INEIGHT

PROGRESS USER GUIDE

Advanced

Release 25.5
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CONTENTS

STEP-BY-STEP PROCEDURES

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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

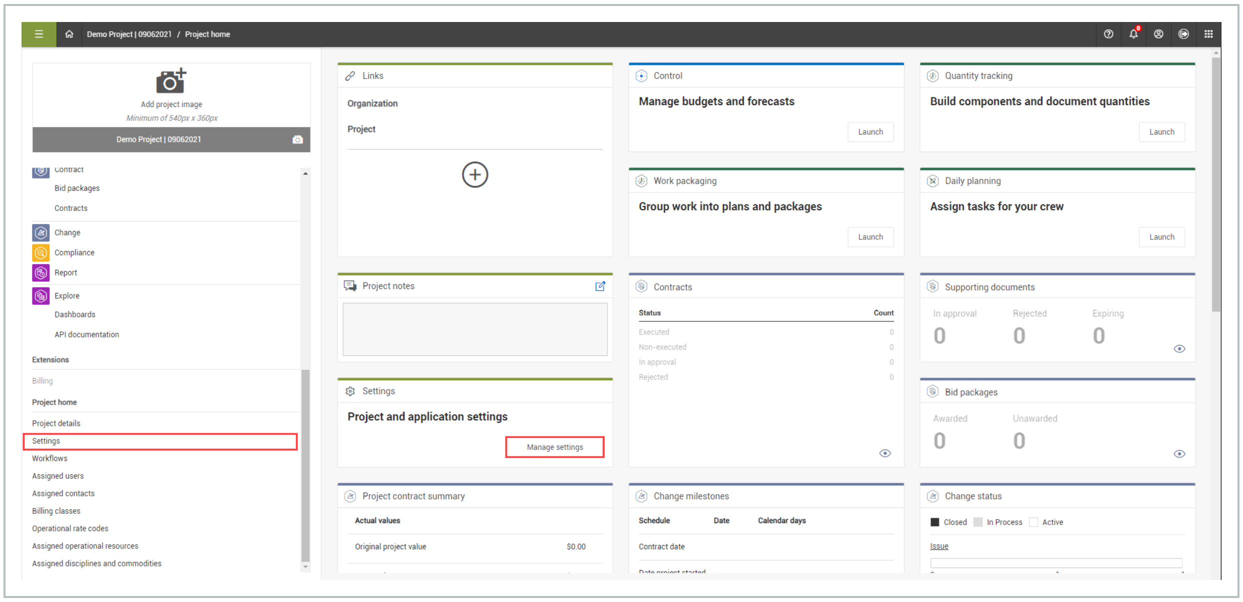
The advanced settings covered in this section can be used for both the Progress web and mobile applications.

- 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

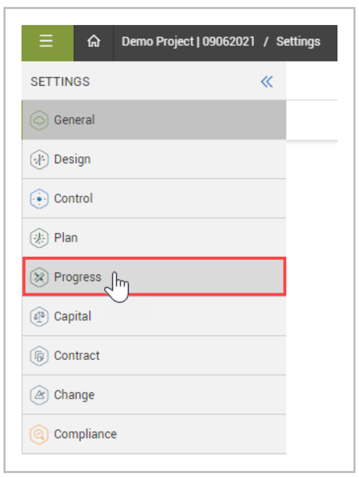
The Step by Step below walks you through how to turn on these advanced options for your daily plans.

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.

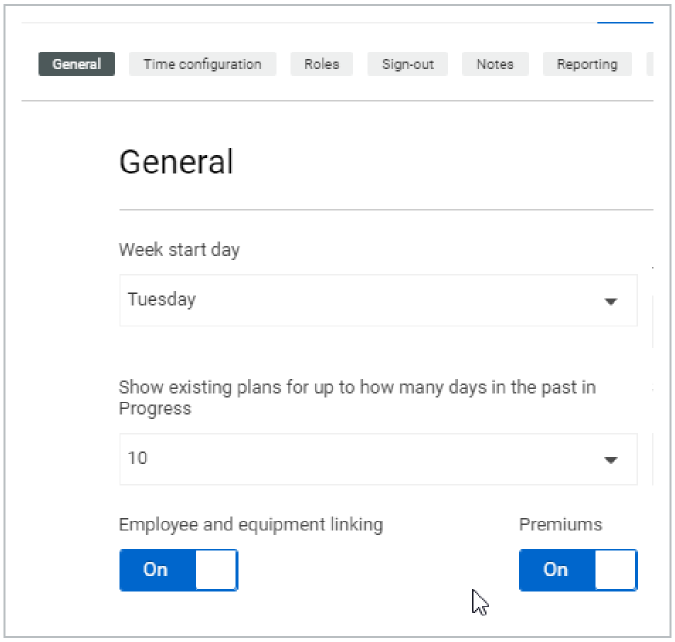


2. Under project settings, click the **Progress** icon on the left.



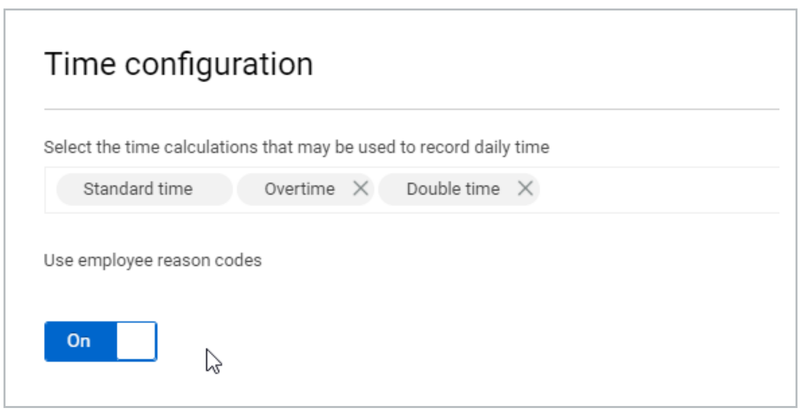
3. Navigate to the **General** tab.

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

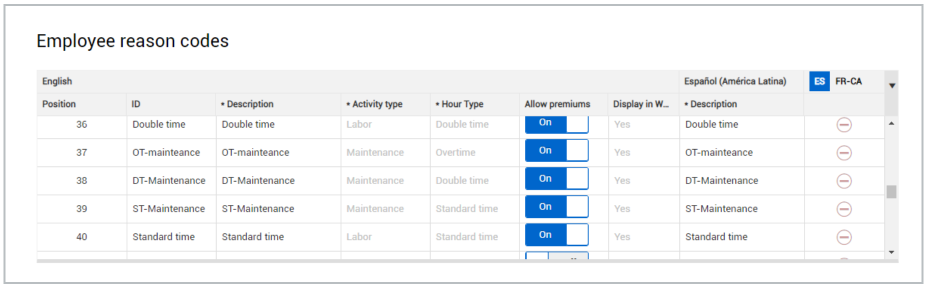


NOTE Employee and equipment linking settings cannot be disabled once plans exist. Premium settings can only be modified when no plans exist.

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

When designating the hours worked for an employee on a daily plan, select reason codes to indicate the payroll categories the hours should be associated with. This assumes reason codes have already been set up in your organization-level settings and enabled or disabled in project settings. These categories can be set up as anything that would be helpful for payroll tracking, such as operating equipment, maintenance, bereavement, or PTO. Reason codes can also be used to designate standard time, overtime, and double time.

NOTE	Reason codes are required for the Time Center and Weekly Timesheet applications.

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 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 might work at a regular labor rate for six hours and as a welder for two hours. You can have two reason codes for that employee, one for six hours and one for two hours, and you can assign a premium code, such as HSS Welder to the two hours. This ensures the correct rate is accounted for when the information goes to payroll.

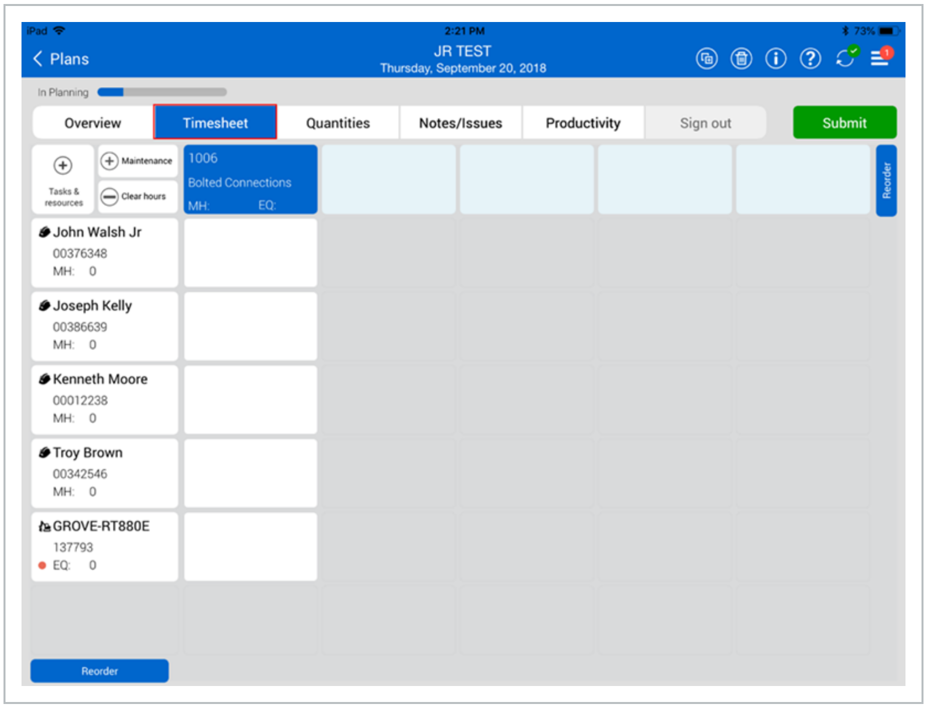
The following steps assume that reason codes were already set up by an administrator in your organization settings and enabled in your project settings and takes you through how to assign hours to reason codes on your daily plans.

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

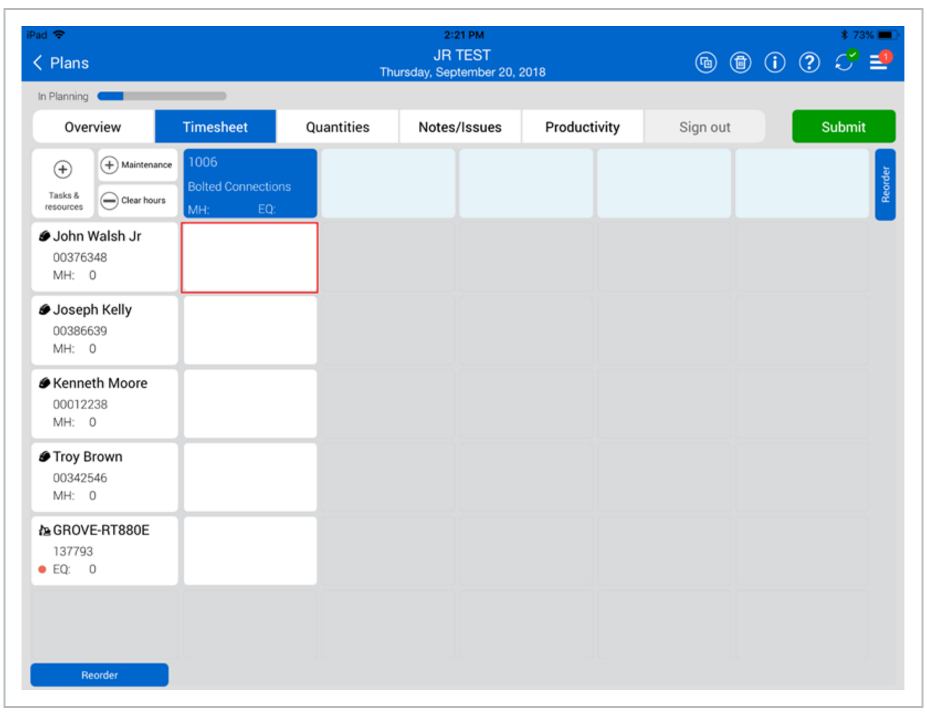
ASSIGN HOURS USING REASON CODES

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

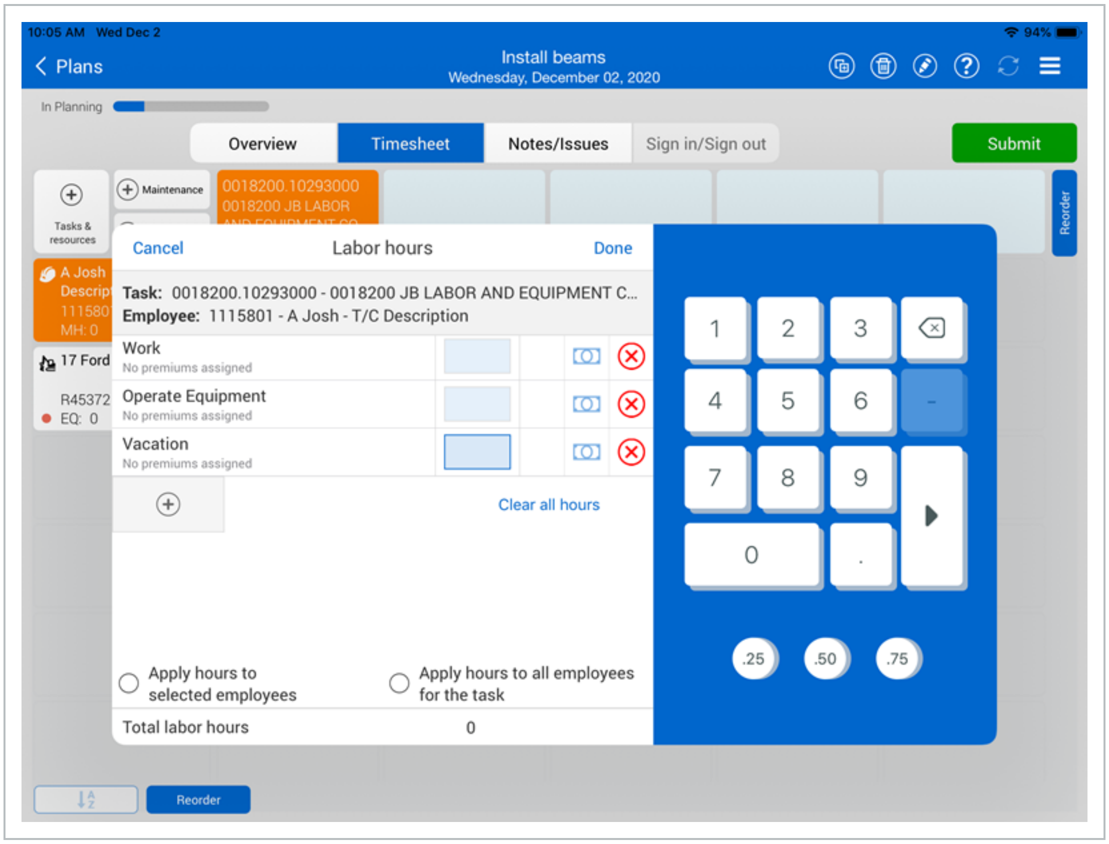
1. Open the daily plan you are working in and navigate to the **Time sheet** tab.



2. Select the tile next to an employee.

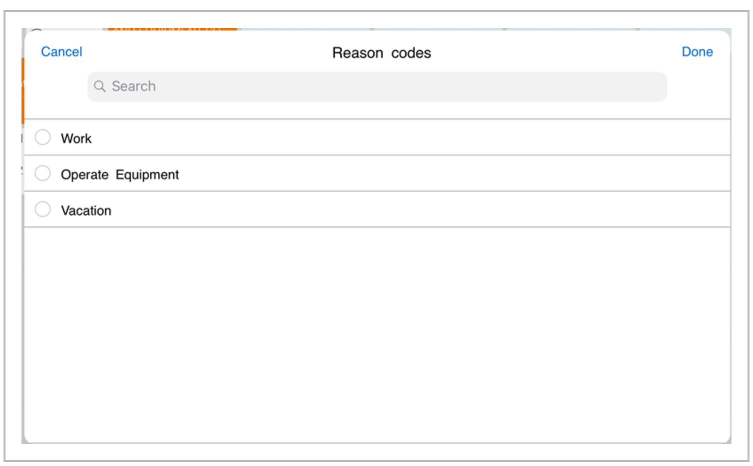


- Notice that instead of Standard time, Overtime, and Double time, you now have reason codes.

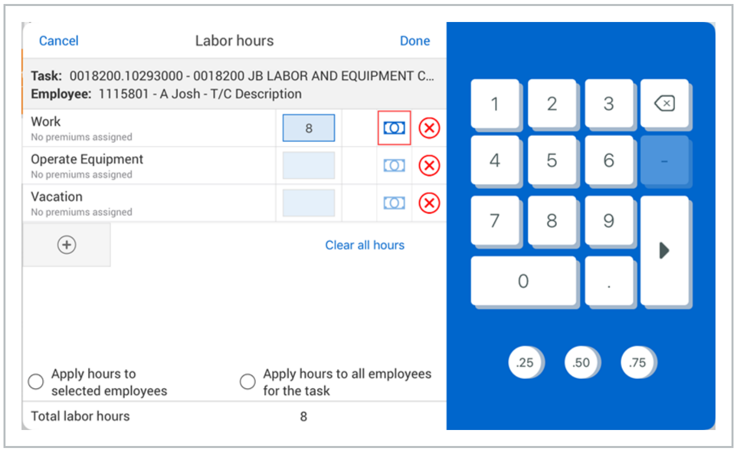


3. Select the **Add** icon to see more examples of reason codes.

- These categories can be set up in the organization settings as anything that would be helpful for payroll, such as work, maintenance, bereavement, 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.

1.2.2.1 REASON CODES AND PREMIUMS COMPARED TO OTHER PAYROLL OPTIONS

For information about how reason codes compare to other payroll options and how they are output to Time Center and other sources, see Payroll Options Analysis.

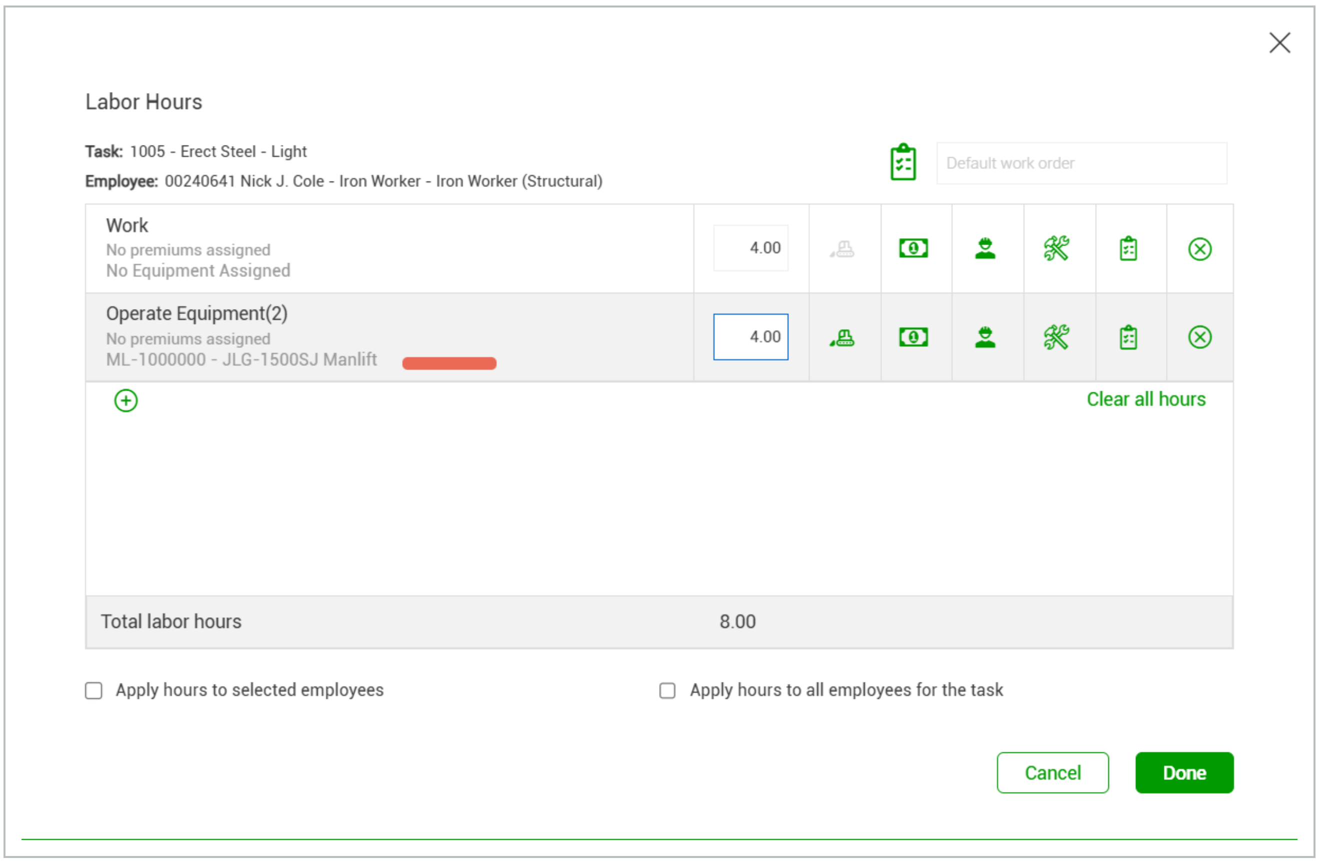
1.3 EMPLOYEE EQUIPMENT LINKING

Scenario

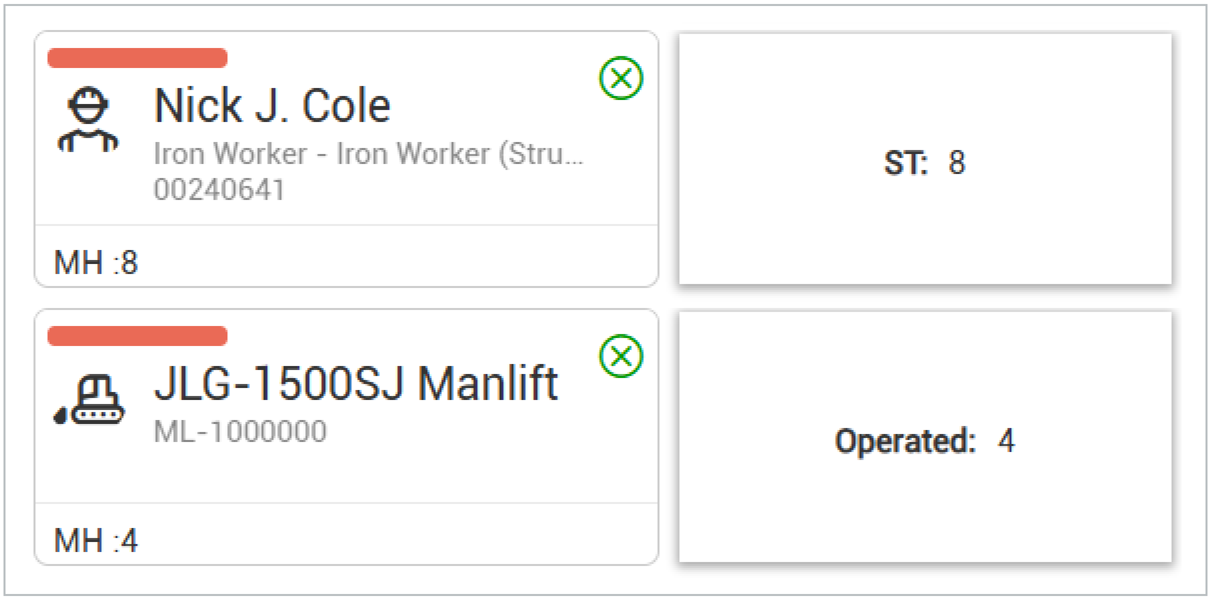
> You are the field engineer responsible for tracking what employee has been operating specific equipment and for how long. You can link the employee to equipment in the daily plan and input the hours they were operating vs labor.

With the employee and equipment linking option enabled for the corresponding employee reason code in organization or project settings, you can link employees and equipment on the time sheet to see which employee is assigned to operate each piece of equipment.

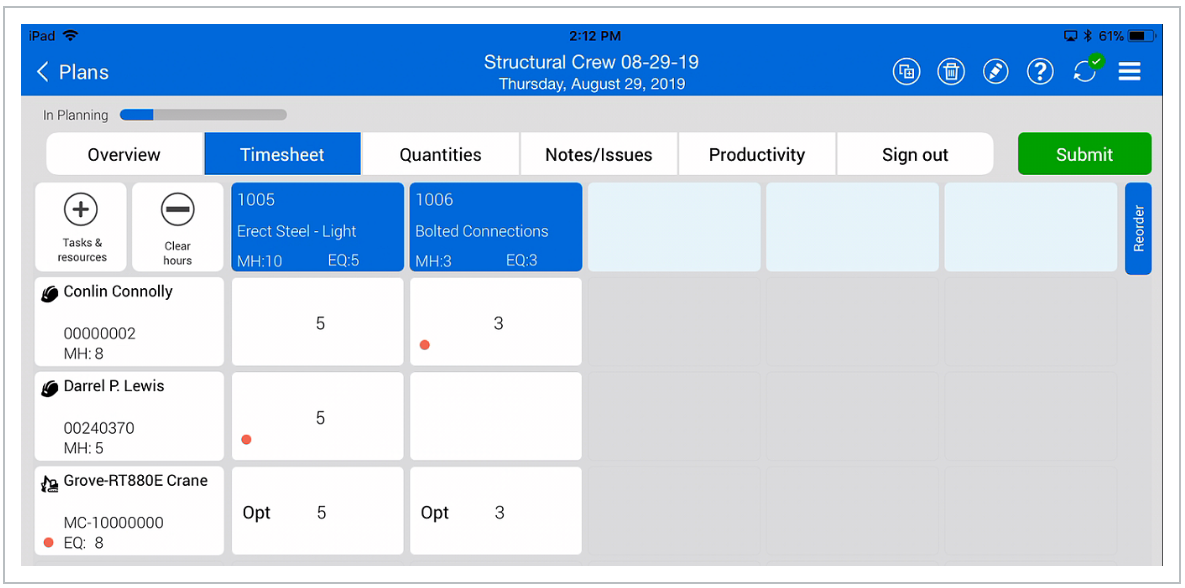
With this option enabled, when you enter hours for an employee, you can also specify the equipment they operate.



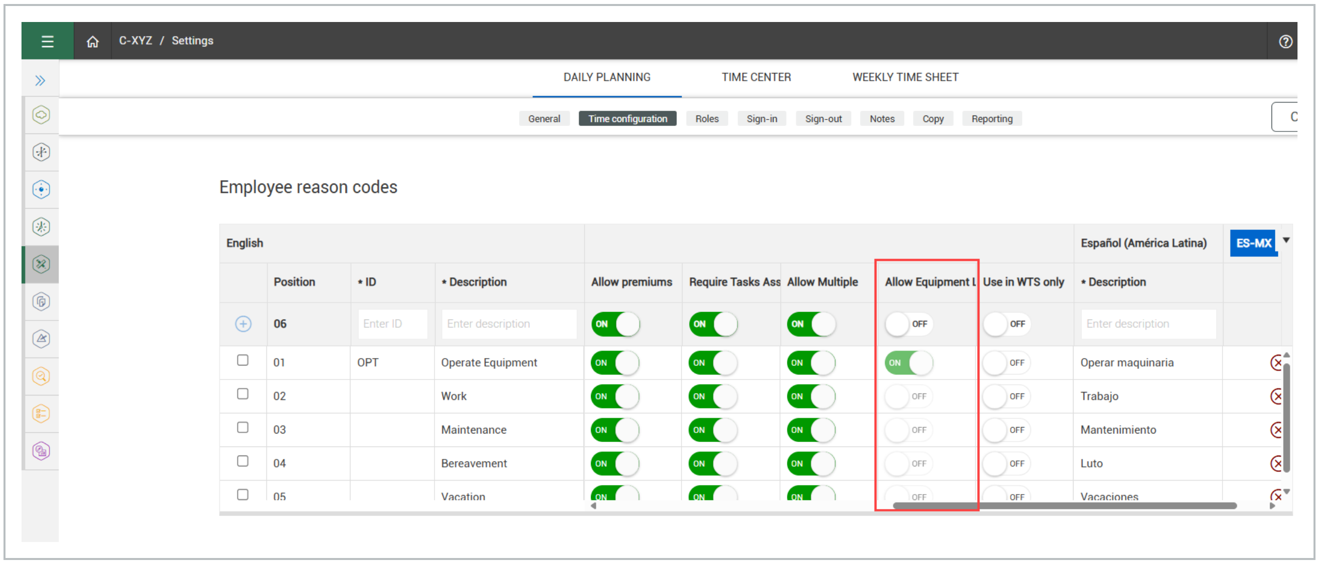
You also see a color-coded bar on the tile of the crew member and the associated equipment.



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



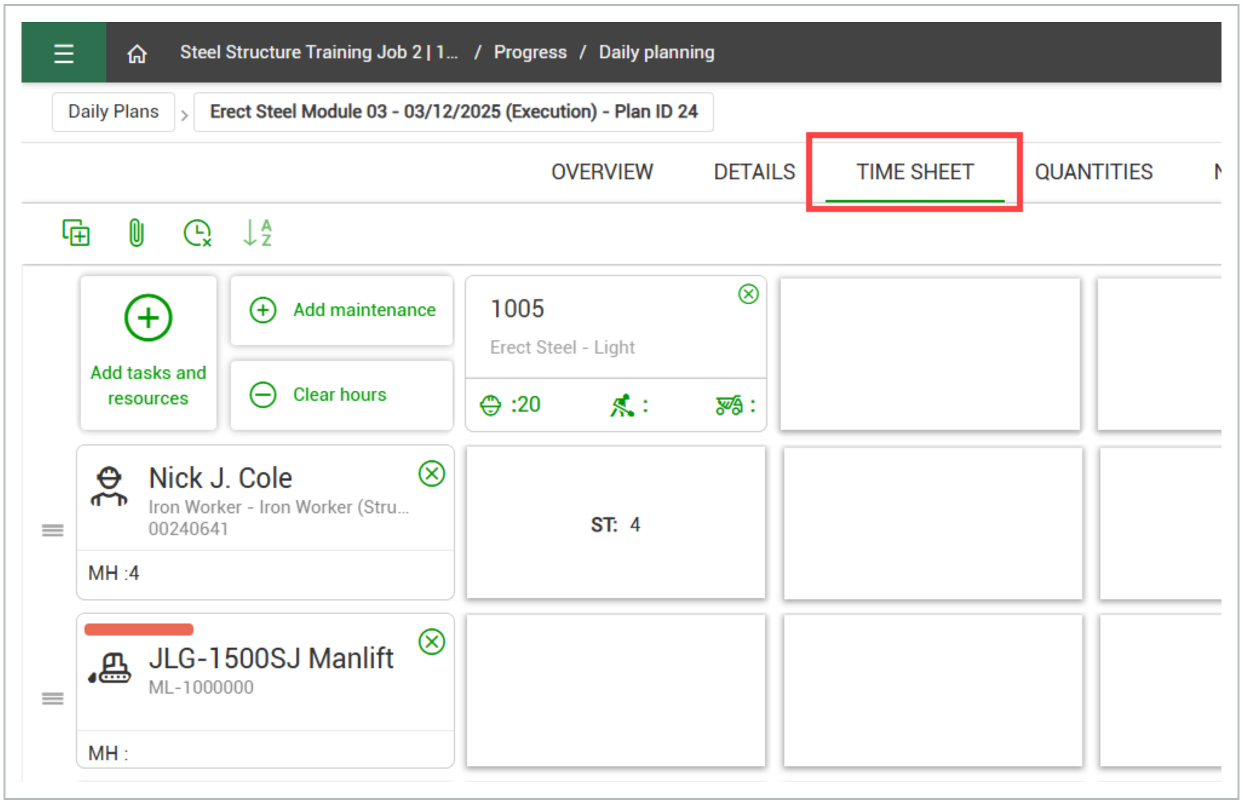
To use equipment linking, the corresponding employee reason code must have "Allow Equipment Linking" enabled in organization settings, and the employee reason code must be added at the project level.



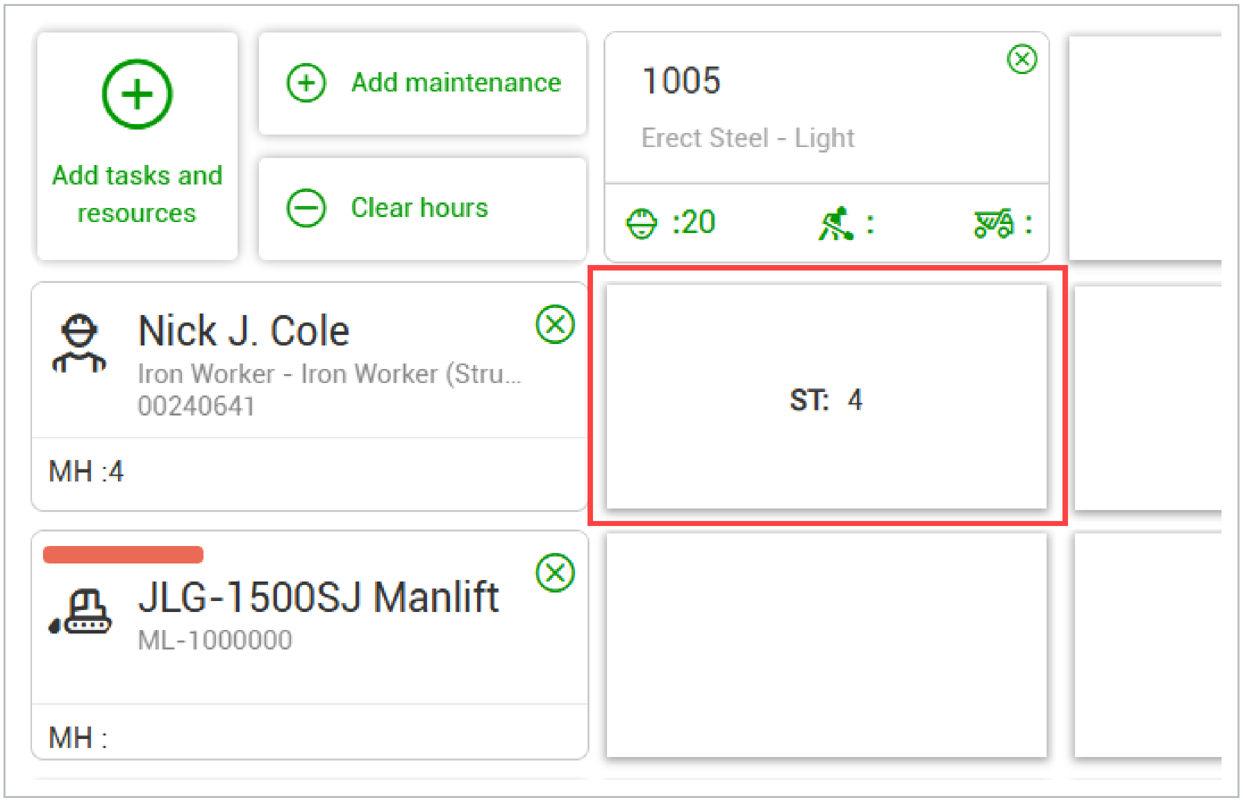
The following steps walk you through linking an employee to equipment on the Time Sheet tab of a daily plan.

LINKING EMPLOYEES AND EQUIPMENT

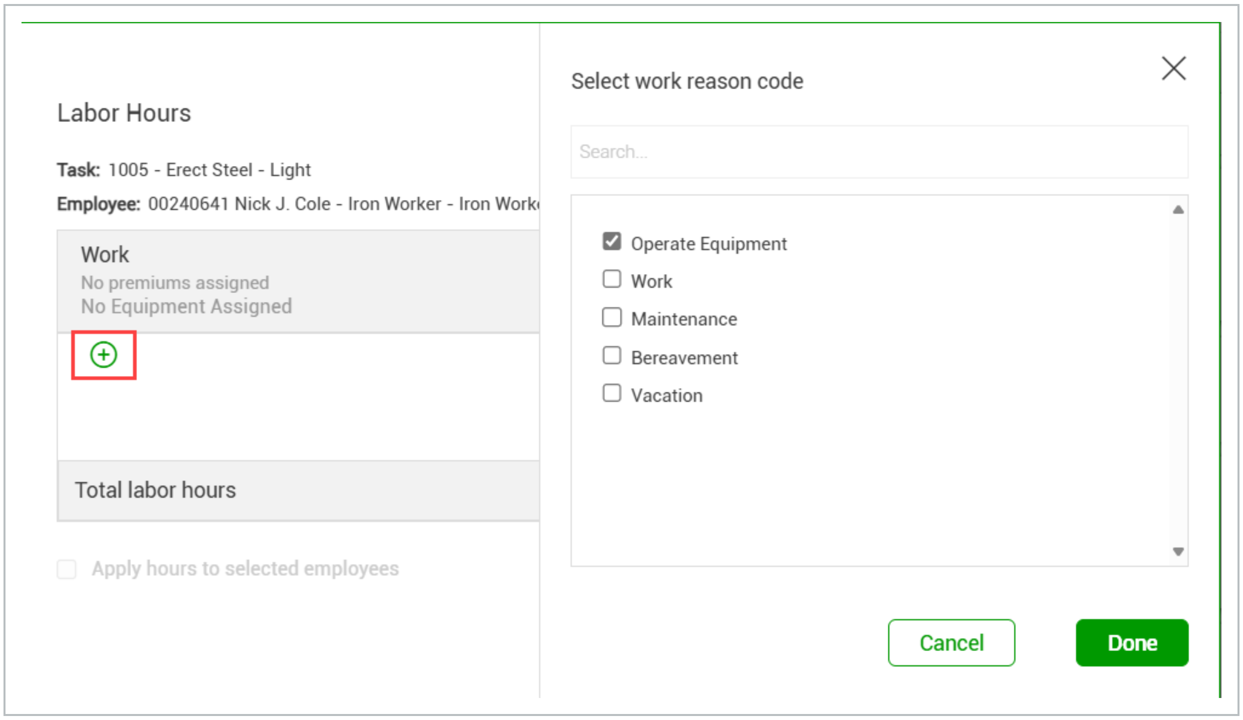
1. Open the **Time Sheet tab** on a daily plan. Add the employee and equipment resources to the daily plan.



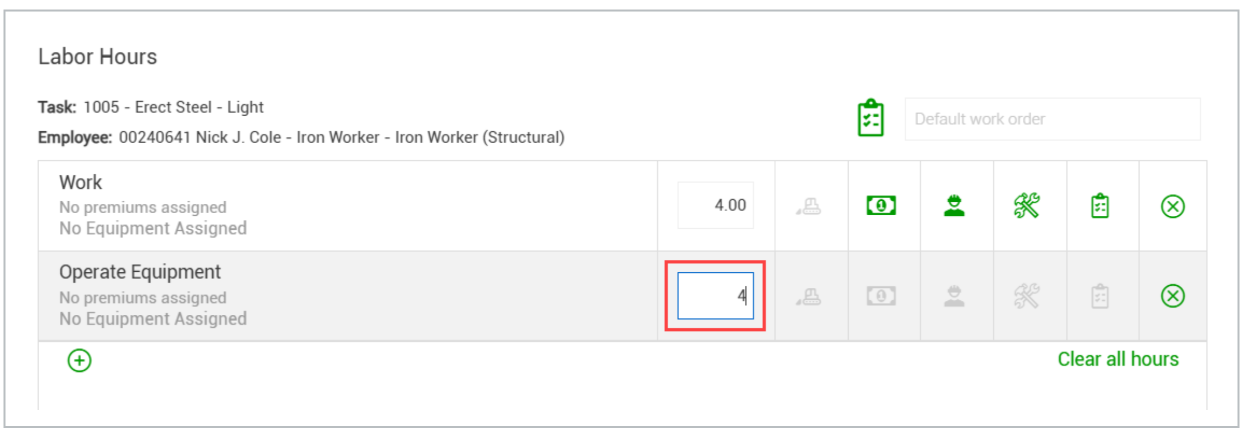
2. Select the **Labor Hours tile** for an employee.



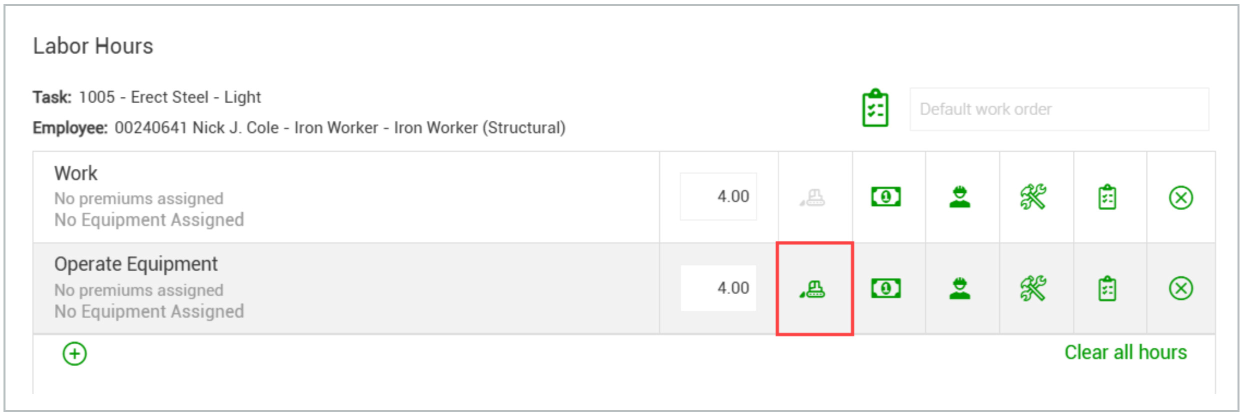
3. Click the **Add icon** to add work hours, and then select an appropriate reason code. When you are finished, click **Done**.



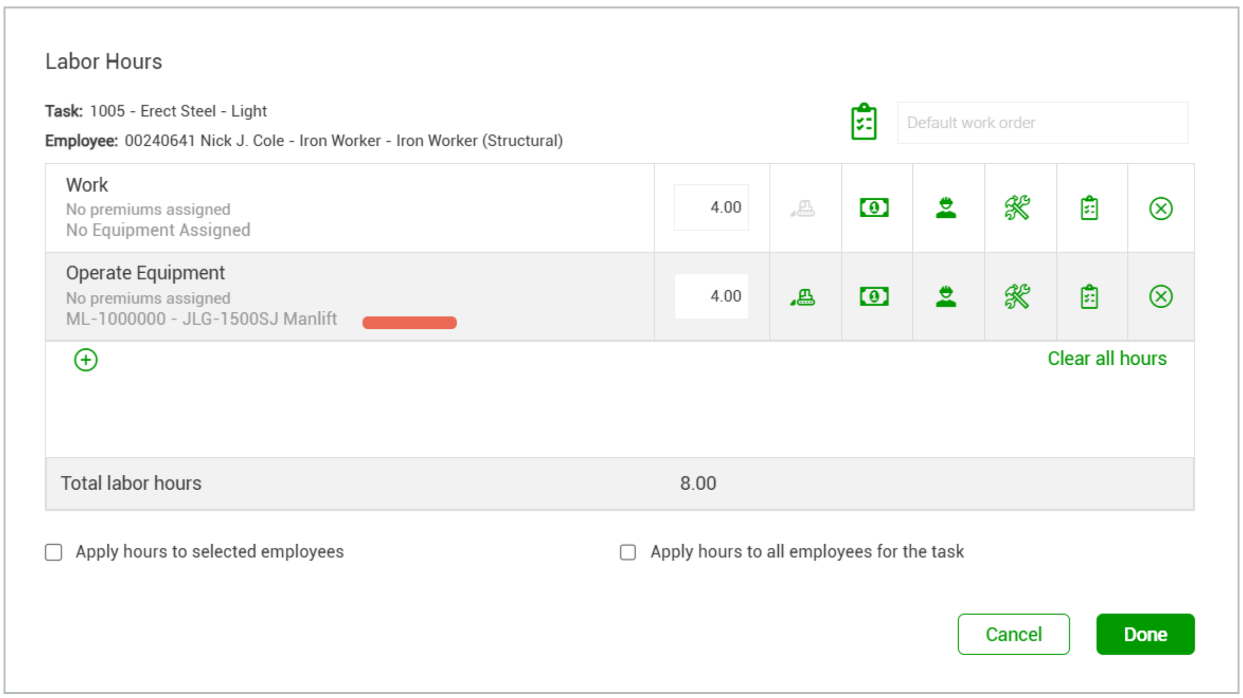
4. In the new row for work hours, enter the number of hours the employee operated the equipment.



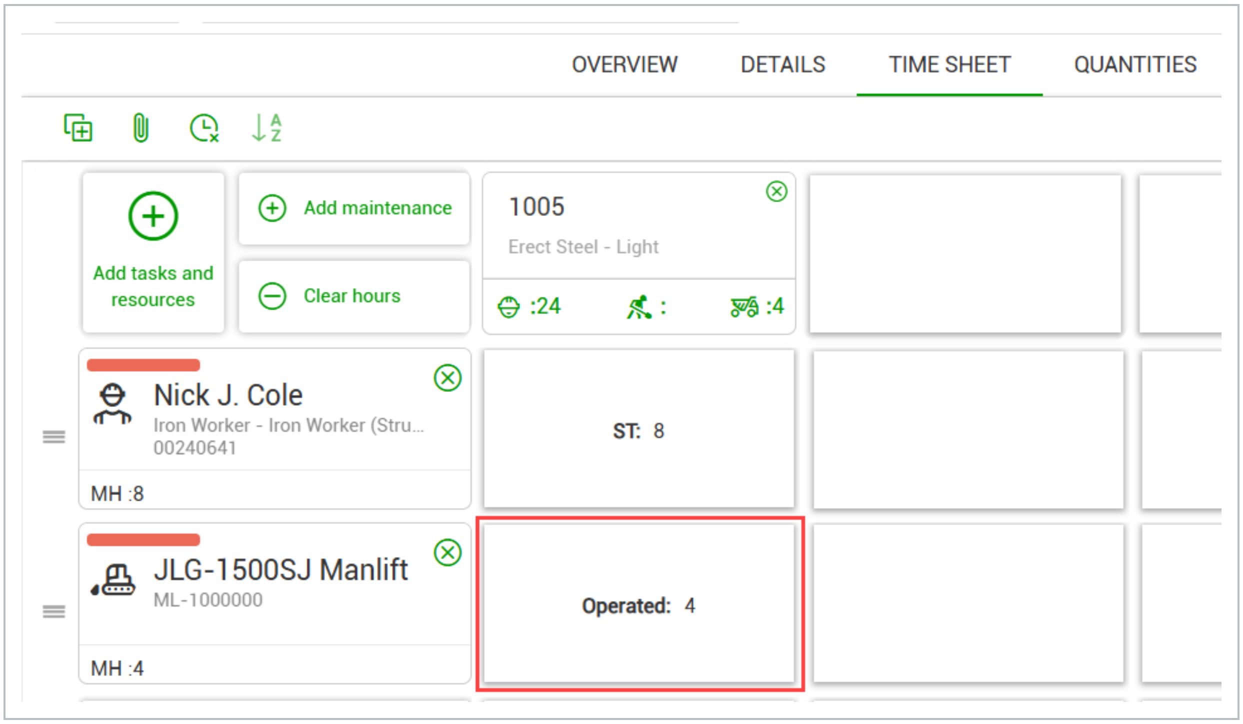
5. Click the **Equipment icon**, and then select the appropriate equipment resource and click **Done**.



6. Now the equipment resource is linked to the employee's work hours. When you're finished updating the employee's work hours, click **Done**.



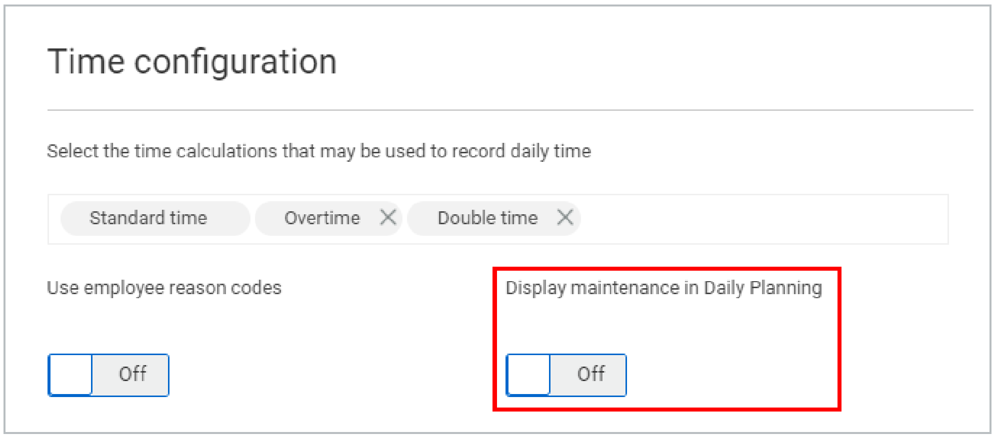
7. On the Time Sheet tab, the operated hours for the equipment resource are automatically populated, and color-coded bars show the link between the employee and equipment resource.


OVERVIEW
DETAILS
TIME SHEET
QUANTITIES
Add tasks and resources
Add maintenance
Clear hours
1005
Erect Steel - Light
:24
:
:4
Nick J. Cole
Iron Worker - Iron Worker (Stru...
00240641
MH :8
ST: 8
JLG-1500SJ Manlift
ML-1000000
MH :4
Operated: 4

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 Time sheet 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.

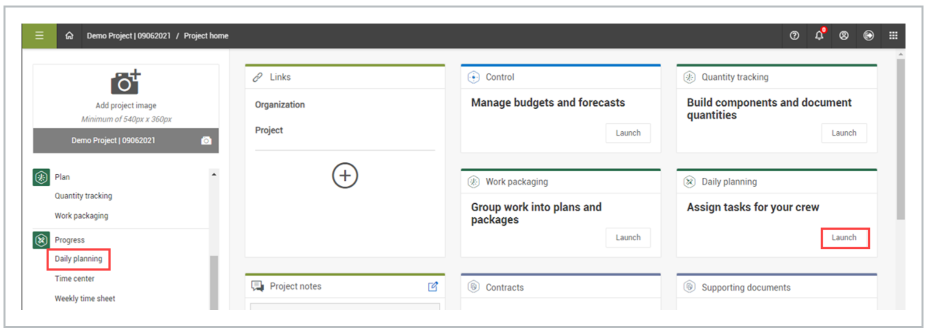
- The option **Add Maintenance** in the daily plan will default to **By Work Orders**

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

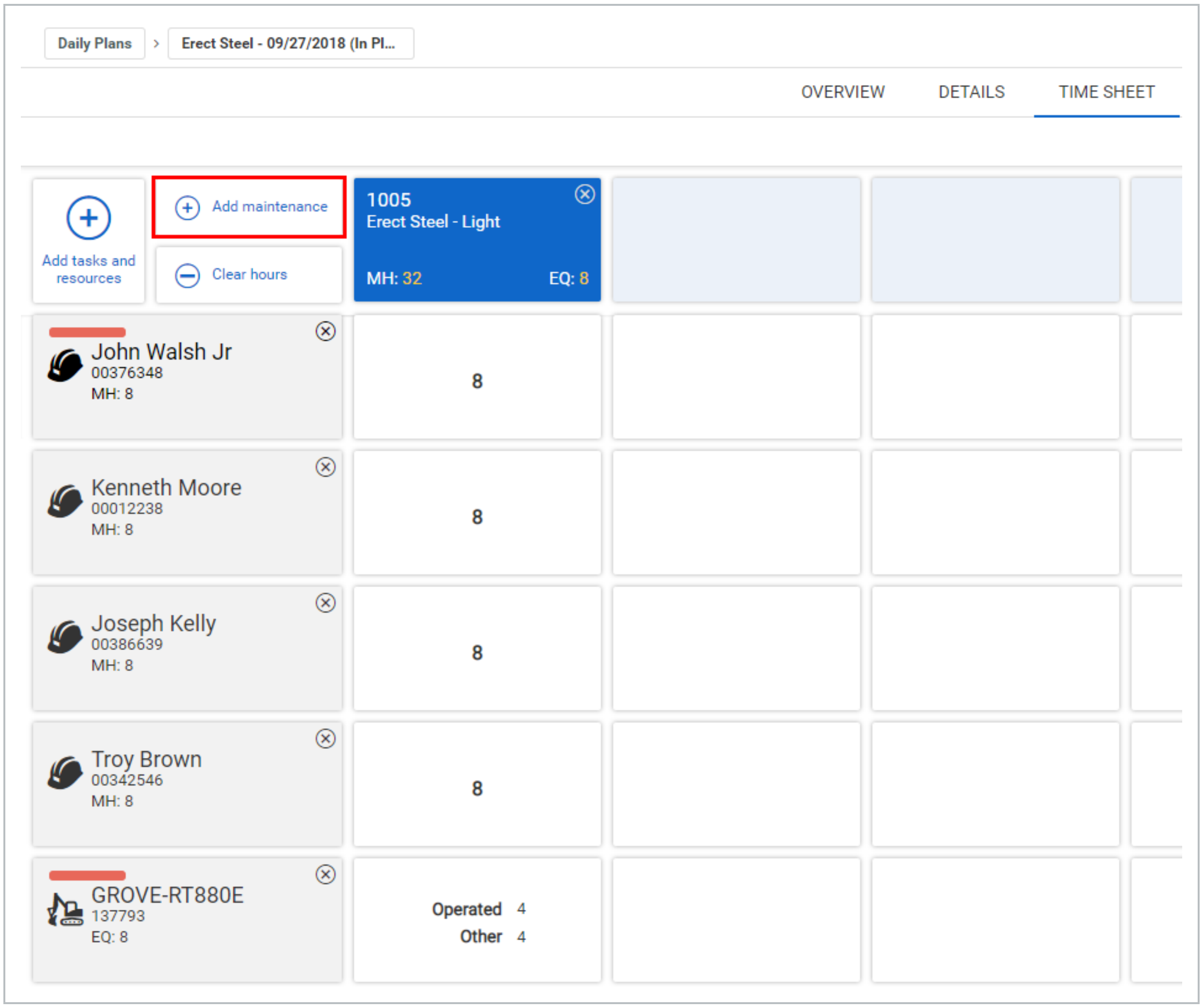
ADD MAINTENANCE WORK ORDER TO TIME SHEET

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**.

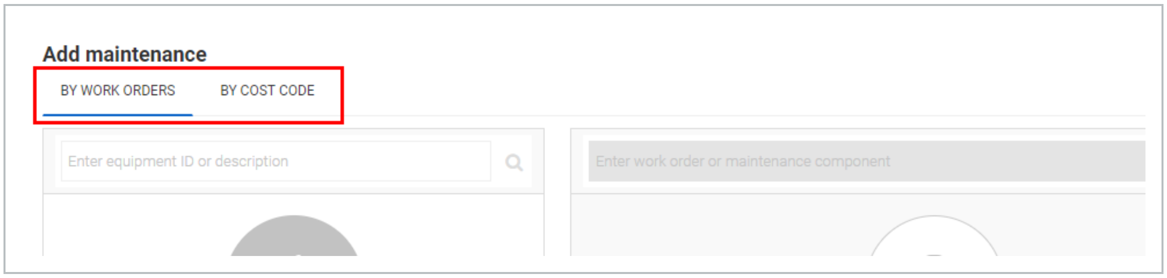


2. In Daily Planning, check your daily plan and click the **edit** icon.
3. Navigate to the **Time sheet** tab.
4. Click the **+ Add Maintenance** button.

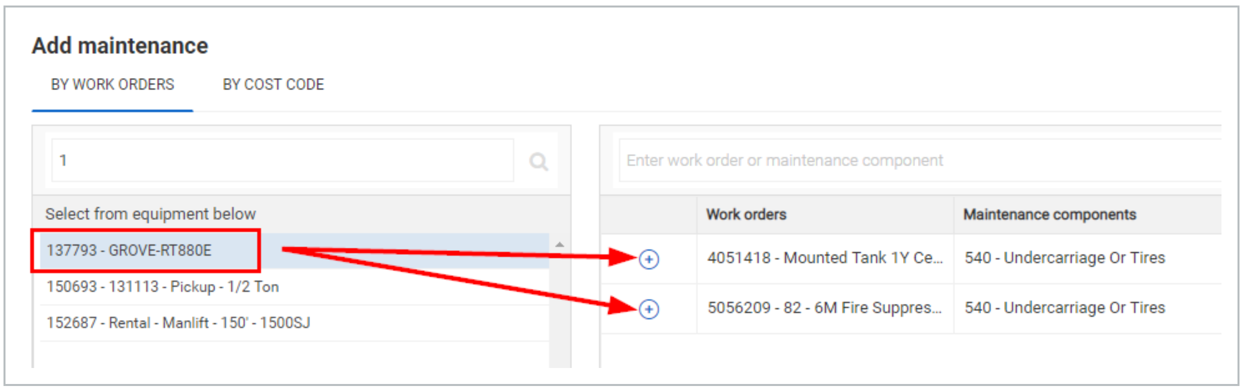


- An **Add maintenance** slide out panel appears
- Note that you can add a maintenance task under one of two categories:
  - **By Work Orders** allows you to select the equipment being maintained and then assign the related work order created in the ERP system
  - **By Cost Code** allows you to select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

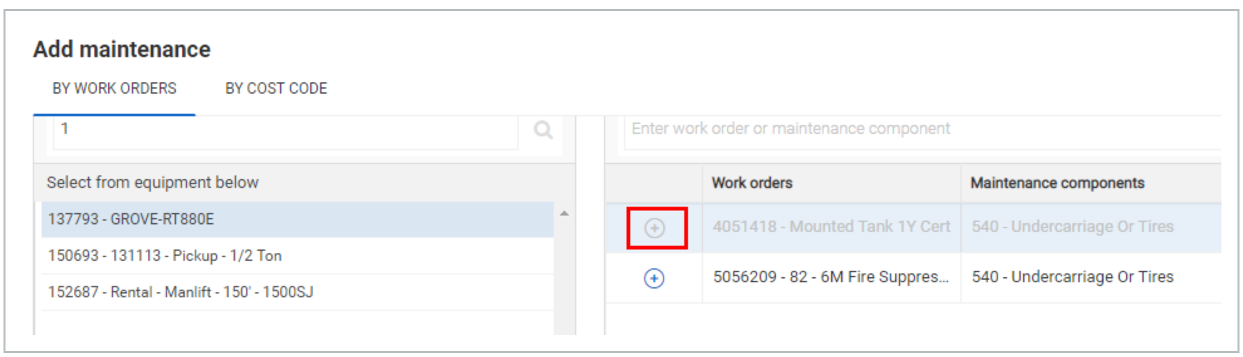
order" so that maintenance-related hours can be tracked



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.



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

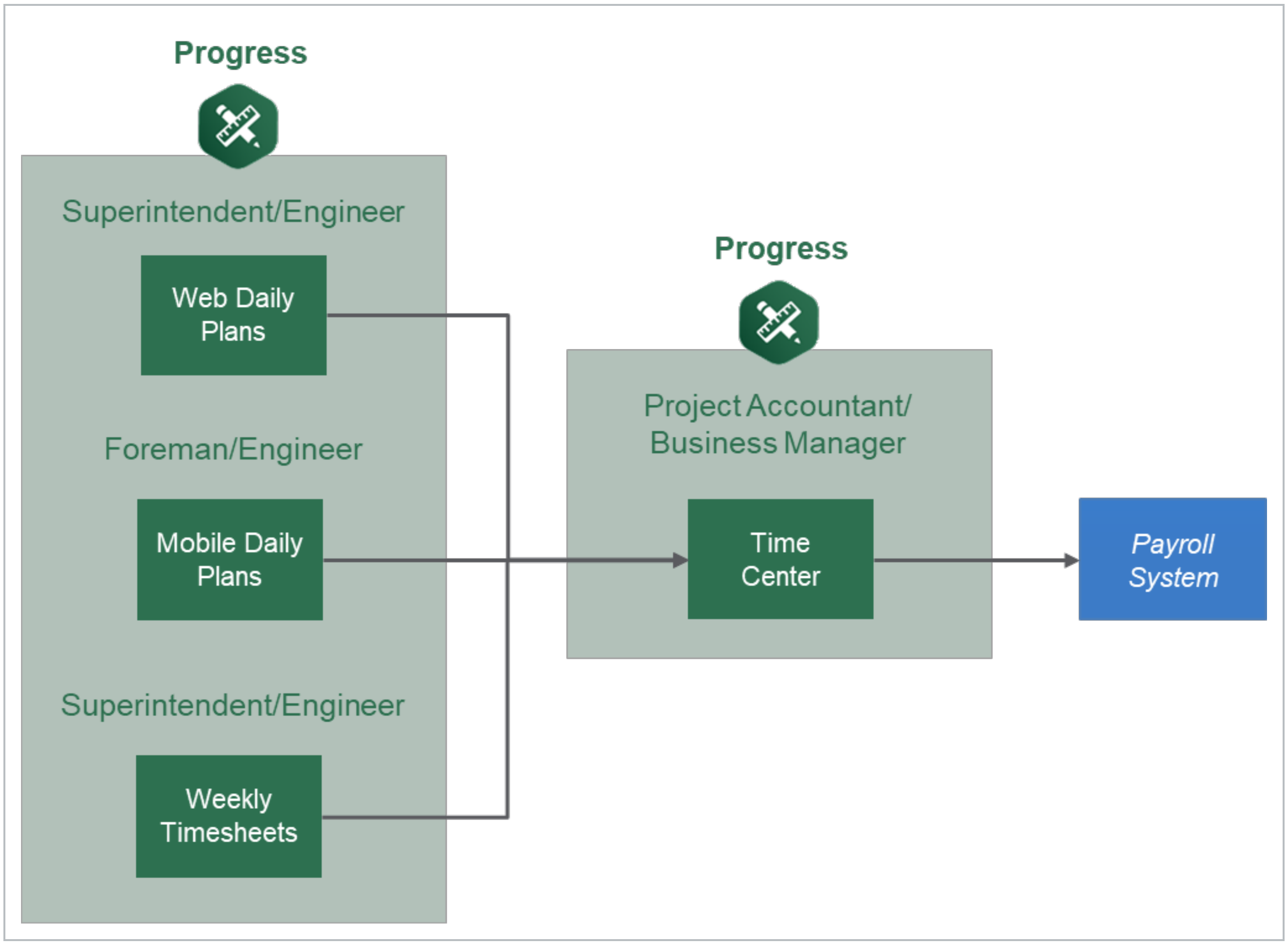
- For work orders added by work order, the tile displays the cost center, work order number, and work order description
- Only labor hours can be added to work orders, not equipment hours. Note in the above the equipment-related tile is dimmed to reflect this
- You can then add labor hours to any given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

2.3 TIME CENTER NAVIGATION

2.3.1 TIME CENTER OVERVIEW

Time Center serves as a final repository to review and correct Time sheet 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 Time sheet module



2.3.1.1 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

2.3.1.2 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.

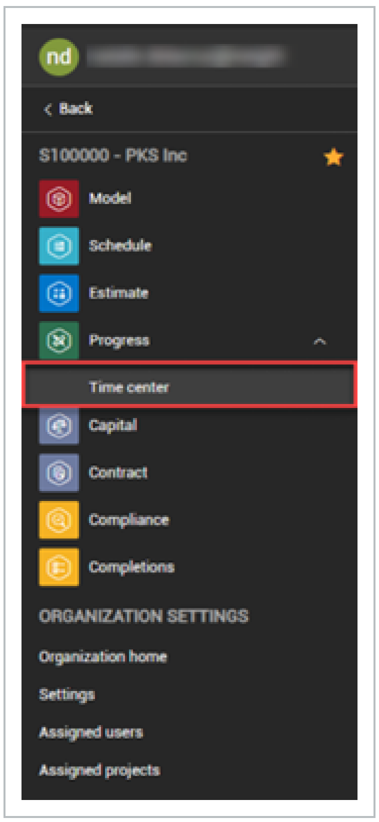
Each InEight application has its own supported display configurations, which might be different than the configuration above.

2.3.1.3 TIME CENTER ACCESS

NOTE To access projects in Time center the project setting **Use Employee Reason Codes** must be toggled on. This setting is required prior to creating daily plans and cannot be changed once daily plans are created.

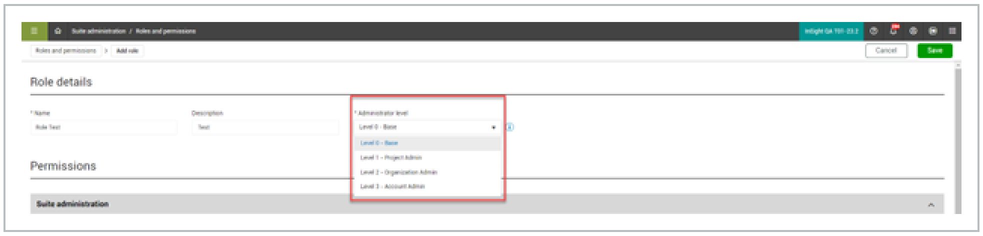
The Progress time center will show as a sub-level menu option under the account level.

You need to have organization or account access to see the sub-level option for Time center.



This option requires level 2 or 3 administrator levels. To set the correct administrator level, Go to Suite administration > Roles and permissions, and then click the Add role icon.

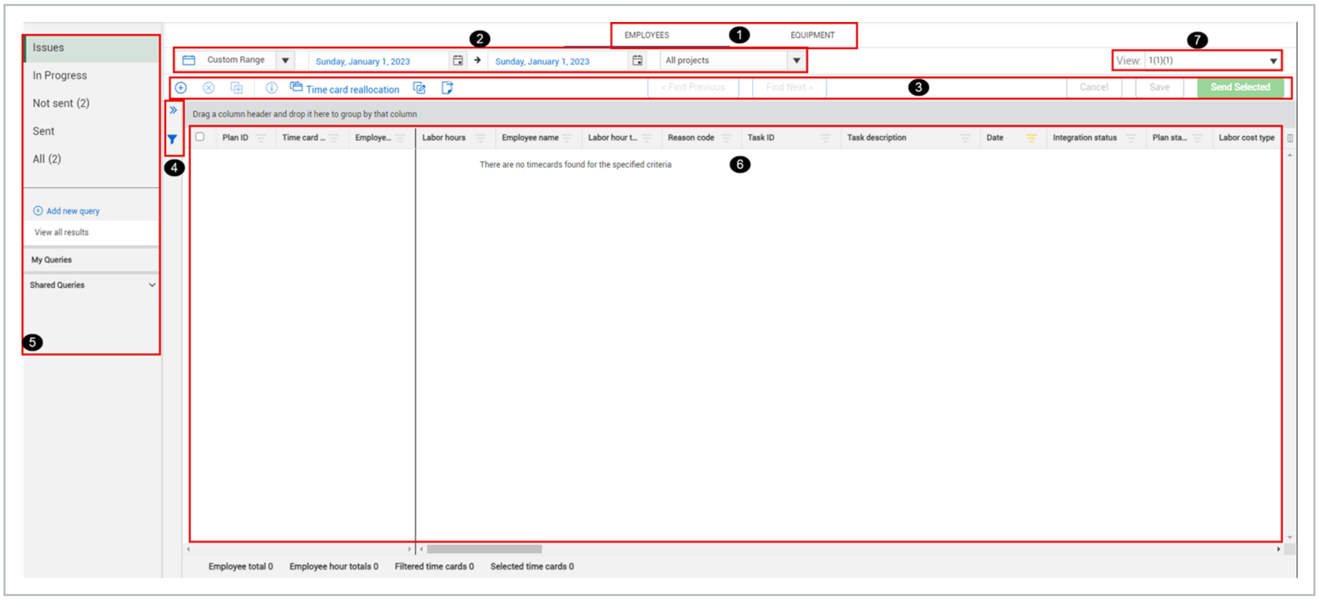
Under Role details, the Administrator level field includes a drop-down menu.



The administrator level can be set and saved only once for every new role.

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 a custom date range or from a predefined calendar.
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 has preset filters to view just time-cards with issues, time cards in progress, 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.
6	Time card register	Contains rows and columns that house all time card data imported from daily plans and weekly Time sheets.
7	View	Views can be saved, removed, and shared with users and roles. Permissions are required for Time Center access.



2.3.2 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 Time sheets from the Weekly Time sheets 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
Plan Status	No	Yes	Yes
Daily Plan name	No	Yes	Yes
Date	No	Yes	No
Approver 1 ID	Automatic	Yes	Yes

Column	Editable in Time Center?	Sortable?	Filterable?
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	Yes	Yes
Labor Hours	Yes	Yes	Yes
Reason Code	Yes	Yes	Yes
Reason Description	Automatic	Yes	Yes
Trade ID	No	No	Yes
Trade description	No	No	Yes
Employee Fields (Continued)			
Craft ID	No	No	Yes

Column	Editable in Time Center?	Sortable?	Filterable?
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
Time sheet 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
Equipment cost type	Yes	No	No
Notes	Yes	Yes	No

Column	Editable in Time Center?	Sortable?	Filterable?
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
Job title	Automatic	Yes	Yes

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

2.3.2.4 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.

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.

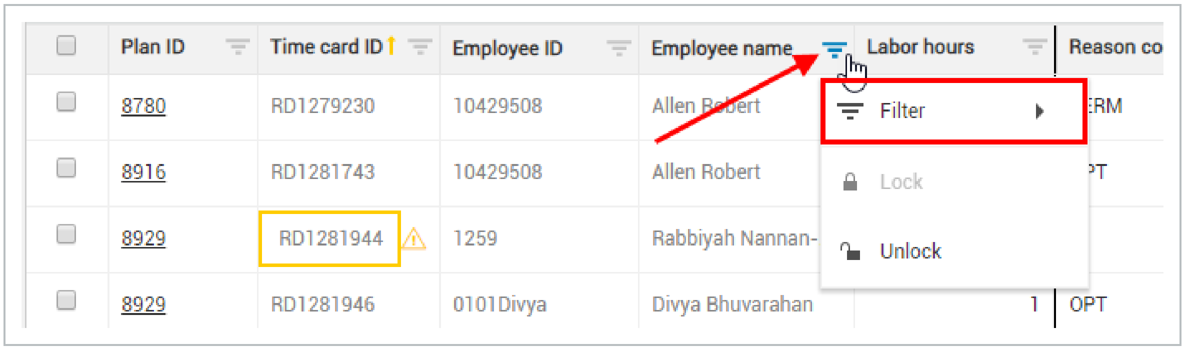
2.3.2.5 MOVE COLUMNS

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.

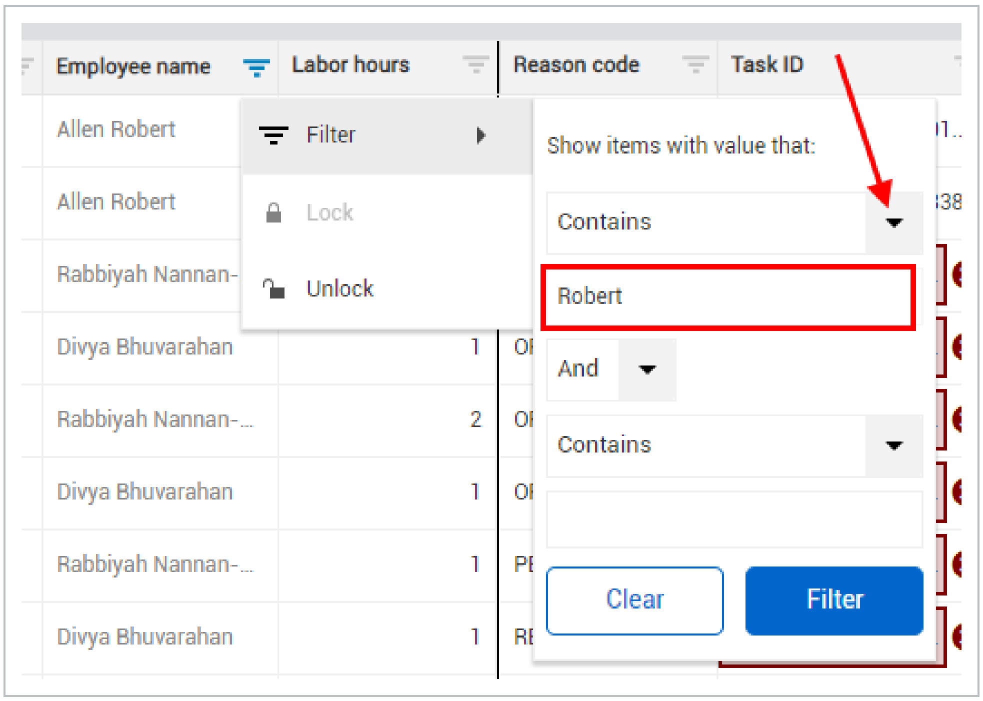
2.3.2.6 FILTER COLUMNS

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.

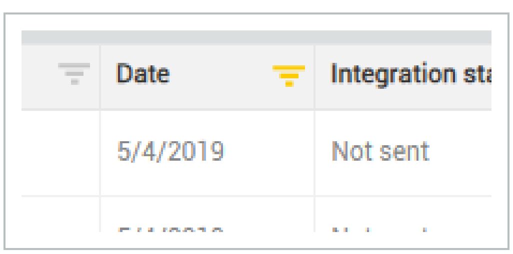
To filter on a column, select the filter icon on the column’s header, then hover over the Filter menu option.



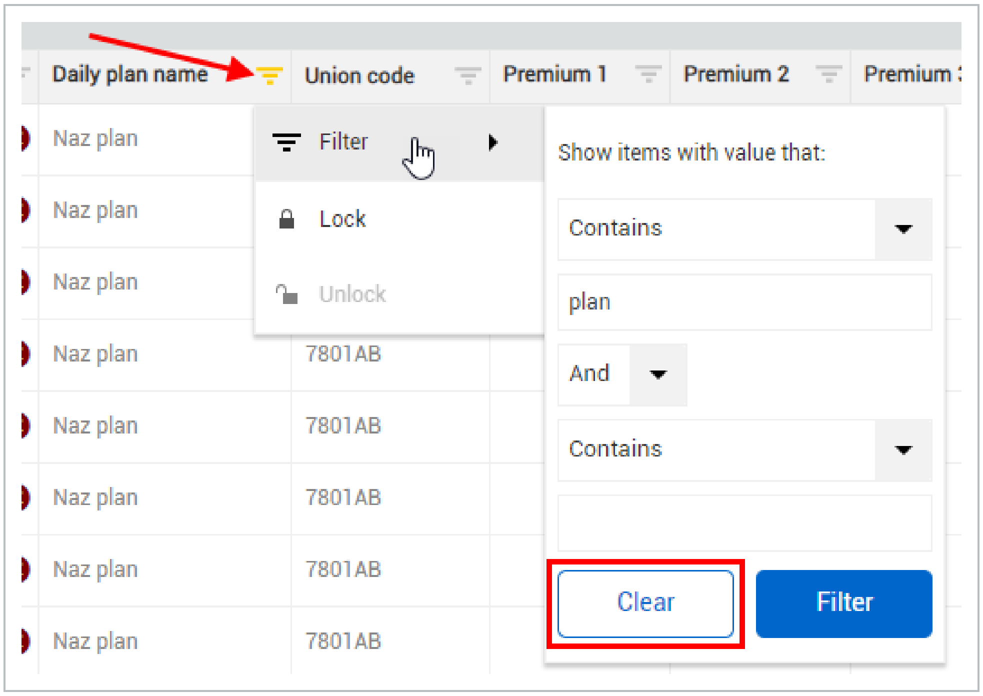
On the resulting Filter window, you can select an operator and value to filter by.



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.



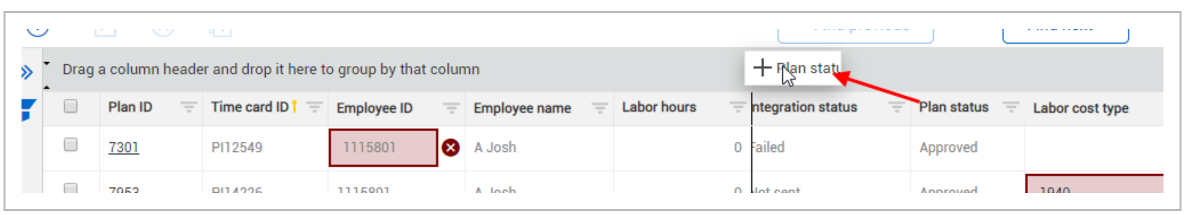
To clear the filter, you would click on the columns filter icon and select Clear.



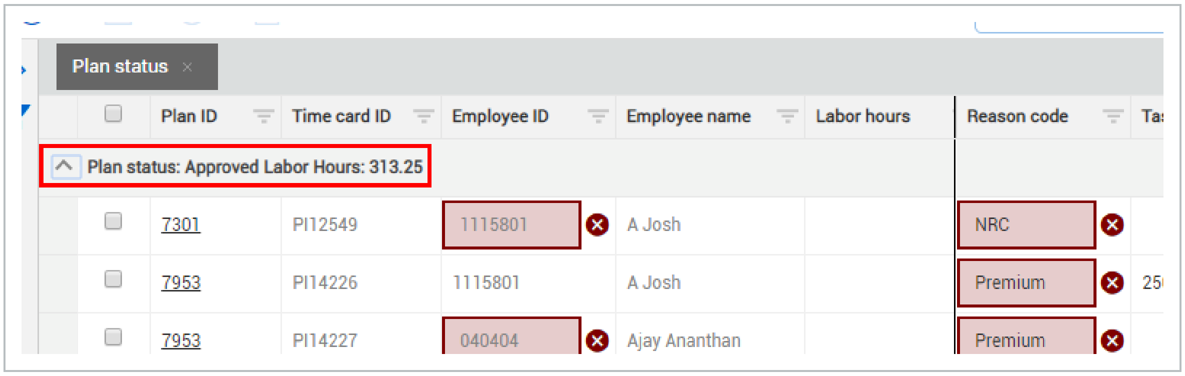
2.3.2.7 GROUP COLUMNS

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.

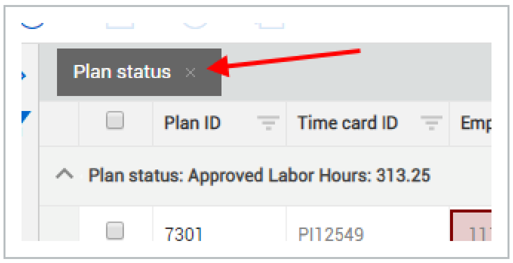
To group by a column, click on the column's header and drag it into the grey area just above the column headers.



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.



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



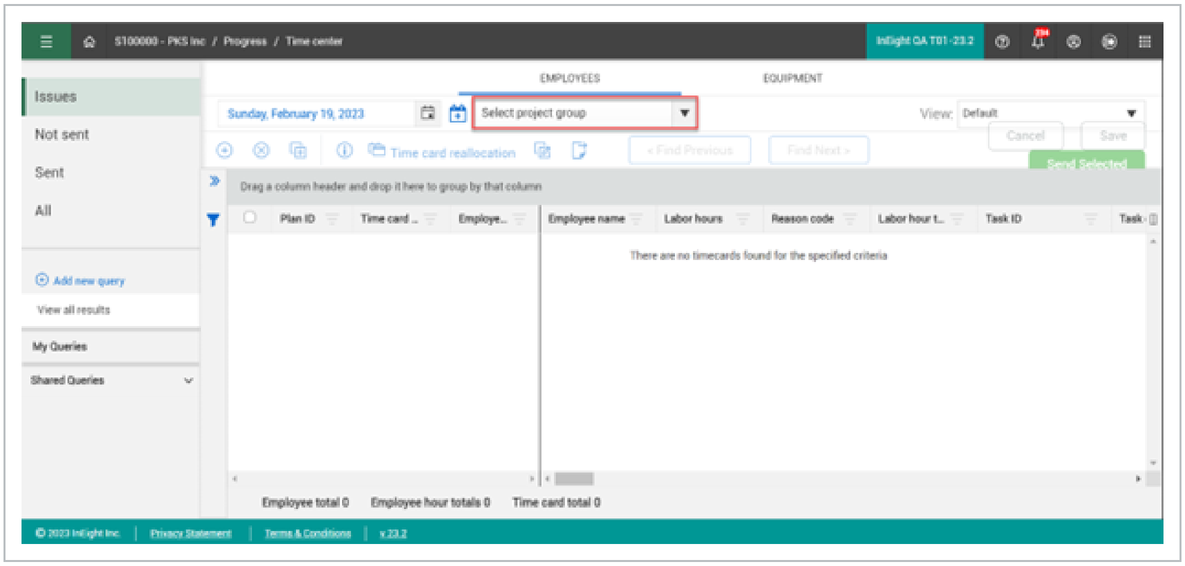
The column will return to its placement within the register.

NOTE	When a Group filter is applied, sorting on any of the data fields will be disabled.

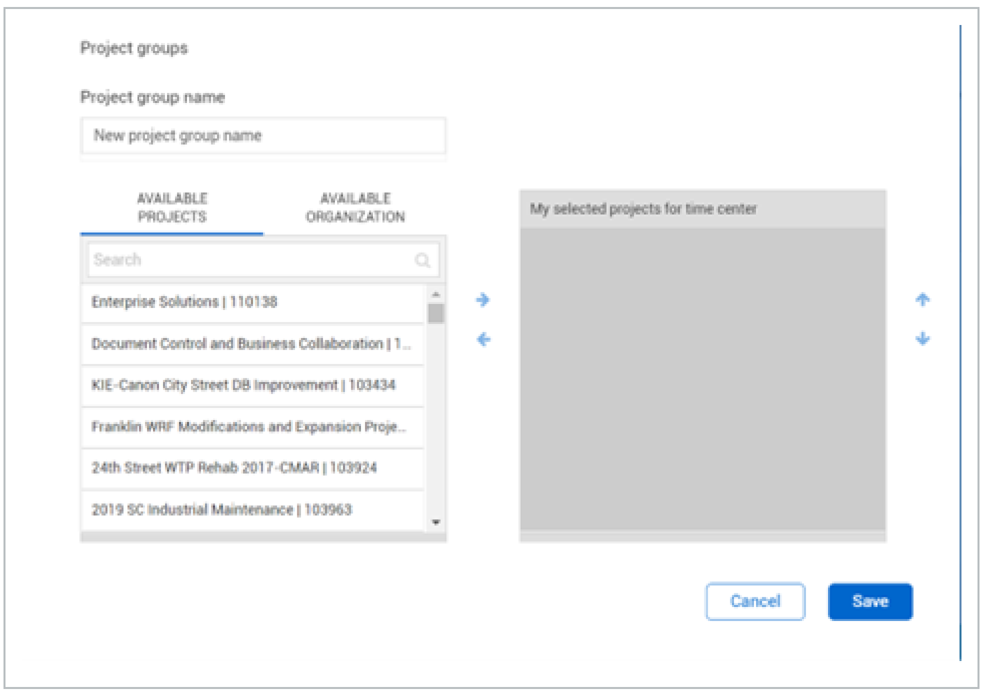
2.3.2.8 PROJECT GROUPS

You can view one or more projects at a time in a single grid of data with the project groups option.

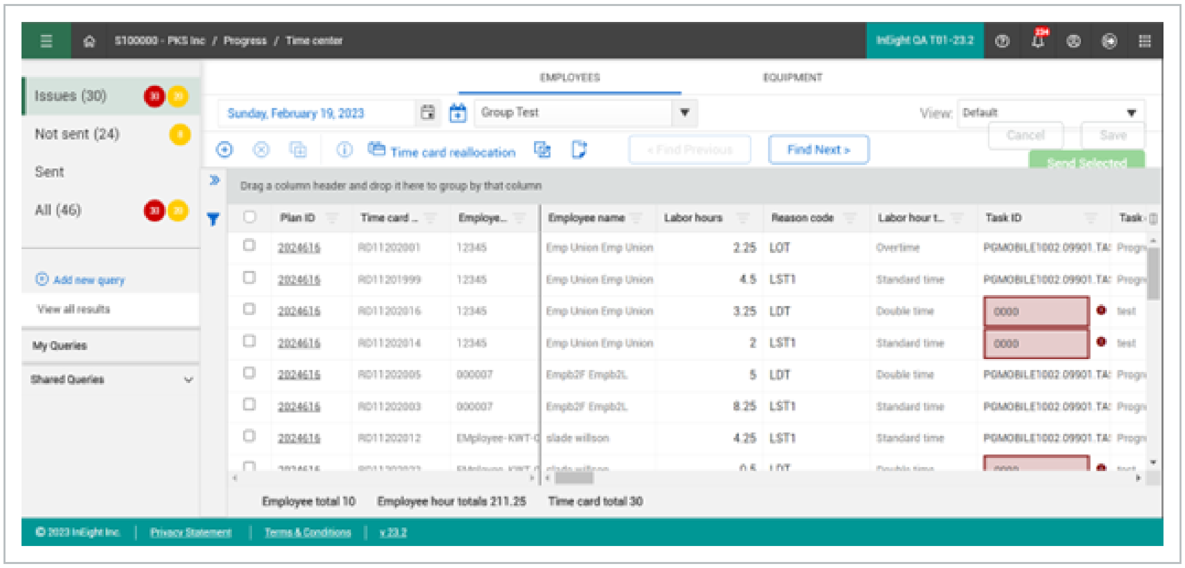
Go to Progress Time center, and then click on the drop-down menu labeled **Select project group**. You can select previously saved groups, and edit or add a new project group.



To add a new group, name the new project group, and then select from the available projects or organizations.



If your resources go across projects, this helps to check employees assigned to multiple projects on a single page instead of checking each project individually.

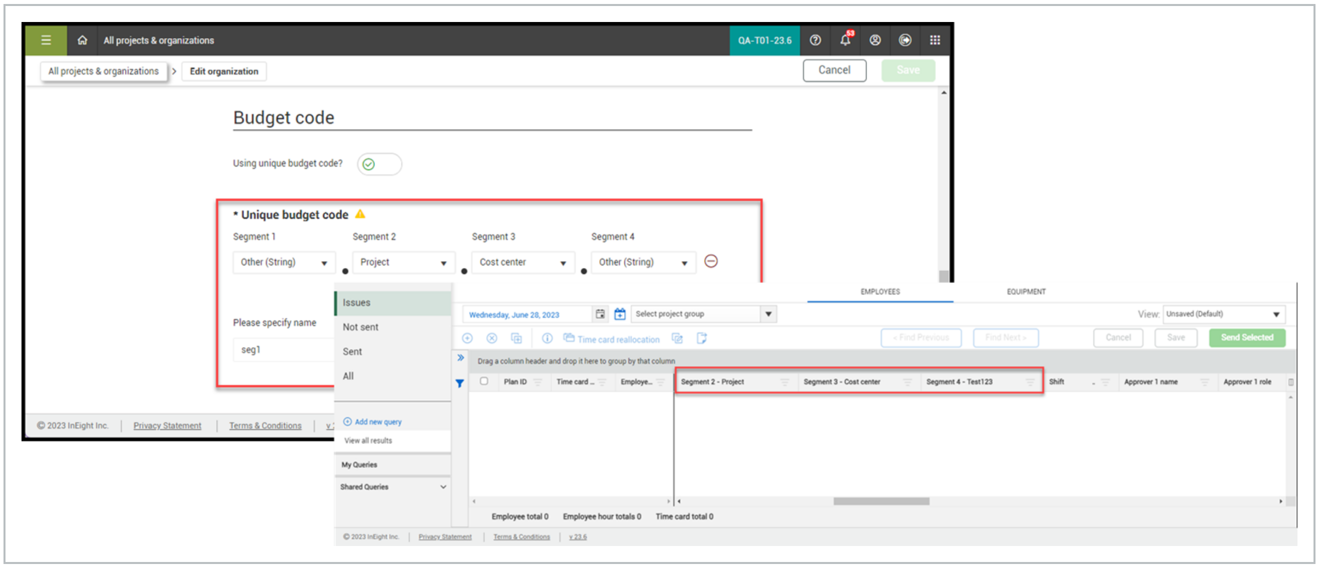


You can still work with a single project. The option to create groups has been added as a quicker work flow option.

NOTE	Saved views will migrate while working with groups.

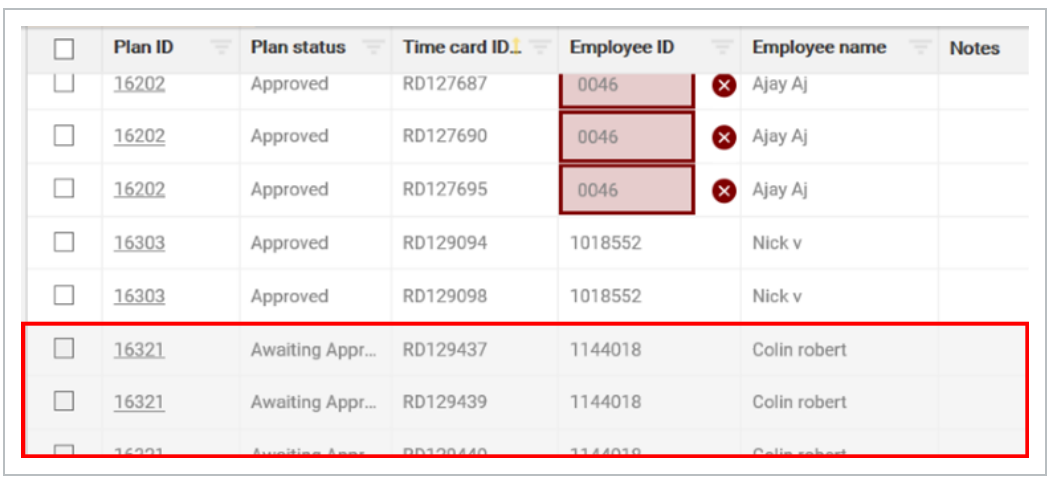
2.3.2.9 UNIQUE BUDGET CODE SEGMENTS

You can populate budget segments to show a unique code label. Unique budget code segments contain additional options to identify a cost item using four independent fields that are separated by periods. When you configure unique budget codes at the organization level (All projects & organizations > Edit organization) the segment numbers are matched with the corresponding columns in Time Center.



2.3.3 UNAPPROVED TIME CARDS

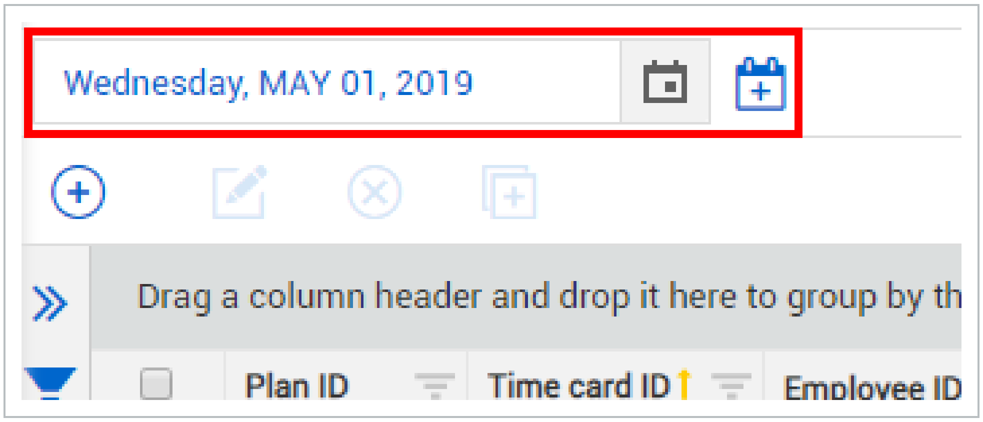
Note that time cards that have not yet been approved and are still in Execution or Awaiting Approval status are not editable within the Time Center register. You can only edit approved time cards.



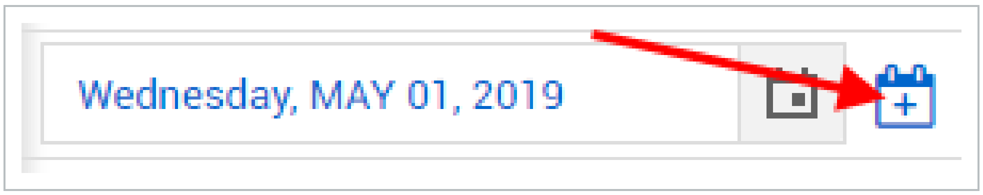
	Plan ID	Plan status	Time card ID	Employee ID	Employee name	Notes
☐	16202	Approved	RD127687	0046	Ajay Aj	
☐	16202	Approved	RD127690	0046	Ajay Aj	
☐	16202	Approved	RD127695	0046	Ajay Aj	
☐	16303	Approved	RD129094	1018552	Nick v	
☐	16303	Approved	RD129098	1018552	Nick v	
☐	16321	Awaiting Appr...	RD129437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

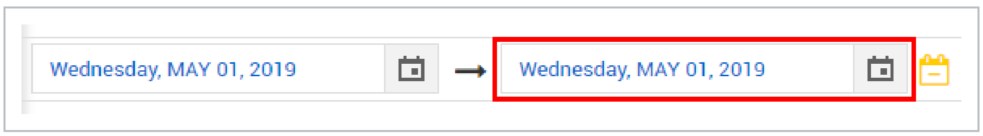
2.3.4 DATE FILTER

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.



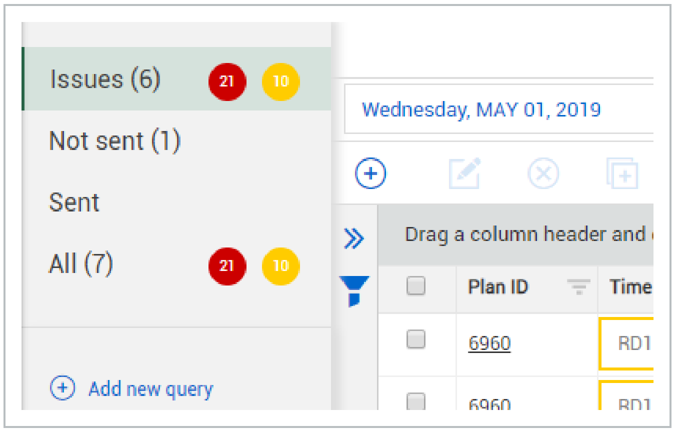


2.3.5 TIME CARD PRE-SET FILTERS

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
- **In Progress**– Time cards that are in a processing status before sending to Payroll.
- **Not sent** – Filters to time cards that have an Integration status of Not sent.
- **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)

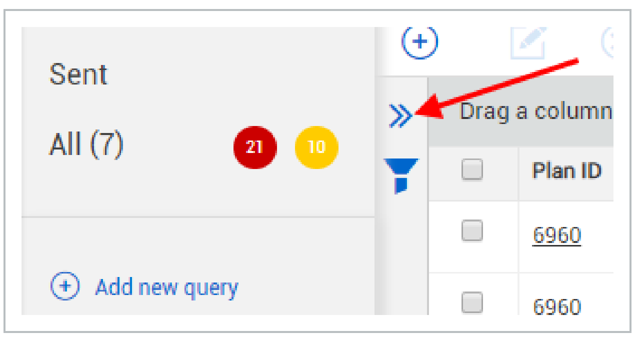


2.3.6 QUERY BUILDER

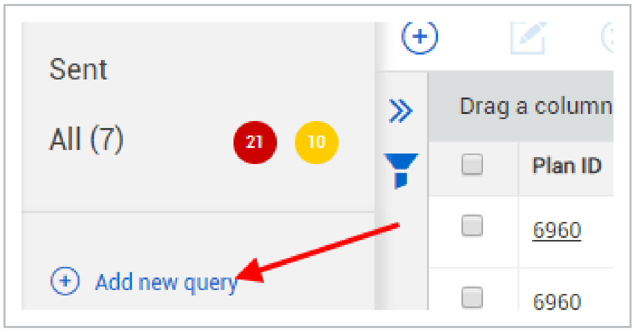
In addition to the filters you can set on individual columns, you can also add filters using the Query Builder. The following steps walk you through creating a query using the Query Builder.

2.3 STEP BY STEP 1 – 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.

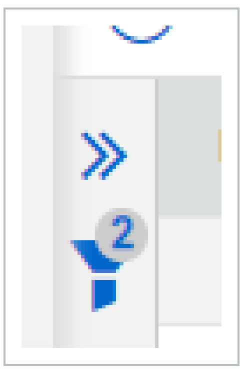
- The query will now show up under Shared queries

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

When you are granted level 2 or 3 permission and the Removed shared queries permission is enabled, you can unshare a shared query, removing from the shared list for all users.

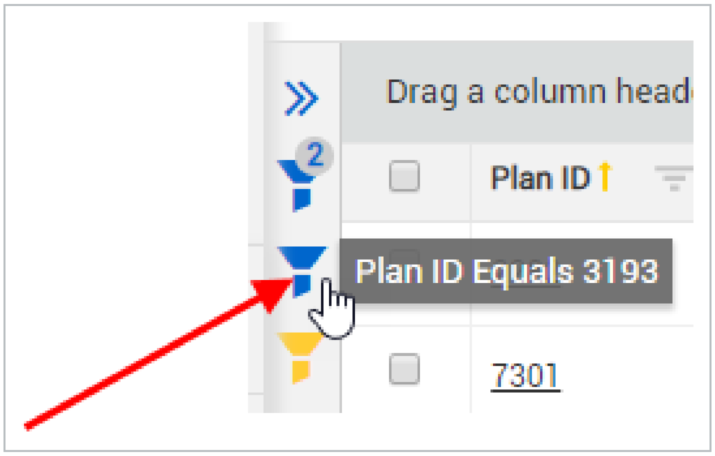
2.3.6.10 FILTER INDICATORS

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.

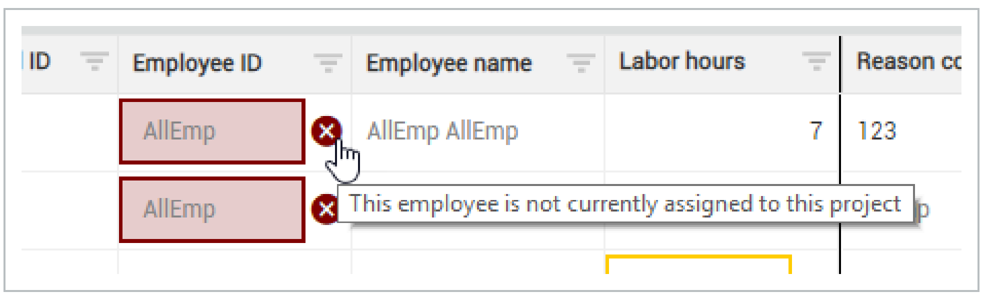
You can hover over the indicator of each applied filter to see the filter name, and you can click on each indicator to remove them from being applied.



2.3.7 ERROR INDICATORS

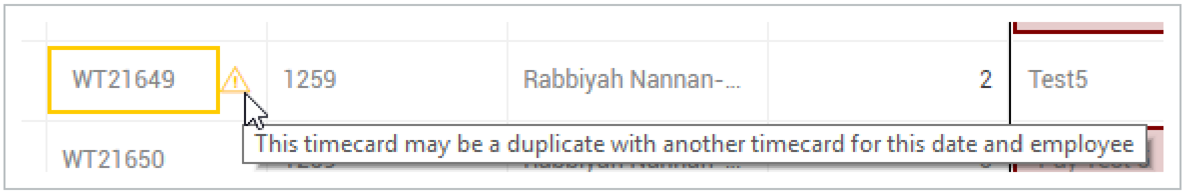
2.3.7.11 ERRORS

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.



2.3.7.12 WARNINGS

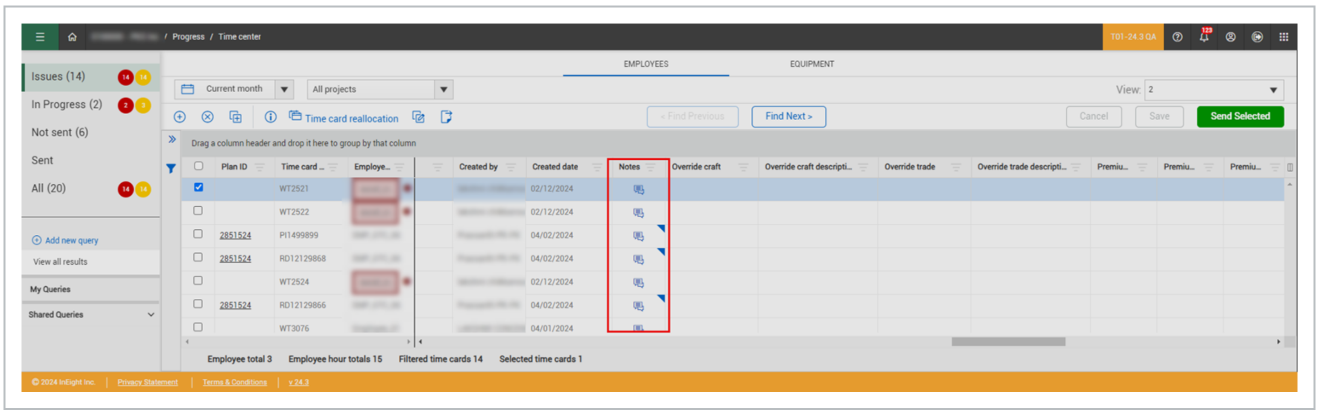
Fields in yellow indicate warnings. Time cards with warnings can still be sent to Payroll, but it is recommended to fix warnings to avoid possible confusion or issues with time cards. You can hover over the warning indicator symbol to see the reason for the warning, so you can make corrections.



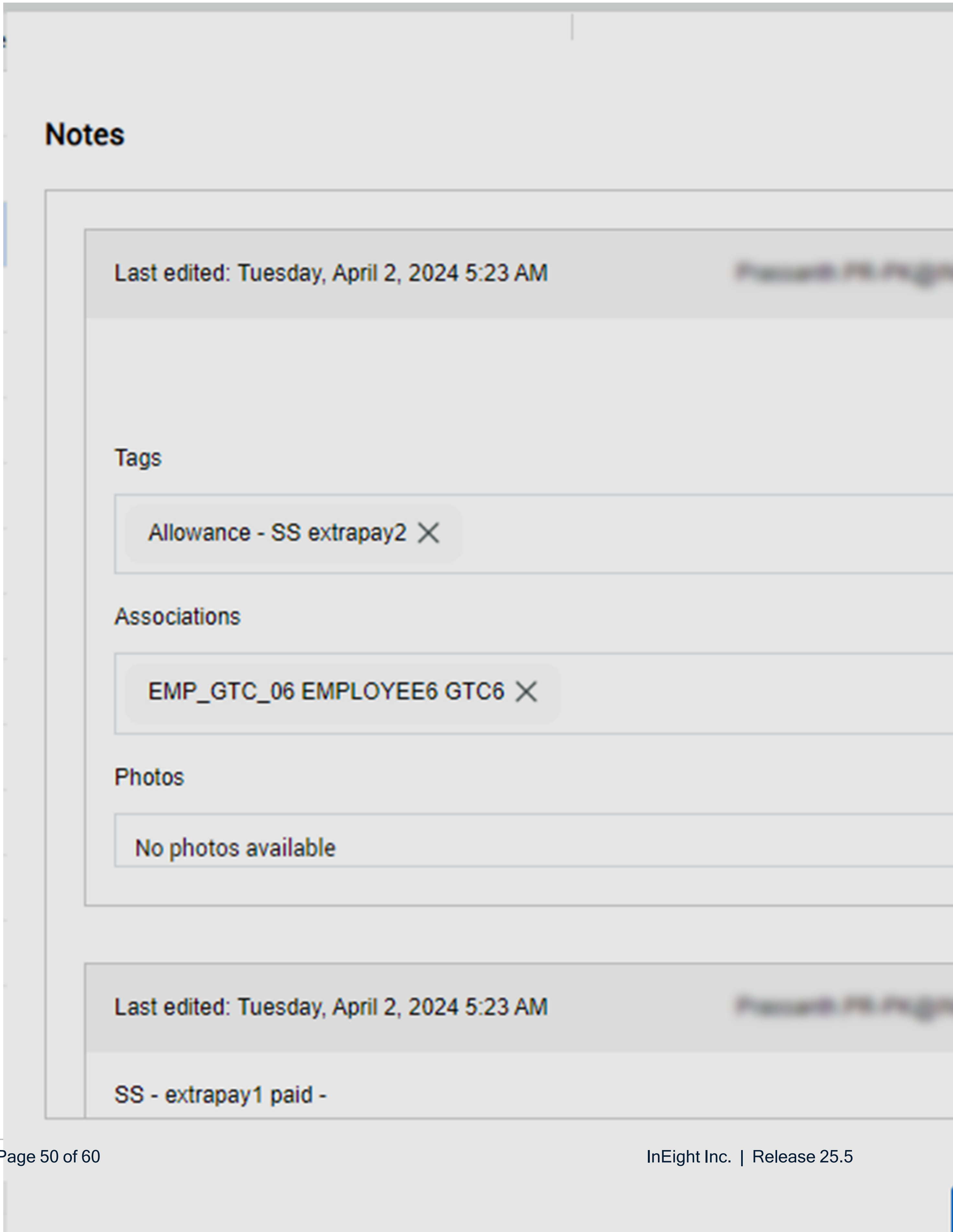
2.3.8 EDIT NOTES

You can edit notes originating in the Weekly Time Sheet or Global Time Center.

In the Time card register, under the Notes column, click the **Edit note** icon. .



The Notes dialog box will open where you can add or edit details.


Notes
Last edited: Tuesday, April 2, 2024 5:23 AM
Tags
Allowance - SS extrapay2
Associations
EMP_GTC_06 EMPLOYEE6 GTC6
Photos
No photos available
Last edited: Tuesday, April 2, 2024 5:23 AM
SS - extrapay1 paid -

In the Photos section, you can click the photo to preview, and a larger version of the photo shows. You can right-click on the photo to download or delete it.

2.4 TIME CARD MANAGEMENT

2.4.1 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.

2.4.2 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

2.4.2.1 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	Equipment status is not active.

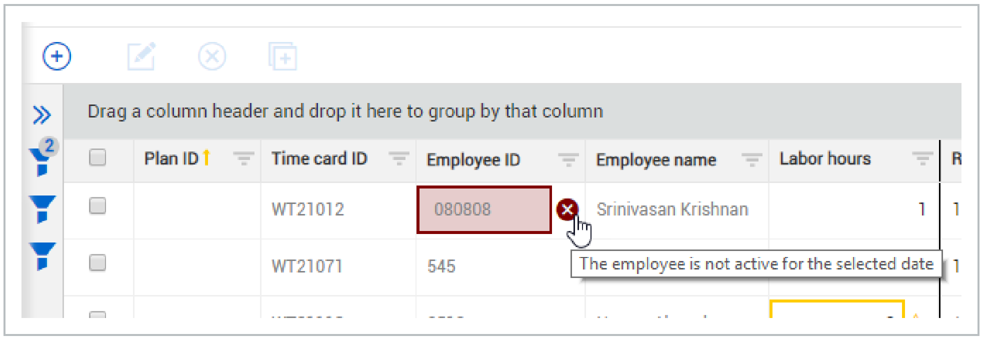
Error	Causes
Number	Equipment status is active, but not assigned to current project.
Invalid Allowances	Employee has an allowance assigned that is not valid for that type of employee or for the union it belongs to.
Invalid Employees	Time card date is not between the employee start and end dates. Employee status is not active. Employee status is set to not report time. Employee is not currently assigned to the project. Time card 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.
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

2.4.2.2 CORRECTING ISSUES OUTSIDE OF TIME CENTER

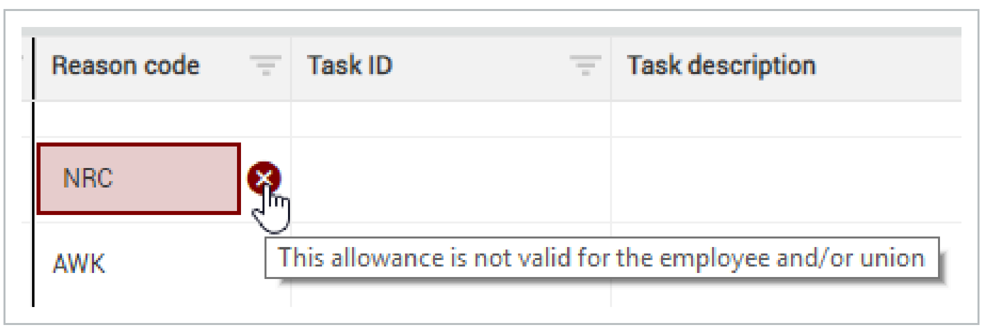
The error message displayed below indicates that the “employee is not active for the selected plan date.”



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 time card. Once corrected, this error would be removed.

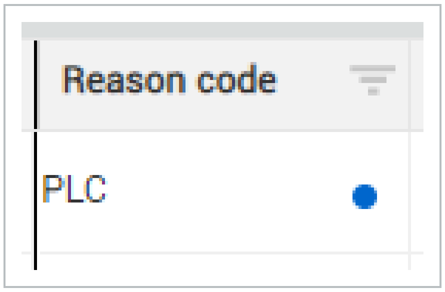
2.4.2.3 CORRECTING ISSUES IN TIME CENTER

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.



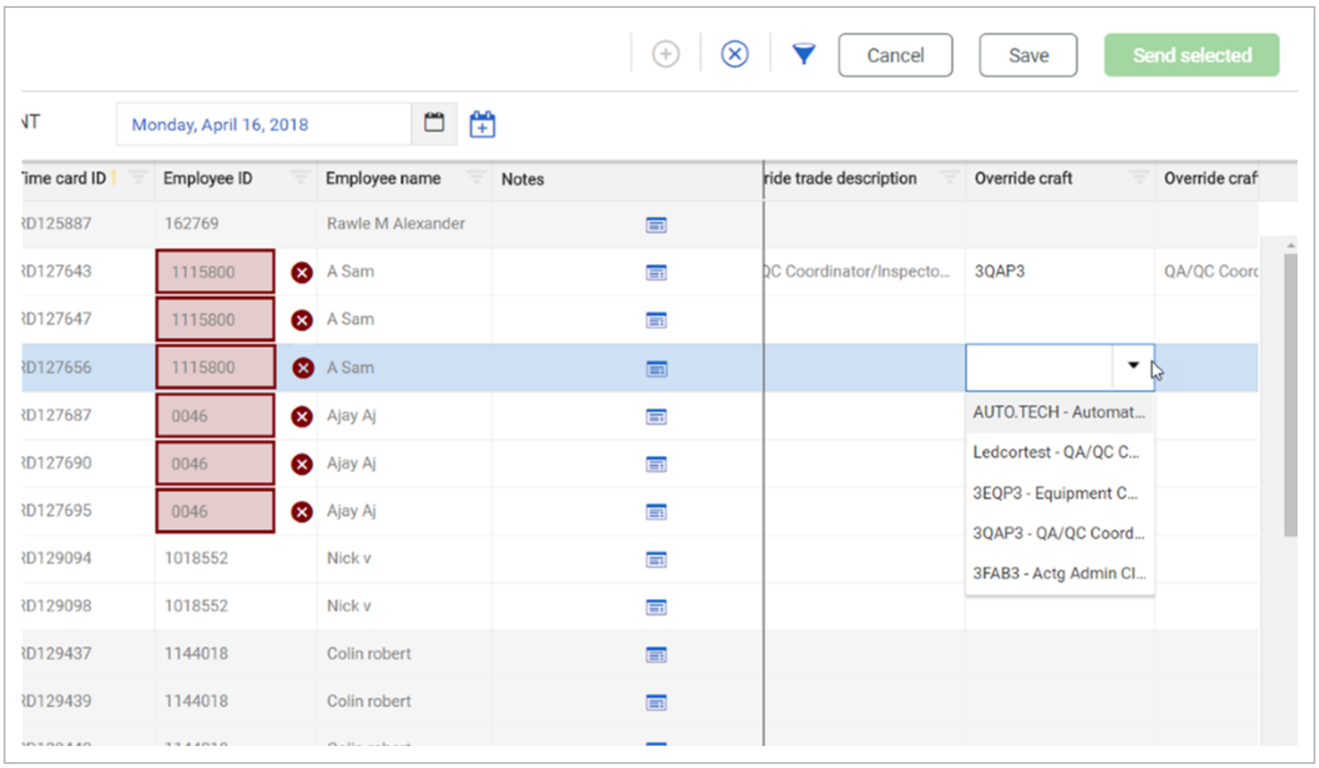
You can edit the Reason Code, changing it to one with a valid allowance for the employee on the time card.

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



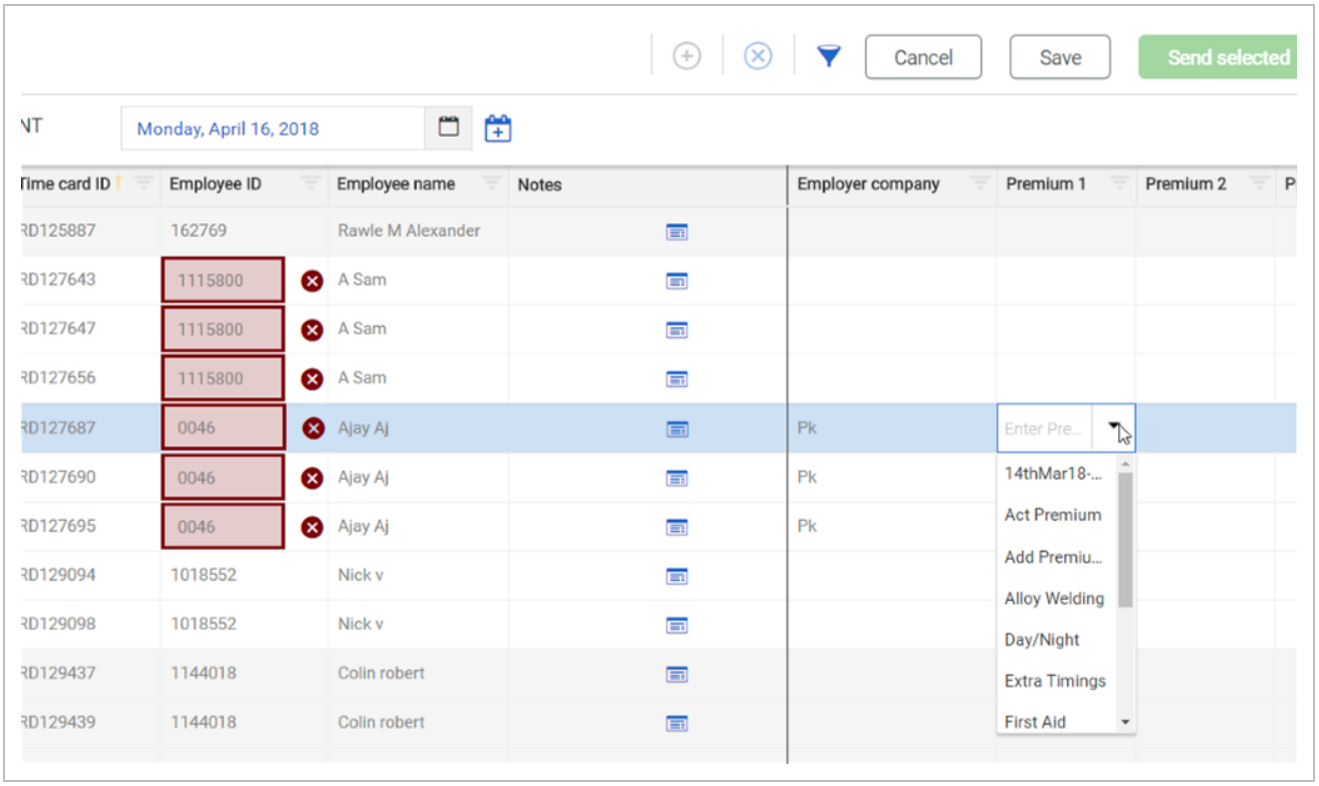
2.4.2.4 OTHER TIME CARD ADJUSTMENTS

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.



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.

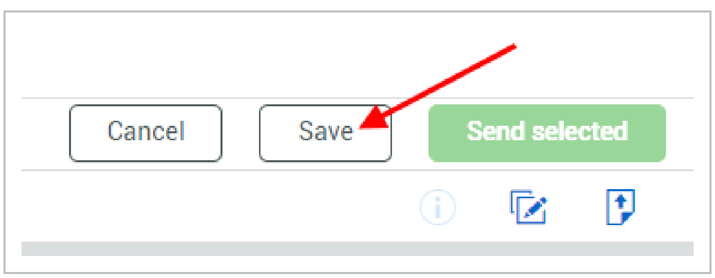
You can also assign or correct premiums. There are identified premiums (created at the project level) from which you can choose.



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

2.4.3 SAVING CHANGES

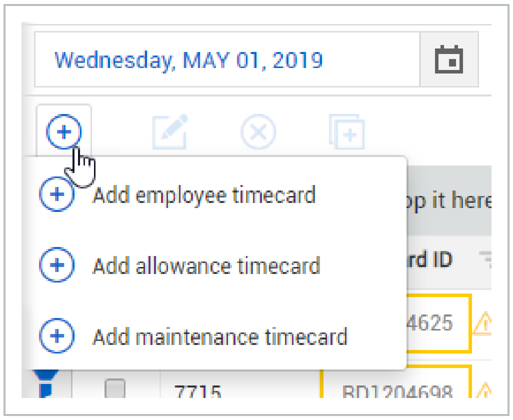
As you make changes, be sure to click **Save** in the upper right-hand corner to save your edits.



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

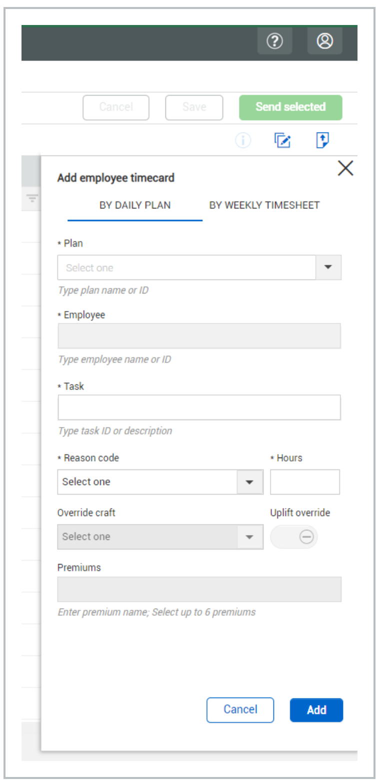
2.4.4 ADD TIME CARD

At times you may need to account for employee hours, allowances, or maintenance hours that were not captured in a daily plan or weekly Time sheet. 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.

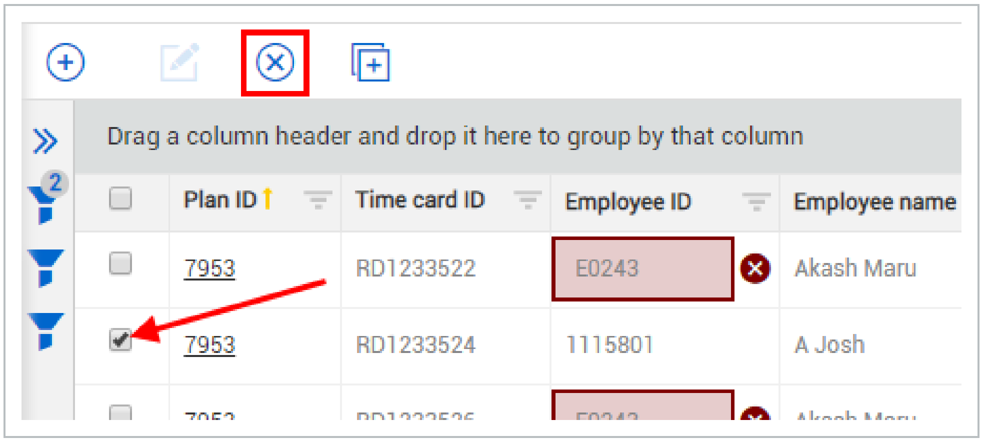
A slide out panel opens on the right to fill out and add the time card.



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

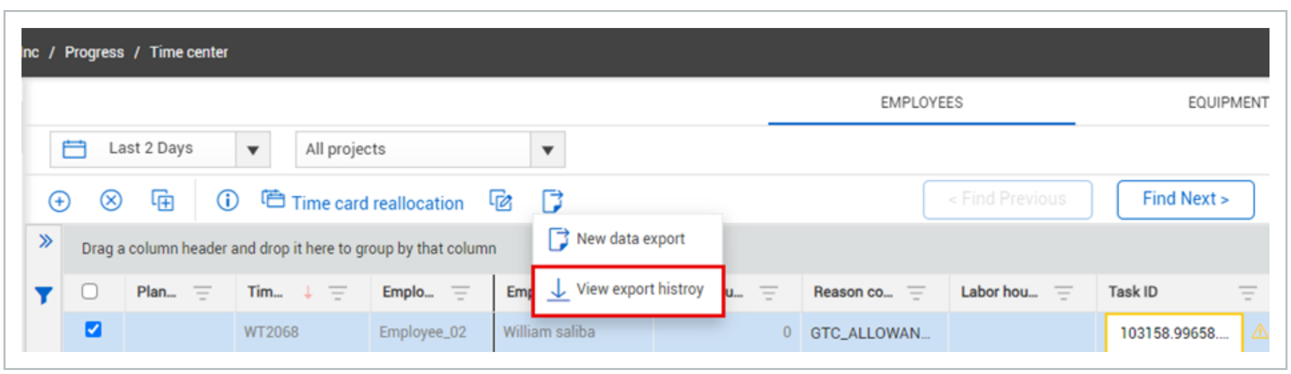
2.4.5 DELETE TIME CARD

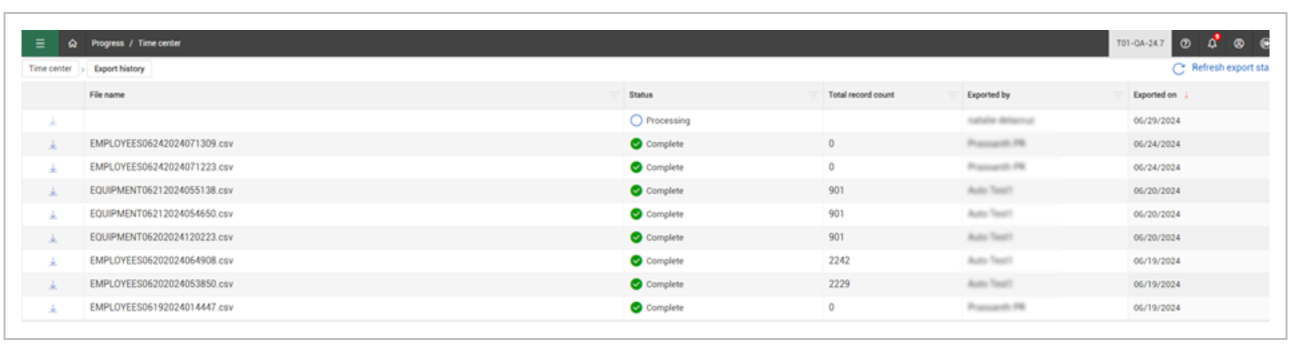
To delete a time card, you check the row header check box of the time card and select the **Delete time card** button.



2.4.6 EXPORT TIME CARDS

In Time Center > Export time cards > **New data export**, you can export time cards with will then send you to the Export history page. There you can also download previous time card history exports. The export is a Microsoft Excel file with nearly unlimited time card export count restrictions. If you do not need to export a specific time card and only need to view the Export history, follow the same steps as above and select **View export history** from the drop down list.

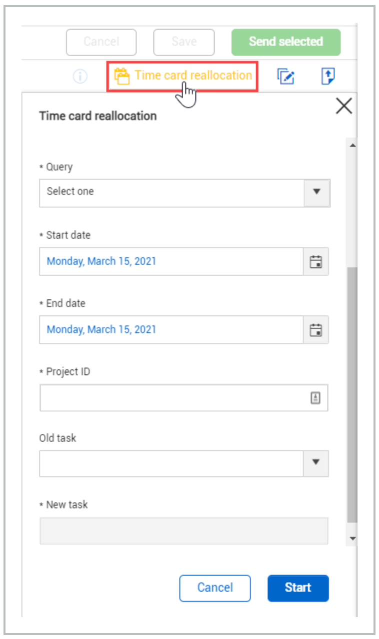




2.4.7 REALLOCATE TIME CARDS

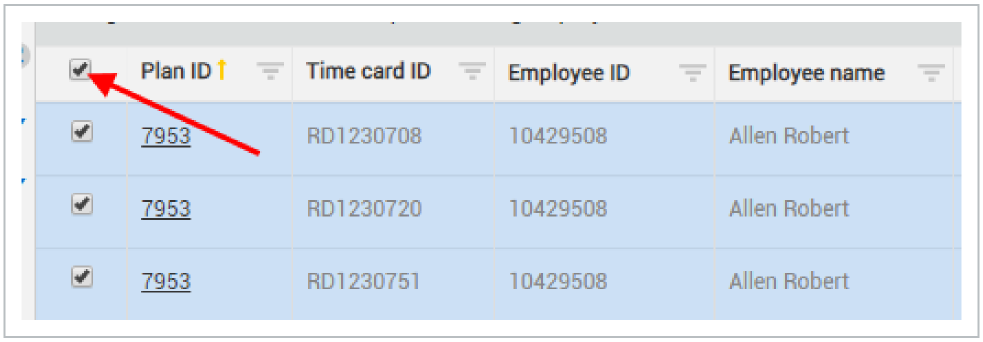
You can move Weekly time sheet time cards from one project to another project. To move time cards to another project, you must first create a query that includes all time cards you want to reallocate. After you create the query, click **Time card reallocation** in the upper right of the page. In the 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.

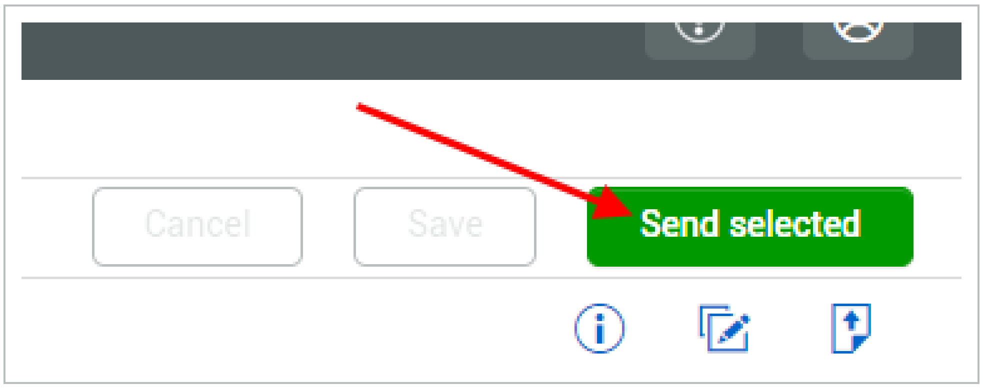


2.4.8 SUBMIT TO PAYROLL

When all the time cards are reviewed and issues resolved, you can either select the time cards individually, hold the shift key to multi select or check the box to select all time cards.



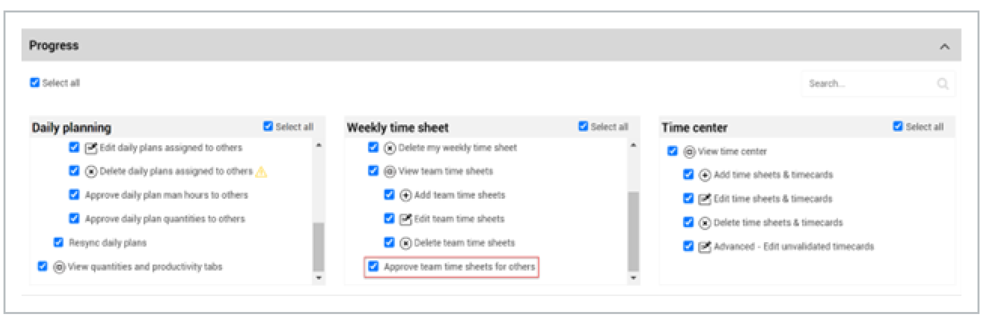
With the time cards selected, click the **Send Selected** button.



This sends the selected time cards to your Payroll system.

2.4.9 APPROVAL DELEGATION PERMISSION

The **Approve team time sheets for others** option allows the selected employee to submit time sheets (other than a supervisor). Go to Roles and permissions > Weekly time sheet, and then select Approve team time sheets for others.

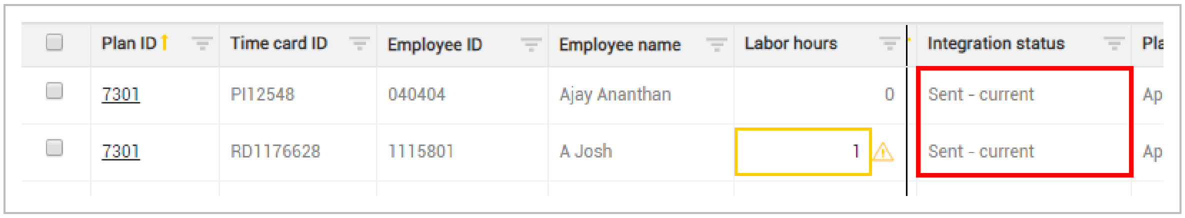


2.4.9.5 INTEGRATION VALIDATION

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**.



	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