
**PROGRESS USER
GUIDE**

Advanced

FIELD EXECUTION MANAGEMENT

INEIGHT 

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CONTENTS

LESSON 1 – ADVANCED OPTIONS	7
1.1 Advanced Option Overview	8
1.1.1 Organization Settings	8
1.1.2 Overview	8
Project Settings in InEight Progress	8
1.2 Reason Codes	11
1.2.1 Reason Codes	11
1.2.2 Premiums	11
Assign Hours Using Reason Codes	12
1.3 Employee Equipment Linking	15
Linking Employees and Equipment	18
Lesson 1 Review	22
Lesson 1 Summary	22
LESSON 2 – MAINTENANCE WORK ORDERS	23
2.1 Maintenance Work Order Overview	24
2.1.1 Organization Settings	24
2.1.2 Overview	24
2.2 Utilizing Maintenance Work Orders	24
Add Maintenance Work Order to Time Sheet	25
Lesson 2 Review	29
Lesson 2 Summary	29
LESSON 3 – WEEKLY TIME SHEET	31
3.1 InEight Progress Workflow - Weekly Timesheet	32
3.2 Weekly Timesheet Navigation	32
3.2.1 Overview	32
Navigate Weekly Time Sheet	33

3.3 Weekly Time Sheet Creation	34
3.3.1 Set Up Members	34
Add Members to Weekly Time Sheet	34
3.3.2 Input Time	36
Input Time on Weekly Time Sheet	36
3.3.3 Submit Hours	38
Lesson 3 Review	40
Lesson 3 Summary	40
LESSON 4 – TIME CENTER	41
4.1 InEight Progress Workflow - Time Center	43
4.2 Time Center Navigation	43
4.2.1 Time Center Overview	43
4.2.1.1 Time Center Purpose	44
4.2.1.2 Display Configurations	45
4.2.1.3 Time Center Access	45
4.2.2 Time Center Register Columns	47
4.2.2.4 Sort Columns	51
4.2.2.5 Move Columns	51
4.2.2.6 Filter columns	51
4.2.2.7 Group Columns	53
4.2.3 Unapproved Time Cards	54
4.2.4 Date Filter	55
4.2.5 Time Card Pre-Set Filters	55
4.2.6 Query Builder	56
Create a Query	56
4.2.6.8 Filter Indicators	58
4.2.7 Error Indicators	59
4.2.7.9 Errors	59
4.2.7.10 Warnings	59
4.3 Time Card Management	60
4.3.1 Time Card Management Overview	60
4.3.2 Time Card Review	60
4.3.2.1 Data Validation Errors	60
4.3.2.2 Correcting Issues Outside of Time Center	61
4.3.2.3 Correcting Issues in Time Center	62
4.3.2.4 Other Time Card Adjustments	63
4.3.3 Saving Changes	64
4.3.4 Add Time Card	65

- 4.3.5 Delete Time Card 66
- 4.3.6 Reallocate Time Cards 66
- 4.3.7 Submit to Payroll 67
 - 4.3.7.5 Integration Validation 68
- Lesson 4 Review 69
- Lesson 4 Summary 69

STEP-BY-STEP PROCEDURES

Project Settings in InEight Progress	8
Assign Hours Using Reason Codes	12
Linking Employees and Equipment	18
Add Maintenance Work Order to Time Sheet	25
Navigate Weekly Time Sheet	33
Add Members to Weekly Time Sheet	34
Input Time on Weekly Time Sheet	36
Create a Query	56



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	8
1.1.1 Organization Settings	8
1.1.2 Overview	8
1.2 Reason Codes	11
1.2.1 Reason Codes	11
1.2.2 Premiums	11
1.3 Employee Equipment Linking	15
Lesson 1 Review	22
Lesson 1 Summary	22

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

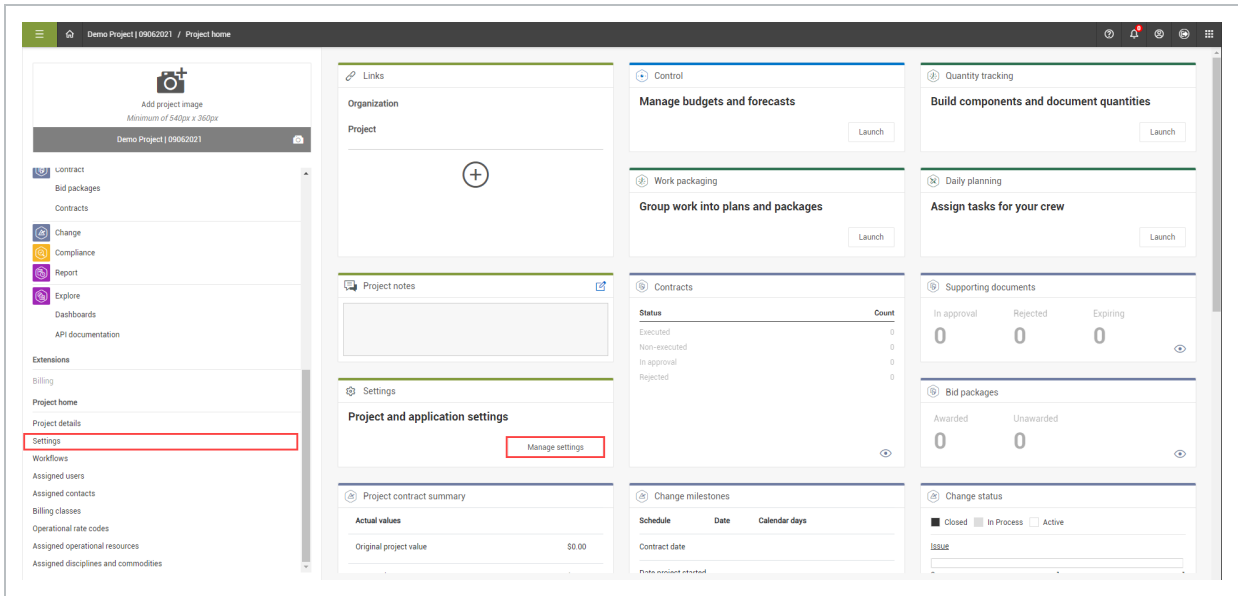
The advanced settings covered in this section can be used for both the Progress web and mobile applications.

- 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

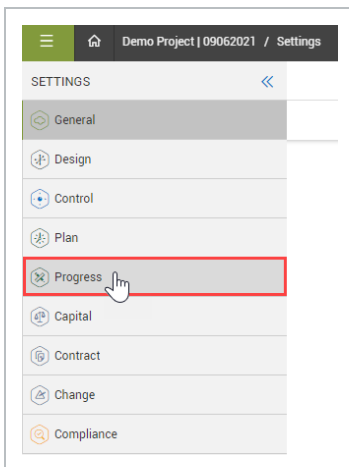
The Step by Step below walks you through how to turn on these advanced options for your daily plans.

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	<input checked="" type="checkbox"/>	Yes	Double time		⊖	
37	OT-maintenance	OT-maintenance	Maintenance	Overtime	<input checked="" type="checkbox"/>	Yes	OT-maintenance		⊖	
38	DT-Maintenance	DT-Maintenance	Maintenance	Double time	<input checked="" type="checkbox"/>	Yes	DT-Maintenance		⊖	
39	ST-Maintenance	ST-Maintenance	Maintenance	Standard time	<input checked="" type="checkbox"/>	Yes	ST-Maintenance		⊖	
40	Standard time	Standard time	Labor	Standard time	<input checked="" type="checkbox"/>	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.

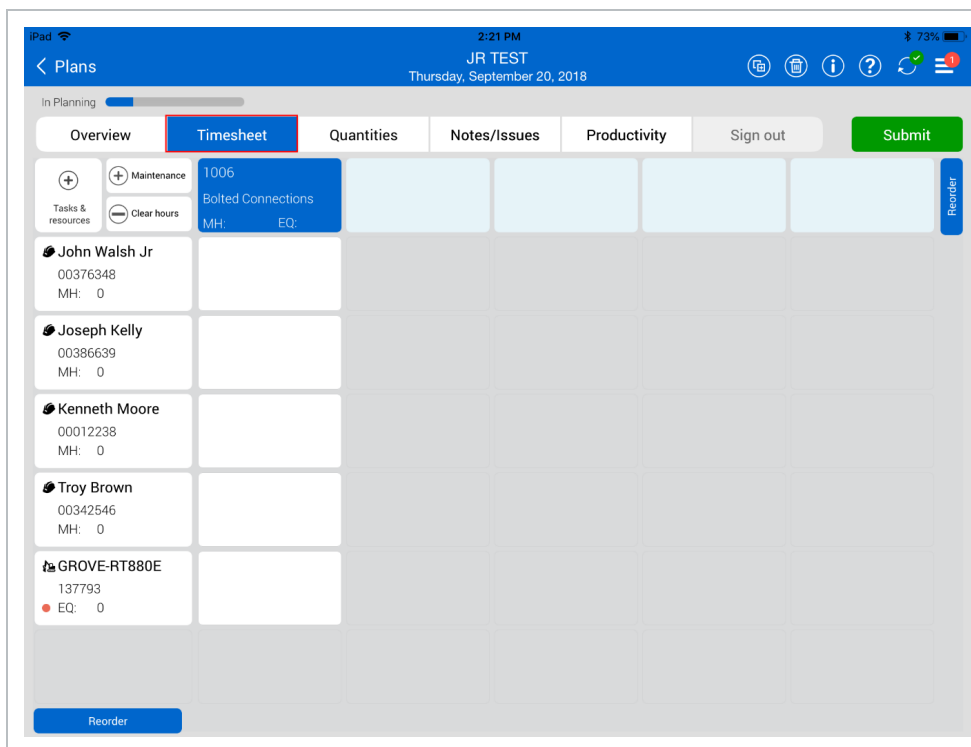
TIP

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

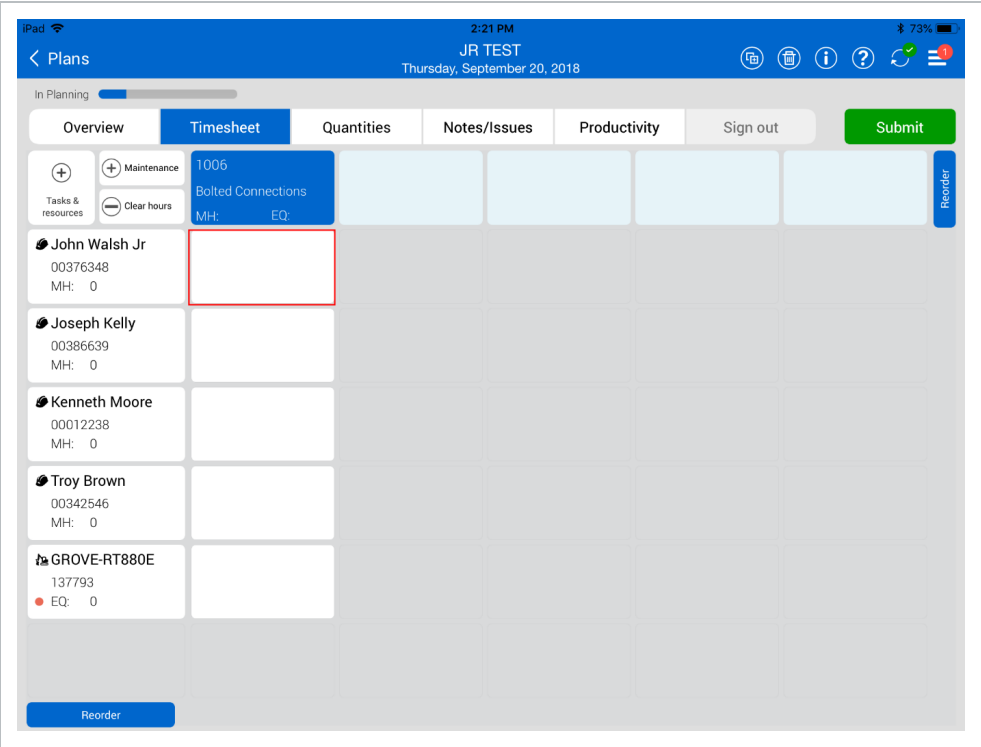
Assign Hours Using Reason Codes

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

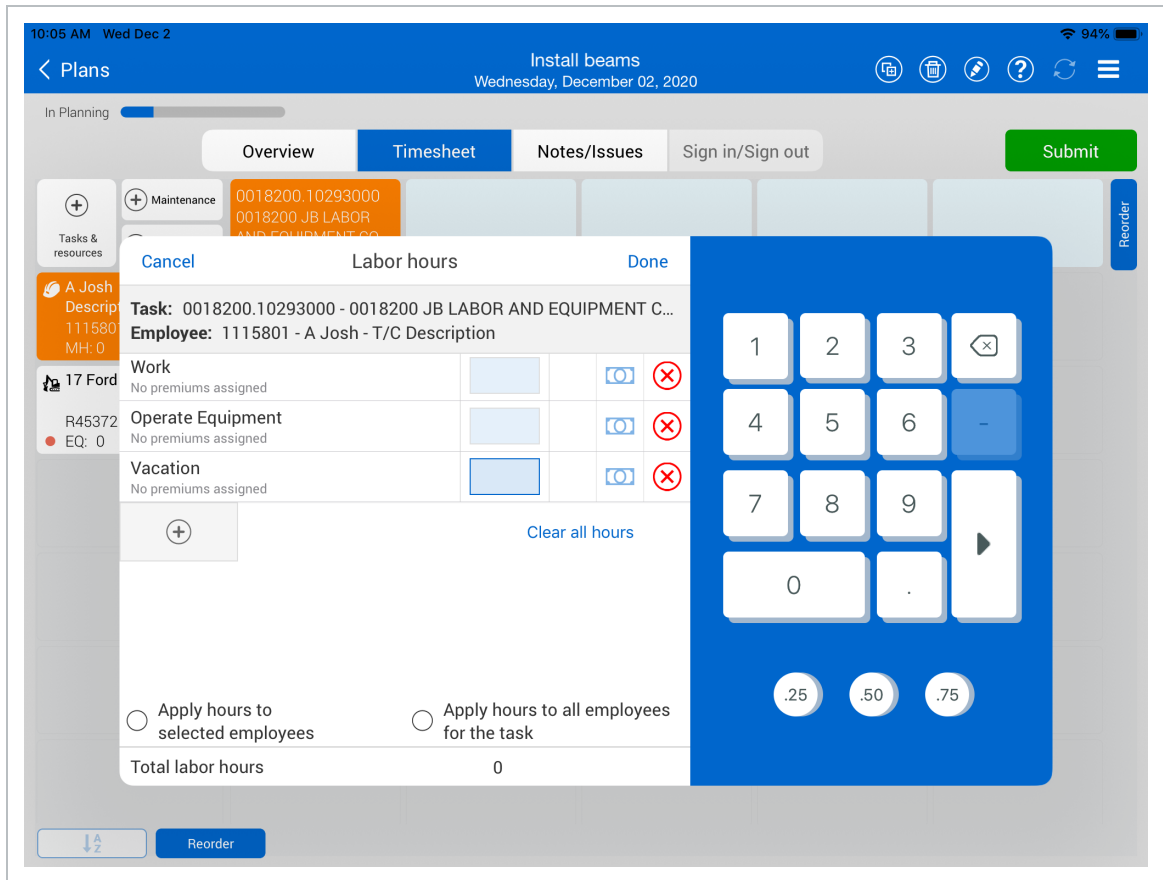
1. Open the daily plan you are working in and navigate to the **Timesheet** tab.



2. Select the tile next to an employee.

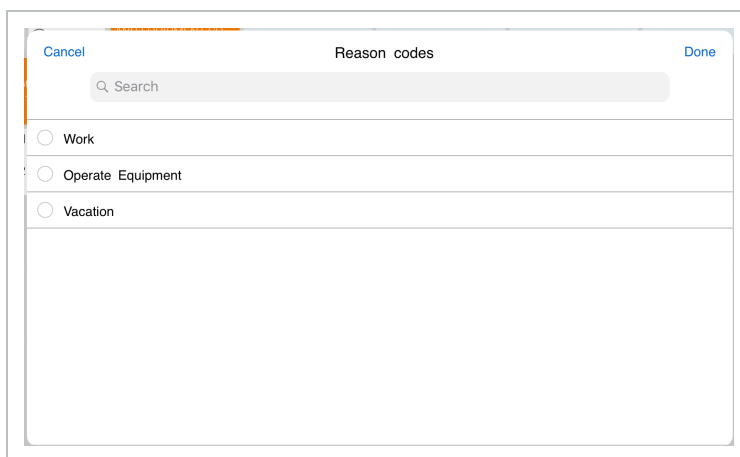


- Notice that instead of Standard time, Overtime, and Double time, you now have reason codes



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..

The screenshot shows a 'Labor hours' dialog box. At the top, there are 'Cancel' and 'Done' buttons. Below that, the task and employee information is displayed: 'Task: 0018200.10293000 - 0018200 JB LABOR AND EQUIPMENT C...' and 'Employee: 1115801 - A Josh - T/C Description'. A table follows with three rows: 'Work', 'Operate Equipment', and 'Vacation'. Each row has a 'No premiums assigned' status, a blue input field containing '8', and a blue icon with a white 'P' and a red 'X'. Below the table is a 'Clear all hours' button. At the bottom, there are two radio buttons: 'Apply hours to selected employees' (selected) and 'Apply hours to all employees for the task'. The 'Total labor hours' is shown as 8. A numeric keypad is overlaid on the right side of the dialog.

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.

Equipment hours

Task: 019200.10293333 - 019200 JB LABOR COST TYPE INVALID AND EQUIPMENT COST TYPE VALID

Equipment: R45372 17 Ford F550

Operate Nichols, E	4		
Clear all hours			

Planned hours: 0

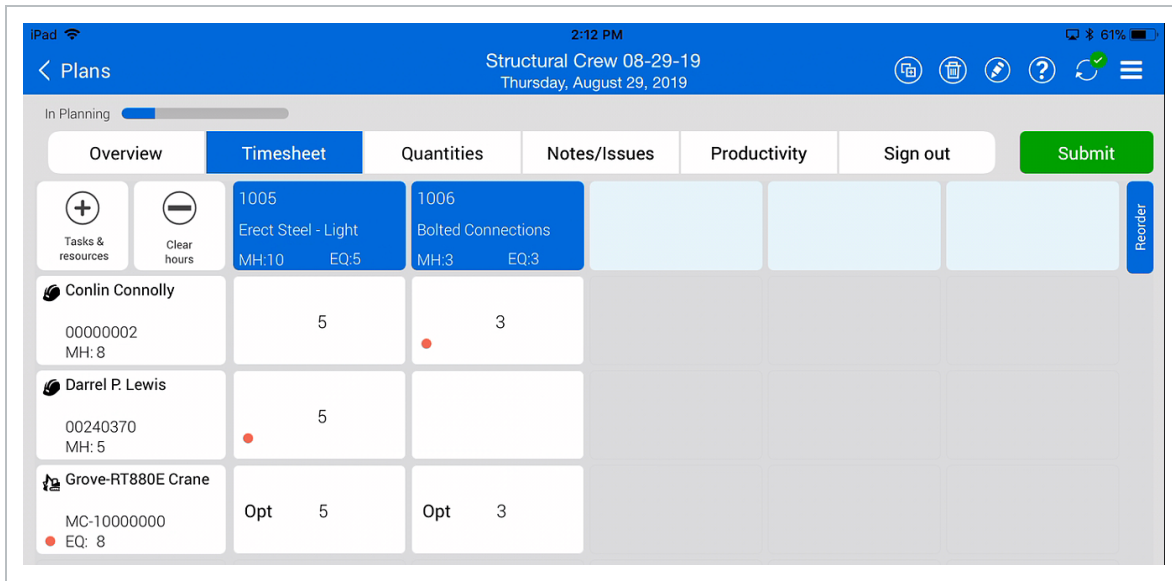
Total equipment hours: 4

Cancel Done

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

<p>Troy Brown 00342546 MH: 18</p>	8
<p>131113 - Pickup - 1 150693 EQ: 13</p>	<p>Operated 8</p> <p>Other</p>

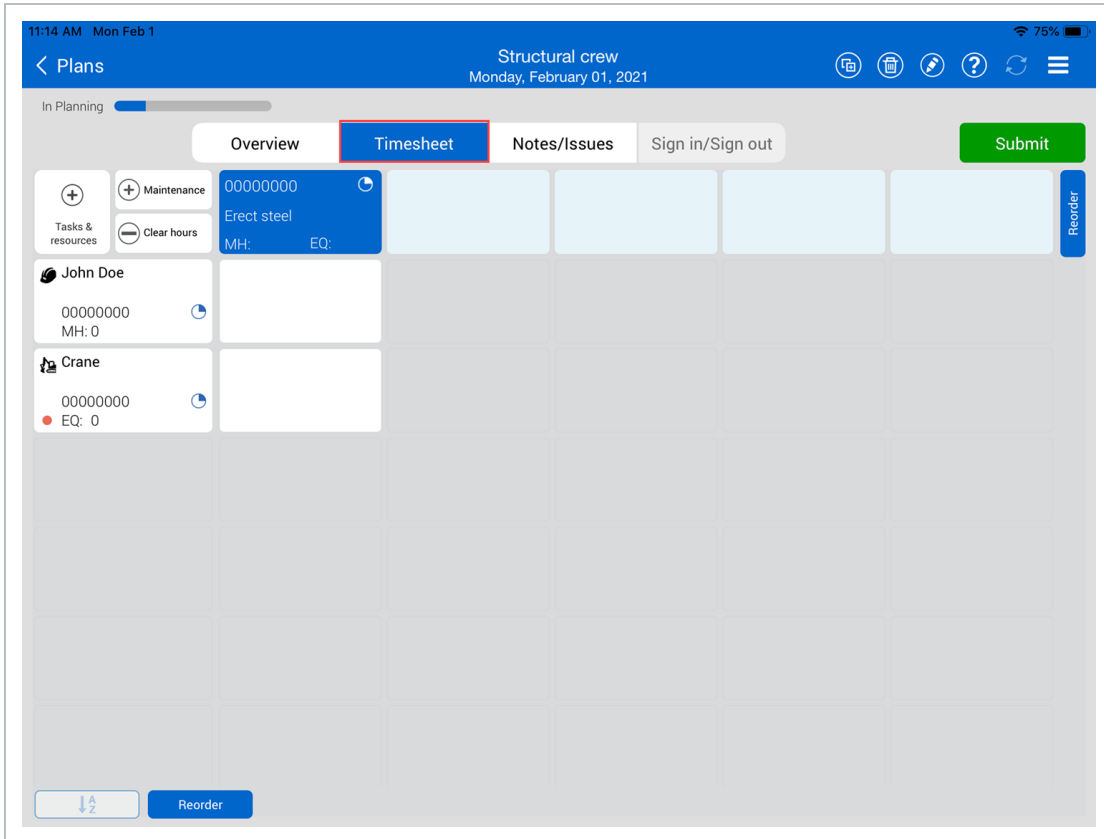
In the Progress mobile application, employee and equipment links are indicated by dots.



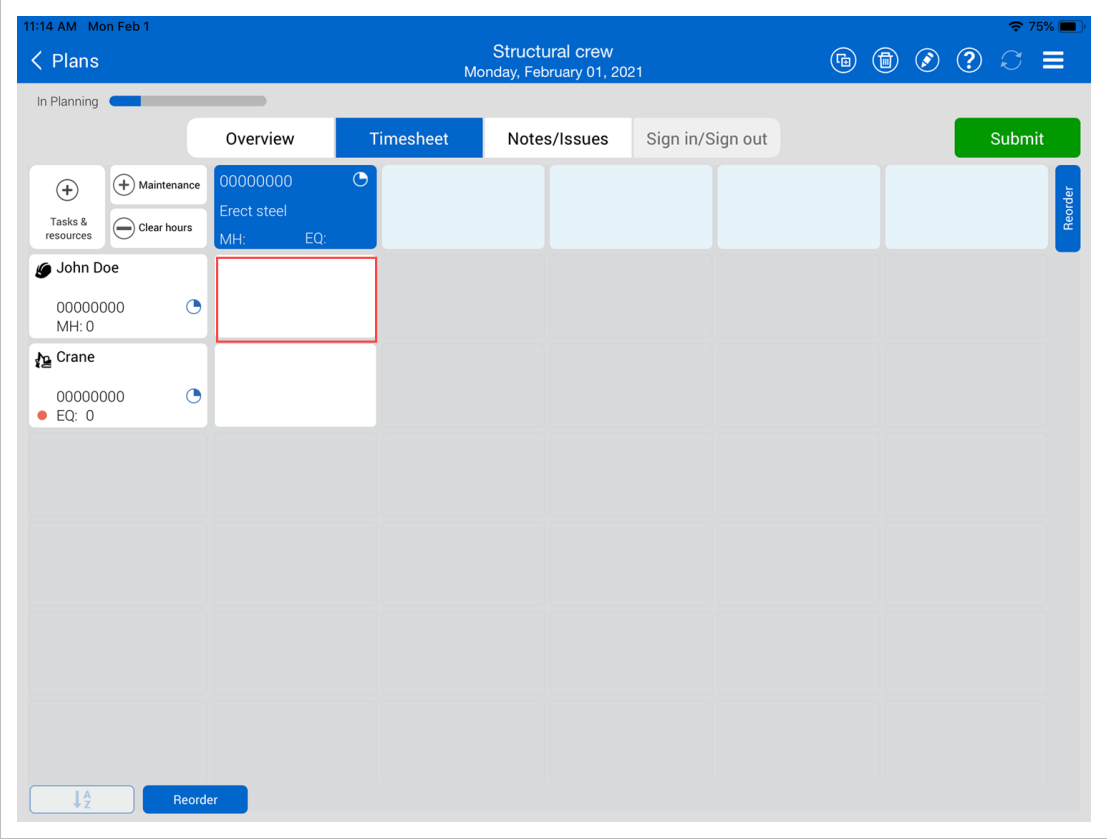
The following steps walk you through linking an employee to equipment on the Timesheet tab of a daily plan. The images in this Step by Step are from the Progress mobile application.

Linking Employees and Equipment

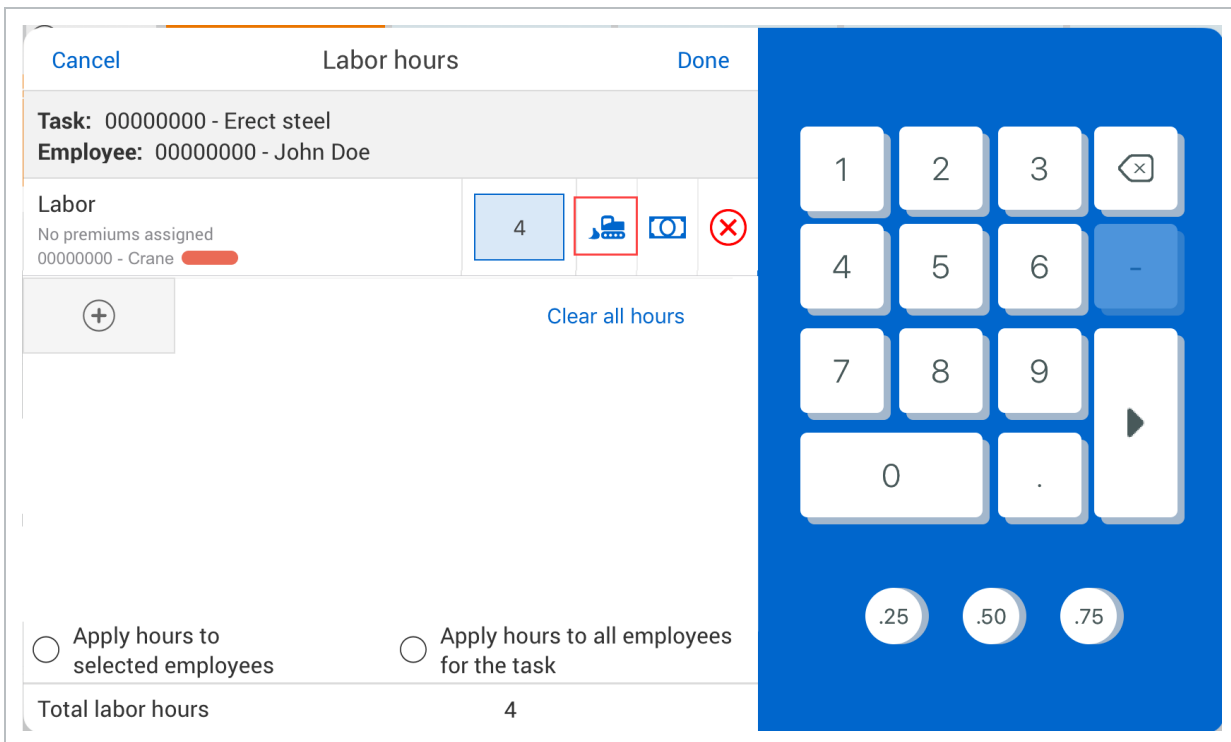
1. Open the daily plan you are working in, and then go to the **Timesheet** tab.



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



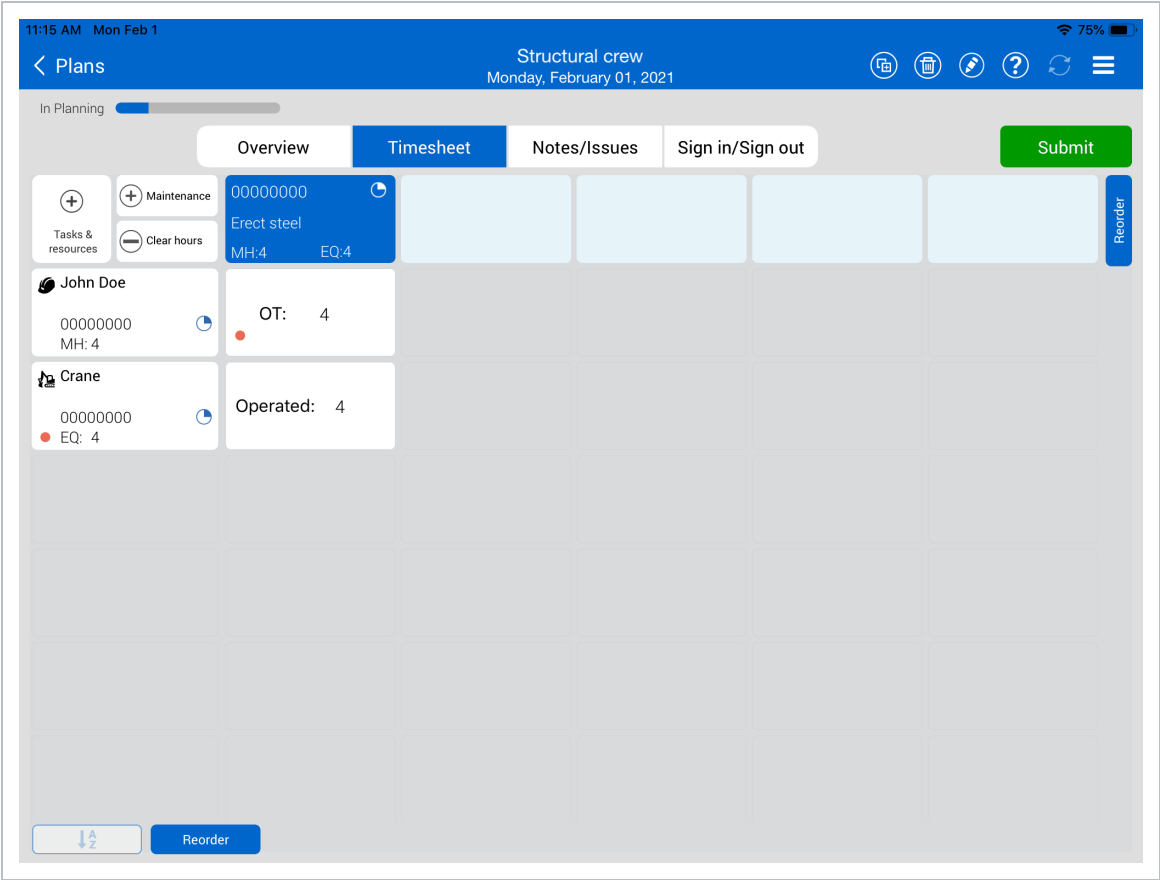
- 3. Enter the labor hours of the employee into the blank field.
- 4. Click the **Equipment** icon, and then select a piece of equipment.



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



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

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

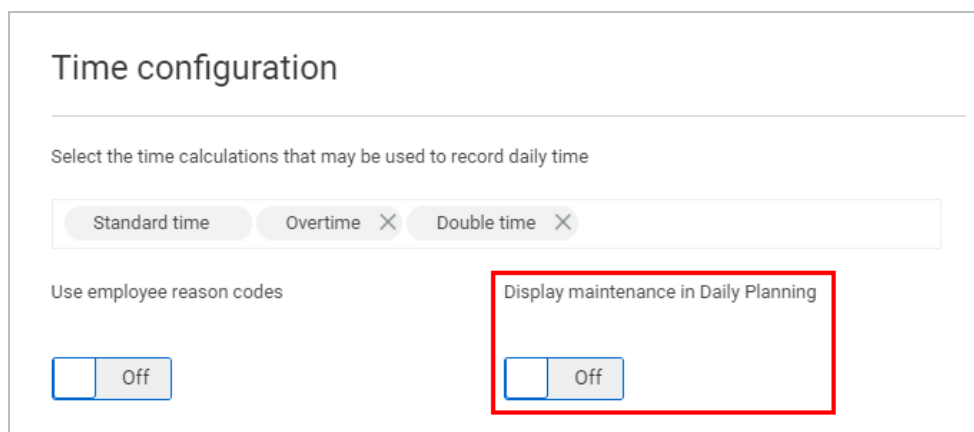
Lesson Topics

2.1 Maintenance Work Order Overview	24
2.1.1 Organization Settings	24
2.1.2 Overview	24
2.2 Utilizing Maintenance Work Orders	24
Lesson 2 Review	29
Lesson 2 Summary	29

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.



Time configuration

Select the time calculations that may be used to record daily time

Standard time Overtime X Double time X

Use employee reason codes Off

Display maintenance in Daily Planning Off

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**

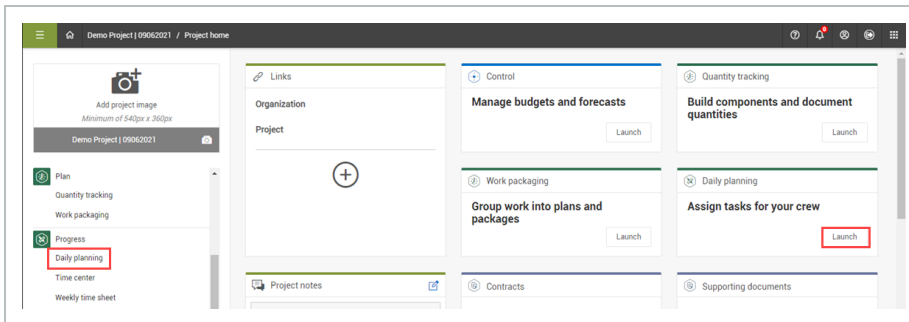
TIP

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.

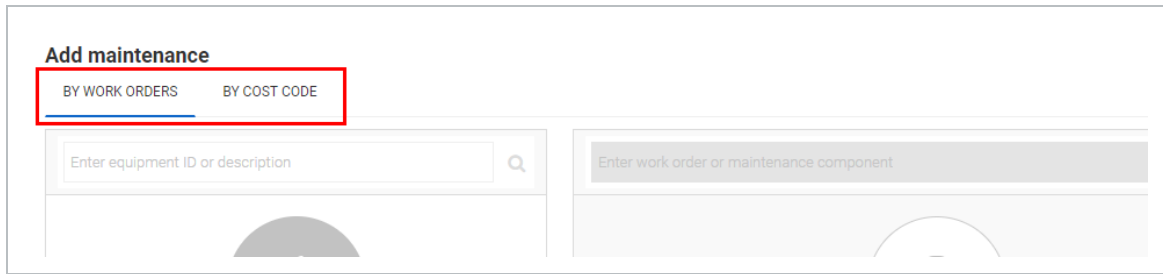
Daily Plans > Erect Steel - 09/27/2018 (In Pl...)

OVERVIEW DETAILS TIME SHEET

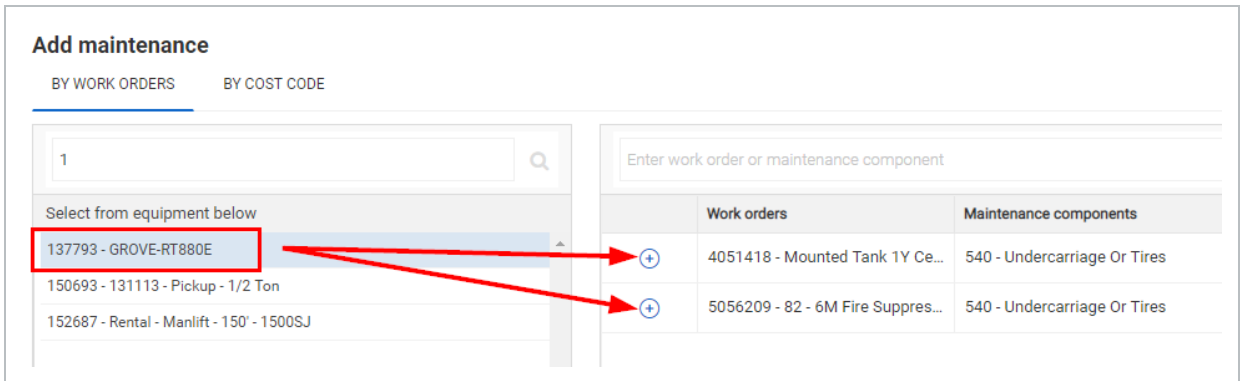
 Add tasks and resources	 Add maintenance	1005 Erect Steel - Light MH: 32 EQ: 8			
	 Clear hours				
 John Walsh Jr 00376348 MH: 8	8				
 Kenneth Moore 00012238 MH: 8	8				
 Joseph Kelly 00386639 MH: 8	8				
 Troy Brown 00342546 MH: 8	8				
 GROVE-RT880E 137793 EQ: 8	Operated 4 Other 4				

- 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

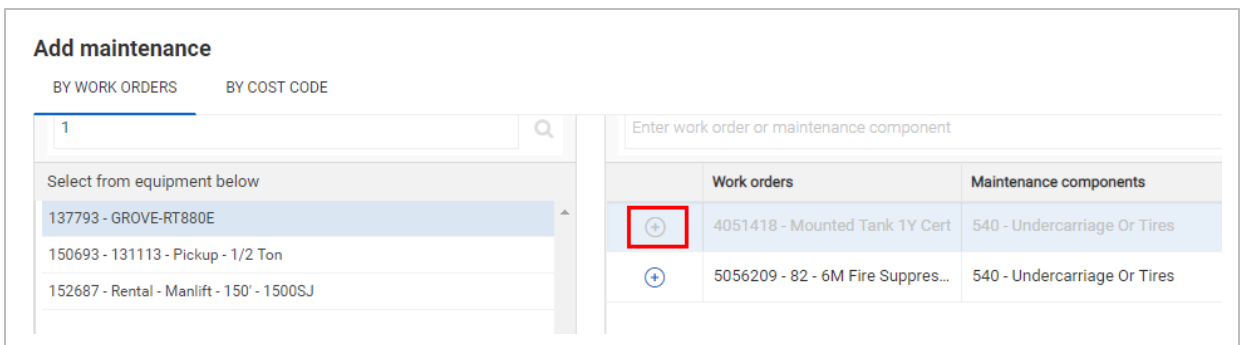
order” so that maintenance-related hours can be tracked



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.



- Notice that the work order shows 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 dimmed 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

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LESSON 3 – WEEKLY TIME SHEET

Lesson Duration: 20 minutes

Lesson Objectives

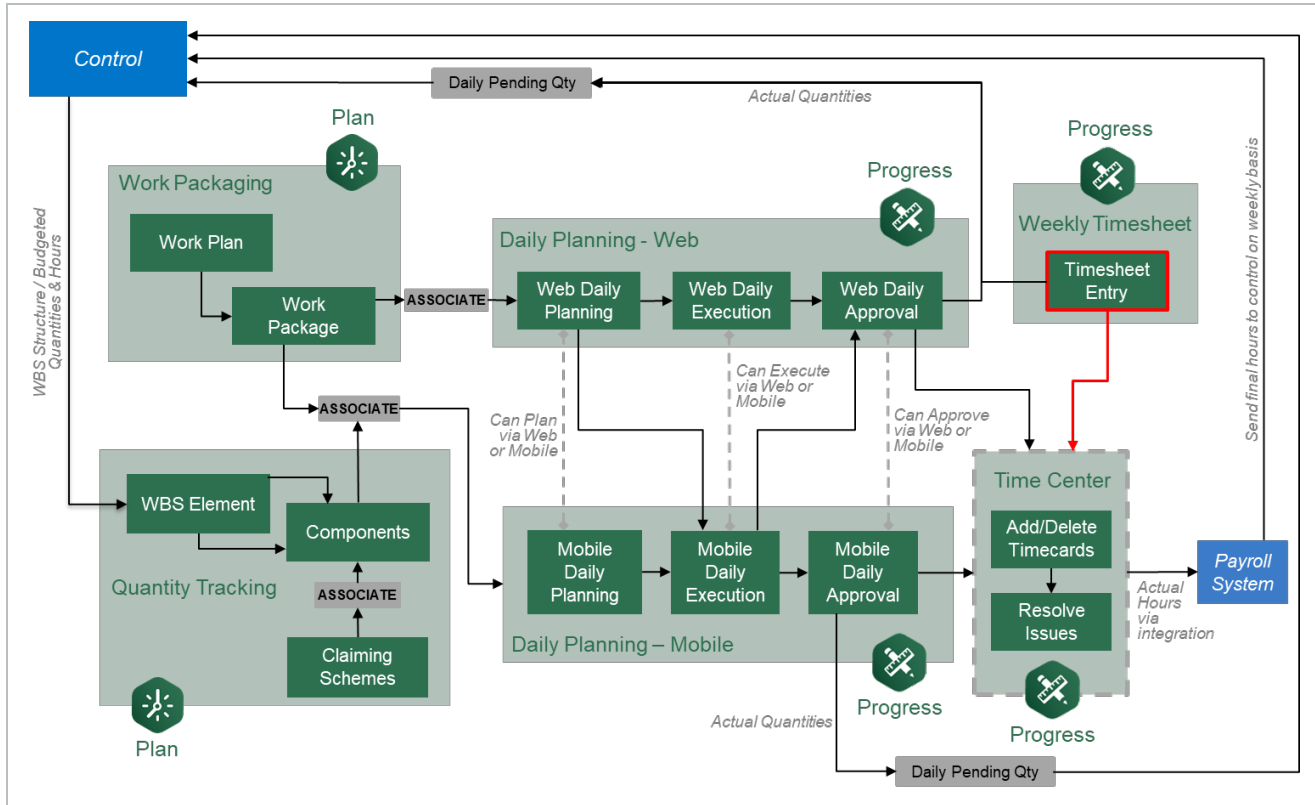
After completing this lesson, you will be able to:

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

Lesson Topics

3.1 InEight Progress Workflow - Weekly Timesheet	32
3.2 Weekly Timesheet Navigation	32
3.2.1 Overview	32
3.3 Weekly Time Sheet Creation	34
3.3.1 Set Up Members	34
3.3.2 Input Time	36
3.3.3 Submit Hours	38
Lesson 3 Review	40
Lesson 3 Summary	40

3.1 INEIGHT PROGRESS WORKFLOW - WEEKLY TIMESHEET



3.2 WEEKLY TIMESHEET NAVIGATION

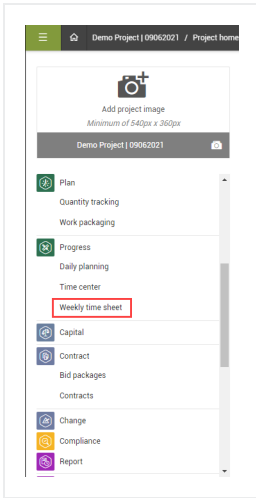
3.2.1 Overview

Weekly Time Sheet is a Progress module that lets you 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.

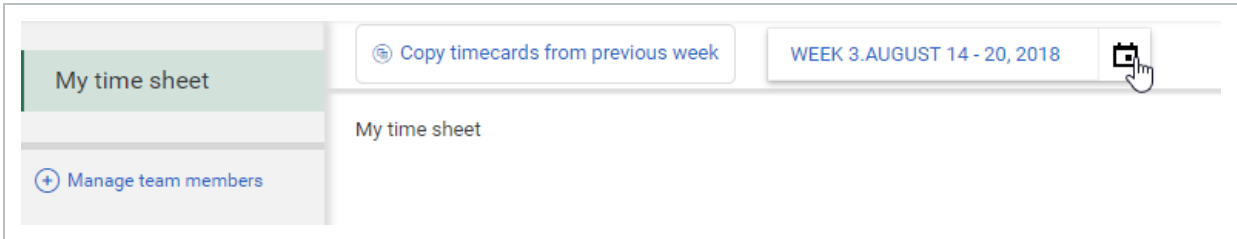
NOTE Week start day is defined by the setting at the organization level in Settings > Progress > Daily planning > **General**.

Navigate Weekly Time Sheet

1. From the project home page, in the side panel, select **Weekly time sheet** under Progress.



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



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

Employee							
Project ID	Project name	Reason code	Reason code description	Task ID	Task description	Plan ID	
No data available on current grid.							
Total:							

Allowances				
Project ID	Project name	Reason code	Reason code description	Plan ID
No data available on current grid.				
Total:				

Equipment									
Project ID	Project name	Reason co...	Reason code descr...	Equipment ...	Equipment descrip...	Task ID	Task description	Plan ID	
No data available on current grid.									
Total:									

3.3 WEEKLY TIME SHEET CREATION

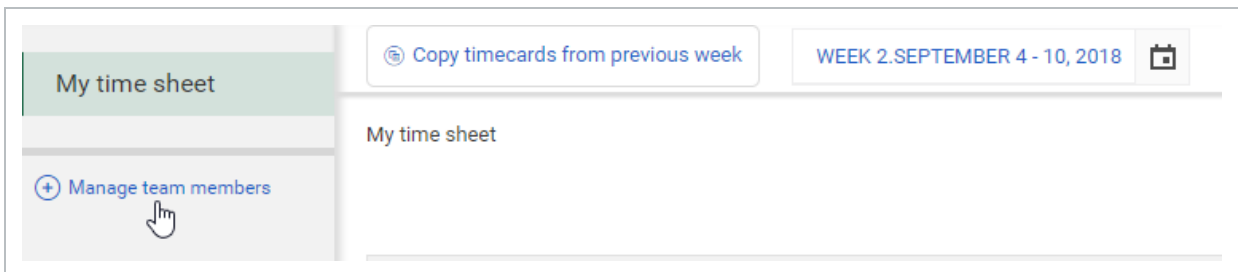
3.3.1 Set Up Members

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

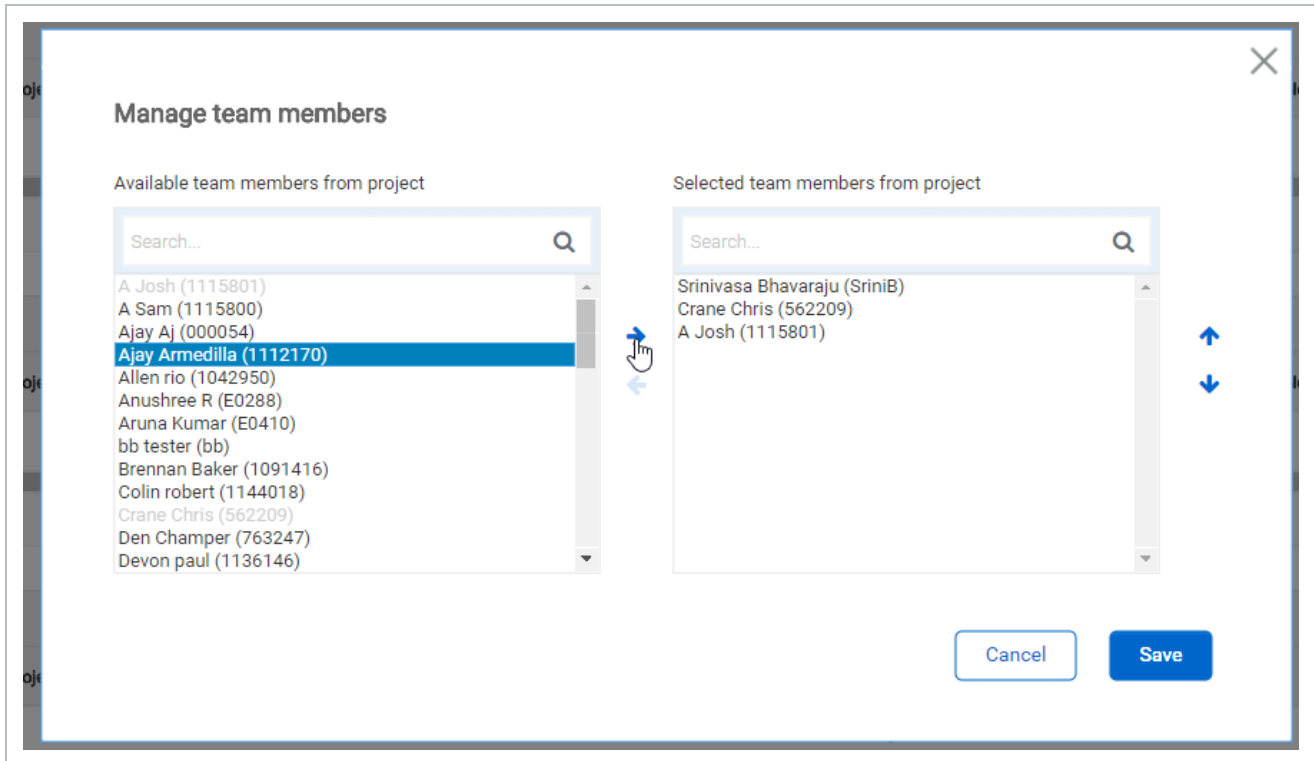
The following steps walk you through how to set up members in Weekly Time Sheet.

Add Members to Weekly Time Sheet

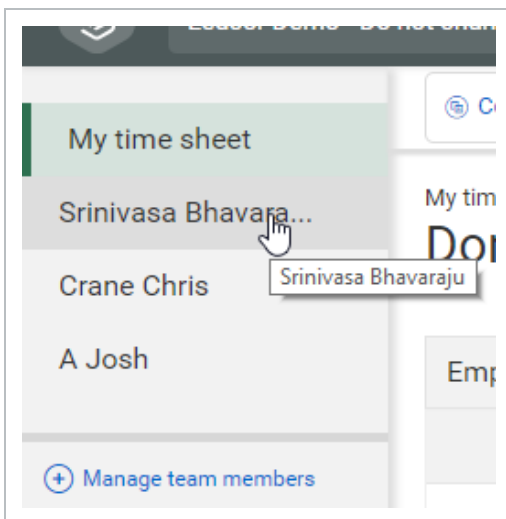
1. From the Weekly time sheet page, select **+ Manage team members**.



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

After 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.

My time sheet
Michael Thorp(1248)

Total Employee Hours: 52

Display: Allowances Equipment

son code	Reason code description	Task ID	Task description	Plan ID	Notes	Mon 22	Tue 23	Wed 24	Thu 25	Fri 26	Sat 27	Sun 28	Total
SON	Reason1	25062018.001_ES.01	With def L & E	Z668					8				8
	Operate Equipment	25062018.001_ES.01	With def L & E	Z668					4				4
	Work	25062018.1234.890	DE Task			8	8	8	8	8			40
						8	8	8	20	8	0	0	52

Allowances

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.

Steel Structure Job (105091) | Progress | Weekly time sheet

My time sheet

Humberto Estrada ...

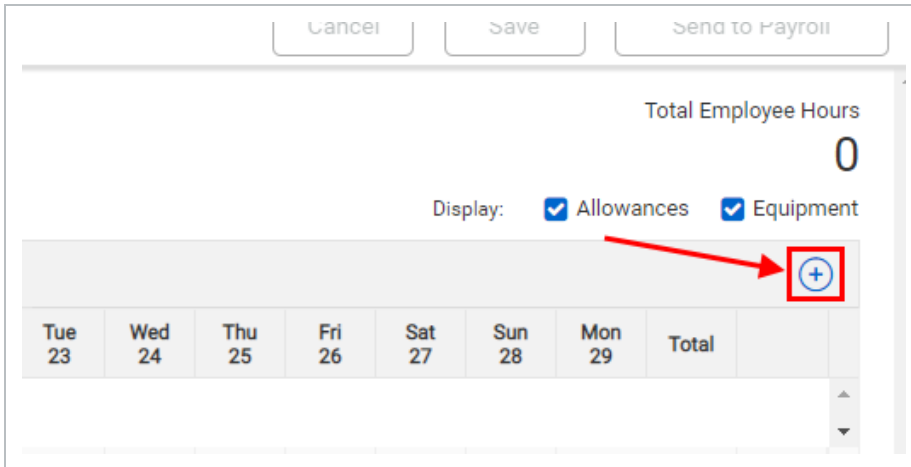
Chace Shelley

Team member
Chace Shelley(00939249)

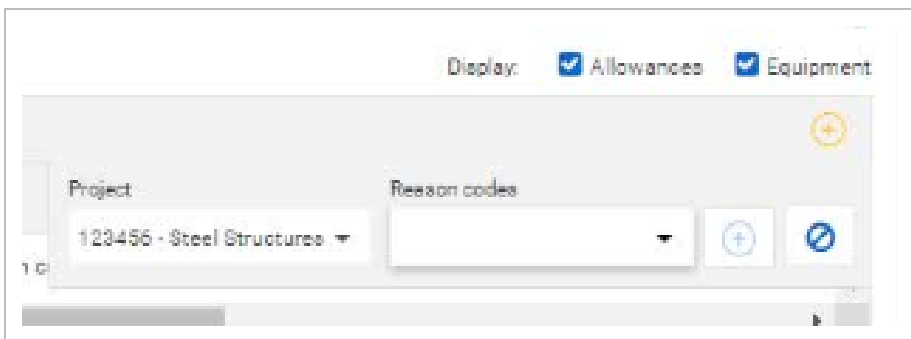
Employee

Project ID	Project name	Reason code	Reason code description
------------	--------------	-------------	-------------------------

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. Select a **Reason code** from the drop-down menu.

5. Enter that employee's time wherever necessary.

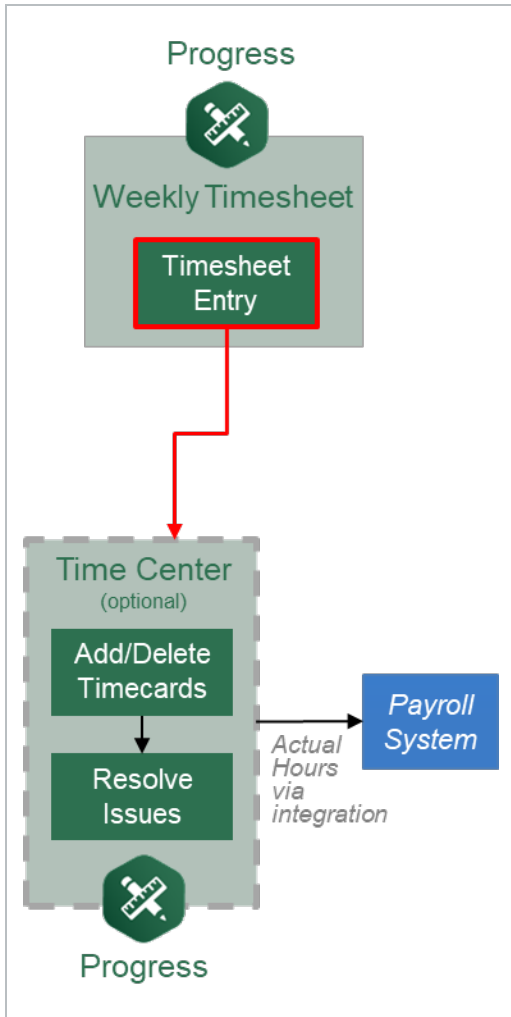
Employee				Sun 23	Mon 24	Tue 25	Wed 26	Thu 27	Fri 28	Sat 29
Task ID	Task description	Plan ID	Notes	0	0	0	0	0	0	0
123456.295116.888	Unallocated Costs			0	0	0	0	0	0	0

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

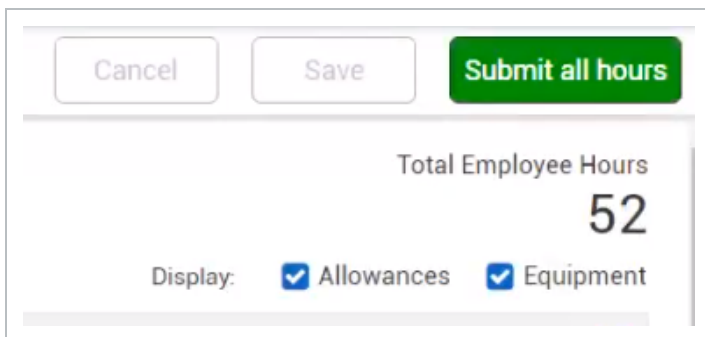
6. Click **Save**.

3.3.3 Submit Hours

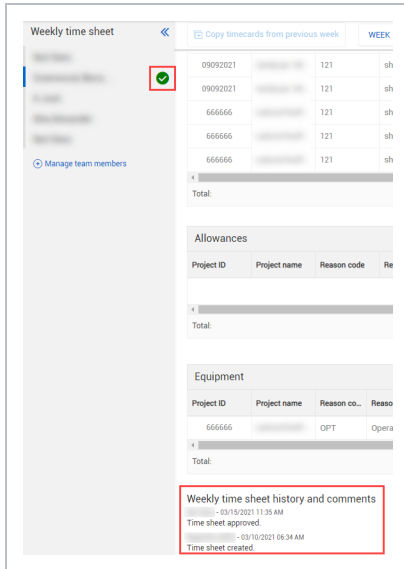
After all hours are input for the week, you can submit them to Time center for final review before they go to your payroll system.



To submit hours to Time center, click **Submit all hours**.



Depending on how your project is set up, your supervisor might be required to approve your hours. You can see the history and comments of the time sheet approval or rejection at the bottom of the page. Icons next to employee names show whether their time sheets have been approved, are pending, or rejected. Notifications remind you when employee and supervisor submissions are due.



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

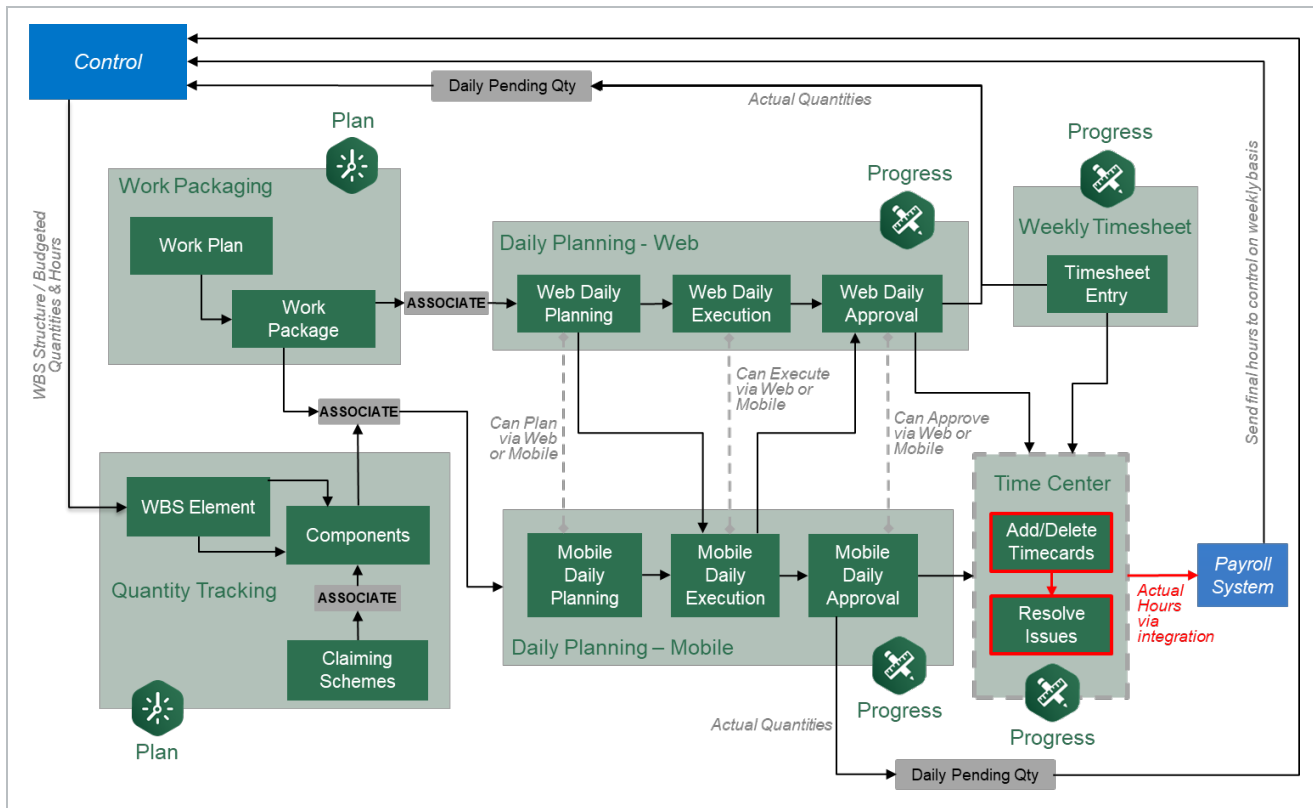
Lesson Topics

4.1 InEight Progress Workflow - Time Center	43
4.2 Time Center Navigation	43
4.2.1 Time Center Overview	43
4.2.2 Time Center Register Columns	47
4.2.3 Unapproved Time Cards	54
4.2.4 Date Filter	55
4.2.5 Time Card Pre-Set Filters	55
4.2.6 Query Builder	56
4.2.7 Error Indicators	59
4.3 Time Card Management	60
4.3.1 Time Card Management Overview	60
4.3.2 Time Card Review	60
4.3.3 Saving Changes	64
4.3.4 Add Time Card	65
4.3.5 Delete Time Card	66
4.3.6 Reallocate Time Cards	66
4.3.7 Submit to Payroll	67

Lesson 4 Review 69

Lesson 4 Summary 69

4.1 INEIGHT PROGRESS WORKFLOW - TIME CENTER

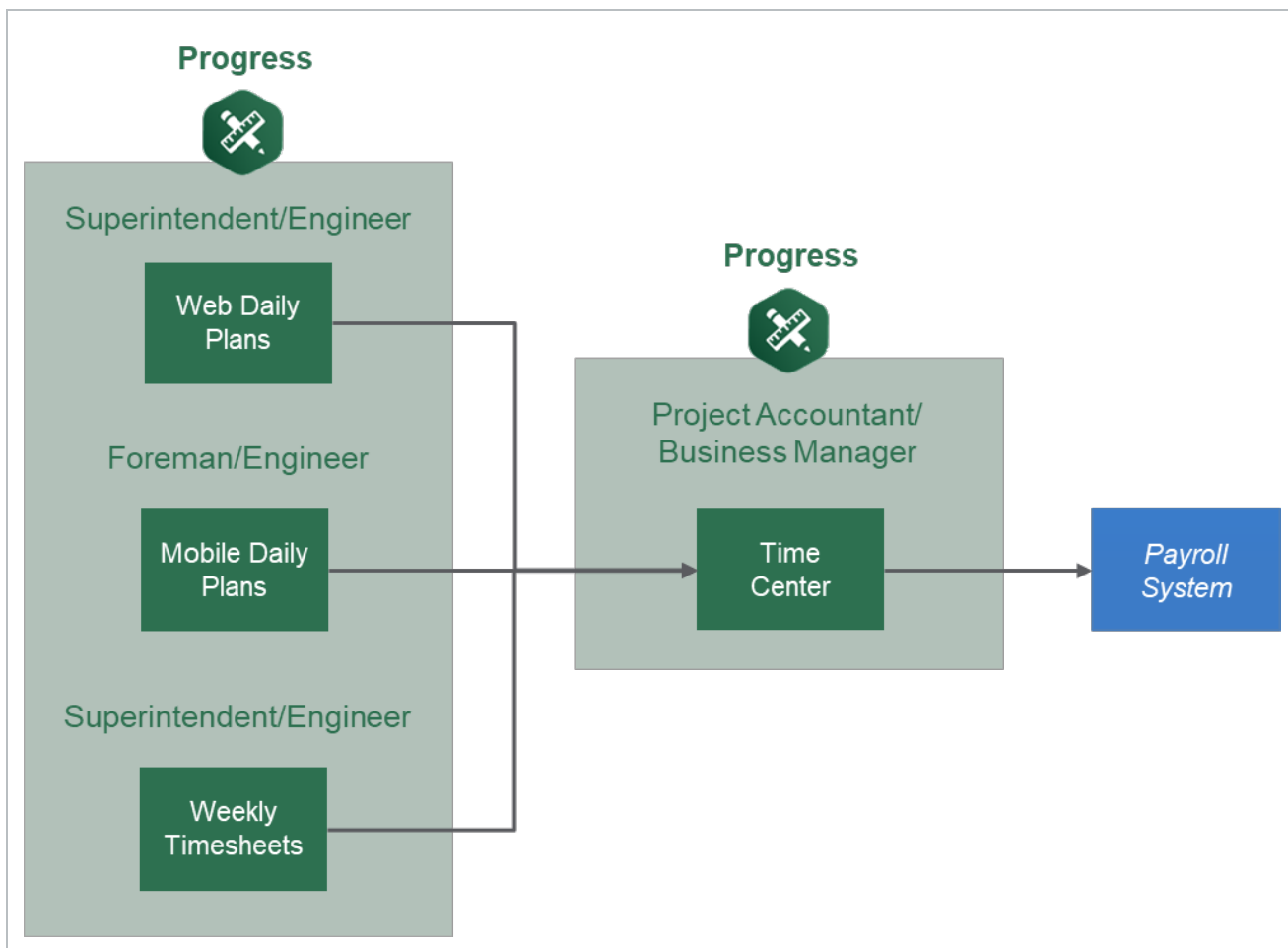


4.2 TIME CENTER NAVIGATION

4.2.1 Time Center Overview

Time Center serves as a final repository to review and correct timesheet information before importing into your payroll system. Time Center allows you to review entries, called **time cards**, 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 (time cards) received from Plan and Progress
- Ensure time cards have the correct properties and data elements
- Edit and correct any potential errors
- Send the reviewed and corrected time cards to your payroll system to process for payment
- Eliminate the need to edit time cards via payroll system database tables or side spreadsheets exported from Excel

4.2.1.2 Display Configurations

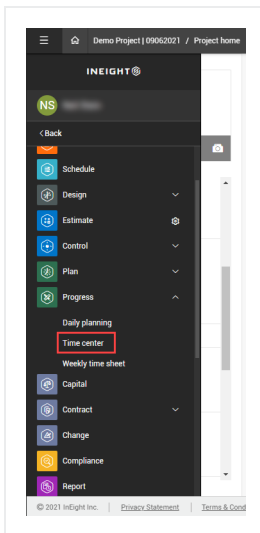
The Time center UI is designed for full HD resolution 1920 x 1080 with browser zoom of 100% and Windows display scaling of 100%. Display configurations other than what is recommended might not render correctly.

Each InEight application has its own supported display configurations, which might be different than the configuration above.

4.2.1.3 Time Center Access

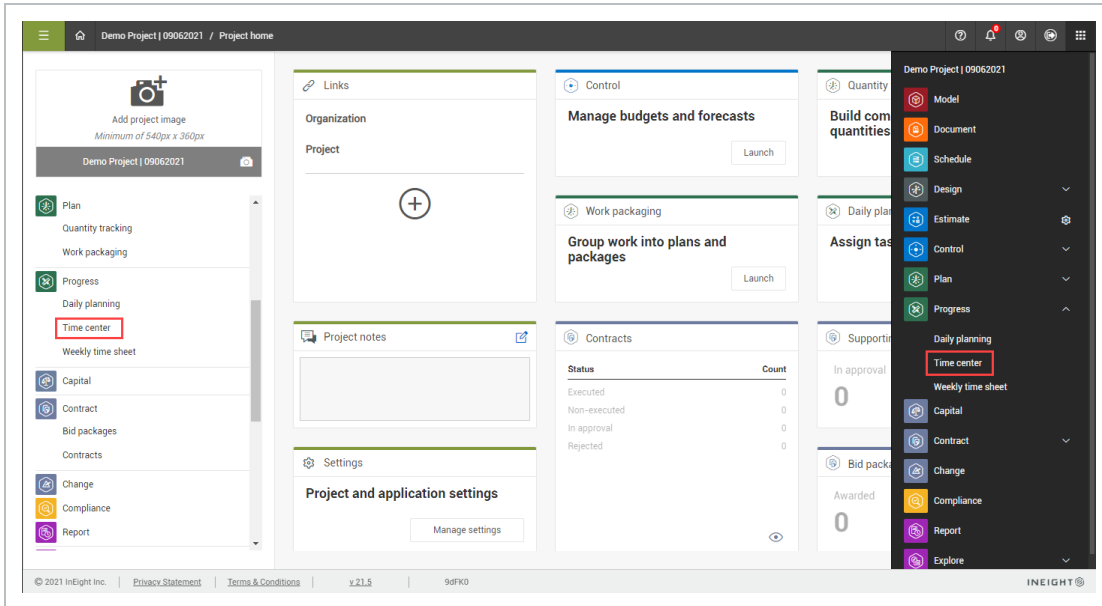
You access Time Center from the Project Home page by selecting one of the following:

- Hamburger icon menu > Project name > Progress > **Time center**



- **Time center** from the project home page side panel

- App launcher icon > Progress > **Time center**

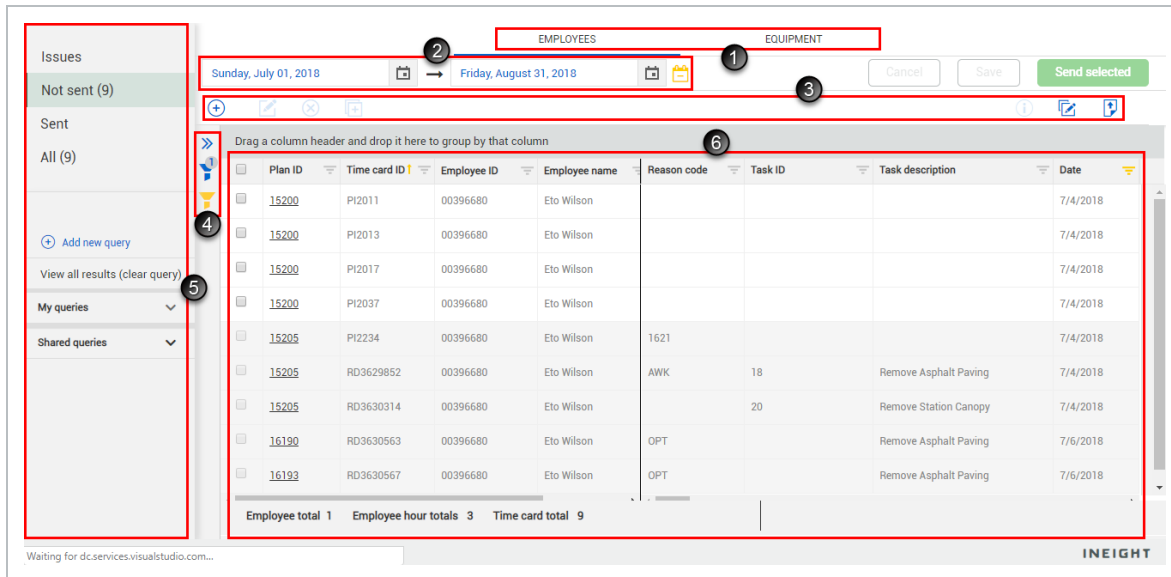


Overview – Time Center Register Page

Title		Description
1	Employee / Equipment Tabs	Select the appropriate tab to view the time cards 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 time cards using the toolbar on the left. View summary information, make bulk edits, and export time cards using the toolbar on the right.
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 time-cards with issues, time cards not sent, time cards sent, or all time cards. The lower portion contains the Query builder to create queries to search for specific time cards. You can save your queries under My queries, and access Shared queries.

Overview – Time Center Register Page (continued)

Title	Description
6 Time card register	Contains rows and columns that house all time card 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 time cards 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 time cards. 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?	Sortable?	Filterable?
Plan Level Fields			
Plan ID	No	Yes	Yes

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

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

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

NOTE

The Integration status indicates whether the time cards have been sent to the payroll system.

4.2.2.4 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.



Time card ID ↑
PI12549
PI14226
PI14227
PI14396

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.

4.2.2.5 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.

4.2.2.6 Filter columns

Depending on the project, you may have thousands of time cards to sift through. You can filter your time cards 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.

<input type="checkbox"/>	Plan ID	Time card ID ↑	Employee ID	Employee name	Labor hours	Reason co
<input type="checkbox"/>	8780	RD1279230	10429508	Allen Robert		ERM
<input type="checkbox"/>	8916	RD1281743	10429508	Allen Robert		PT
<input type="checkbox"/>	8929	RD1281944	1259	Rabbiyah Nannan-		
<input type="checkbox"/>	8929	RD1281946	0101Divya	Divya Bhuvarahan	1	OPT

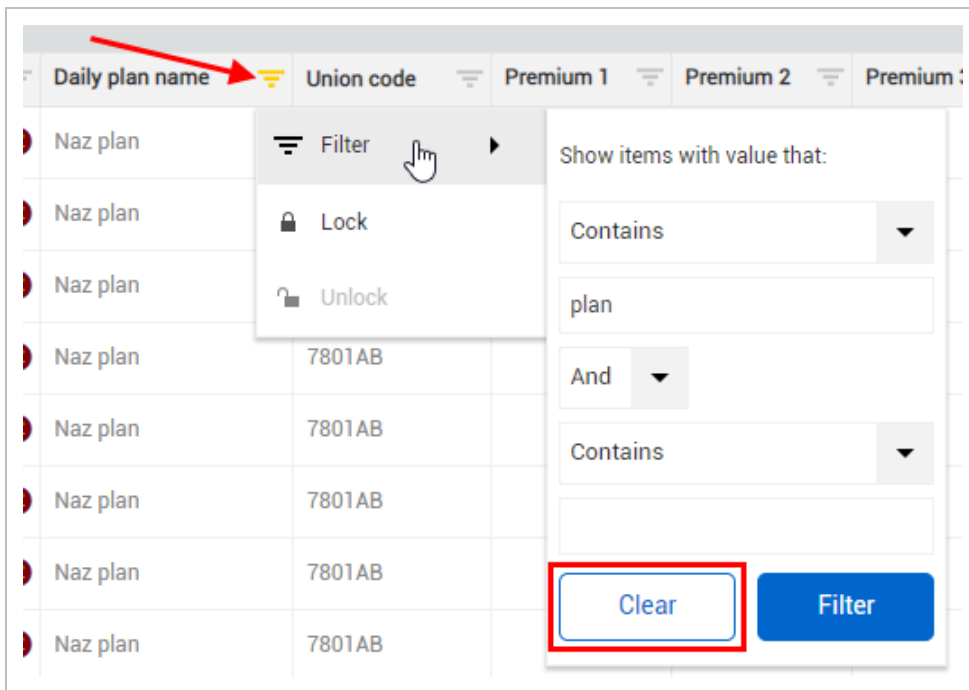
On the resulting Filter window, you can select an operator and value to filter by.

The screenshot shows the 'Filter' window for the 'Employee name' column. The window has a header 'Show items with value that:' and a dropdown menu with 'Contains' selected. Below the dropdown is a text input field containing 'Robert'. There is also an 'And' dropdown and another 'Contains' dropdown. At the bottom, there are 'Clear' and 'Filter' buttons. A red arrow points to the 'Filter' button.

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

<input type="checkbox"/>	Date	Integration sta
	5/4/2019	Not sent
	5/1/2019	...

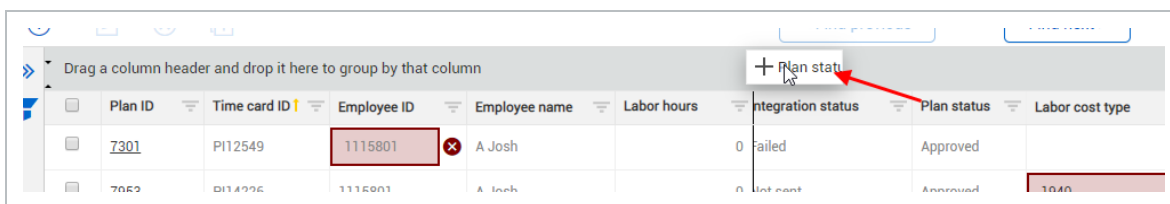
To clear the filter, you would click on the columns filter icon and select Clear.



4.2.2.7 Group Columns

With column grouping, you can organize your time cards into groups by the values of a selected column. By organizing time cards into groups, you can review time cards 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 time card data.

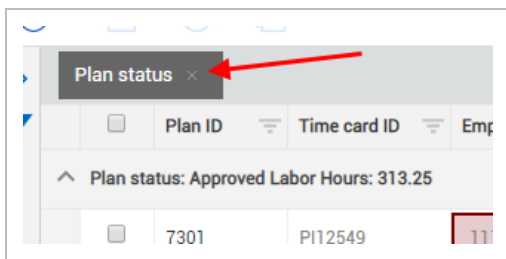
To group by a column, click on the column's header and drag it into the grey area just above the column headers.



Your time cards 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 time cards within each group.

Plan ID	Time card ID	Employee ID	Employee name	Labor hours	Reason code	Ta
Plan status: Approved Labor Hours: 313.25						
7301	PI12549	1115801	A Josh		NRC	
7953	PI14226	1115801	A Josh		Premium	25
7953	PI14227	040404	Ajay Ananthan		Premium	

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.

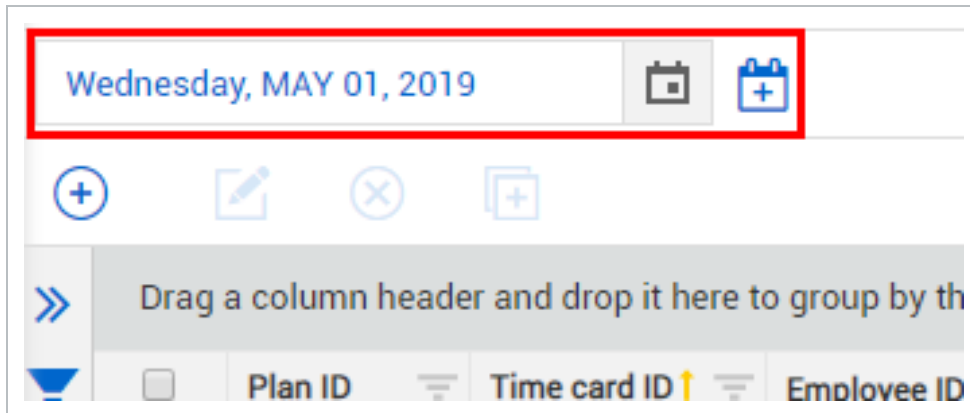
4.2.3 Unapproved Time Cards

Note that time cards 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 time cards.

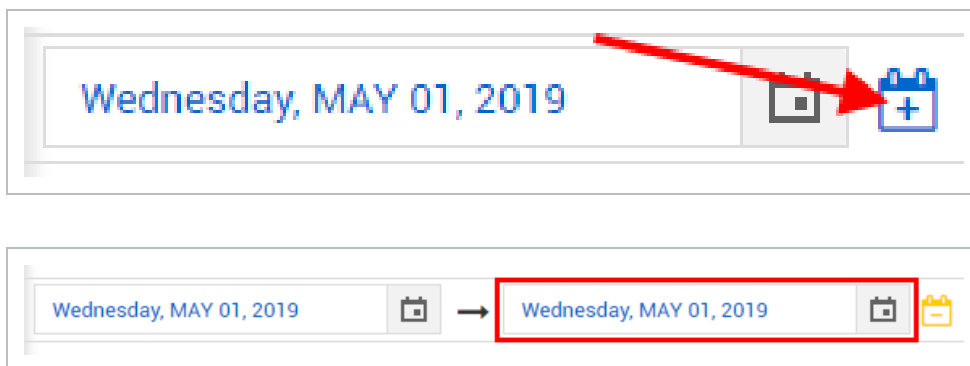
<input type="checkbox"/>	Plan ID	Plan status	Time card ID	Employee ID	Employee name	Notes
<input type="checkbox"/>	16202	Approved	RD127687	0046	Ajay Aj	
<input type="checkbox"/>	16202	Approved	RD127690	0046	Ajay Aj	
<input type="checkbox"/>	16202	Approved	RD127695	0046	Ajay Aj	
<input type="checkbox"/>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

4.2.4 Date Filter

You can filter to a specific date for your time cards 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.

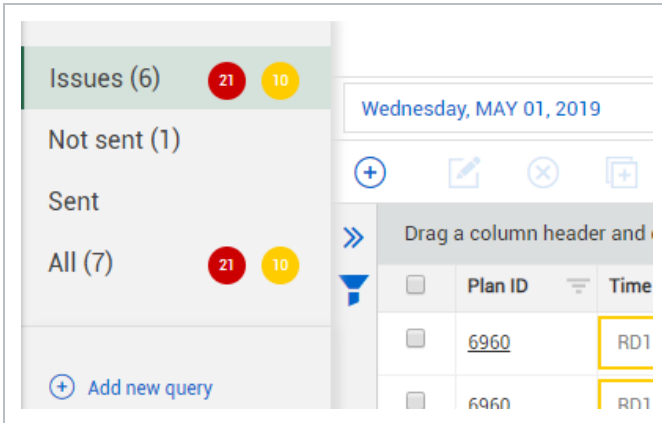


4.2.5 Time Card Pre-Set Filters

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

- **Issues** – Time cards that have information on them tagged as issues
- **Not sent** – Filters to time cards that have an Integration status of Not sent, or time cards that have not been sent to Payroll
- **Sent** – Filters to time cards that have an Integration status of Sent, or time cards that have been sent to Payroll

- **All** – Shows all time cards within the selected date(s)

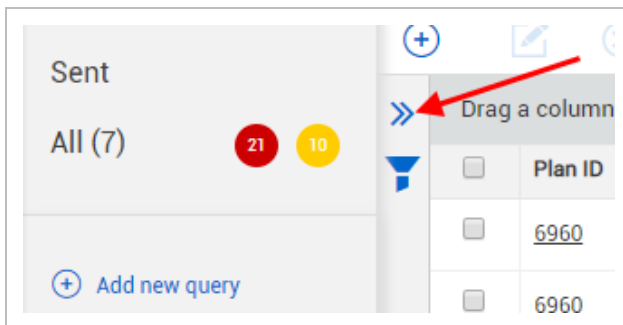


4.2.6 Query Builder

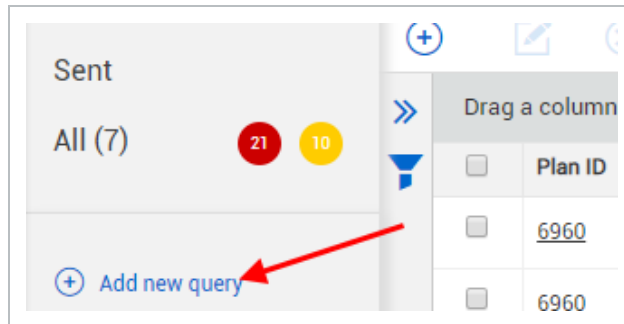
In addition to the filters you can set on individual columns, you can also add filters using the Query Builder. The following steps walk you through creating a query using the Query Builder.

Create a Query

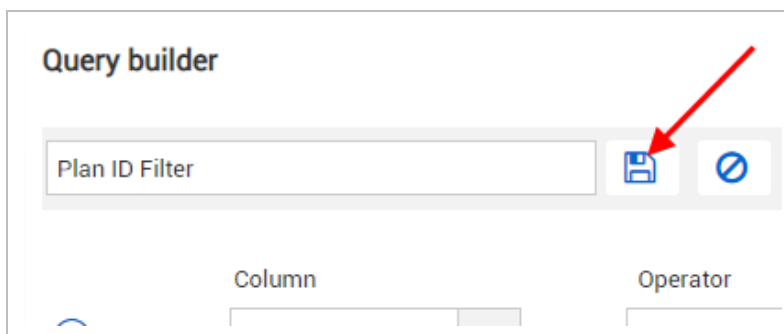
1. From the Time Center register, do one of the following to open the Query Builder:
 - Click on the **double arrows** next to the left side bar.



- 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.

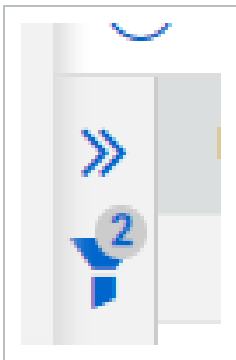


- The query will now show up under Shared queries

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

4.2.6.8 Filter Indicators

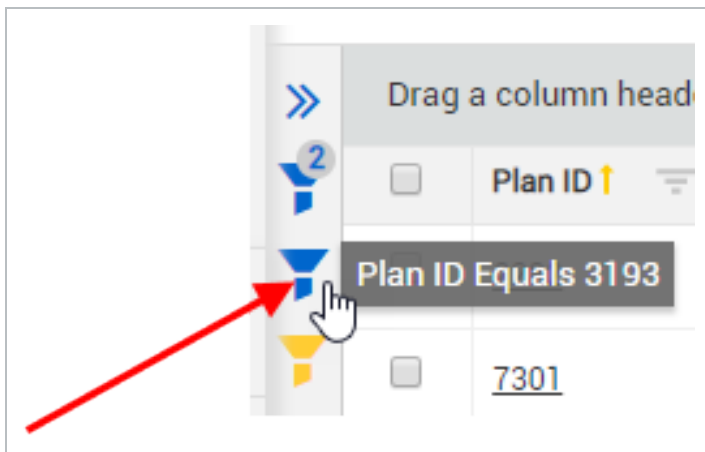
The number next to the top filter indicator shows how many queries have been applied.



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

4.2.7.9 Errors

Fields that appear in red indicate an error with information on the time card. Time cards 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.

ID	Employee ID	Employee name	Labor hours	Reason code
	AllEmp	AllEmp AllEmp	7	123
	AllEmp	This employee is not currently assigned to this project		

4.2.7.10 Warnings

Fields in yellow indicate warnings. Time cards with warnings can still be sent to Payroll, but it is recommended to fix warnings to avoid possible confusion or issues with time cards. You can hover over the warning indicator symbol to see the reason for the warning, so you can make corrections.

WT21649	1259	Rabbiyah Nannan-...	2	Test5
WT21650	This timecard may be a duplicate with another timecard for this date and employee			

4.3 TIME CARD MANAGEMENT

4.3.1 Time Card 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 time card 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 time cards, such as for unions, reason codes, allowances, and premiums, based on your payroll needs.

4.3.2 Time Card Review

Within the Time Center register, you can validate your time card data, reviewing each time card 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 time card 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.

Error	Causes
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	<p>Time card date is not between the employee start and end dates.</p> <p>Employee status is not active.</p> <p>Employee status is set to not report time.</p> <p>Employee is not currently assigned to the project.</p> <p>Time card has an operated equipment reason code and the Employee ID is blank.</p>
Invalid Equipment	<p>Equipment status is not active.</p> <p>Equipment is not assigned to the project.</p> <p>Employee reason code is "operated", but Equipment ID is blank.</p>
Invalid Task ID	<p>Task is closed for either employees or equipment.</p> <p>The task is a TEMP (temporary) task.</p> <p>Cost code is not active.</p> <p>Cost code is a TEMP (temporary) cost code.</p> <p>Cost code is not active.</p>
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.
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.”

The screenshot shows a table with columns: Plan ID, Time card ID, Employee ID, Employee name, Labor hours, and R. The first row has Employee ID 080808 and Employee name Srinivasan Krishnan. A red 'x' icon is over the Employee ID cell, and a tooltip reads: "The employee is not active for the selected date".

Plan ID	Time card ID	Employee ID	Employee name	Labor hours	R
	WT21012	080808	Srinivasan Krishnan	1	1
	WT21071	545			1

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 time card. 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 time card that is associated with an allowance that is not available.

The screenshot shows a table with columns: Reason code, Task ID, and Task description. The Reason code field contains 'NRC' and is highlighted in red with a red 'x' icon. A tooltip reads: "This allowance is not valid for the employee and/or union". Below the table, the text 'AWK' is visible.

Reason code	Task ID	Task description
NRC		

AWK

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

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

The screenshot shows a table with a column: Reason code. The Reason code field contains 'PLC' and has a blue dot next to it, indicating a change has been made.

Reason code
PLC

4.3.2.4 Other Time Card Adjustments

You may need to make time card 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 time card.

Time card ID	Employee ID	Employee name	Notes	Trade description	Override craft	Override craft
125887	162769	Rawle M Alexander				
127643	1115800	A Sam		QC Coordinator/Inspecto...	3QAP3	QA/QC Coord
127647	1115800	A Sam				
127656	1115800	A Sam				
127687	0046	Ajay Aj				
127690	0046	Ajay Aj				
127695	0046	Ajay Aj				
129094	1018552	Nick v				
129098	1018552	Nick v				
129437	1144018	Colin robert				
129439	1144018	Colin robert				

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.

(+), (x), (filter), Cancel, Save, Send selected

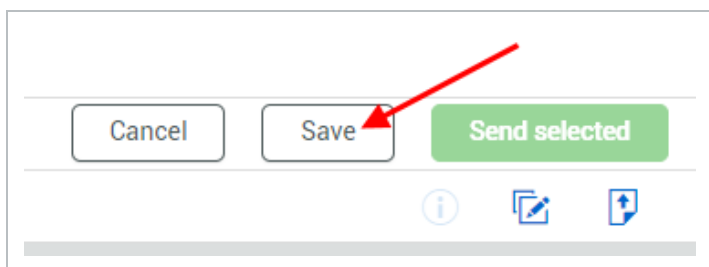
NT Monday, April 16, 2018

Time card ID	Employee ID	Employee name	Notes	Employer company	Premium 1	Premium 2	P
RD125887	162769	Rawle M Alexander					
RD127643	1115800	A Sam					
RD127647	1115800	A Sam					
RD127656	1115800	A Sam					
RD127687	0046	Ajay Aj		Pk	Enter Pre...		
RD127690	0046	Ajay Aj		Pk	14thMar18...		
RD127695	0046	Ajay Aj		Pk	Act Premium		
RD129094	1018552	Nick v			Add Premiu...		
RD129098	1018552	Nick v			Alloy Welding		
RD129437	1144018	Colin robert			Day/Night		
RD129439	1144018	Colin robert			Extra Timings		
					First Aid		

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

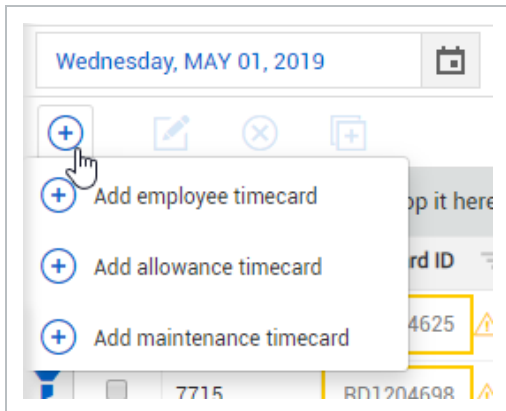
As you make changes, be sure to click **Save** in the upper right-hand corner to save your edits.



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

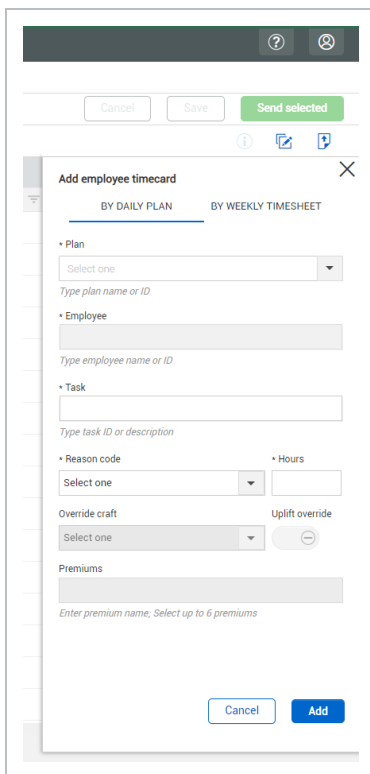
4.3.4 Add Time Card

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 time card to record the hours by clicking the **Add time card** button and selecting the type of time card to add.



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

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



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

4.3.5 Delete Time Card

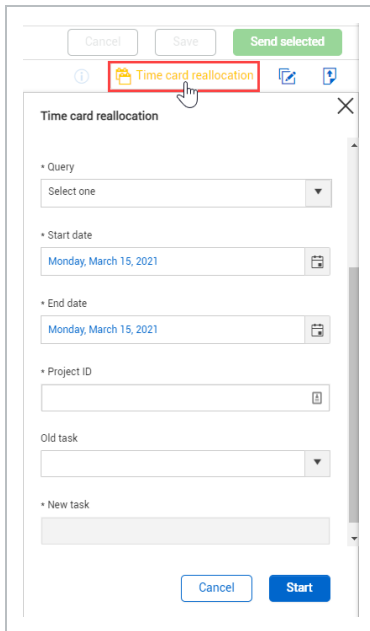
To delete a time card, you check the row header check box of the time card and select the **Delete time card** button.

	Plan ID ↑	Time card ID	Employee ID	Employee name
<input type="checkbox"/>	7953	RD1233522	E0243	Akash Maru
<input checked="" type="checkbox"/>	7953	RD1233524	1115801	A Josh
<input type="checkbox"/>	7953	RD1233525	E0243	Akash Maru

4.3.6 Reallocate Time Cards

You can move Weekly time sheet time cards from one project to another project. To move time cards to another project, you must first create a query that includes all time cards you want to reallocate. After you create the query, click **Time card reallocation** in the upper right of the page. In the slide-out panel, select the query and the start and end dates of all the time cards you want to move. You must then enter the new project ID. You can also move all time cards to a new task in the new project.

NOTE If you leave the Old task field blank, you can reallocate all selected time cards to one new task. This is a many-to-one reallocation. If you select a task in the Old task field, only time cards with that task are reallocated. To do a many-to-many reallocation, you must perform multiple reallocations.

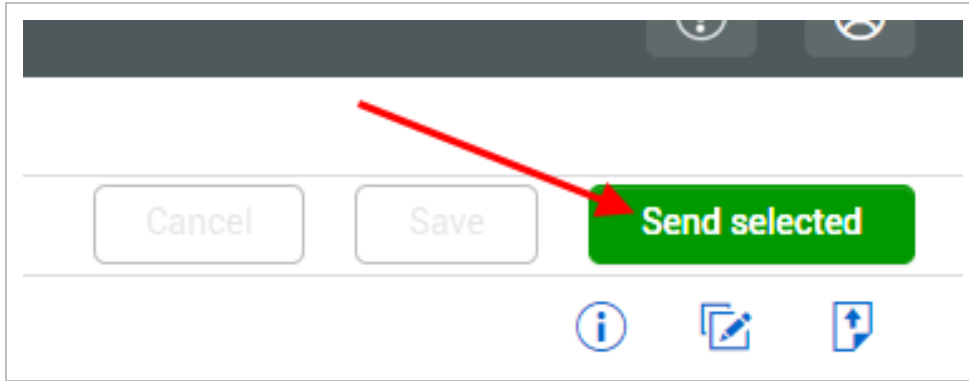


4.3.7 Submit to Payroll

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

<input checked="" type="checkbox"/>	Plan ID ↑	Time card ID	Employee ID	Employee name
<input checked="" type="checkbox"/>	7953	RD1230708	10429508	Allen Robert
<input checked="" type="checkbox"/>	7953	RD1230720	10429508	Allen Robert
<input checked="" type="checkbox"/>	7953	RD1230751	10429508	Allen Robert

With the time cards selected, click the **Send Selected** button.



This sends the selected time cards to your Payroll system.

4.3.7.5 Integration Validation

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

- If there are errors, that time card 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**.

<input type="checkbox"/>	Plan ID ↑	Time card ID	Employee ID	Employee name	Labor hours	Integration status	Pla
<input type="checkbox"/>	7301	PI12548	040404	Ajay Ananthan	0	Sent - current	Ap
<input type="checkbox"/>	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

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

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

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