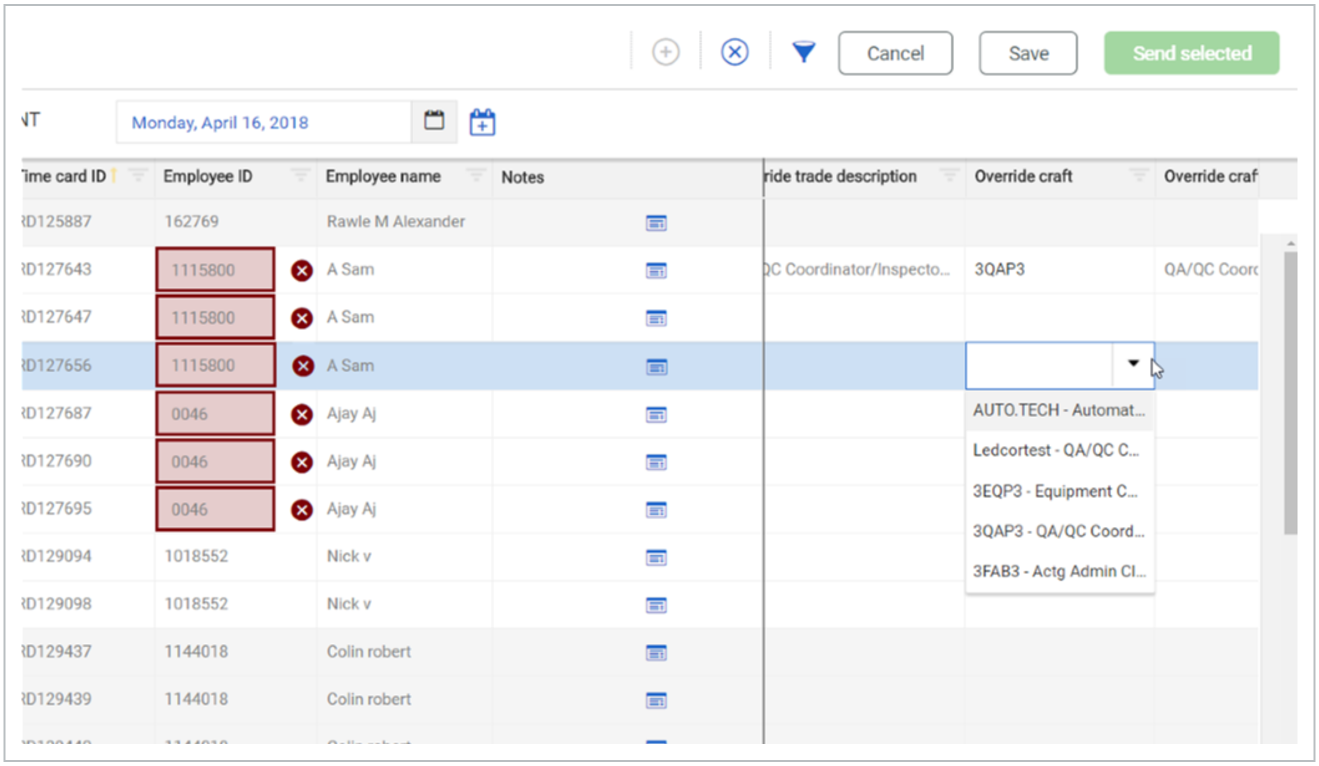
You can edit the Reason Code, changing it to one with a valid allowance for the employee on the timecard.

Note that a blue dot appears when any changes have been made prior to saving.



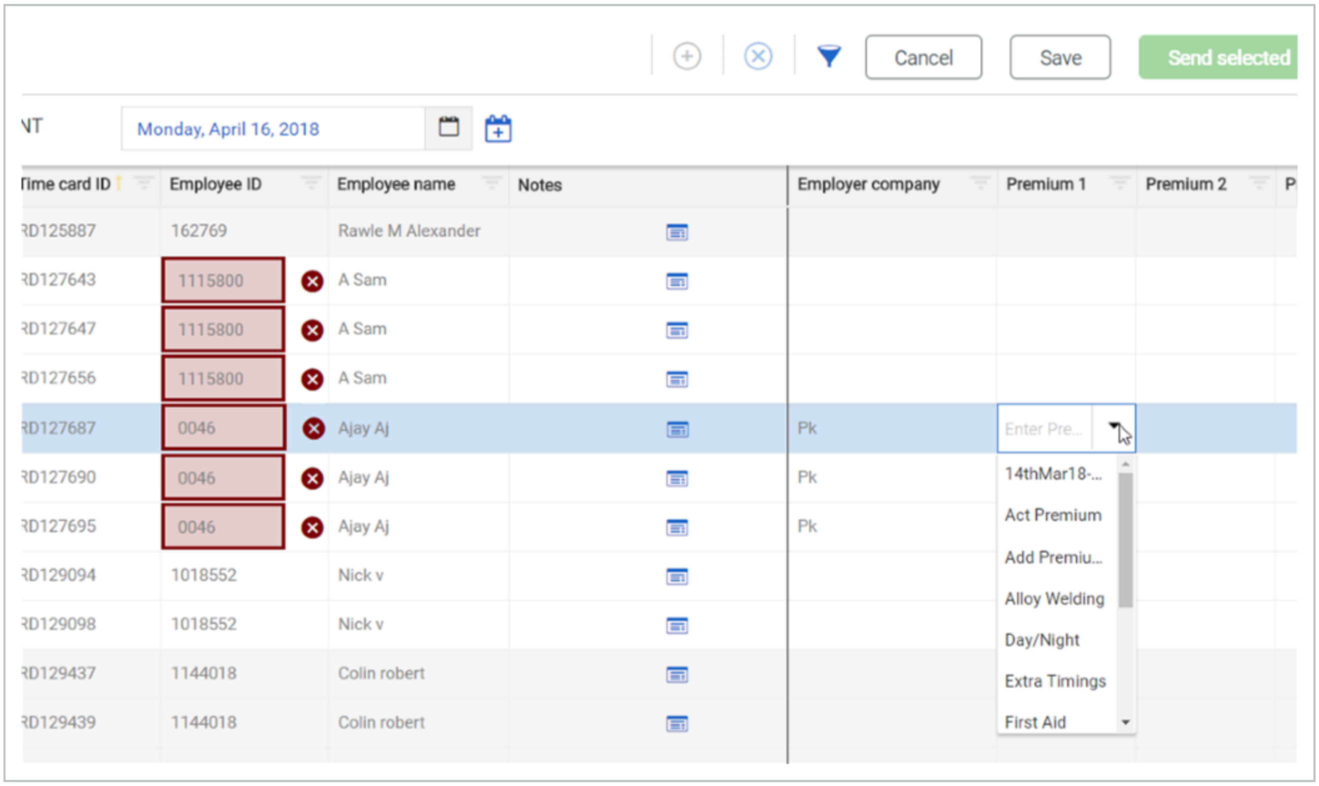
4.3.2.4 Other Timecard Adjustments

You may need to make timecard adjustments, even when there is no error. For example, you may need to override the craft assignment of an employee. You can make this change in the Override Craft column of the timecard.



NOTE For craft and trade overrides, the override craft or trade specified for the employee must pertain to the appropriate union, as assigned at the project level or as defined and imported from the ERP, otherwise there will be an error.

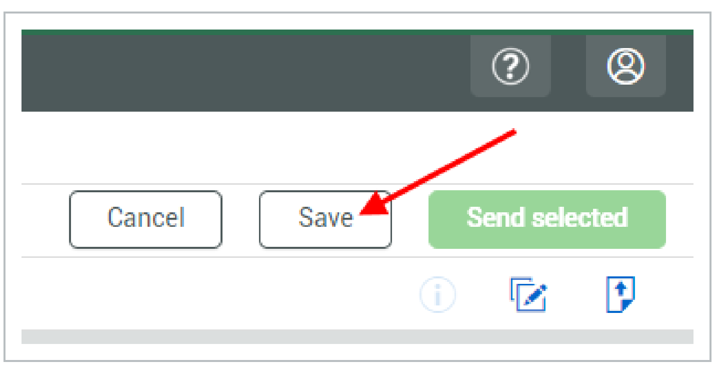
You can also assign or correct premiums. There are identified premiums (created at the project level) from which you can choose.



Do not confuse premiums with allowances (known as Extra Pay in the Progress application). Unlike premiums, allowances apply for the entire day.

4.3.3 Saving Changes

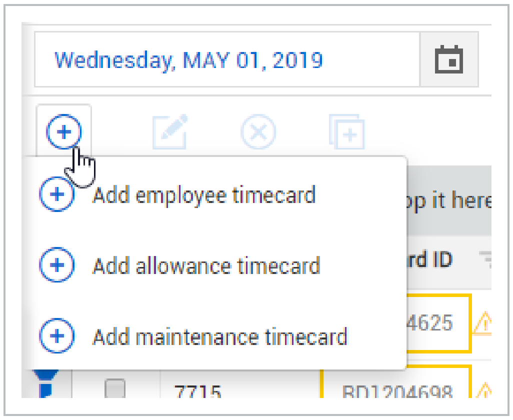
As you make changes, be sure to click **Save** in the upper right-hand corner to save your edits.



Any changes made in Time Center will update automatically in the daily plans of the InEight Progress application.

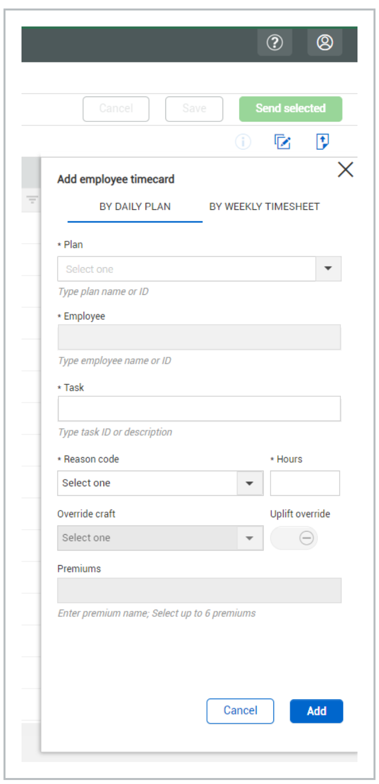
4.3.4 Add Timecard

At times you may need to account for employee hours, allowances, or maintenance hours that were not captured in a daily plan or weekly timesheet. Perhaps they were missed, or you need to make a quick adjustment without going back to the InEight Progress application. You can add a new timecard to record the hours by clicking the **Add timecard** button and selecting the type of timecard to add.



NOTE	Until you save your changes, you will not be able to add or delete any timecards.

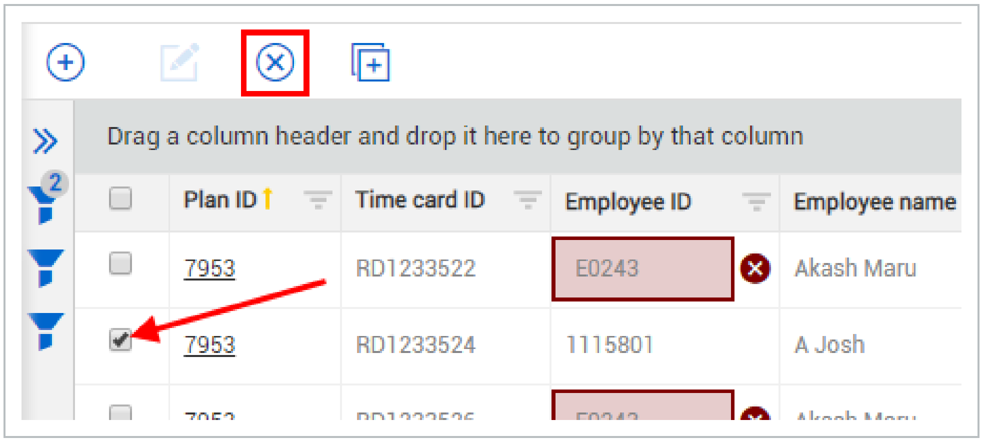
A slide out panel opens on the right to fill out and add the timecard.



This same process is followed when you want to create timecards for allowances and maintenance.

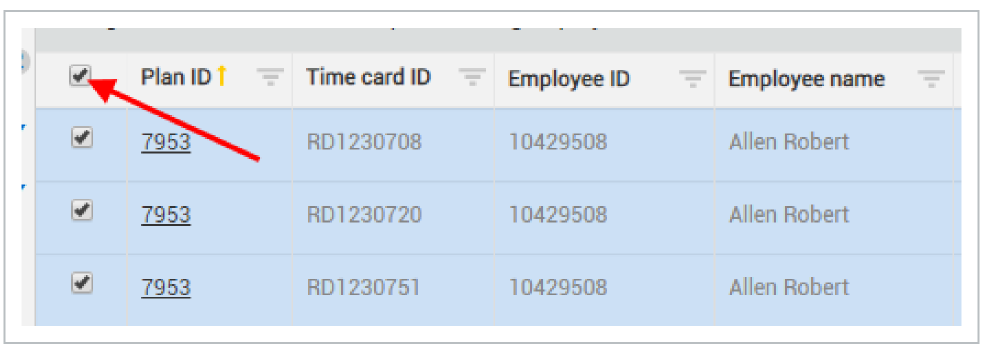
4.3.5 Delete Timecard

To delete a timecard, you check the row header check box of the timecard and select the **Delete timecard** button.

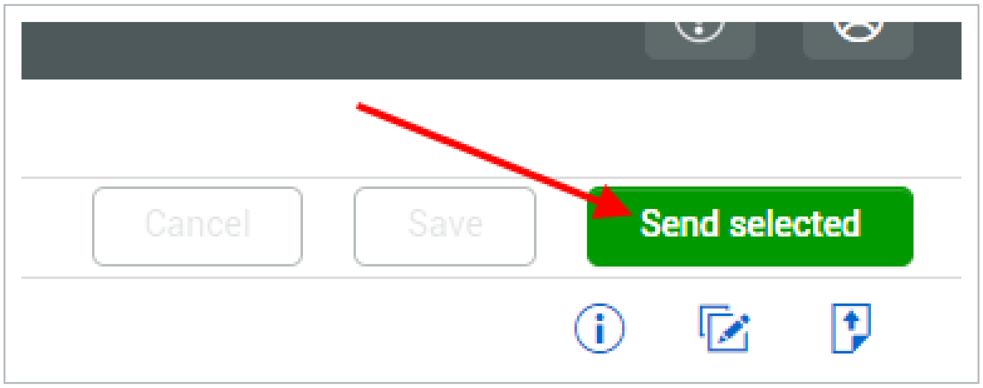


4.3.6 Submit to Payroll

Once all the timecards are reviewed and issues resolved, you can either select the timecards individually or check the box to select all timecards.



With the timecards selected, click the **Send Selected** button.



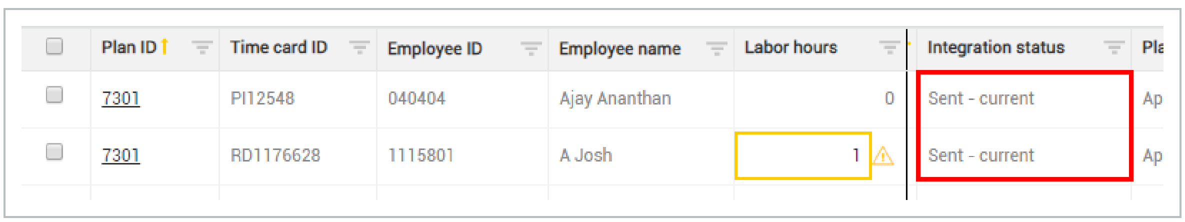
This sends the selected timecards to your Payroll system.

4.3.6.5 Integration Validation

The system will validate the information to make sure there are no errors.

- If there are errors, that timecard will not be sent
- If there are no errors, the records are put in queue and sent to your ERP system to be processed for payroll

Once processed, you will get back a result from Payroll indicating whether it succeeded or failed. If successful, the Integration status updates to **Sent – current**.



	Plan ID	Time card ID	Employee ID	Employee name	Labor hours	Integration status	Pla
	7301	PI12548	040404	Ajay Ananthan	0	Sent - current	Ap
	7301	RD1176628	1115801	A Josh	1	Sent - current	Ap

Lesson 4 Review

1. What is ONE of the purposes of Time Center?
    a. Record daily timesheets in the field
    b. Input weekly timesheets into the system
    c. Edit and correct timecard errors before sending them to Payroll
    d. Create daily plans for the next day's work

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2. Which of the following can you do with columns on the Time Center register to drill in on your timecard data? (Select all that apply.)
    a. Hide
    b. Move
    c. Delete
    d. Sort
    e. Group
    f. Filter

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3. Fields highlighted in red in the Time Center register signify what?
    a. A warning indicator, recommending that the issue be fixed
    b. An error indicator that must be resolved before sending to Payroll
    c. A duplicate timecard
    d. A tag indicator used for filtering

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4. What would you select to submit selected timecards to Payroll?
    a. Select **Submit to payroll** from the Actions menu
    b. Right click on the selected timecards and select **Submit to payroll**
    c. Click the **Save** button
    d. Click the **Send selected** button

Lesson 4 Summary

As a result of this lesson, you can:

- Navigate the Time Center module
- Create, edit, and send timecards