PROGRESS USER GUIDE

Administrator

FIELD EXECUTION MANAGEMENT

INEIGHT

Release 19.7
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STEP-BY-STEP PROCEDURES

EXERCISES

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LESSON 1 – INEIGHT PROGRESS OVERVIEW

Lesson Duration: 30 minutes

Lesson Objectives

After completing this lesson, you will be able to:

- Summarize the purpose of the InEight cloud platform
- Describe the purpose of InEight Progress
- Explain the general workflow for InEight Progress

Lesson Topics

1.1 INEIGHT CLOUD PLATFORM OVERVIEW

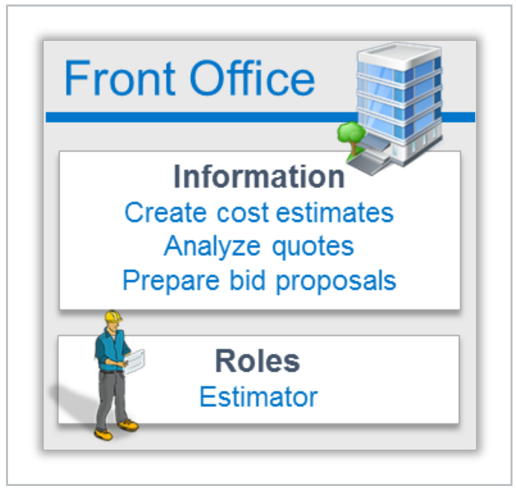
1.1.1 Project Management and Lifecycle

Most projects that you are working on will follow a typical lifecycle. It is broken down into different roles and the people involved. We will break those roles and people down into four locations:

- Front office
- Field office
- Jobsite
- Back office

1.1.1.1 Front Office

What are the essential functions of the front office? What roles are involved?



The front office focuses on getting work and typically houses estimators who, during the *bidding phase* of the project, start out by estimating its value. This is done by calculating cost estimates, analyzing quotes, and capturing all the data necessary to submit a bid to the client.

Once complete, they prepare the bid proposal, submit it to the client, and find out if they are the preferred contractor to do the work. If they have the winning bid, they can start the *planning phase* and preparing to build the project.

1.1.1.2 Field Office

What work roles are typically found in the field office? What are their primary tasks?

Budgeting and Forecasting

During the *execution phase* of a project, the field office manages the budget and forecasting for the project. The

Field office relays this information to the other field personnel, so they understand what the budgets for the work are, how they should build the job, who the suppliers of materials are, and if there are any subcontractors, etc.

Contract Procurement

Project engineers and managers procure contracts for materials and with subcontractors.

Work Planning and Quantity Tracking

The field office is where the field engineers and superintendents responsible for the work prepare work plans for the foremen and their crews, breaking down the work into manageable pieces. They then create quantity-tracking plans, formulate inspections and create daily plans to send to the foremen on the jobsite.

Change Management

As issues arise, project engineers record and submit issues, get them approved through the client, and execute change orders.

Inspections Management

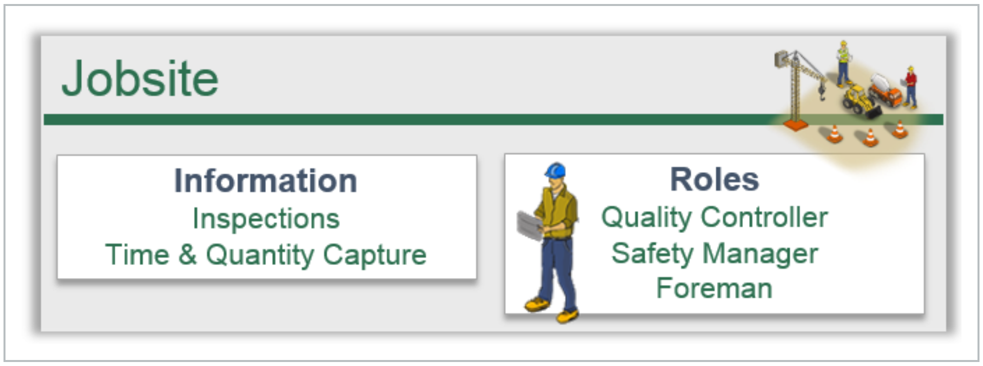
Inspections, as well as actual time and quantities from the jobsite, come back to the field office where they are review and approval before going to the back office.

1.1.1.3 Jobsite

What types of employees work at the jobsite? What type of information do they capture as they build the work? Where does that information need to go and why?

The jobsite is where you find the quality controller, safety manager and foreman. It is where the work is completed. The safety managers, superintendents and foremen are involved in safety inspections, while the quality controller and field engineers perform inspections before and after the work is complete. The foreman also captures the time of each of the craft workers and the quantity completed each day, based on the plan provided from the superintendent and field engineer.

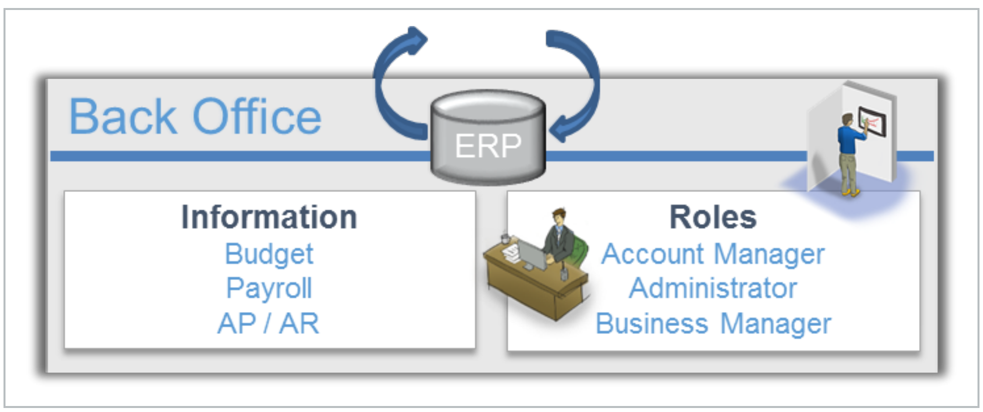
All this information is relayed back to the field office where it can be verified and approved.



1.1.1.4 Back Office

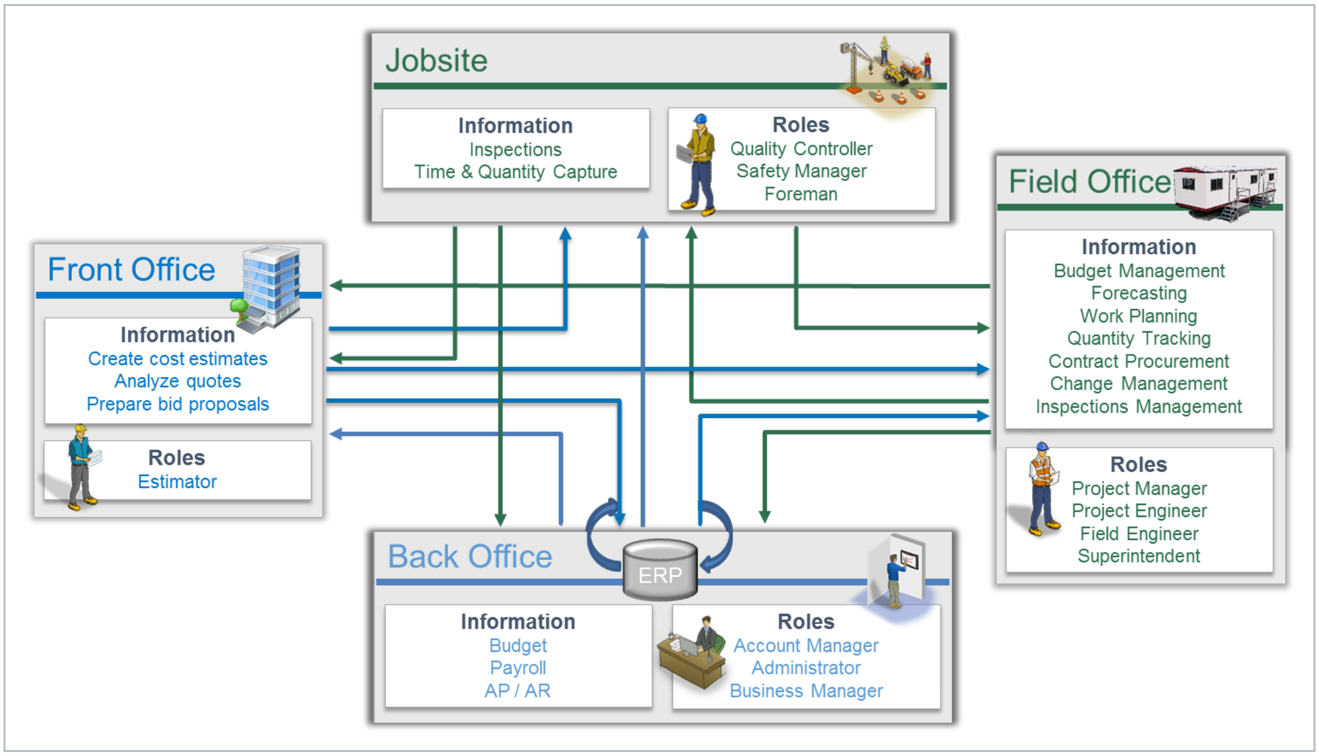
What functions take place in the back office, related to the project? Why is the back office a critical element of managing the project?

The back office is where the account managers and administration staff keep track of budgets, make sure the payroll is correct and completed in a timely manner, keep track of all the accounts payable and receivable, and take care of revenue. After a contract is created, the business manager verifies purchase orders are generated. All the “actual” data, whether it be time or dollars then is communicated back to all the other areas of the job.



1.1.1.5 Problems with Existing Systems

Often issues arise when it comes to communication between all the different areas of a project. Information must flow quickly and accurately between the different areas, but often it is lost, miscommunicated, or slowly received. In some cases, information must be re-entered in a new system and is duplicated. This can cause all sorts of issues when it comes to managing a project.



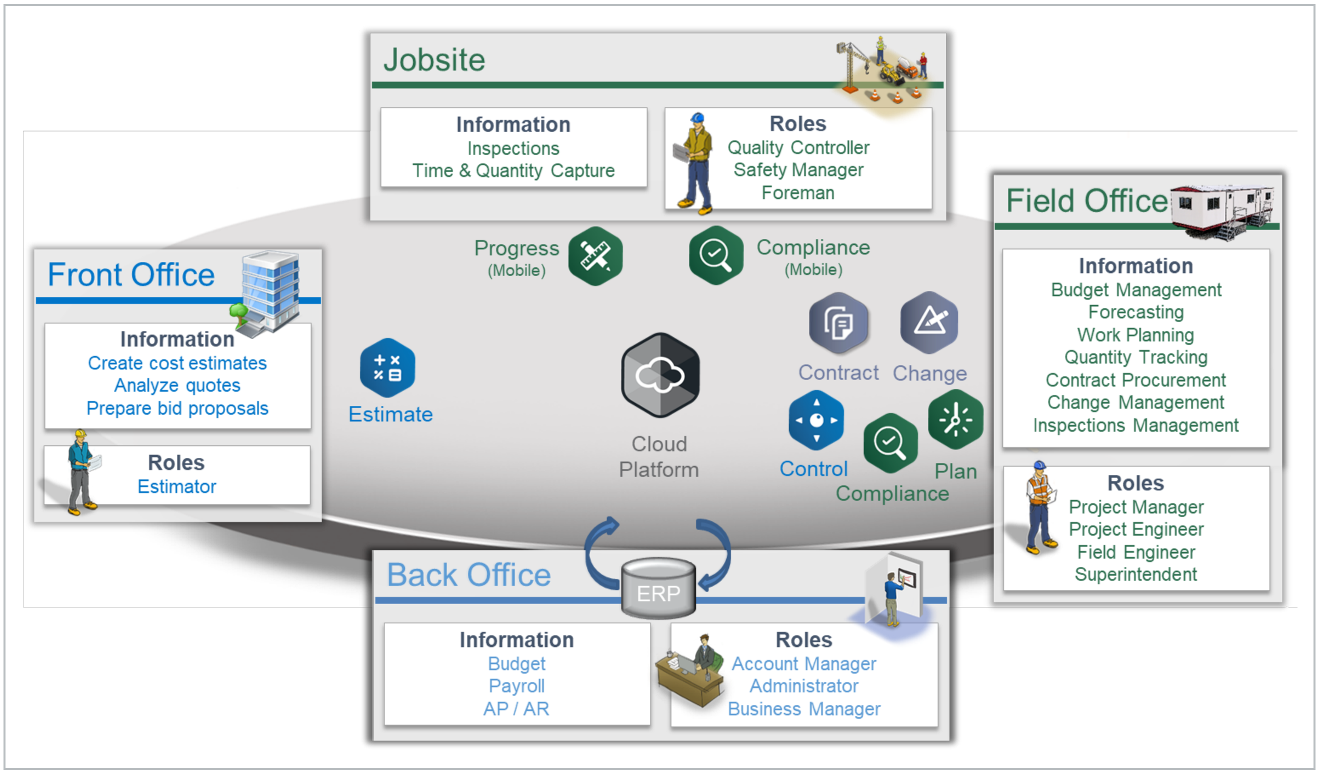
Employing too many systems to transmit information on a project can result in duplication, which is not efficient. Here are a few examples of such inefficiencies:

- Inspections that are completed on paper must be manually input or scanned into a computer system.
- Hand-written time cards that are misplaced or get wet must to be reproduced and then entered into a computer system so that the crew can be paid.
- Quantities established in the daily plan do not coincide with the quantity claiming system.

What issues can you think of that you have experienced on your projects?

1.1.2 What is InEight Cloud Platform?

The InEight cloud platform was designed and is continually updated to address these issues. The cloud platform of software applications designed to help companies visualize, estimate, manage, control, and connect all aspects of capital and maintenance projects. The cloud platform is built so all the different applications can communicate with each other. It is also designed to communicate with multiple different **ERP systems** such as SAP or Oracle to share key information with the back office.

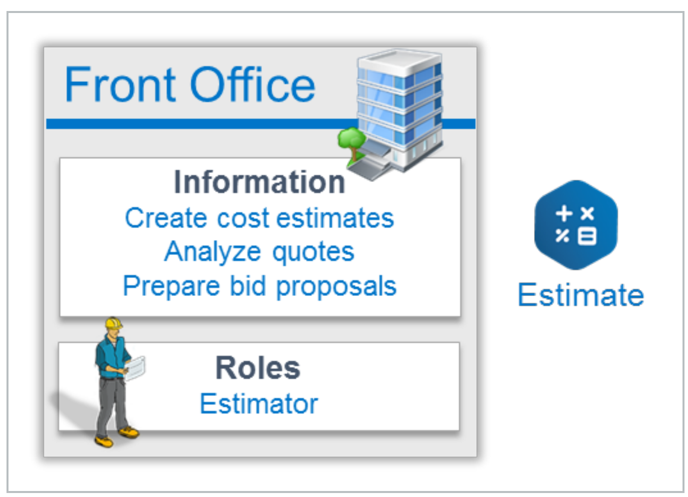


1.1.3 How Does InEight cloud platform Integrate in to a Project?

Scenario: Step 1

> Skyline Construction Company decides to bid on a project to build a concrete foundation.
>
> Upon submittal, the client informs them that they are the preferred contractor for the work. They now need to take the project from the estimate to the project execution phase.

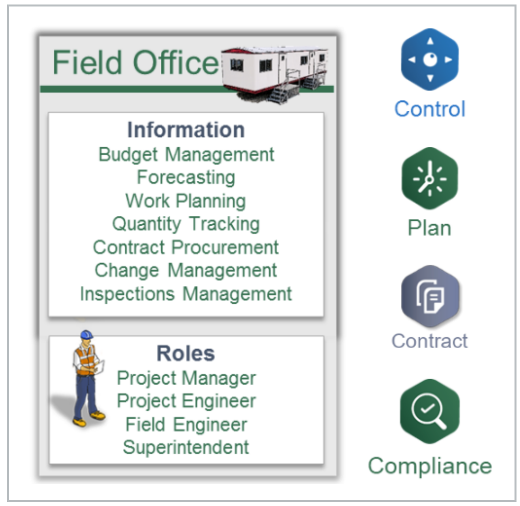
Using the **InEight Estimate** application, the estimating team in the front office builds the cost estimate and submits the bid proposal, including awarded quotes and all bid documents.



Once awarded the contract, the project team then transfers all the information from the estimate to **InEight Control** where the project can be managed. This includes the cost item estimates, awarded quotes, bid and proposal documents, and the estimate budget structure. During this transition, the project management team can modify the estimate easily to conform to how the project will be built and tracked.

Scenario: Step 2

> The field engineers and superintendents in the field office are ready to begin planning the work. They break the work plans down into work packages that contain the specific quantities, materials, labor, equipment, and budgets associated with each portion of work.
>
> The project manager and engineers procure contracts for material and subcontracted work.
>
> Then, inspections are created for quality of the work to ensure it meets the specifications as well as safety.



The field engineers in the field office can now go into **InEight Plan** to break down the work into work areas, work plans within those areas, and then work packages where the work is broken down into components. There, all the components are assigned a WBS code from **InEight Control** as well as other important information and claiming schemes.

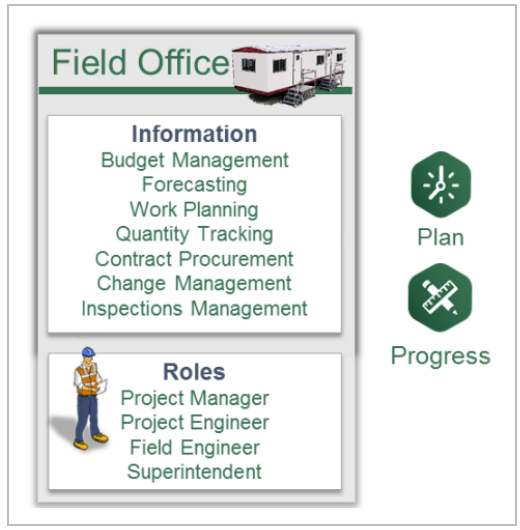
Project Engineers use **InEight Contract** to create bid packages and submit them to vendors and subs and solicit contracts.

Engineers also utilize **InEight Compliance** to create the forms necessary for both the quality and safety inspections. They can then send these to **InEight Compliance Mobile** for the responsible person to complete them in the field.

Scenario: Step 3

> Joe, the concrete superintendent, now has all the work planned for a concrete foundation and is ready to communicate all the details to his foreman Jill, so construction can begin tomorrow.

The superintendent can go into **InEight Plan** and create a daily plan for his crew to erect the formwork needed for the foundation. He brings in all the quantities, budgets and claiming schemes from the work package his field engineer created and breaks it down into what Jill's crew needs to complete tomorrow. He adds production goals for the day and safety notes related to the formwork installation. He communicates this to his foreman by syncing it to her, where the foreman can open the **InEight Progress** app on her iPad.

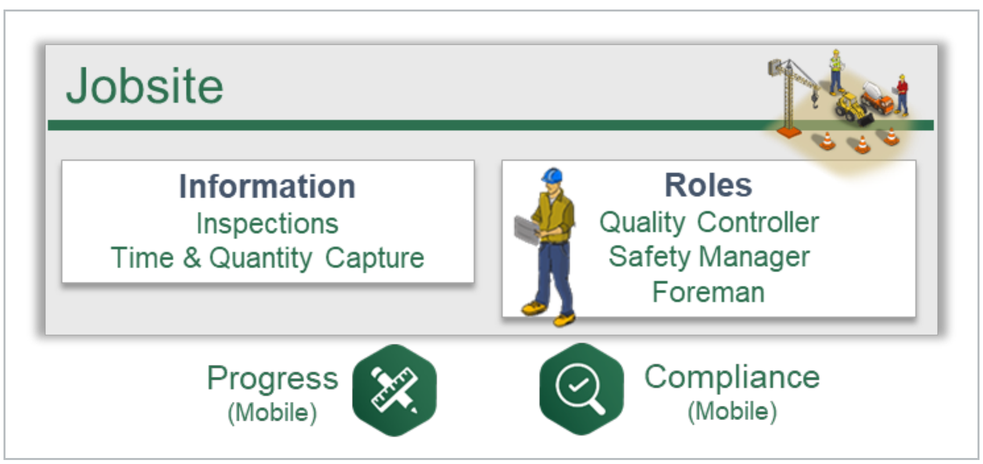


Scenario: Step 4

> In the morning, Jill reviews the plan for the day and determines if any changes are necessary due to one of the crewmembers calling in sick.
>
> John, the quality controller on the project reviews the quality inspections that he needs to perform that day and creates a plan with Jill to schedule the proper times.

The foreman reviews the plan in the **InEight Progress** app on her iPad and adjusts as necessary to the plan (e.g., sick crewmember, unforeseen issues).

The quality controller speaks with the foreman and determines when they can complete the inspection for the day. The quality controller uses the **InEight Compliance** app on his iPad to perform the inspection.

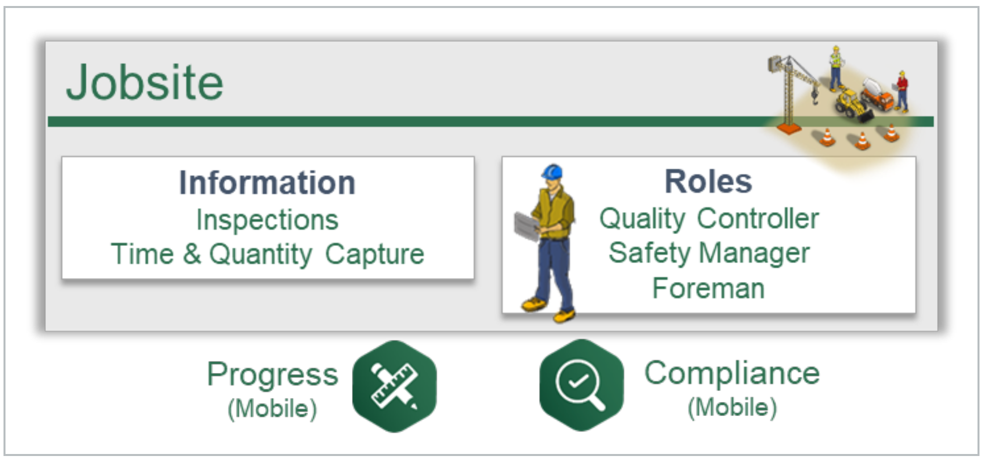


Scenario: Step 5

> Throughout the day, Jill has kept track of the quantities completed on the formwork but had to adjust the plan to send her crew to build a quick access ramp for an earthworks crew. This was not in the plan and she needs to account for it before signing out the crew.

In the **InEight Progress** app, the foreman can keep a log of notes on the day’s progress and any unforeseen construction needs that come up. She can quickly add extra tasks to accommodate adjustments to the plan, review each crewmembers’ hours, and sign them out at the end of the shift. She enters in the quantities completed and can see her crew’s productivity for the day. She will be able to communicate this to the crew in the morning.

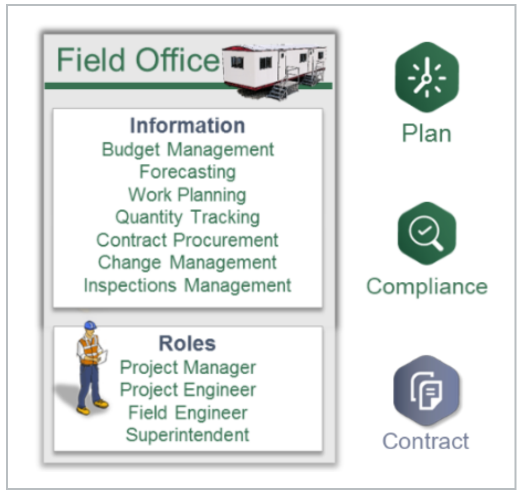
Once complete, she approves the daily plan and synchronizes it, so it can be reviewed by the superintendent in the field office.



Scenario: Step 6

> Joe and his field engineer have received the quantities, hours, and inspections completed during the day and now want to review and approve them.
>
> Upon review, they discover there was an issue with the foundation specifications that may result in a change order. They log this issue to communicate with the client.

The superintendent can open **InEight Plan** and review the hours for each crewmember, any new tasks created, and the quantities completed for each of the tasks. He is also able to review the daily costs and see how the crew performed in both man-hours and cost. He can approve the plan and can make any necessary changes to the plan tomorrow based on the productivity information he received.



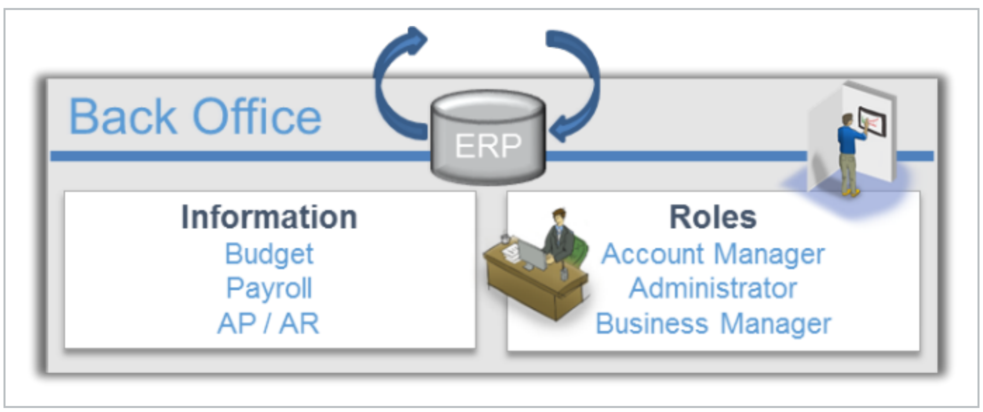
The field engineer is can also verify the inspections were completed in the **InEight Compliance** application.

One of the project engineers records the concrete foundation issue in **InEight Contract** and will track it, converting it into a change order if necessary.

Scenario: Step 7

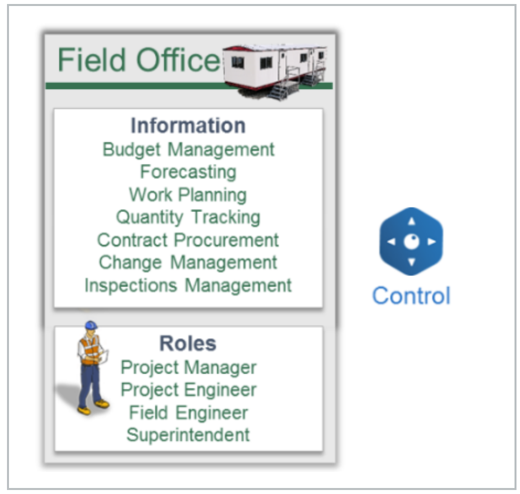
> The account manager in the back office will now verify all the time for each crewmember and ensure they are paid correctly according to the union guidelines.
>
> This information is then communicated to the front office, so the project manager can analyze the job costs and update forecasting.

Within the **ERP system**, the account manager and administrators review all the time that has come in, adjust where necessary, and submit the payroll to ensure everyone is paid accurately and on time. They then synchronize this information into the **ERP system**, where it can be sent to **InEight Control** so project management in the front office can review the information.



Scenario: Step 8

> At the end of the month, the project management in the front office views all the actual quantity and cost information, compares it to the budget, and projects the final cost of each operation. Forecasts are then finalized for the project.

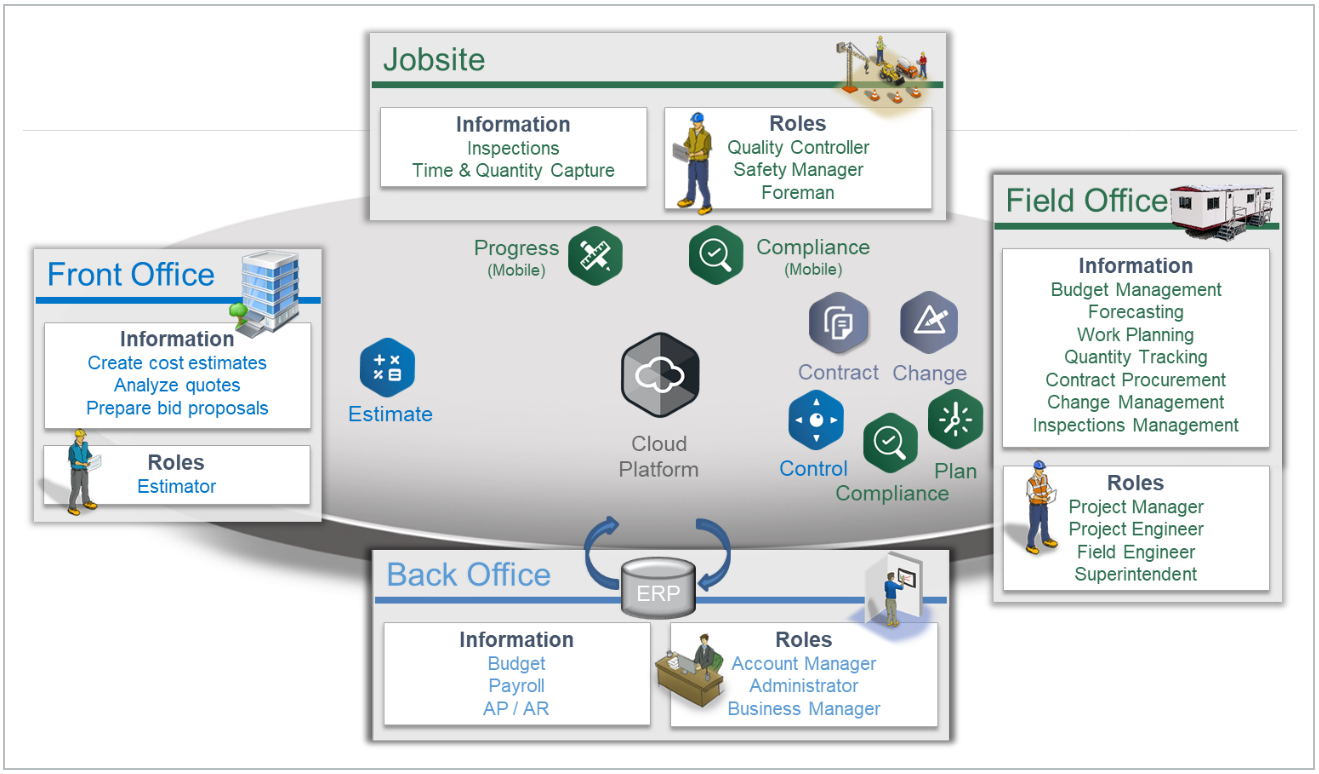


In **InEight Control**, project engineers and managers can view all the actual quantities and costs from the jobsite and analyze the information to determine if they are going to meet their budgets. If, after review, they see that a few operations are spending more time and money due to weather delays, they can decide to update the forecasts for those operations accordingly.

They also look at the total quantities for the month to determine how much of the scope can be billed to the client.

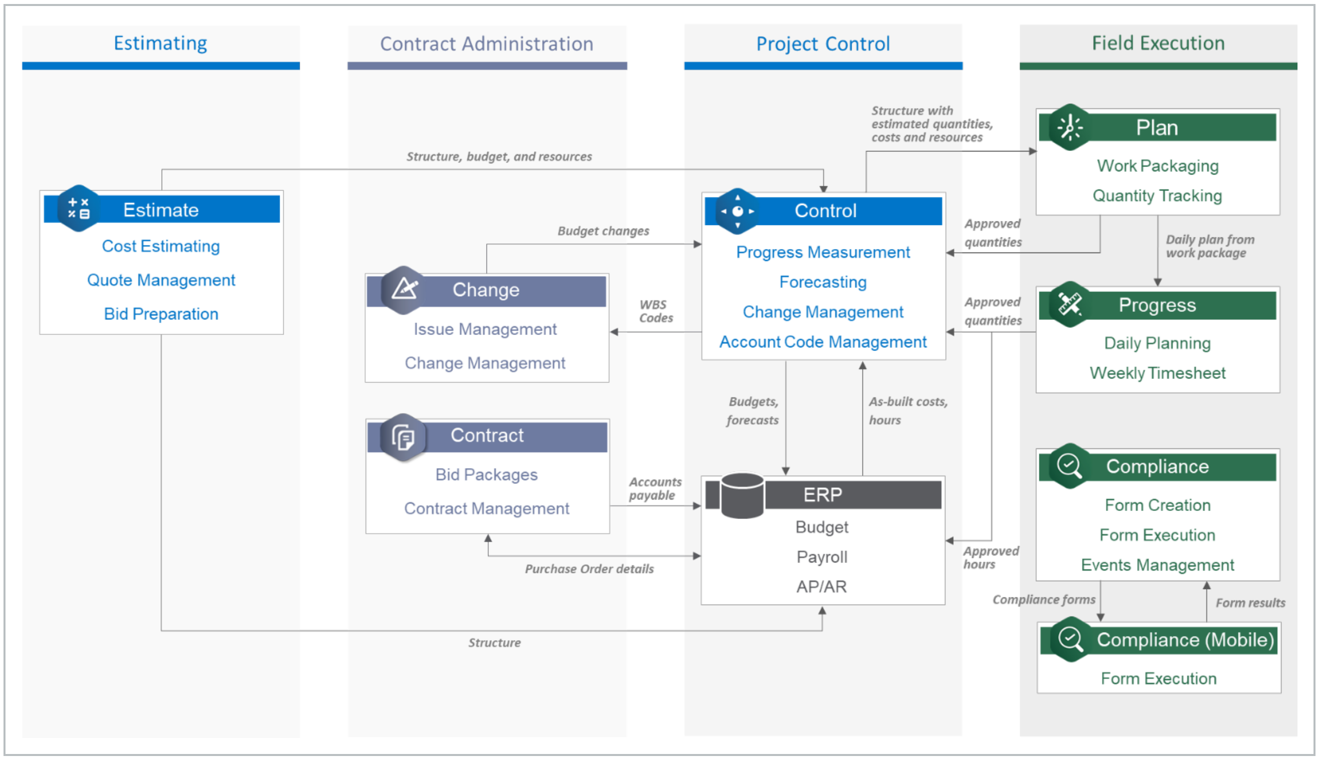
1.1.4 Summary

No matter what location you are in or what role you have, the information created for your project is communicated to all the InEight cloud platform applications and shared through the Cloud Platform. The **InEight Cloud Platform** is also able connect and communicate to your **ERP system** and other 3rd party applications to utilize the same information, eliminating the need to re-enter data. All this information can then be archived for future reference, and selected information can easily be turned over to the client.



1.1.5 InEight cloud platform Workflow

The following workflow diagram illustrates in greater detail what information travels between the InEight cloud platform applications and the **ERP system** and direction in which it flows.

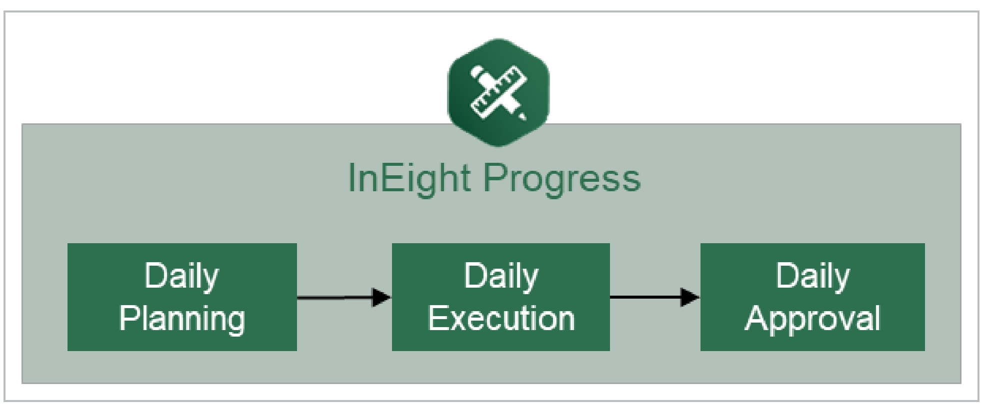


1.2 INEIGHT PROGRESS OVERVIEW

InEight Progress is one of the applications within the InEight portfolio of products, and is an integrated electronic time, equipment, and quantity data capture tool.

1.2.1 InEight Progress phases

There are three specific phases in the application: Planning, Execution, and Approval.



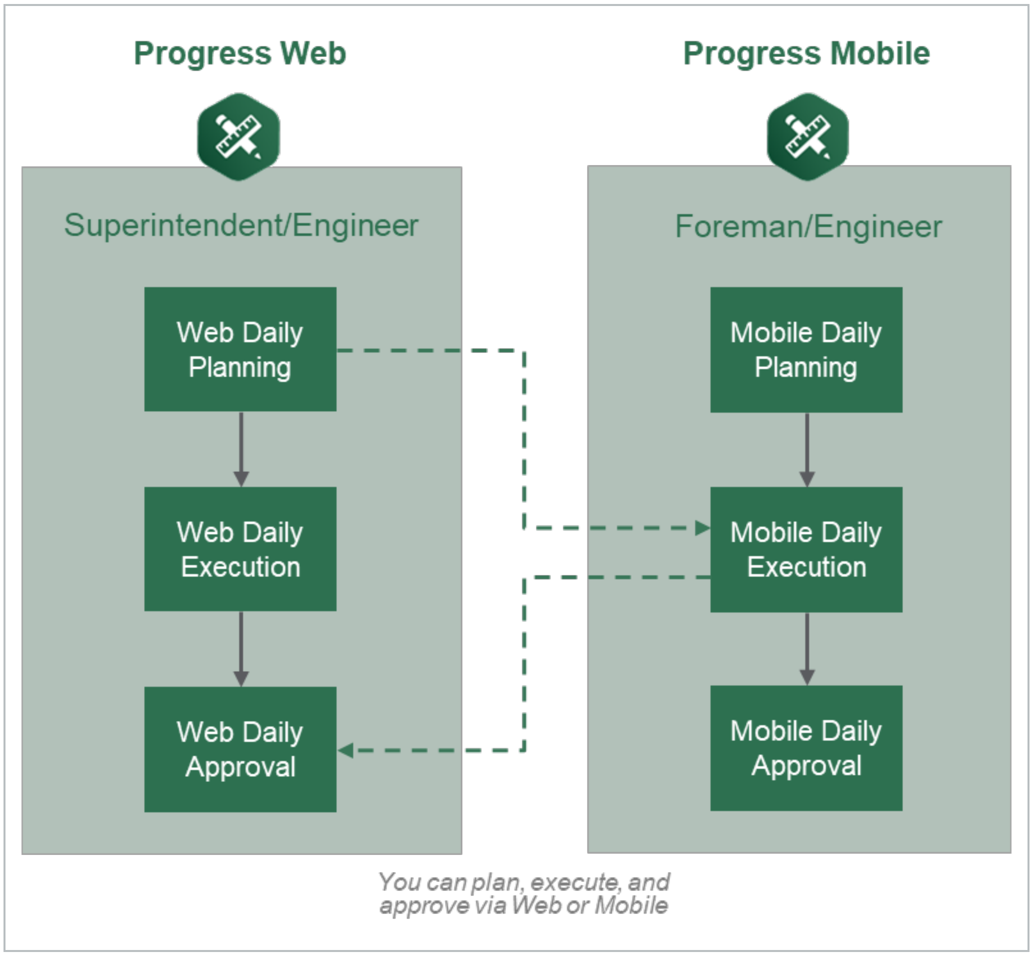
A daily plan is created by a project member to specify the tasks to be completed and to help ensure productivity targets are met. These details are entered in the Daily Planning Phase and provide streamlined communication from the office to the field. Once all the details are entered and the daily plan is complete, the daily plan is submitted to the Daily Execution Phase.

In the Daily Execution Phase, a project member takes the daily plan out in the field and references it throughout the day. As work is completed, the project member enters actual hours worked for employees and equipment. He or she also enters installed quantities, notes/issues and/or pictures to document issues and reviews the overall productivity. By claiming installed quantities and entering actual hours worked as they happen, the project member can view productivity in real-time. Once all employees have reviewed their hours worked and signed out of the application, the daily plan is submitted for approval.

In the Daily Approval Phase, a project member reviews the actual tasks, employees, equipment, hours, quantities and productivity for the plan. In this phase, the hours and/or quantities can be approved as is, or if the approver would like something changed, the plan can be edited or sent back to the Execution Phase.

1.2.2 Daily Plan Work Flow

For all phases of the Daily Planning Process, InEight Progress Mobile communicates directly with the InEight Progress Web application, as shown in the diagram below:

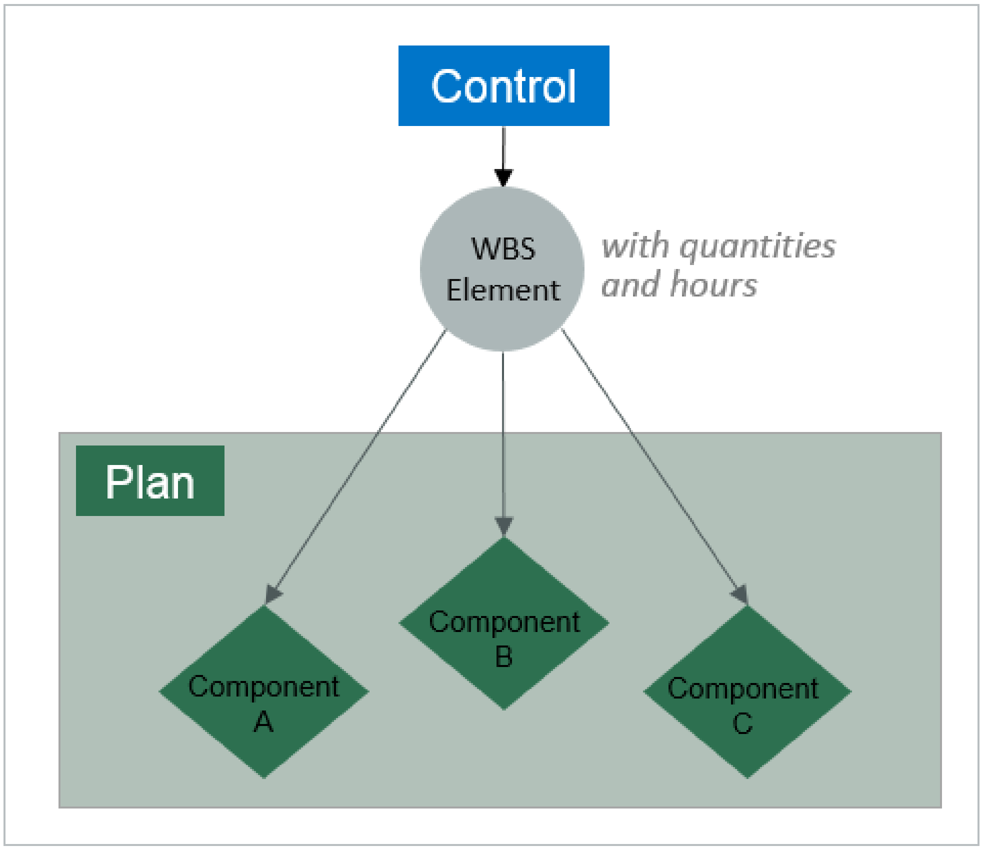


A daily plan can be accessed in either program in any of the phases of daily planning. The program used for a phase may vary from project to project and depends largely on the roles of the project members involved. For example, it may be preferable to have a staff member such as a superintendent or engineer complete daily planning in the InEight Progress web application because they prefer to work from a computer in an office location. The Execution Phase of that same daily plan may be completed by a foreman who spends his or her entire workday out on the jobsite without access to a computer. In this case the Execution Phase is completed in the InEight Progress mobile application. Finally, the superintendent or engineer may also be responsible for approval of the daily plan which would again be completed in the InEight Progress Web application from the office computer.

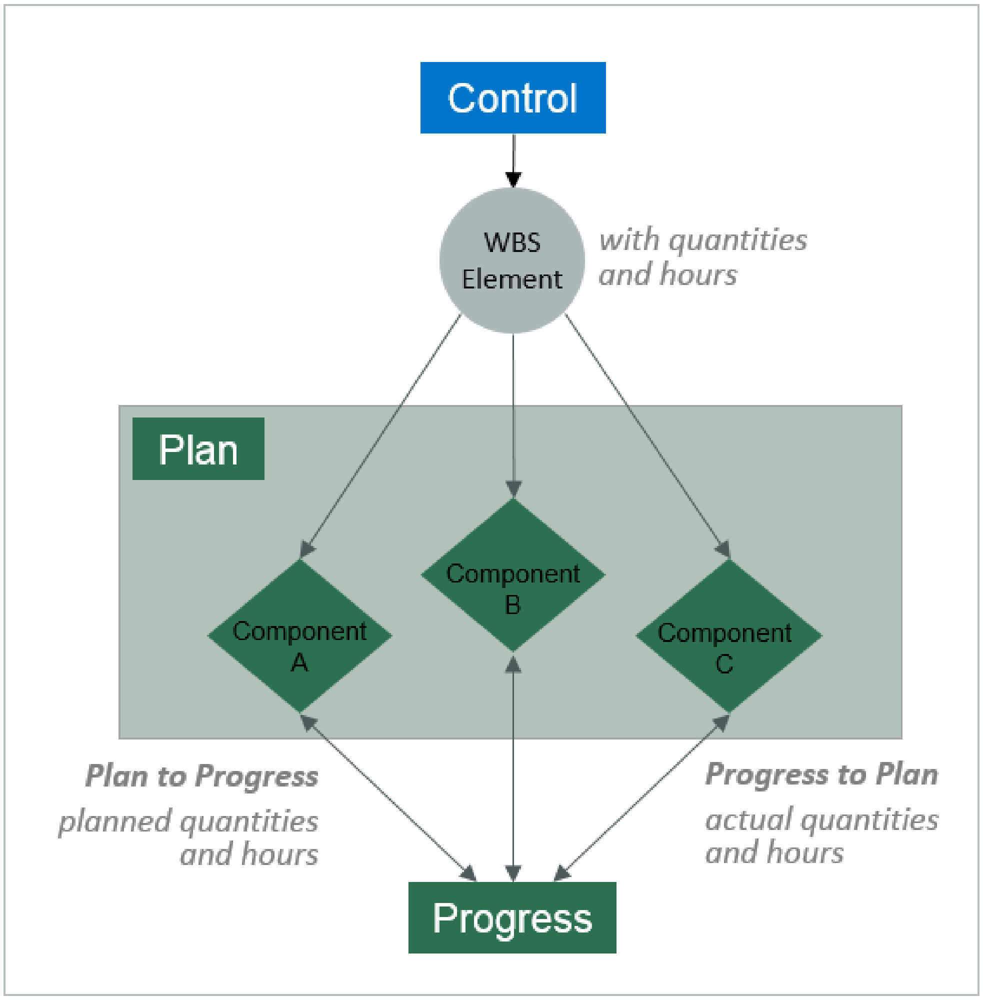
TIP	Mobile Daily Planning has all the same functionality as Web Daily Planning for InEight Progress, but is available as a mobile-only application.

1.2.3 InEight Control Integration

WBS (work breakdown structure) elements are used to link the quantity, hours and cost captured in InEight Progress with the cost elements in InEight Control. InEight Control communicates the WBS Structure (including budgeted quantities, hours and cost) with InEight Plan. InEight Plan then assigns WBS elements to components.



InEight Progress uses the component quantities along with actual hours to determine productivity.



This lesson provides an overview of InEight Progress and the subsequent lessons will expand on the InEight Progress functionality in more detail.

1.2.4 Daily Planning

Daily planning offers specific functionality for project members to create, view, or change daily plans as needed. Daily plans allow you to select specific components and resources (labor and equipment) from a work package and assign it in daily production increments.

Daily Planning is completed by navigating through the six tabs in the navigation bar at the top of the screen:

- **Overview** – Modify or enter plan details, approvers, and executors
- **Details** – Enter planner notes at tool box talk items
- **Time Sheet** – Select tasks and resources and assigned planned hours

- **Quantities** – Select specific components and specify planned installation quantity
- **Notes/Issues** – Enter any additional plan notes/issues including photos if needed.
- **Productivity** – Review planned productivity and compare against current budget or estimate

NOTE A foreman can also use mobile daily planning to change an existing daily plan. If the plan changes from the original plan, a foreman can still make changes to the daily plan.

1.2.5 Daily Execution

Daily execution allows you to capture actual hours, quantities, notes/issues, and productivity. You can document the number of hours worked for each employee and machine assigned to a specific task. (For hourly rates, you can document standard time (ST), over time (OT), or double time (DT).

You can claim the quantity completed and see the productivity for the day. You can also add notes and pictures. Once you complete the entries, you can sign out employees and fill out compliance questionnaires. This is commonly used to ensure at sign off that employees are not injured while at work.

Daily execution is completed by navigating through the six tabs in the navigation bar at the top of the screen:

- **Overview** – Review plan details, approvers, and executors
- **Details** – Review planned tasks, planner notes and tool box talk items
- **Time Sheet** – Enter actual hours worked and assign to tasks and resources
- **Quantities** – Enter actual components and indicate installed quantity
- **Notes/Issues** – Enter any notes/issues and photos related to execution of the work
- **Productivity** – Review actual productivity and compare with current budget, estimate and planned production rates
- **Sign Out** – Review employee hours, enter sign out pin or signature and answer compliance questions

1.2.6 Daily Approval

Daily approval allows you to review actual hours, quantities, notes/issues, and productivity that were entered during the execution phase. This is the last chance to review this information before the hours are sent to the ERP payroll system and quantities are claimed in InEight Progress.

There are 3 options in the Approval Phase:

- **Approve** - Quantities and hours can be approved independently or all at once
- **Edit** – The daily plan can be further edited by the Approver to change specific details such as tasks, resources, hours and quantities
- **Reject** – Sends the daily plan back to Execution Phase to allow the Executor to revise the plan and resubmit

NOTE All tabs from the Execution Phase can be viewed in the Approval Phase.

1.2.7 Work Flow Beyond InEight Progress

When quantities are approved in Progress, they can be brought into the InEight Control application (initiated within InEight Control).

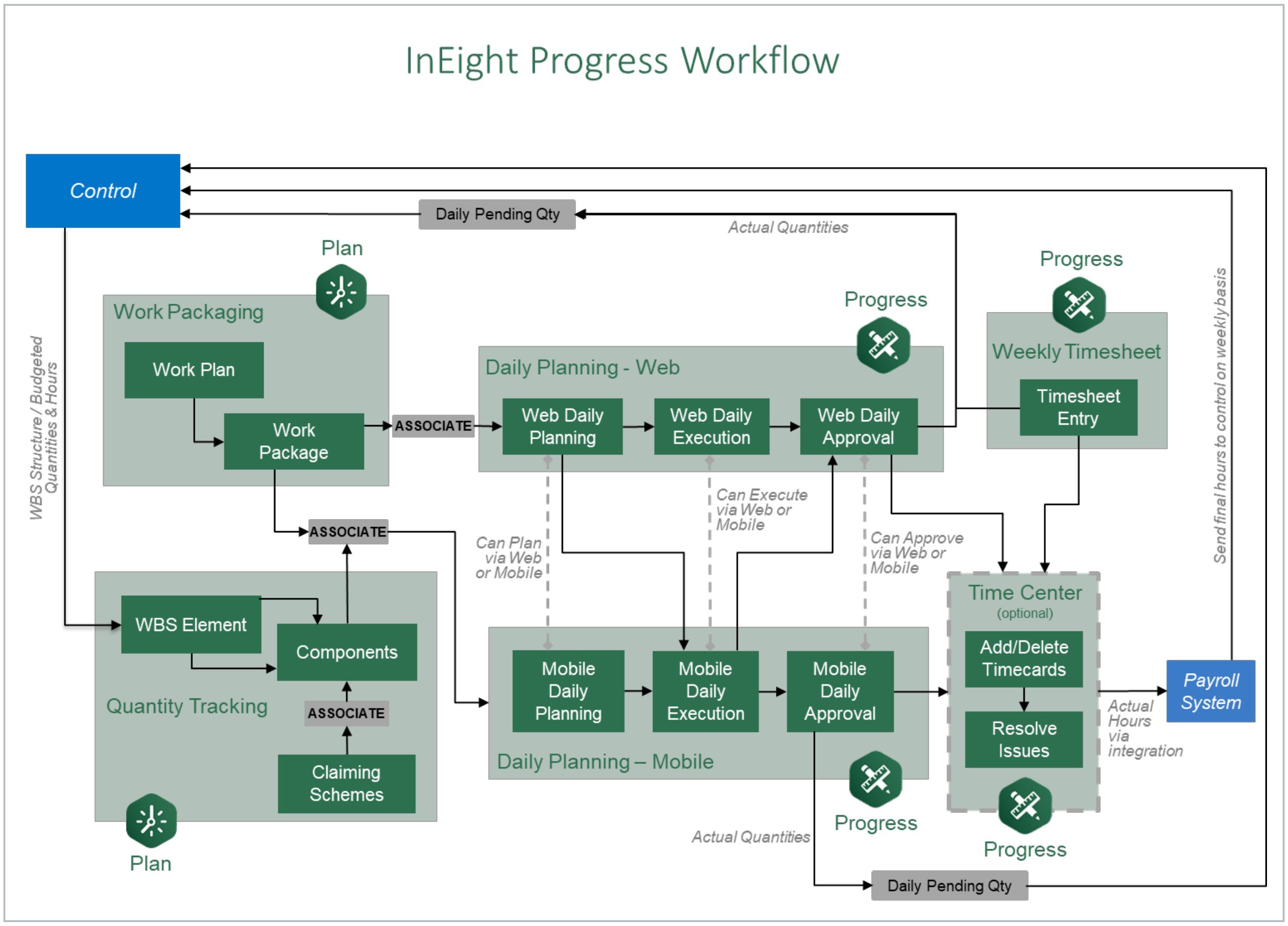
1.2.7.1 Hours

When hours are approved, the hours are sent to your payroll system. Once ERP payroll has processed the hours, as-built hours and costs can then be pulled into InEight Control from ERP payroll (again initiated in InEight Control).

1.2.7.2 Quantities and Costs

Bringing actual installed quantities and as-built costs into InEight Control allows you to monitor and compare actual costs and productivity against budgets for all cost accounts. It also helps provide accurate information to accurately forecast costs.

The following diagram illustrates the workflow of InEight Progress in relation to other products within the InEight portfolio and the ERP system. You will reference this diagram throughout the course.



InEight Progress Workflow
Control
Daily Pending Qty
Actual Quantities
Plan
Work Packaging
Work Plan
Work Package
ASSOCIATE
Progress
Daily Planning - Web
Web Daily Planning
Web Daily Execution
Web Daily Approval
Progress
Weekly Timesheet
Timesheet Entry
WBS Structure / Budgeted Quantities & Hours
Send final hours to control on weekly basis
ASSOCIATE
Can Plan via Web or Mobile
Can Execute via Web or Mobile
Can Approve via Web or Mobile
Time Center
(optional)
Add/Delete Timecards
Resolve Issues
WBS Element
Components
Quantity Tracking
ASSOCIATE
Claiming Schemes
Mobile Daily Planning
Mobile Daily Execution
Mobile Daily Approval
Daily Planning – Mobile
Payroll System
Actual Hours via integration
Progress
Progress
Plan
Actual Quantities
Daily Pending Qty

Lesson 1 Review

1. InEight Progress is a tool to capture _____?
    a. Quantity take off
    b. Schedule progress
    c. Daily time, equipment & quantities
2. You can complete Planning, Execution and Approval Phases on which of the following platforms?
    a. Web (InEight Progress)
    b. Mobile (InEight Progress)
    c. Both
3. You enter actual employee hours in which daily planning phase?
    a. Planning
    b. Execution
    c. Approval

Lesson 1 Summary

As a result of this lesson, you can:

- Summarize the purpose of the InEight cloud platform
- Describe the purpose of InEight Progress
- Explain the general workflow for InEight Progress

InEight® PROGRESS

LESSON 2 – GENERAL NAVIGATION

Lesson Duration: 45 minutes

Lesson Objectives

After completing this lesson, you will be able to:

- Log in and load a daily plan
- Navigate through the Daily Planning, Execution, and Approval phases
- Explain what each sync symbol represents

NOTE	This lesson covers general navigation in the Progress **Mobile** application. While there are some slight differences in the Progress Web application, most of the functionality is the same in both mobile and web.

Lesson Topics

2.1 MOBILE OVERVIEW

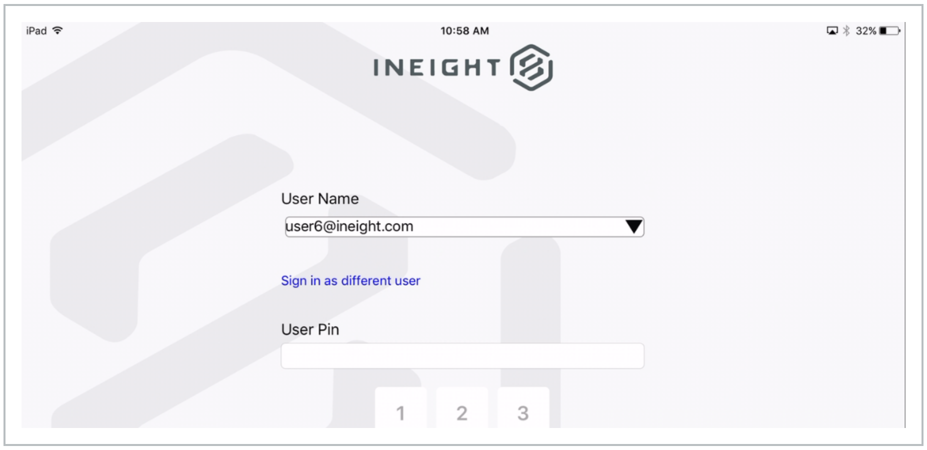
2.1.1 Login

InEight Progress Mobile is a mobile application only and must be installed on an Apple iPad device to be used. Once installed, you take the following steps to log in to the application:

2.1 Step by Step 1 — Log into InEight Progress

1. From the home screen, open the **InEight Progress** application.

2. In the **User Name field**, enter the email provided by your manager.



3. In the **User Pin field**, enter the password provided by your manager.
    - InEight Progress automatically syncs on the initial login. After syncing, the available projects assigned to the user are listed

2.1.2 Kiosk Mode

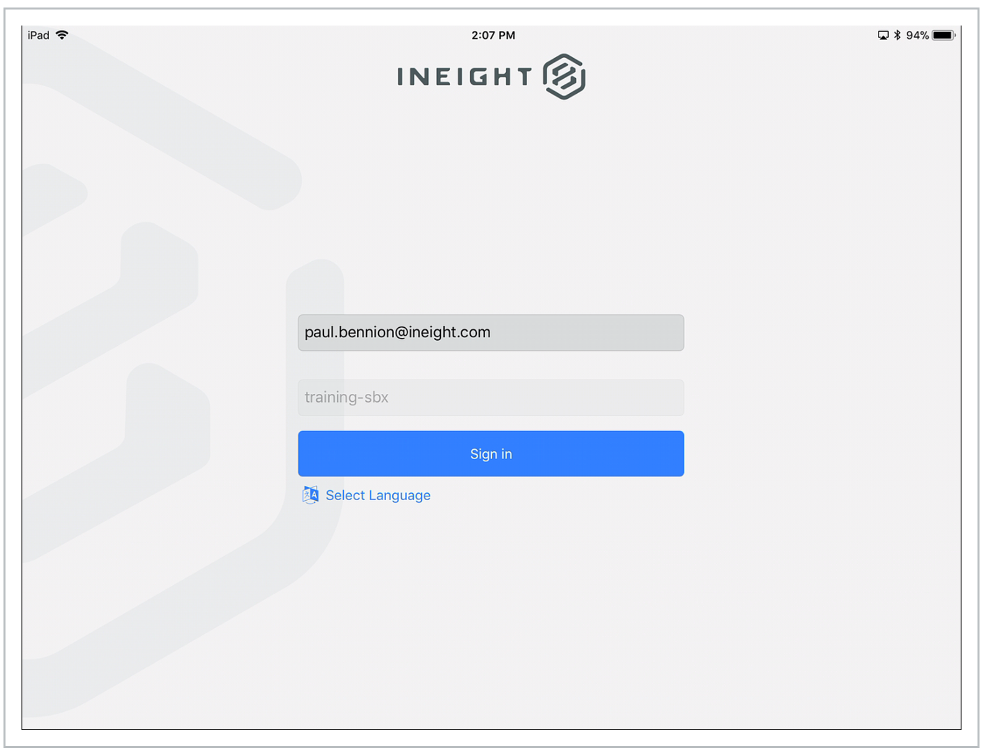
Progress mobile allows multiple users to log in on the same device using Kiosk Mode, so that only one device is needed for multiple users to perform their daily activities.

- Users can log in whether they have the same or differing roles
- When a different user logs in, it does not affect the existing logged in user
- The user logged in at the time will only see their own data

2.1.2.1 Kiosk Workflow

When a previous user logs out, the new user is presented with a login screen that includes a hyperlink to **Sign in as different user**.

Selecting the option to sign in as a different user will take you to a new login screen where you can input your email and sign in for the first time on the device.



Once you have logged in, the next time you use the device you can select your email from a drop-down list and then sign in.

2.1.3 Project List

Scenario

> Paul is an electrical superintendent on a project. Earlier that afternoon, he asked his foreman to create a daily plan for tomorrow's work. At the end of the day Paul sits down to review the plan the foreman created.

Navigating through InEight Progress is straightforward. First, you select a project and then create and/or execute a daily plan. The following sections walk you through the process.

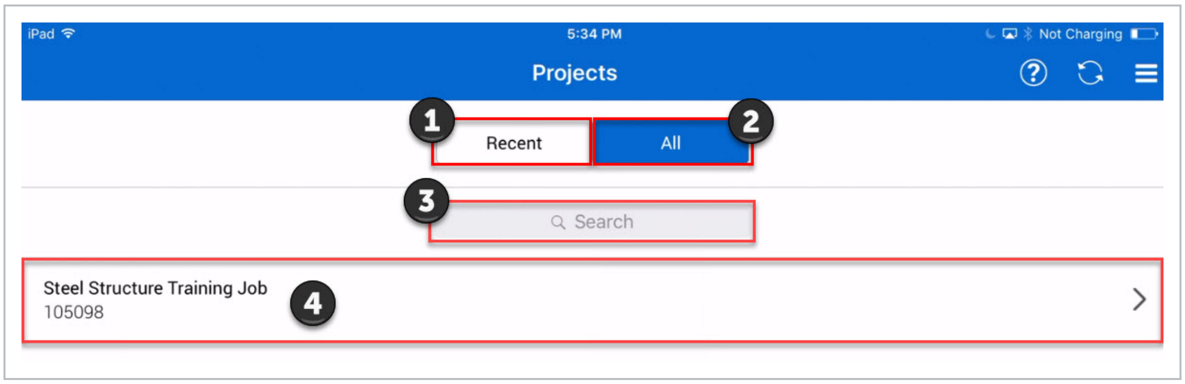
The project list shows all projects available for you. You must have the role of Superintendent, Engineer or Foreman assigned in the InEight cloud platform under Suite Administration > User Management, for a project to appear in the project list.

Overview – Project List

Title		Description
1	Recent	Select to view all projects that you have opened before.

Overview – Project List (continued)

	Title	Description
	Projects	
2	All Projects	Select to view all projects you are assigned to.
3	Search Bar	Only appears when viewing all projects. Allows you to filter down the project list by typing any part of the project number or description in the search field.
4	Project List	List of projects to choose from. To open a project, simply tap on that project in the list.



2.1.4 Plan List

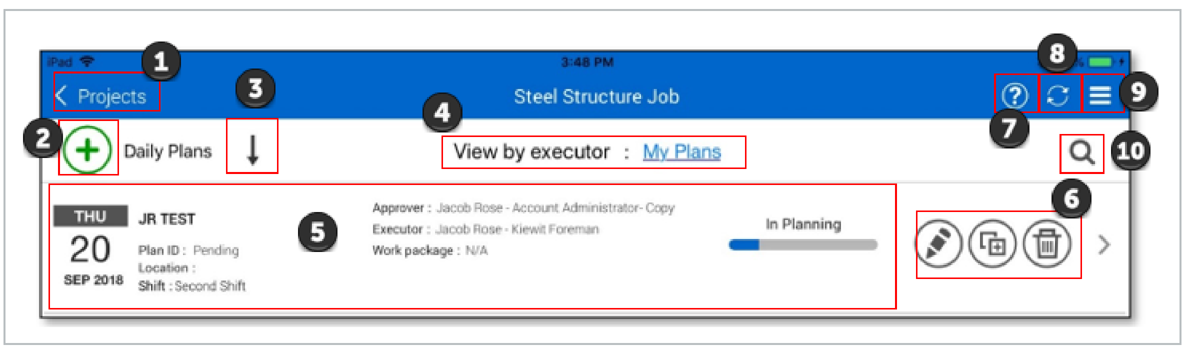
The plan list shows all the daily plans already created and assigned to you within a specified date range. You can configure the date range in the project settings, but the default is ten days in the past and five days in the future. Tapping on an existing plan opens that plan.

Overview – Plan List

	Title	Description
1	Project List	Takes you back to the Project List.
2	Create Daily Plan	Select this to create a new daily plan.
3	Sort	Toggles sort between ascending and descending dates.
4	View by	Allows you to view plans assigned to a specific foreman.

Overview – Plan List (continued)

	Title	Description
	Executor	
5	Plan Header Details	Displays plan name, date, shift, location, superintendent, engineer, foreman, work plan and status. Tapping on this section will open the plan.
6	Edit / Copy / Delete	Allows you to edit, copy or delete a plan.
7	Help Overlay	Provides explanations for key items on the current screen
8	Sync	Updates the application with the latest information from InEight Plan and pushes any changes from InEight Progress back to InEight Plan.
9	Menu	Contains quick links to the project list and sign out. Also displays the current date, app version, and date/time of last sync.
10	Search	Free text search bar to find daily plans by plan name.



TIP	Selecting a work plan ID will sync all components associated with that plan to the iPad for use in offline mode.

TIP	You can copy daily plans in the plan list. This is especially useful when completing repetitive work that will span multiple days.

2.2 DAILY PLANNING

To navigate through the Daily Planning Phase, you will tap and complete each tab in the navigation bar.

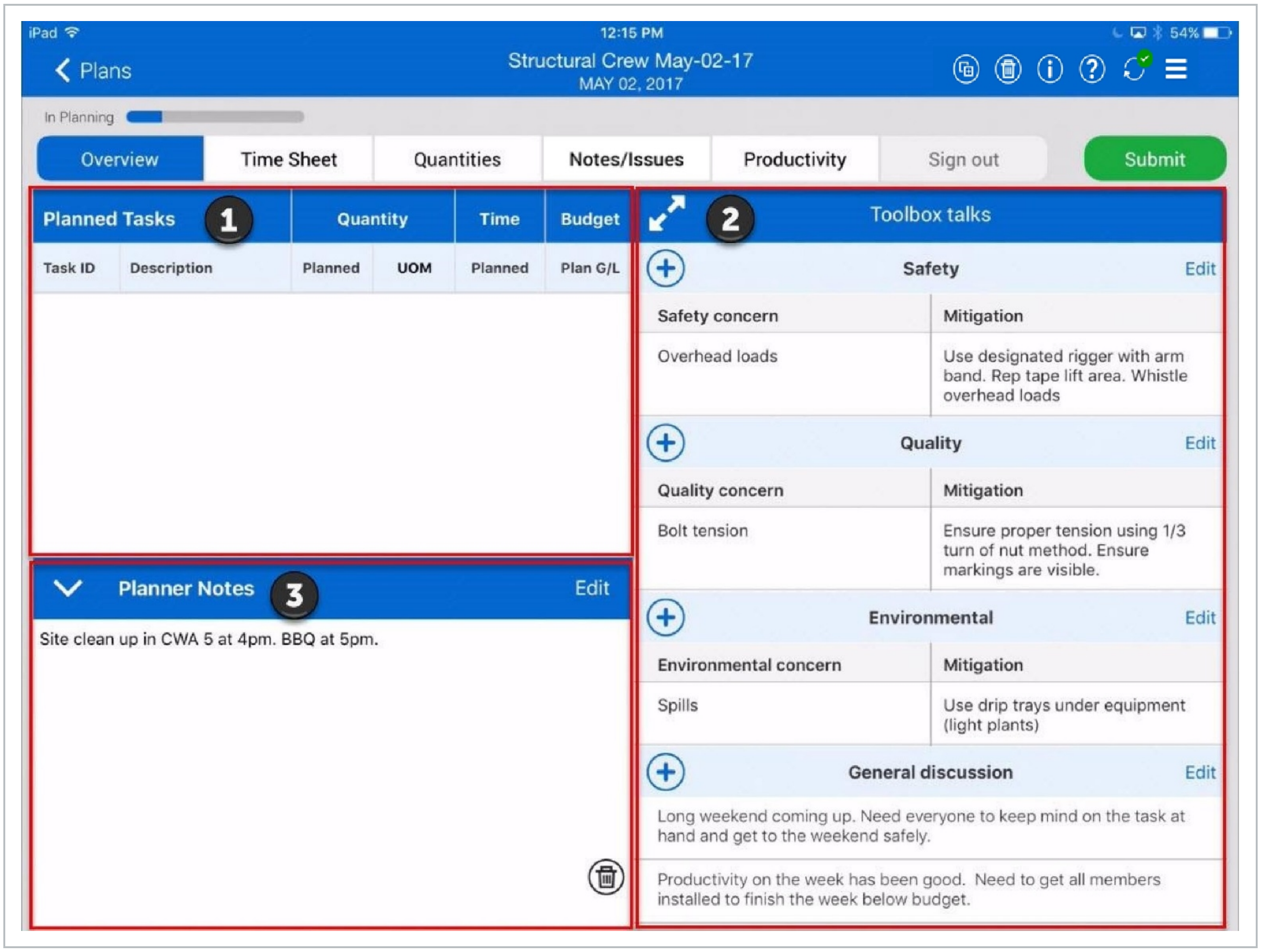
TIP While in the Planning Phase, the screen is highlighted with a blue accent. When in the Execution Phase, this changes to green. This helps to remind yourself which phase of the process you are in.

2.2.1 Overview

Once a daily plan is created, you are taken to an Overview screen. Initially this screen is blank because you have not entered any information. The Overview screen allows you to review your daily plan before starting work and includes the following information:

Overview – Overview Tab

Topic		Description
1	Tasks	Include the planned quantity, man-hours and budget gain/loss (G/L).
2	Tool Box Talks	Provide key information including general discussion, safety, quality, and environmental considerations.
3	Planner Notes	Provides space for additional notes related to the plan.



On the Overview tab, you can:

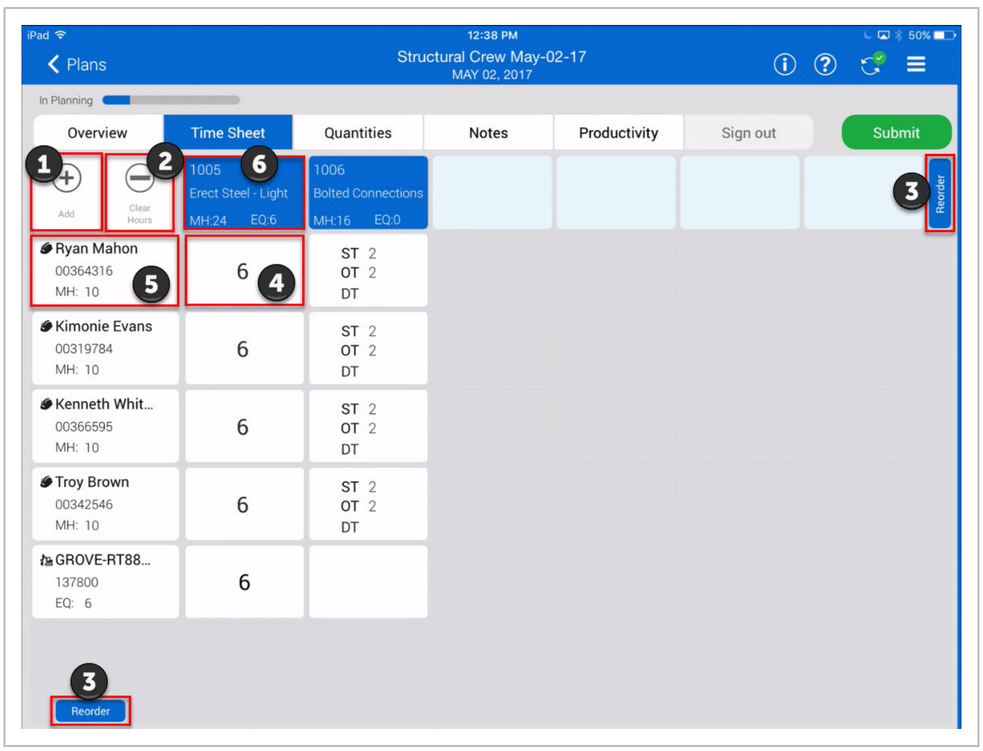
- Add tool box talk items by tapping the  icon
- Tap the  icon to expand to a larger view
- Minimize planner notes by tapping the  icon

2.2.2 Time Sheet

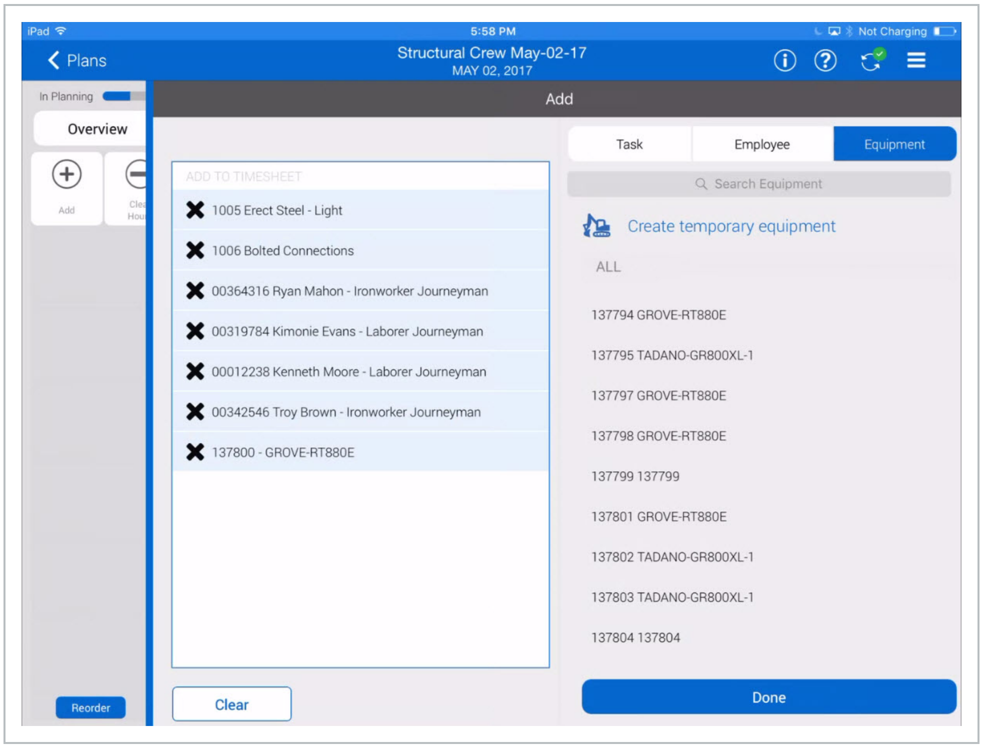
On the Time Sheet tab, you can enter all your tasks, employees and equipment and assign hours to each. The table below explains key navigation points.

Overview – Time Sheet Tab

	Title	Description
1	Add	Tap here to add tasks, employees and equipment. (Further explained below.)
2	Clear Hours	Tap here to clear all hours from the time sheet.
3	Reorder	Tap here to reorder tasks, employee and equipment in the time sheet.
4	Enter Hours	Tap here to enter hours (ST, OT, DT) for employees and equipment.
5	Employee / Equipment Details	Tap here to mark attendance, enter extra pay, add notes, delete row, or clear hours.
6	Task Details	Tap here to enter total task planned hours, add notes, swap task or delete task.



When adding tasks, employees, or equipment, the Add slide out panel appears as shown below.



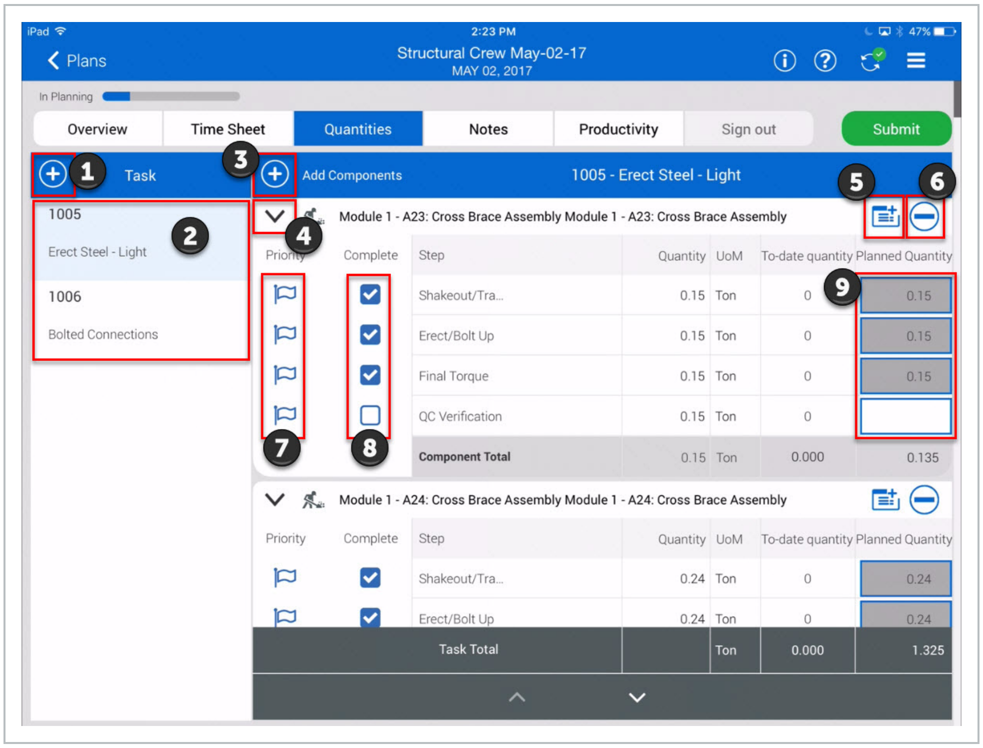
- View your lists of all available tasks, employees and equipment by tapping on the appropriate tab at the top of the window
- Once selected from a list, items appear on the left-hand side of the window under Add To Time Sheet as shown above
- Tapping on the **X** next to an item removes it from the list
- If an item you require is not available in the list, you can add a temporary task, employee or equipment by selecting **Create Temporary Task**, **Create Temporary Employee**, or **Create Temporary Equipment**
- When you are satisfied with the list to be added to the Time Sheet, tap **Done** to return to the time sheet

2.2.3 Quantities

In the Quantities tab, you select components for each task. If you plan to use claiming rules with multiple steps, you can choose which steps you plan to complete. You can also indicate which components are higher priority.

Overview – Quantities Tab

	Title	Description
1	Add Task	Tap here to add additional tasks. Resource hours must be assigned back in the Time Sheet tab.
2	Select Task	Tap here to display components for the selected task.
3	Add Components	Tap here to add components by selecting from a list.
4	Expand / Collapse	Tap here to expand and collapse individual component details.
5	Add Note	Tap here to add a note associated with an individual component.
6	Delete Component	Tap here to delete a component.
7	Priority	Tap here to mark a component step as a priority.
8	Complete	Tap here to select a component step to complete as part of the daily plan and add the corresponding quantity to the planned quantity.
9	Planned Quantity	Tap here to enter the planned quantity for a component step, providing the planned quantity does not exceed the component quantity.

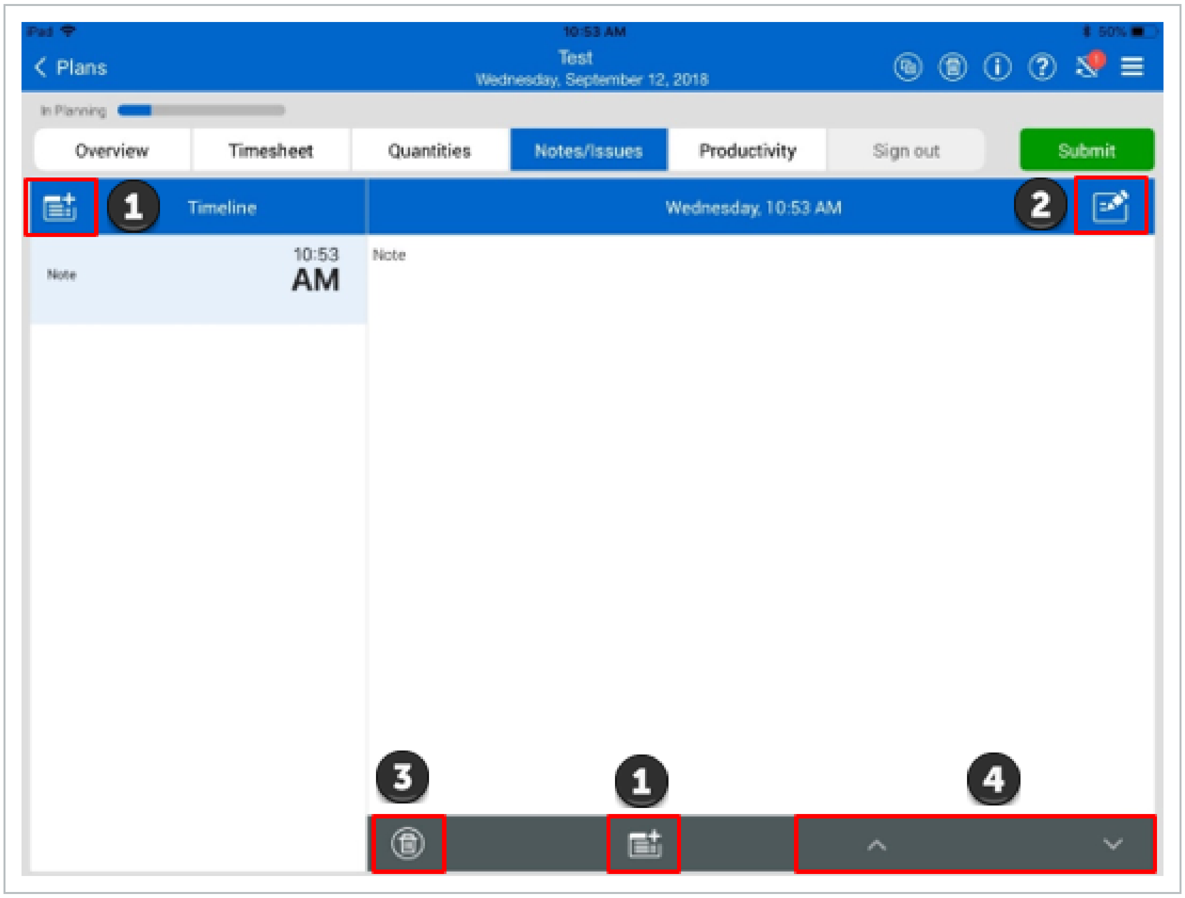


2.2.4 Notes/Issues

The Notes/Issues tab is where you can enter additional information regarding a task or component for the crew to be aware of when they execute the plan. You can add safety, quality control, environmental, subcontract, and other information. If an issue is added it will automatically show up on the issue log in the change management portion of the contract module.

Overview – Notes/Issue Tab

Title		Icon	Description
1	Add		The Add button allows you to add a note or issue under the Notes/Issues tab.
2	Edit		The Edit button allows you to make changes to an existing note.
3	Delete		The Delete button allows you to remove existing notes.
4	Arrow Up Arrow Down		The Arrow button allows you to navigate through the list of notes up or down.



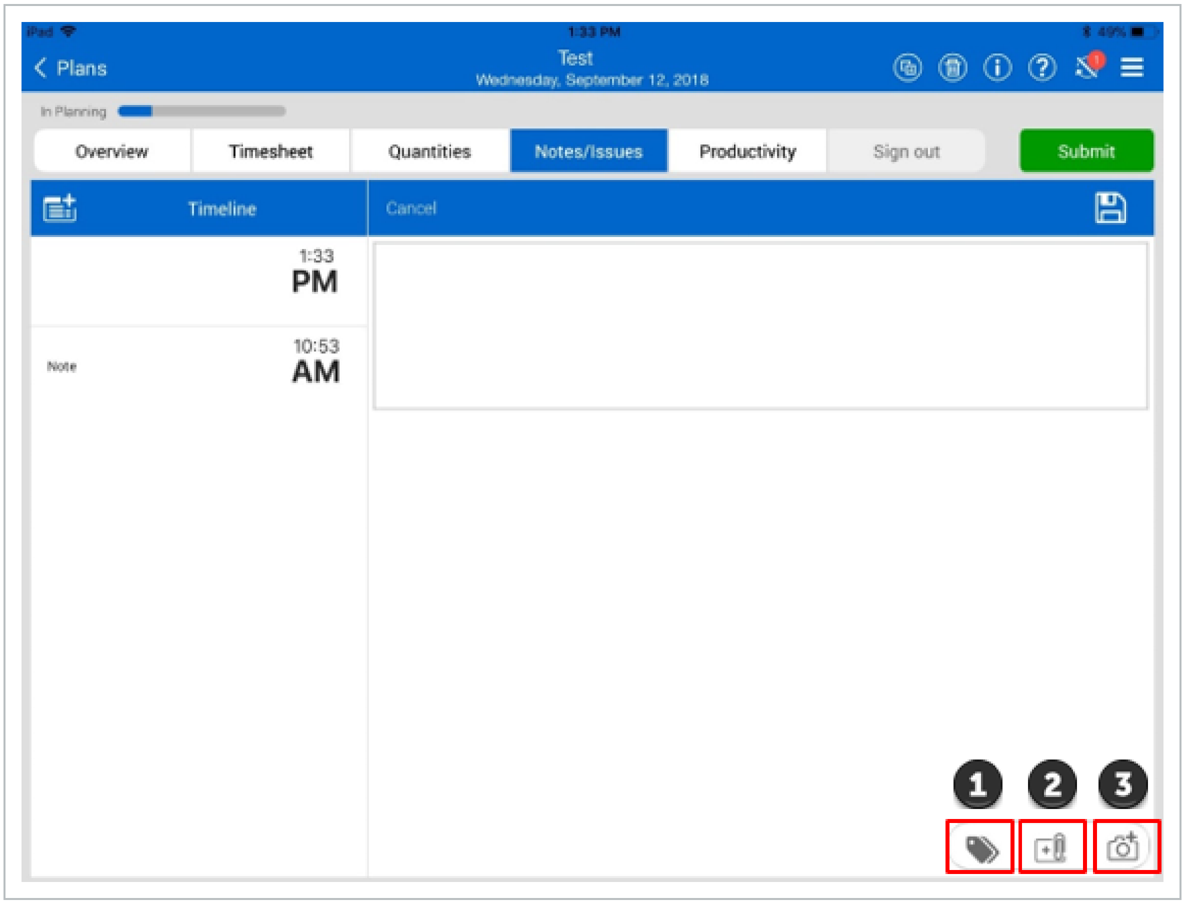
When you add a new note or issue, three icons will appear at the bottom. The following overview explains these icons.

Overview – Tags & Associations

Title		Icon	Description
1	Tags		The Tags button allows you to add tags to your notes. The following tags are available: • Safety • Quality • Environmental • Extra Work/Changes • Delay • Production Notes
2	Associations		The Associations button allows you to associate the note with a specific task, employee, equipment, or components.

Overview – Tags & Associations (continued)

Title		Icon	Description
3			The Photo button allows you to add a picture to a note. The photo can either be taken from the device's camera or from the saved photos on the device.

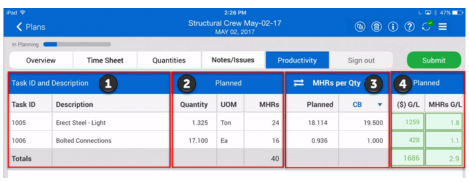


2.2.5 Productivity

The Productivity tab is where you can review the planned quantity and man-hours and compare against the current budget or current estimate rates.

Overview – Productivity Tab

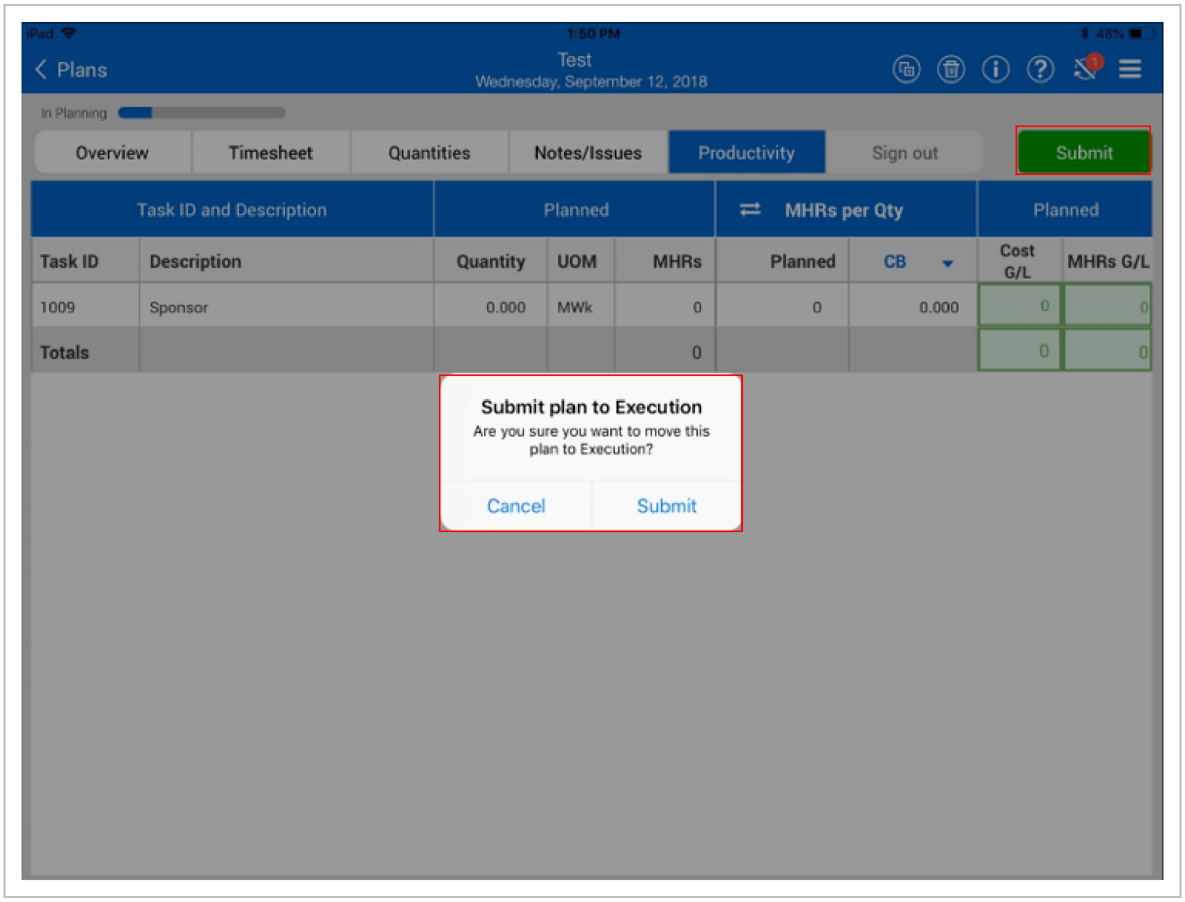
	Title	Description
1	Task ID and Description	Indicates the tasks planned for the crew to perform that day.
2	Planned	Displays the plan information you entered in the Quantity tab (quantity, unit of measure, and man-hours).
3	MHRs per Qty	Compares the planned values to the current budget values.
4	Planned	Displays gain/loss for planned $/mhrs compared to budget.



2.2.6 Submit & Sync

After reviewing the planned information in the Productivity tab and confirming that the employees and equipment you have are accurate for the tasks, you can tap on the Submit button.

When you tap on the Submit button, a Submit Plan window appears asking if you are sure you want to move the plan to Execution.



Daily Plan information will reside in the sync platform until you hit the sync button. Once you tap on the Sync button, the Daily Plan information becomes available in the InEight Progress web application for review by the superintendent or engineer.

Scenario Recap

> Paul could review the daily plan by navigating through each tab in the navigation bar and reviewing the data in each tab.

2.3 DAILY EXECUTION

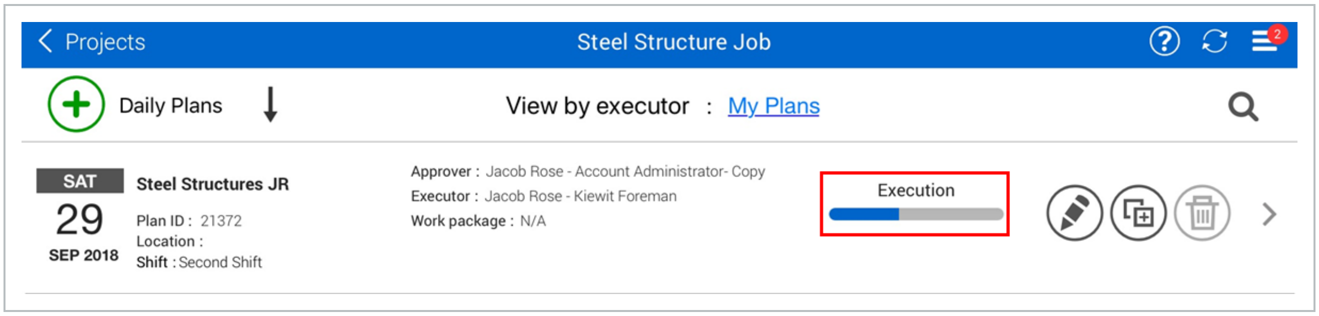
Scenario

> Steve is an electrical foreman on a project. Yesterday he created a daily plan that was reviewed by his superintendent, Paul. He is now preparing for the morning meeting and getting ready to

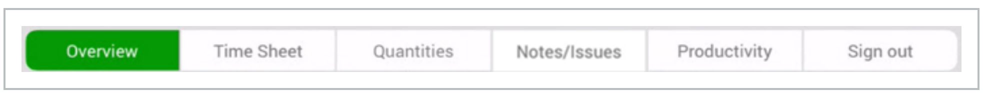
execute the daily plan.

2.3.1 Plan List

You access a daily plan from the list of daily plans. Note that the current status is now Execution.



Navigating through the Daily Execution Phase is very similar to the Daily Planning Phase. The same navigation bar appears at the top of the screen and you work though each tab to review the plan information and enter actual data. The tabs in the navigation bar are the same as in the planning phase except you are now able to access the Sign Out tab.



2.3.2 Overview

The first tab that you open to is the Overview tab. The Overview tab contains key information you would want to review with your crew at the start of the shift such as:

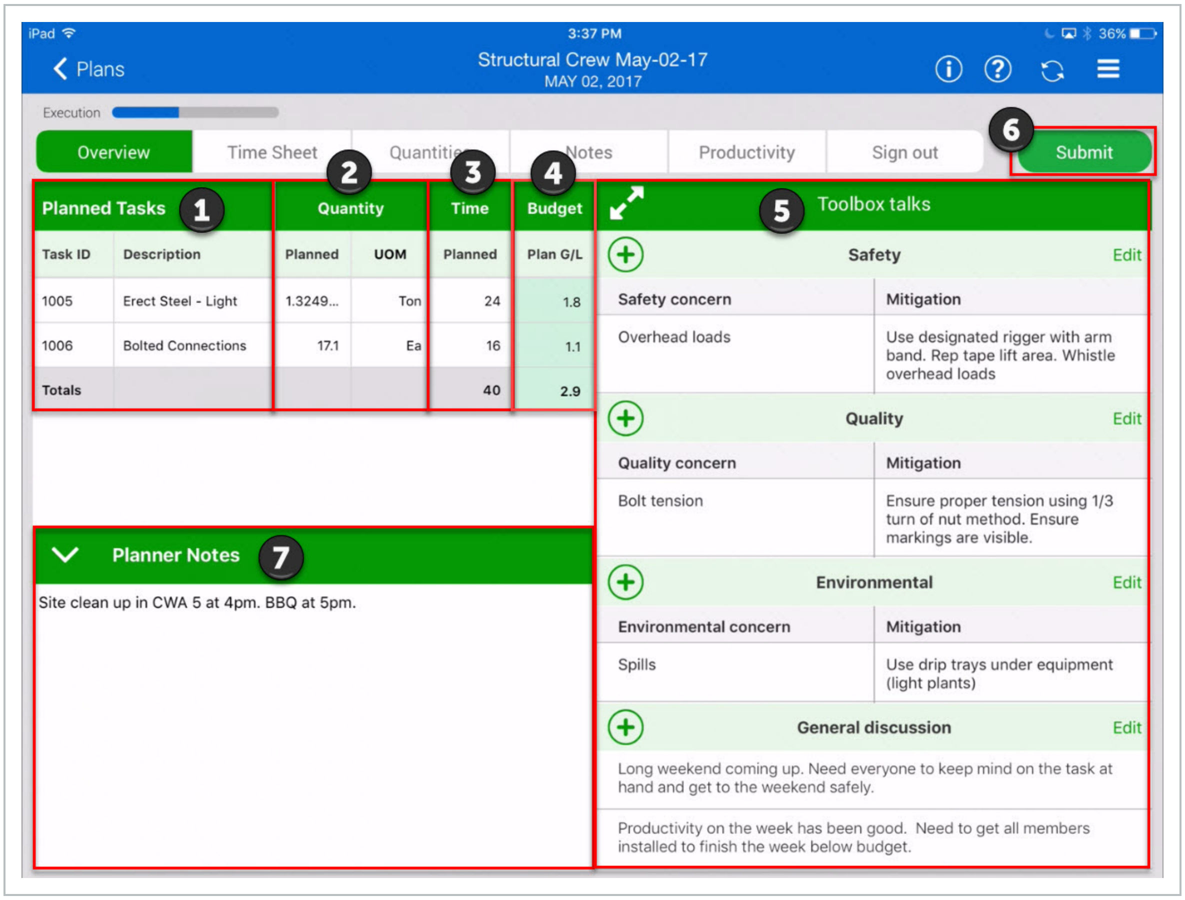
- Planned tasks
- Planned quantity for each task
- Planned budget
- Tool Box Talks (Safety, Quality, Environmental, and General Discussion)
- Planner Notes

Overview – Overview Tab

Title		Description
1	Planned	Displays the Task ID and Description of each planned task.

Overview – Overview Tab (continued)

	Title	Description
	Tasks	
2	Quantity	Displays the Planned Quantity and Unit of Measure for the task. The Planned Quantity comes from information in InEight Plan.
3	Time	Displays the planned hours for the task.
4	Budget	Displays how much cost you plan to gain versus lose when compared to the budget.
5	Tool Box Talks	Contains plan information on Safety, Quality (Quality Concern and Mitigation), Environmental (Environmental Concern and Mitigation), and General Discussion.
6	Submit	Once the plan is executed and all data has been entered, you can tap the Submit button to send the daily plan to the approval phase. You can access the submit button anytime under any tab that you are working in.
7	Planner Notes	You can enter notes pertaining to your plan in this field. For example, notes requesting for a QC inspector, etc.



2.3.3 Time Sheet

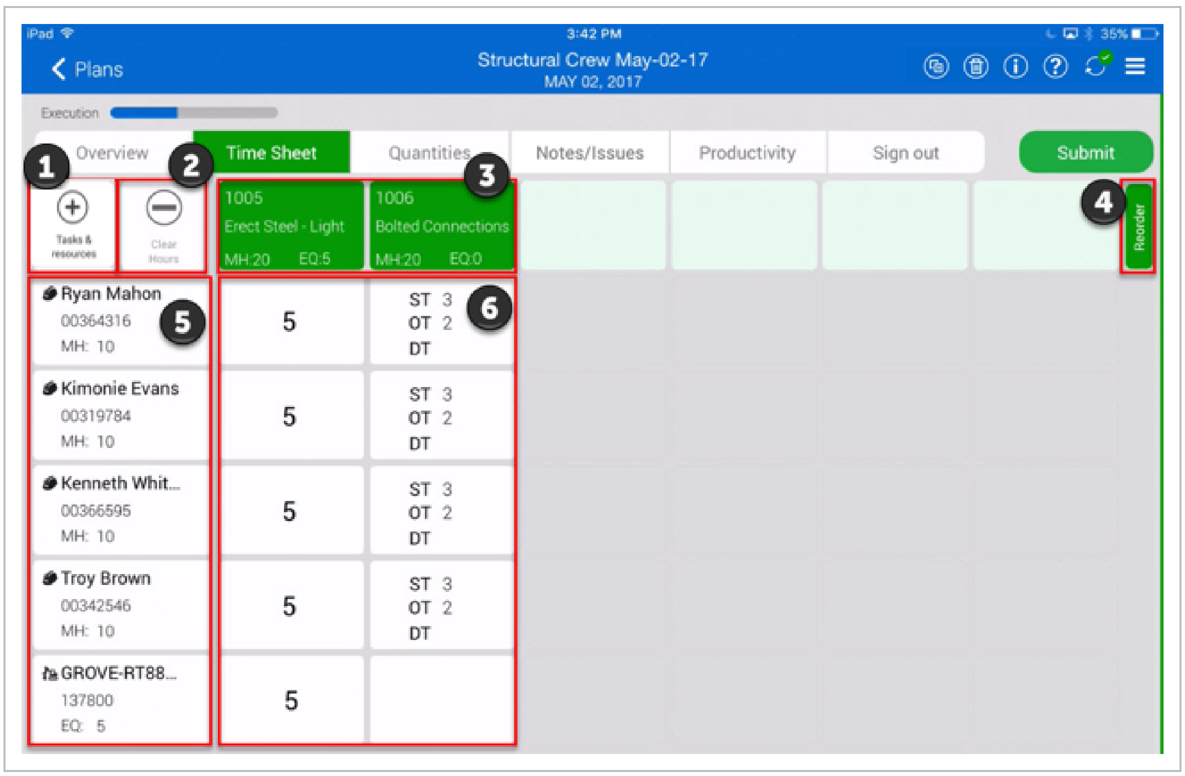
In the Time Sheet tab, the planned tasks, resources and hours are all displayed. As the day progresses you can enter in actual hours for each resource and task. If you need to add tasks or resources, you can do it here as well.

Time Sheet Tab

Title		Description
1	Add	Allows you to add additional tasks, employees, and equipment to the Time Sheet. You can also create temporary tasks, employees, and equipment.
2	Clear Hours	Allows you to clear all the hours from the Time Sheet. For instance, if you copied a daily plan and copied in the hours worked by the employees you can clear it out for the new task.
3	Tasks	The pieces of work to be completed.

Time Sheet Tab (continued)

	Title	Description
4	Reorder	Allows you to reorder the list of items in the time sheet any way you want, by tapping and dragging the item.
5	Employees & Equipment	Displays the employees and equipment assigned to the Time Sheet.
6	Hours	Displays the actual hours each employee worked.



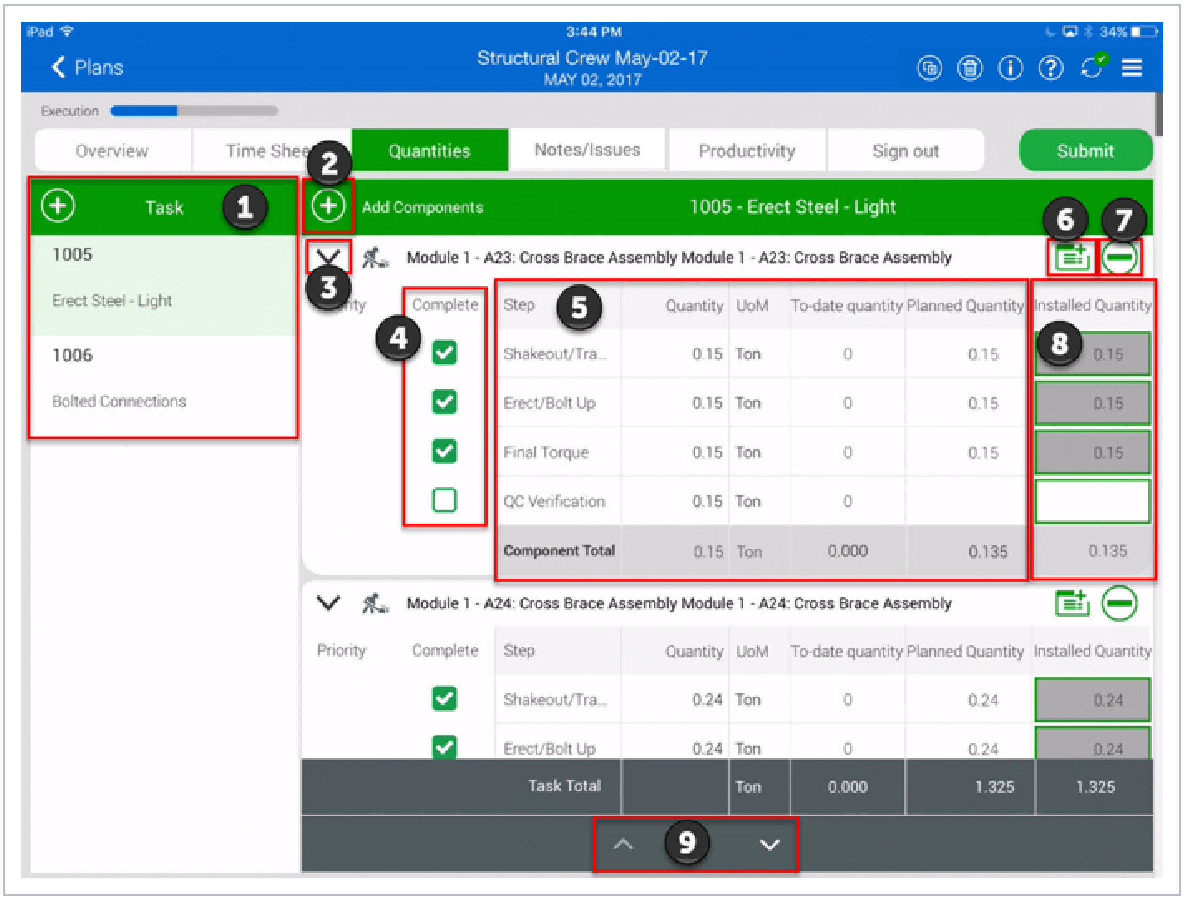
- To enter hours for equipment and crewmembers, you click on the hour box under each task and next to the crewmembers' name
- A window appears where you can enter ST (Straight Time), OT (Over Time), or DT (Double Time)

2.3.4 Quantities

In the Quantities tab, all the components that were included in the planning process for each task are shown. Actual quantities are claimed by entering the quantity or tapping the Complete check box. You can add or delete components at this point if required.

Overview – Quantities Tab

Title		Icon	Description
1	Add Task	Task	Allows you to add tasks under the Quantities tab. You can also add temporary tasks.
2	Add Components	Add Components	Allows you to add components to the Quantities tab. You can also add temporary components.
3	Expand / Collapse Icon		Selecting these icons will either expand or collapse the component details.
4	Complete Checkbox		Check this box when the component of the task is complete.
5	Component Breakdown		Displays the Planned Quantity and what is claimed to date. Displays the components or steps of the task. This area is greyed out because it is not an editable field.
6	Notes		Allows you to add notes to the components.
7	Delete		Tap this icon to remove the component.
8	Installed Quantity		Enter the numerical value of the installed quantity for each claiming step here. Checking the Complete box will auto populate this field with the total quantity.
9	Arrow Up and Down		Allows you to nav gate through the different tasks.

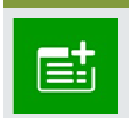


2.3.5 Notes/Issues

With the hours and quantities inputted, you also can use the Notes/Issues tab to add notes to your components or task, for example to provide additional information regarding the operation you performed for the day, the performance results, quality issues, environmental compliance and many more.

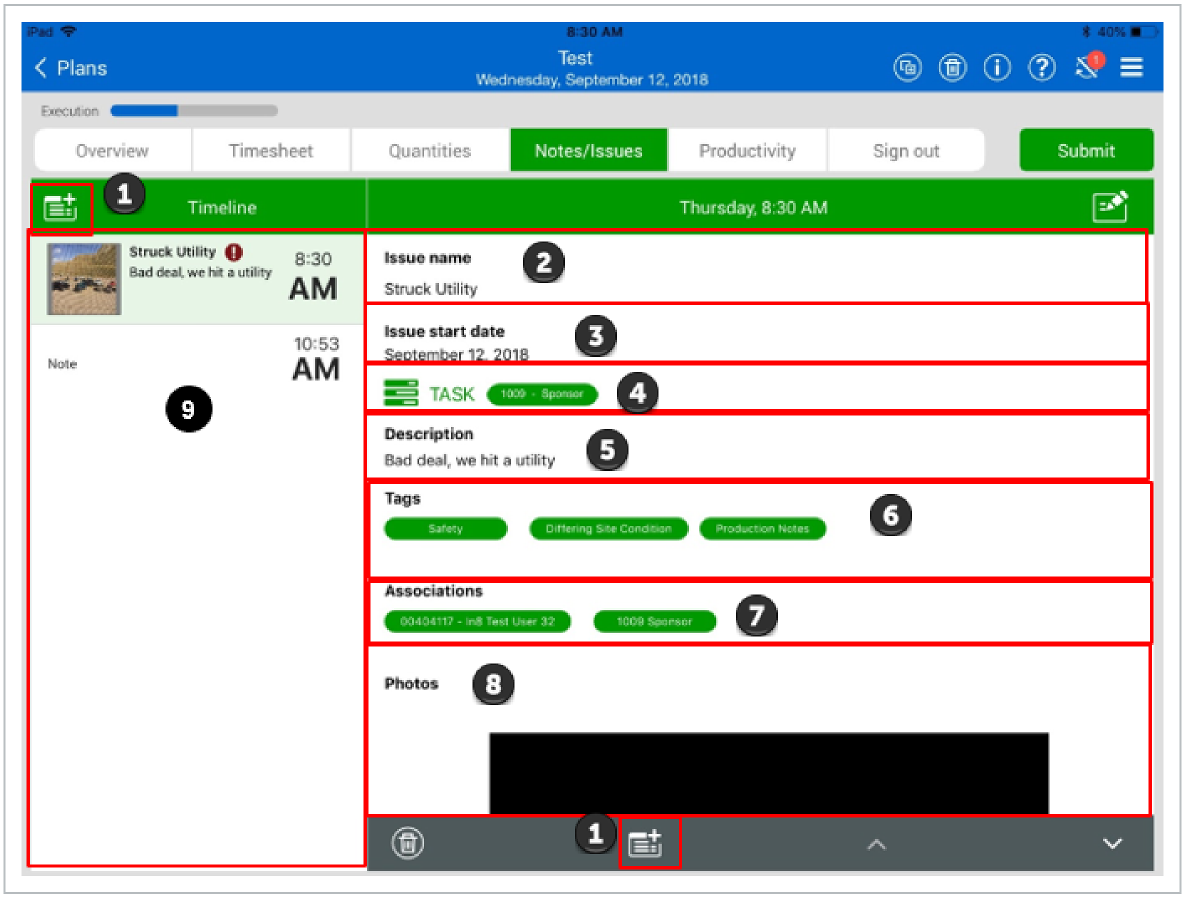
Along with the note/issue, you can add tags to associate the notes/issues with a pre-defined category. You also can add photos with your notes/issues.

Overview – Notes/Issues Tab

Title			Description
1	Add		Allows you to add notes/issues to InEight Progress.

Overview – Notes/Issues Tab (continued)

Title			Description
			
2	Name		Displays the name of the note or issue.
3	Date		The start date of the note or issue
4	Tasks		Associates the note/issue to a specific task.
5	Description		A free text field of the description of the note/issue.
6	Tags		Allows you to tag the notes/issues to a certain category such as Safety, Quality, Environmental, Extra Work/Change, Delay, or Production Notes. To see this icon, you must click on the add button.
7	Associations		Allows you to add associations to your notes, such as task, employee, equipment, and components. To see this icon, you must click on the Add button.
8	Pictures		Allows you to take a photo and attach it with your notes, or to select a photo from the photo library. To see this icon, you must click on the Add button.
9	Timeline		Thumbnail view of all notes in daily plan organized in chronological order.



2.3.6 Productivity

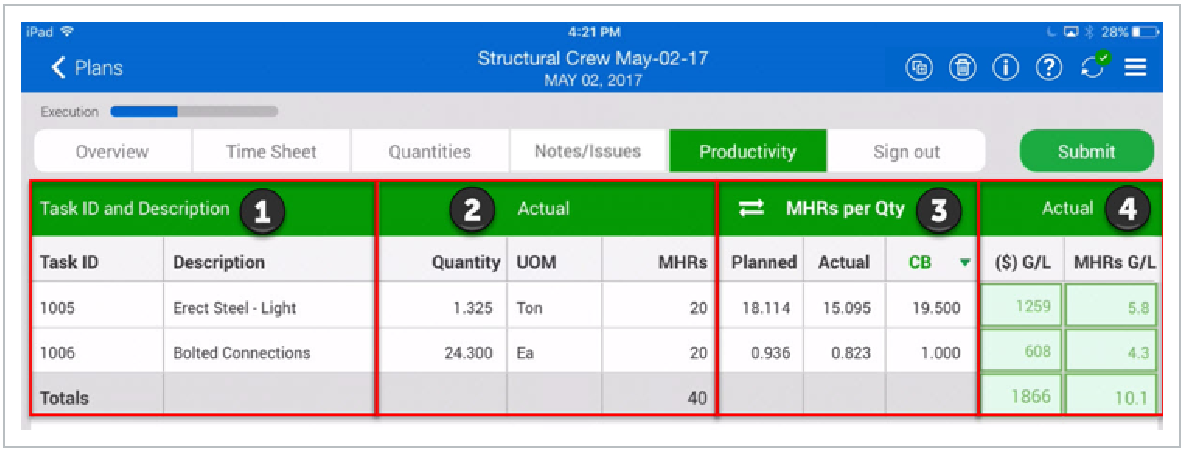
After adding notes, in the Productivity tab you can review your tasks, quantities, and hours claimed for the tasks, and compare the actuals to the planned quantities and hours.

Overview – Productivity Tab

Title		Description
1	Task ID and Description	Displays the task ID and description.
2	Actuals (UoM and MHRs)	Displays the actual claimed quantities and man-hours.
3	MHRs per Qty	Compares the Planned versus Actual MHRs per Qty. You can select CE (Current Estimate) or CB (Current Budget).

Overview – Productivity Tab (continued)

Title		Description
5	Actual (G/L)	Compares actual cost or MHRs to budgeted cost or MHRs for each task and shows the gain or loss for each task.



2.3.7 Sign Out

At the end of the plan's execution, employees need to sign out by tapping their name. You enter the employee PIN (personal information number) which can be the birthdate of the employee or a number that the IT personnel has assigned to that employee.

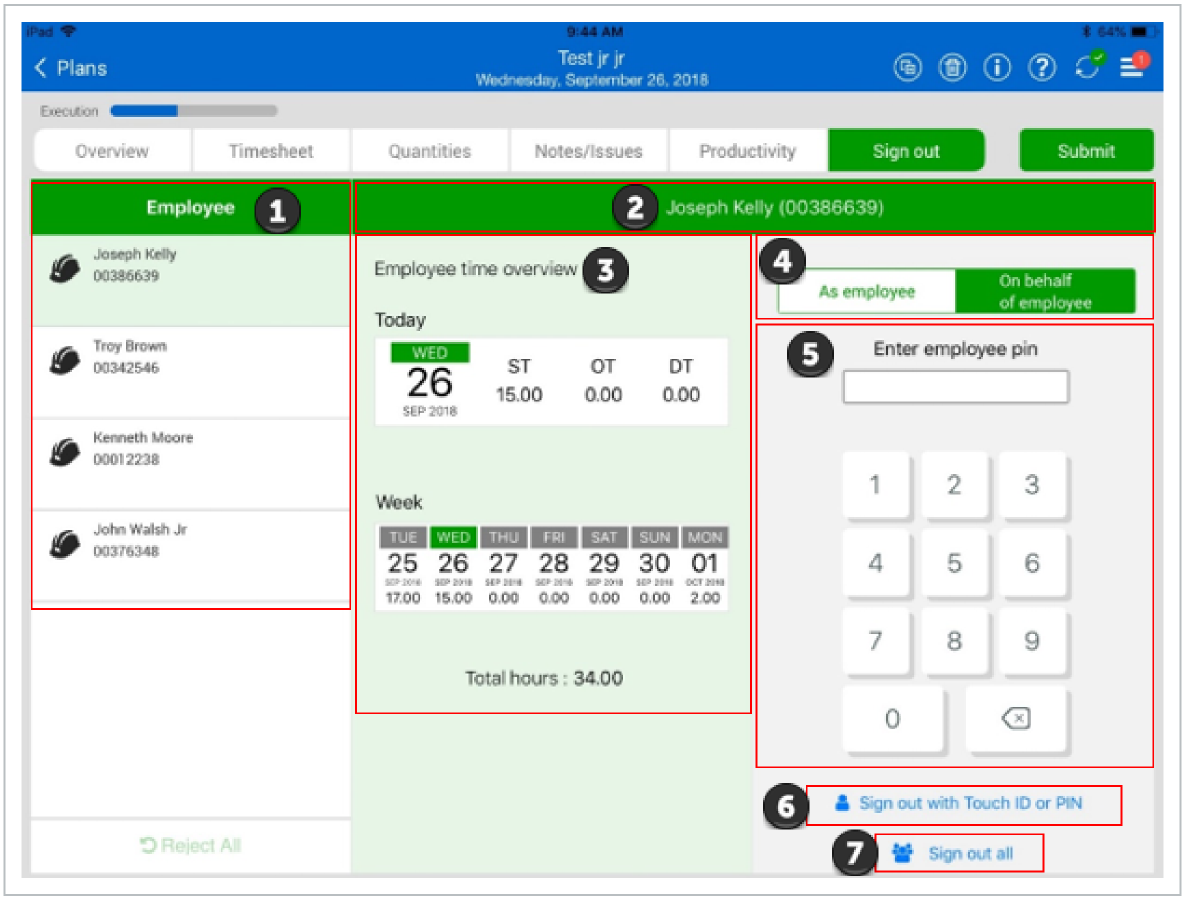
The employee will be able to review the hours input by the Foreman before signing the card. At this point, they can agree or disagree with the hours and negotiate the hours before signing out.

Overview – Sign out Tab

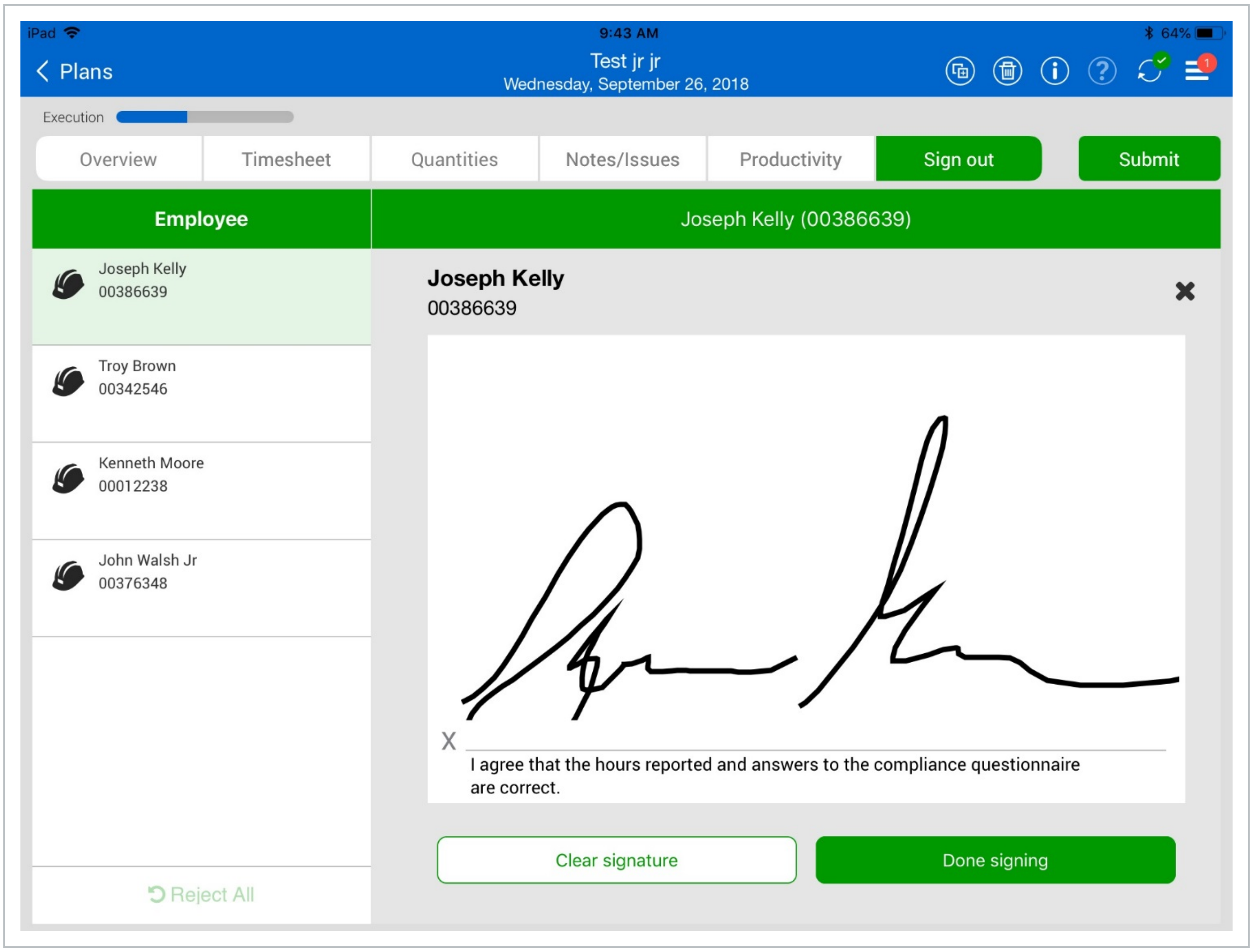
Title		Description
1	Employee	Displays all the employees including the foreman on a specific daily plan.
2	Employee Name	Displays the name of the employee selected to sign out.
3	Employee Time Overview	Displays a summary of hours for the day and week entered for that employee.
4	As Employee/On Behalf of Employee	There are two options for signing out: the employee can sign out, or the foreman with permissions can sign out for the employee.

Overview – Sign out Tab (continued)

Title		Description
5	Employee Pin	Where the employees enter their pins.
6	Touch ID Signout	User can use iPad thumb-print to sign out rather than entering pin.
7	Sign out all	Allows user to sign out all employees by signing out only once.



If employees sign out themselves, they have the option to either enter their pin or use an electronic signature on the iPad.



TIP	You can customize compliance questions for the specific needs of your company.

2.3.8 Submit and Sync

Like daily planning, you must select Submit to send the daily plan to the Approval Phase. All employees must be signed out to submit the daily plan for approval. Tap the Sync button to push any updates back to InEight Plan.

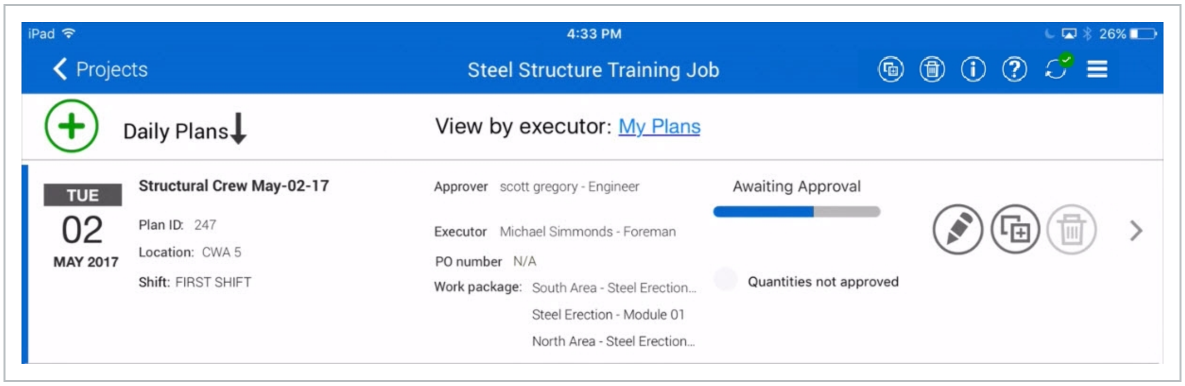
Scenario Recap

> Steve and his crew could execute the work on the jobsite and he was able to complete the Execution Phase of his daily plan by navigating through each tab of the navigation bar. At the end of the shift when all employees had signed out, he submitted the daily plan for approval.

2.4 DAILY PLAN APPROVAL

2.4.1 Plan List

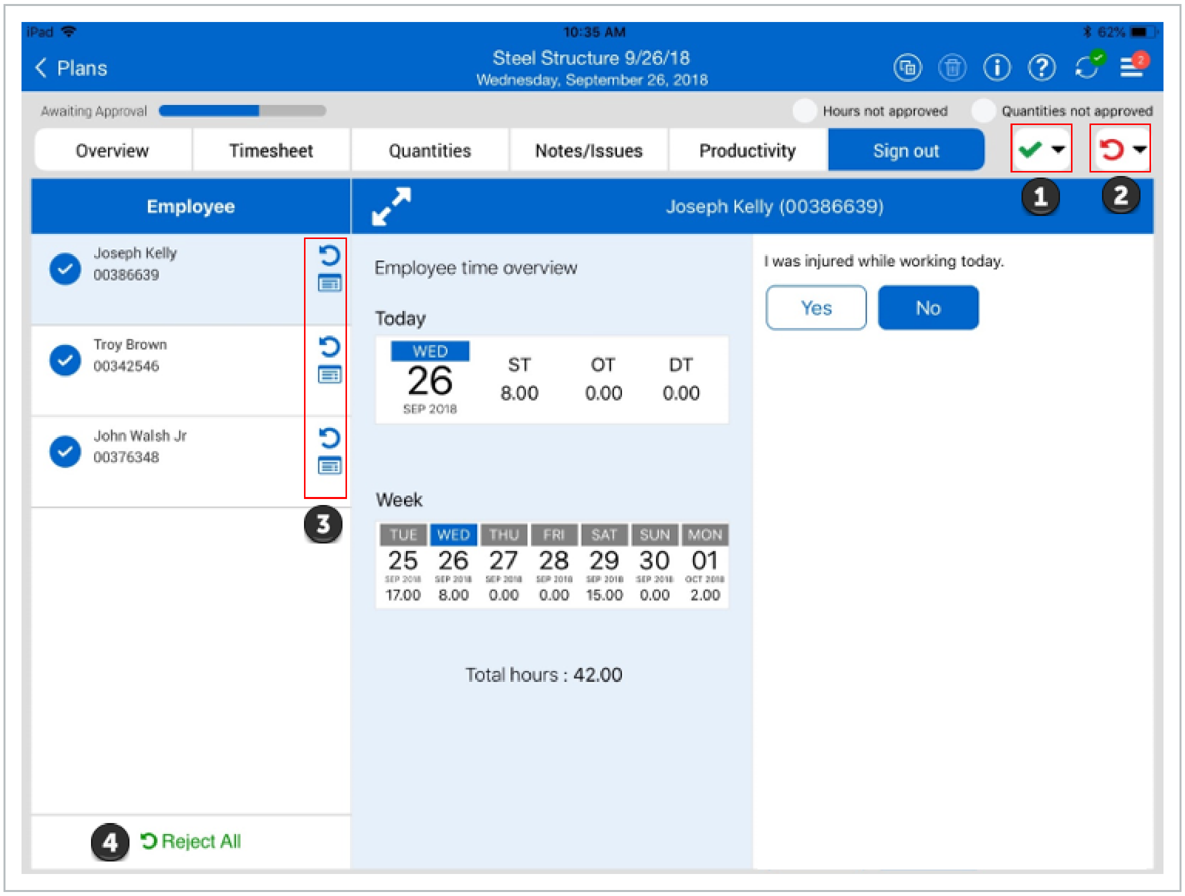
You access a daily plan from the list of daily plans. Note that the current status is now Awaiting Approval. There is also a note indicating that the quantities have not been approved.



Navigating through the Approval Phase is very similar to the Planning and Execution Phases. The same navigation bar appears at the top of the screen. You can review the information in each tab to ensure everything has been entered correctly. The Submit button is now gone and is replaced by two new buttons.

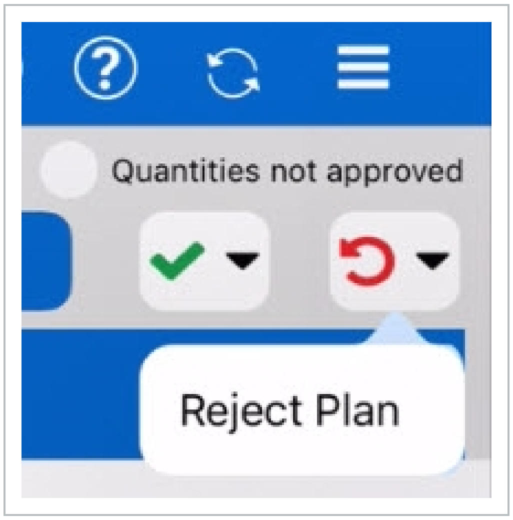
Overview – Sign out Tab

Title		Description
1	Approval	Approves actual quantities, hours or both.
2	Reject	Rejects the plan and send back to Execution Phase.
3	Reject Sign out	Rejects the sign out for an individual employee. This must be done before editing any hours in timesheet. The employee must sign out again after changes have been made.
4	Reject All	Rejects the sign out for all employees. This must be done before editing any hours in timesheet. The employee must sign out again after changes have been made.



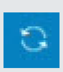
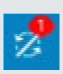
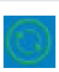
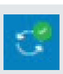
There is no requirement to enter new information in the Approval Phase. If the information is all correct, the plan can simply be approved by selecting “Approve Quantity and Hours”. If there are changes to be made that affect quantities, but the hours are correct, then you can select “Approve Hours” to send the hours to ERP payroll for processing while the changes to quantities are sorted out. The opposite is true when the quantities are correct but changes to the hours are required.

If a significant amount of changes are required, or if the Executor is the member required to make changes, it would be preferable to revert the Daily Plan back to the Execution Phase before making the changes. In this case, you can select the “Reject Plan” button.



2.5 DATA SYNC

The InEight Progress application must be synced periodically to update changes from InEight Plan and vice versa. The following table explains the different sync symbols you may encounter when using InEight Progress.

Icon	Title	Description
	Available (Online)	App is online but has not been synced.
	Offline	App is offline.
	Unsynced Changes	Changes have been made to plans that haven’t been synced (number of plans with unsynced changes will appear in red dot).
	Syncing	App is currently syncing (icon will spin).
	Success	Latest sync was successful.
	Failed	Latest sync was unsuccessful.

TIP	You can use InEight Progress Mobile online or offline. A Wi-Fi or cellular connection is only required to perform a sync.

Exercise 2.1 — Navigate InEight Progress

Now that you have seen the process of navigating through daily plans in InEight Progress, put your skills to the test and see if you can navigate through daily plans on your own.

1. Open InEight Progress (mobile or web) and log in if necessary.
2. Open your project.
3. Open any daily plan in the Plan List and navigate through each of the daily plan tabs to review the plan information.

Congratulations, you have completed this exercise!

Lesson 2 Review

1. In the Time Sheet tab, you can add notes to which of the following?
    a. Employees
    b. Equipment
    c. Tasks
    d. All of the above

---

2. You can enter tasks in which tab(s):
    a. Time Sheet
    b. Quantities
    c. Both a and b

---

3. You can enter actual quantities using which of the following methods?
    a. Check the Complete box for a component step
    b. Enter the actual quantity at the task level
    c. Enter the actual quantity at the component step level
    d. Both a and c

---

4. What does this sync symbol  represent?
    a. Offline
    b. Currently syncing
    c. Successful sync
    d. Plans with un-synced changes

Lesson 2 Summary

As a result of this lesson, you can:

- Log in and load a daily plan
- Navigate through the Daily Planning, Execution, and Approval phases

- Explain what each sync symbol represents

LESSON 3 – SETTINGS

Lesson Duration: 5 minutes

Lesson Objectives

After completing this lesson, you will be able to:

- Navigate and define the InEight Progress organization level settings
- Navigate and define the InEight Progress project level settings

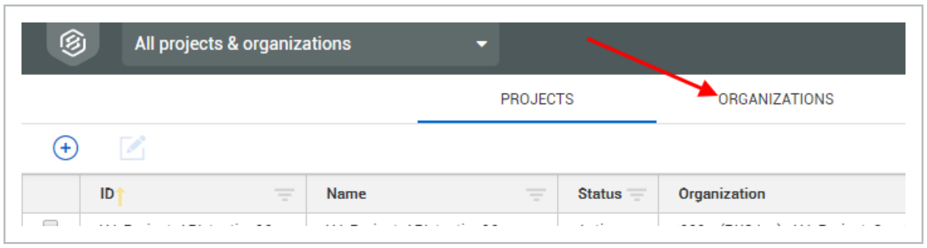
Lesson Topics

3.1 ORGANIZATION SETTINGS

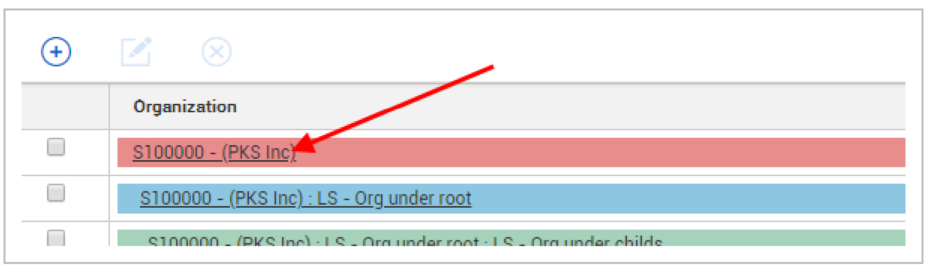
To track time and quantities successfully within Progress, the correct settings need to be set up before project initiation. The Organization level is the top-most level where your company will set parameters for all projects. The steps below walk you through how to access the organization settings.

3.1 Step by Step 1 — Open Organization Settings

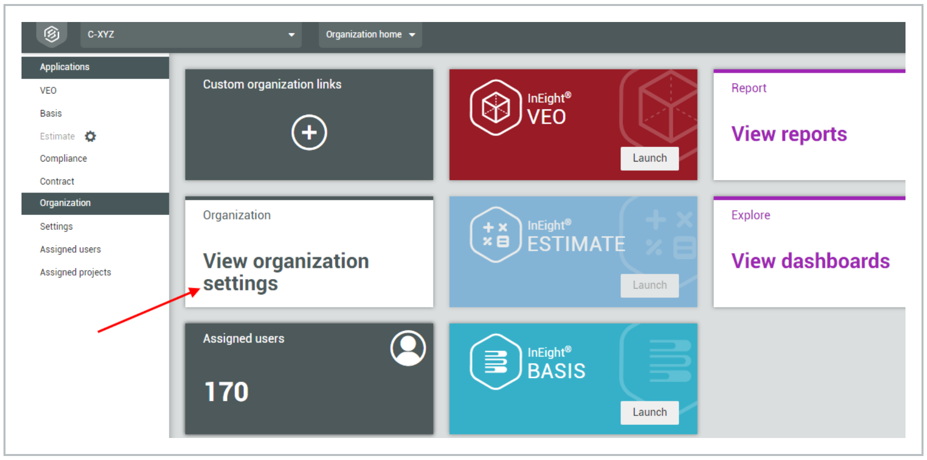
1. From the All projects & organizations page, click on the **Organizations** tab.



2. Select an **organization level**.

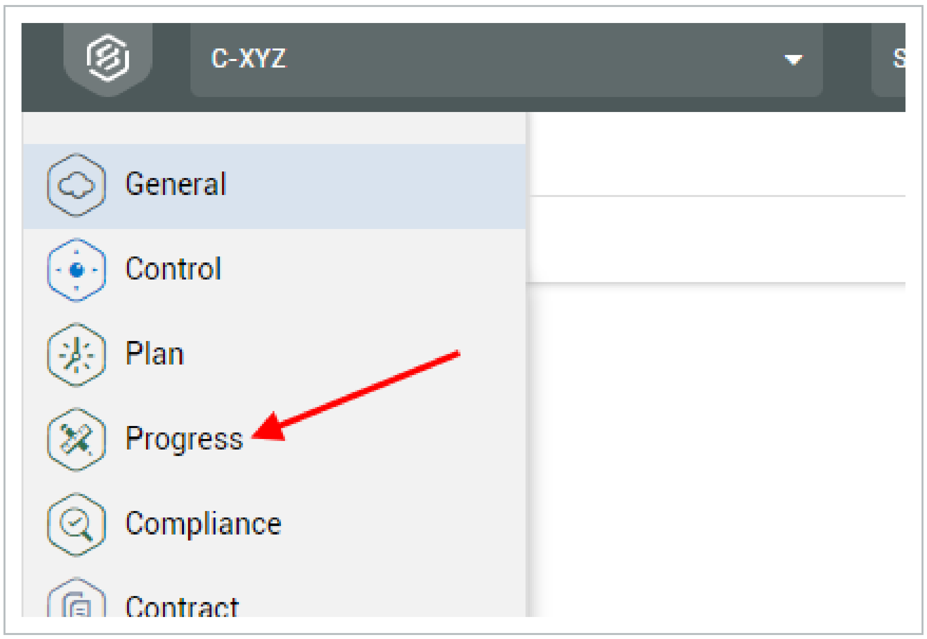


3. From the organization's Home locate the **View Organization Settings** tile on the upper left side of the screen.
4. Click on **View Organization Settings**.



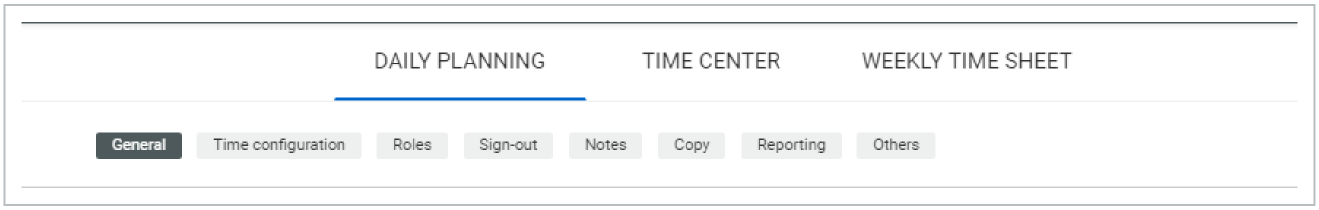
- You can also click on Settings under Organization in the side bar menu on the left

5. Select **Progress** to navigate to the organization settings for Progress.



3.1.1 Daily Planning

Under the Daily Planning tab, you can configure the organizational settings for the use of daily plans.



Selecting any of these tabs does not open more windows, but they are bookmarks making it easier to navigate through the page.

3.1.1.1 General

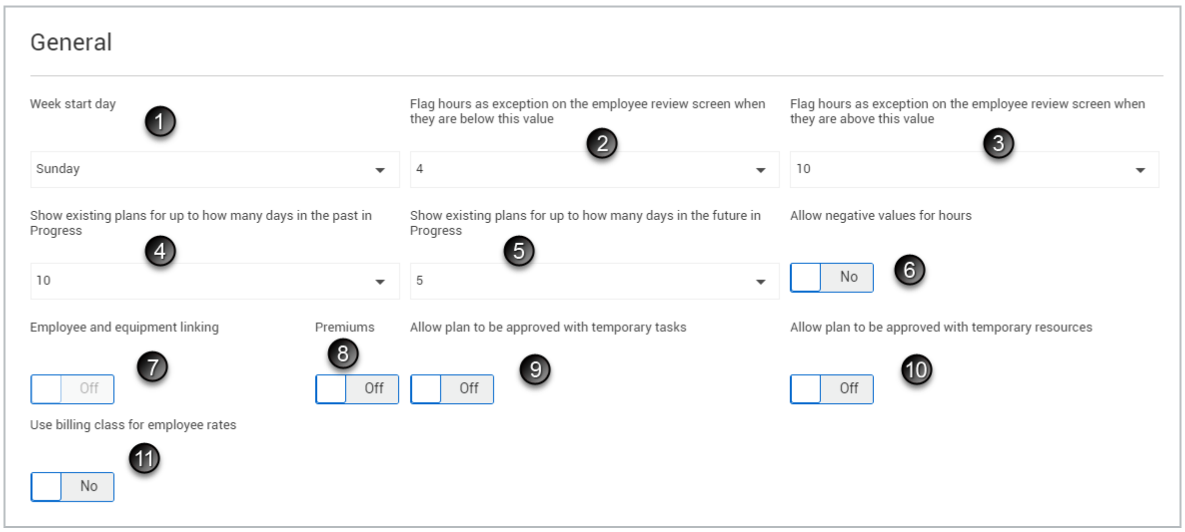
At the organization level, you can set the number of days that you want to see the plans (in the past or the future) in Progress. You can set the minimum and maximum value for the number of hours an employee has worked. You can also add new items, adjust the display order, choose whether the item is required to be used or not, add auto notes, and delete items.

Overview – General

Title		Description
1	Week start day	The day of the week that starts the clock for payroll.
2	Flag hours below value	This will flag if you are on multiple plans and if your threshold amounts are below the limits.
3	Flag hours above value	This will flag if you are on multiple plans and if threshold amounts are over the limits.
4	How many days in past	The number of days past that daily plans will show up on the mobile device.
5	How many days in future	The number of days in the future that daily plans can show up on the mobile device.
6	Negative Hours	Allows negative hours on daily plans.
7	Employee & Equipment Link	Allows employees and equipment to be linked together on daily plans.

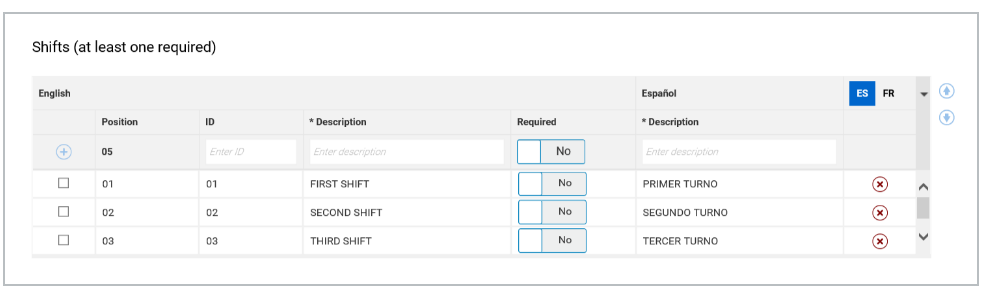
Overview – General (continued)

Title		Description
8	Premiums	Enables use of premium pay rates to account for employees that work outside their regular responsibilities for an increased rate.
9	Approve with Temporary Task	Allows daily plans to be approved with temporary tasks on them.
10	Approve with Temporary Resource	Allows daily plans to be approved with temporary resources on them.

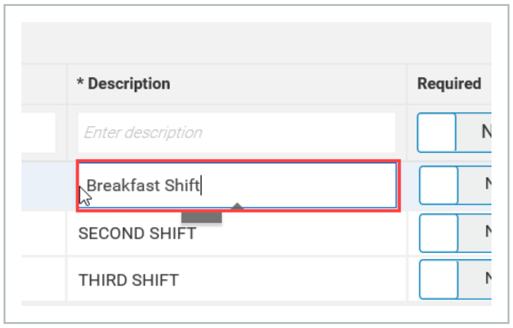


Shifts

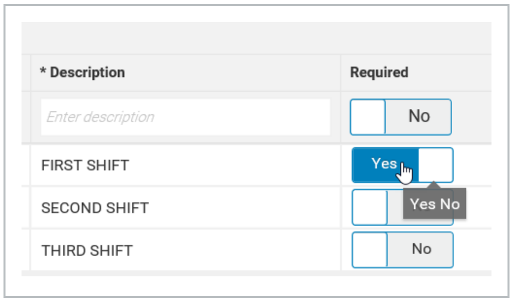
You can configure shifts and change descriptions as needed.



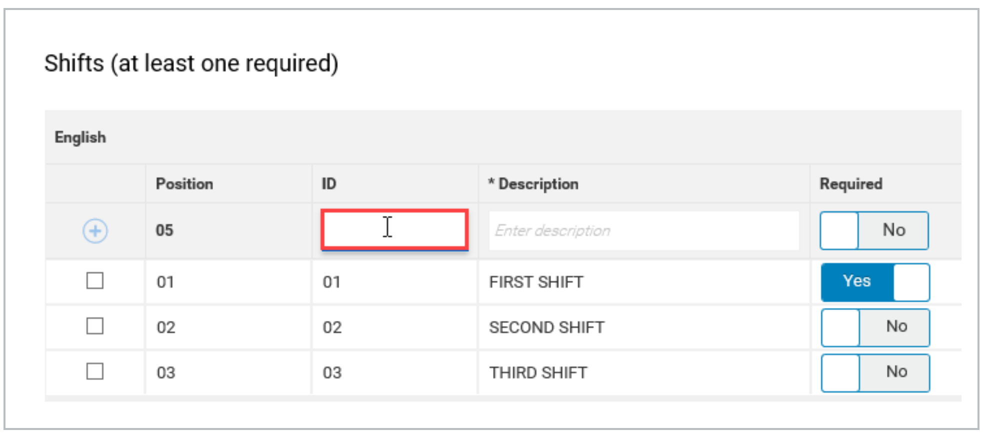
For example, you can change first shift to “breakfast shift”.



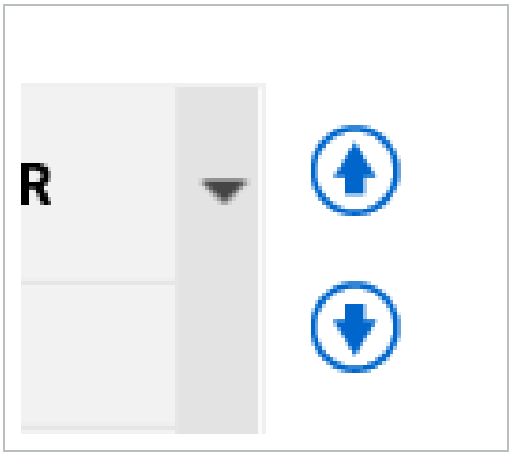
The shift can be required at the project level, meaning if you select **Yes** for required, then it will appear at the project level and cannot be removed or modified.



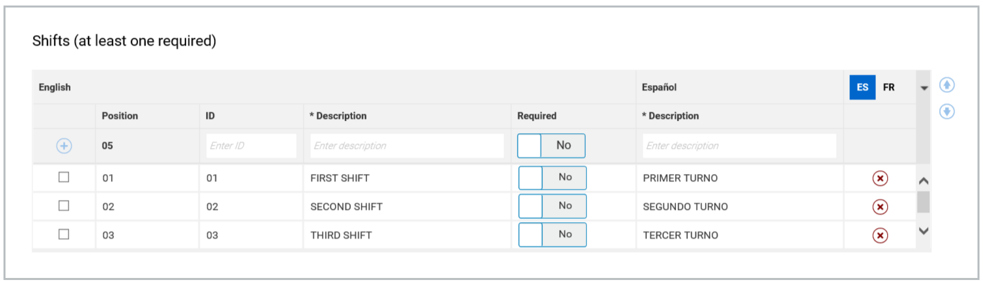
You can create and customize shifts and make them required. When creating a new payroll item, it is important to assign a payroll ID. The purpose of the ID field is to feed back into the payroll system automatically rather than the payroll item having to be manually entered by a payroll clerk.



You can sort shifts by using the up and down arrows. This will alter the viewing sequence to match the order that the program will display. Whatever you have in the first position, will be the default display.

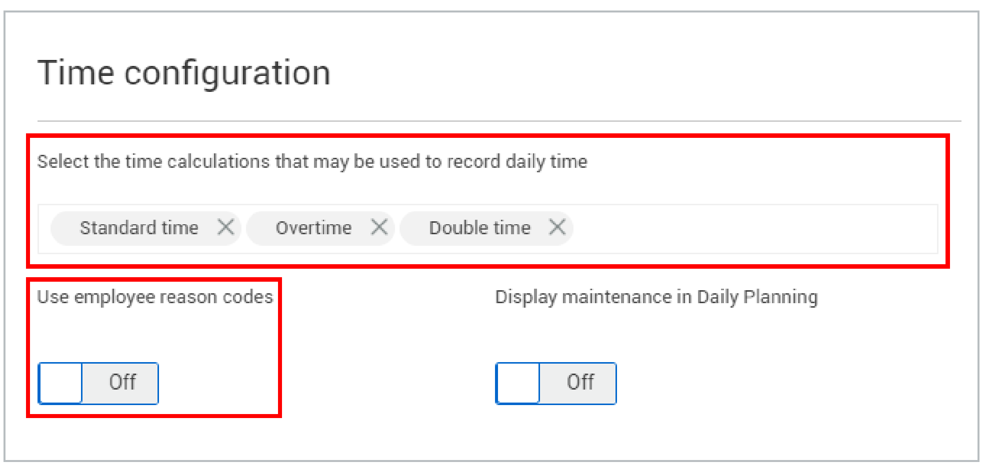


The shift section also allows you to add translation to your shifts. Below shows an example of how the English shift descriptions have been translated to Spanish.



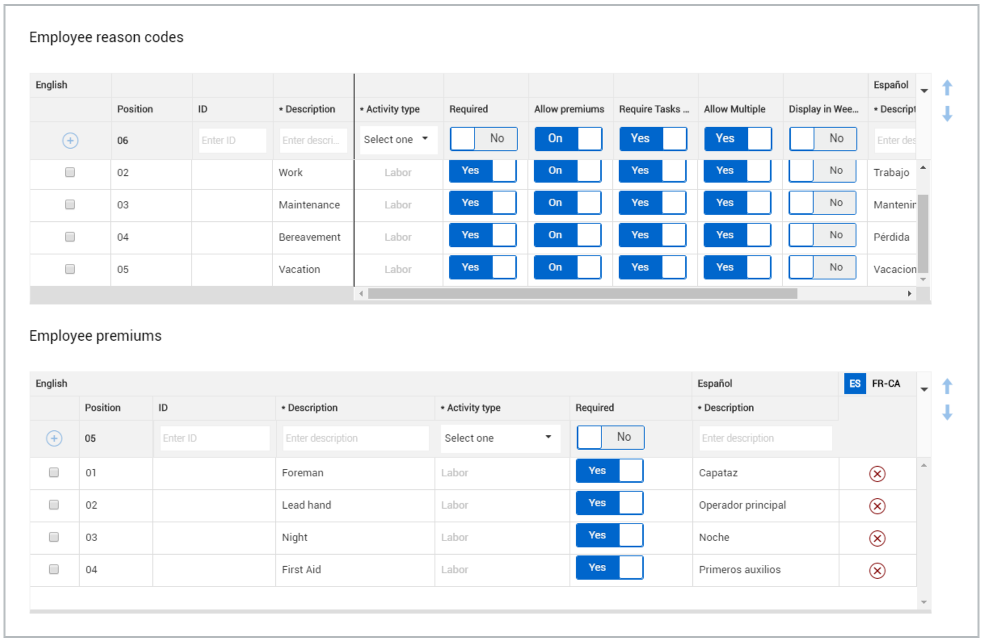
3.1.1.2 Time Configuration

Time configuration settings determine how hours are calculated for employees and equipment on daily plans. Daily time can be calculated by Standard time, Overtime, and/or Double time, or by a more advanced setting called Reason codes.



Within Organization settings, you can define the Reason code values and their associated Premium categories for use on project-level daily plans. For each value, you can toggle whether they:

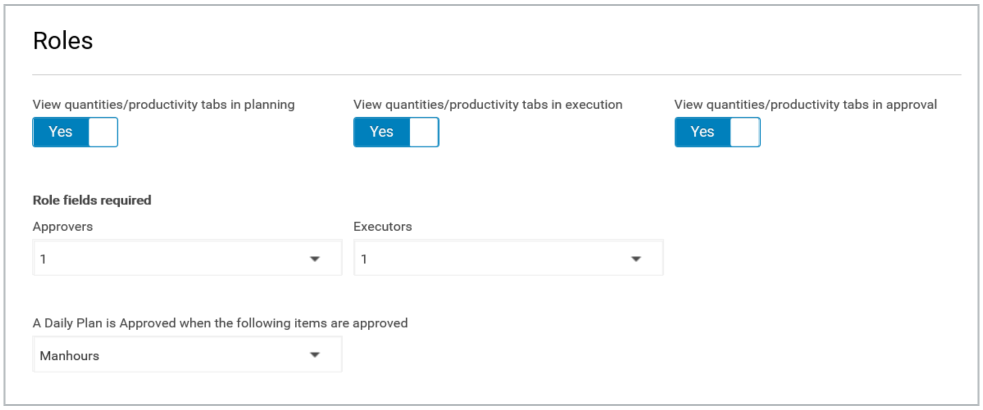
- Are required
- Allow premiums
- Require task associations
- Allow multiple uses of the same code
- Are displayed in weekly time sheets



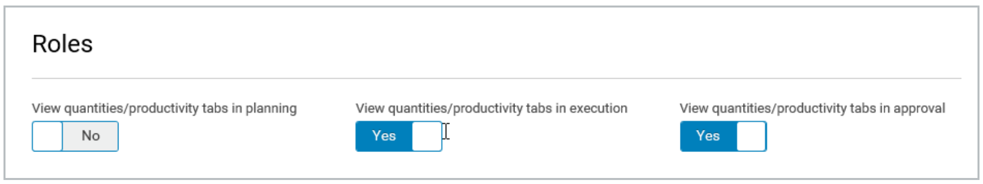
Reason codes, used in combination with Premiums are covered in more detail in the *InEight Progress Advanced* training course.

3.1.1.3 Roles

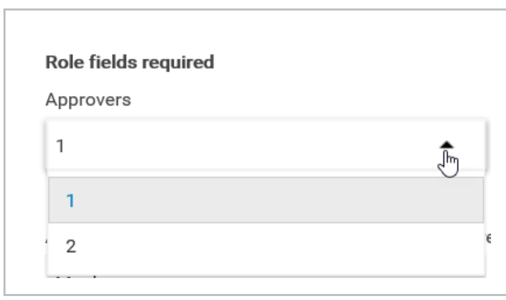
Roles are defined for people who are approvers and executors of Daily Plans.



The YES/NO toggle switches are to enable or disable views for the Approvers and Executors at different phases of the project.



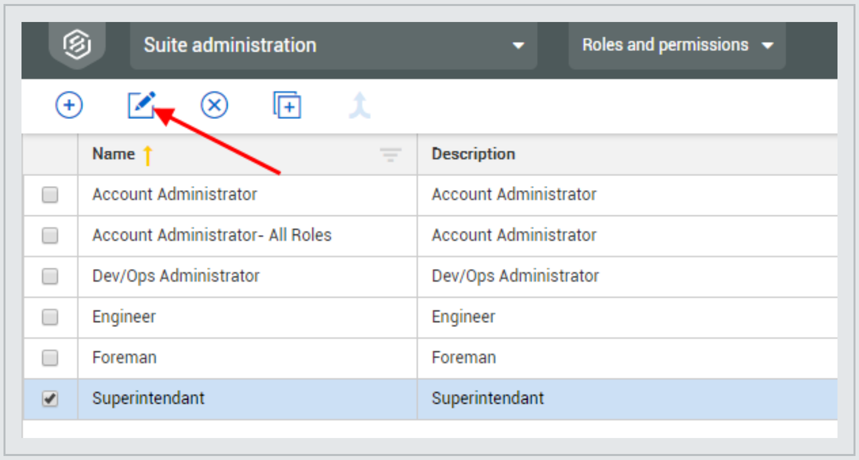
The Role fields required are indicators of how many Approvers or Executors will be required for daily plans on your projects. You are allowed up to 2 Approvers and 0 or 1 Executor as defaults.



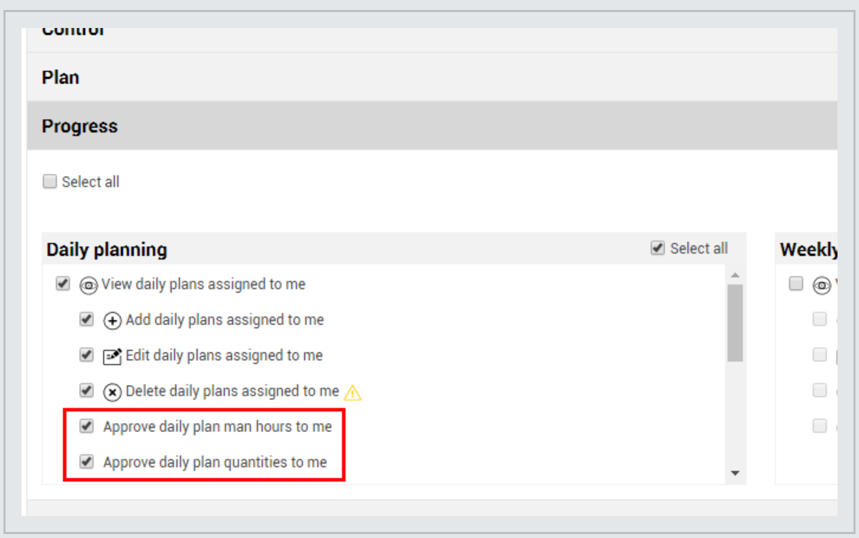
NOTE

When deciding on Approver and Executor roles for daily plans, it is important to note that if you use both an Approver and Executor for your daily plans, only the Approver role can have permissions to approve daily plans. The Executor role must NOT have permissions to approve daily plans.

For example, you may plan to only allow employees with the Superintendent role to act as Approvers on daily plans. Under 1st level menu > Suite administration > Roles and permissions you can edit the Superintendent role's permissions by checking the checkbox next to Superintendent and selecting edit.

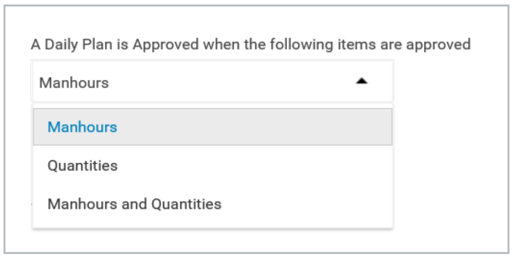


Under the Progress settings, you would ensure that the **Approve daily plan** options are checked, then click **Save**.



NOTE If you plan to allow employees assigned to the Foreman role to act as Executors for daily plans, you would need to edit the Foreman role to make sure the **Approve daily plan** permissions are UNCHECKED.

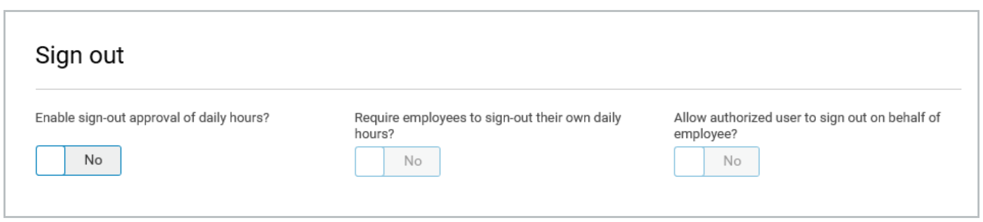
The Daily Plan is Approved drop-down indicates what needs to be approved for the plan to be approved. By default, the system is set up to approve the plan when man-hours is selected. The approved plan will then be sent to and processed by your ERP. Quantities are optional, by default, but you can change the setting to approve plans when quantities, or both quantities and man-hours are approved.



3.1.1.4 Sign out

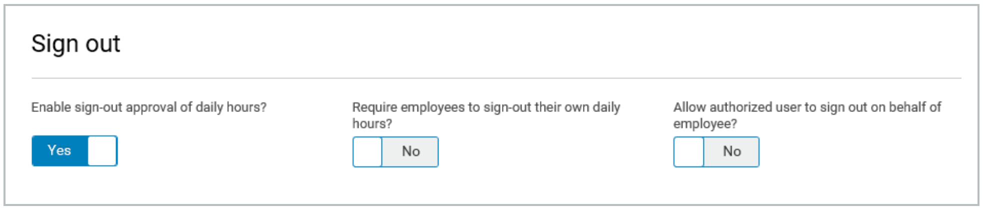
At the Organization level settings, the Sign out area will be set up to expedite timesheets. It is required that either employees or employees and an executor / approver sign out timesheets for approval.

The top half of this Sign out tab has three Yes/No toggle switches which the Administrator at the Organization level will decide on. This will be carried through to each project under this organization.

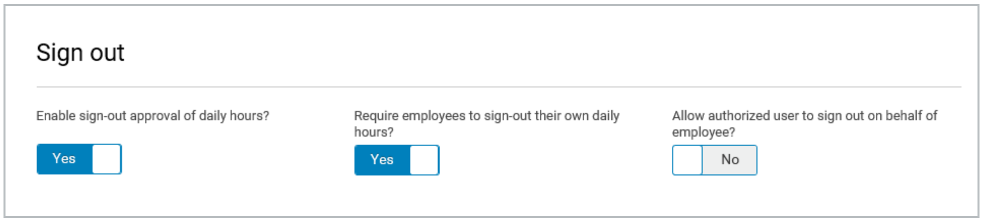


These selections, whether single or multiple, will indicate who needs to validate man hours worked by the employee.

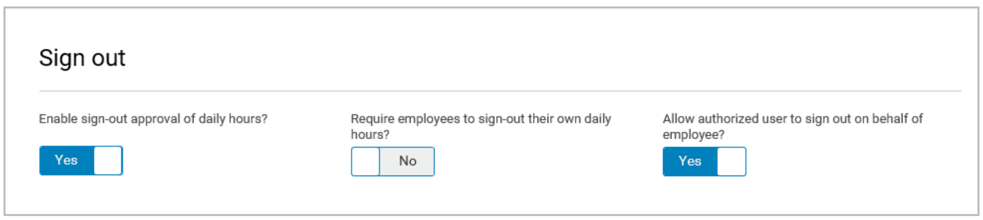
When the first button (Enable sign-out approval of daily hours) is the only one selected, you can approve hours and answer the sign-out questions, but you **cannot** physically sign out for the employee.



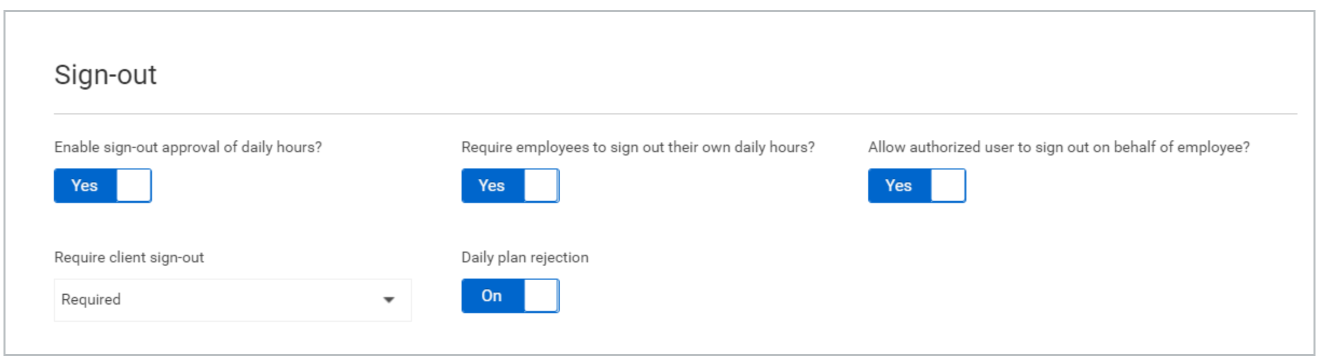
If Yes is selected for the second toggle, the employees will have to sign out for their own hours. This means each employee will have to input their 6-digit pin code to answer the questions, and then sign out.



If the Require employees option is not enabled, then the foreman can sign out on behalf of his crew and each person would not have to sign out on their own.



If both buttons are enabled and the Foreman signs someone out, a note will appear asking the Foreman to give a reason why he signed that worker out. As an example, the Foreman might enter, “Worker was unable to sign out for themselves due to a sudden illness, and had to leave work.” This is a legal requirement in some states because the sign-outs can be tracked.

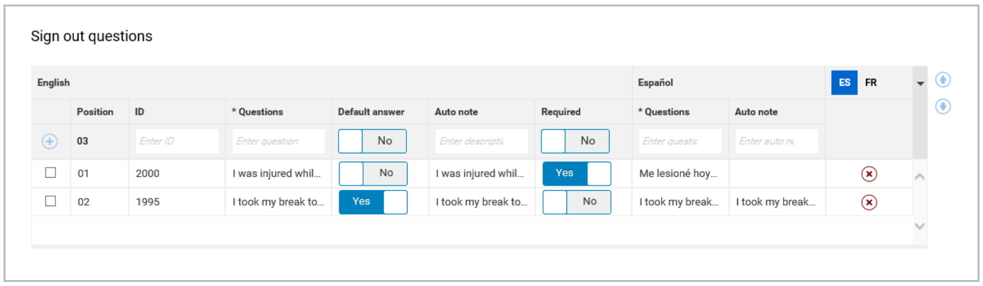


TIP	It is suggested that both the **Require employees** and **Allow authorize user** settings be enabled to sign out on behalf of an employee if the employee is not present or left early.

A client sign-out option is also available. The client sign-out can be toggled to required, optional, or off. You can also decide if you want to be able to reject daily plans using the Daily Plan Rejection option.

Sign out questions

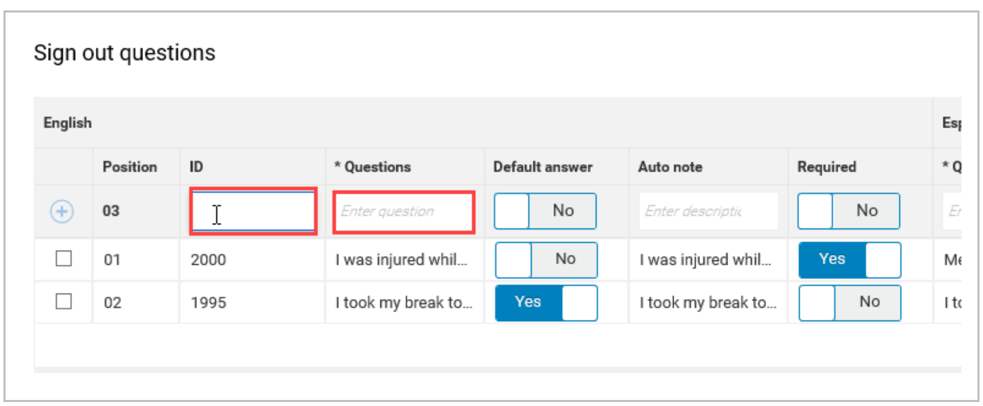
Sign out questions appear during the sign out process.



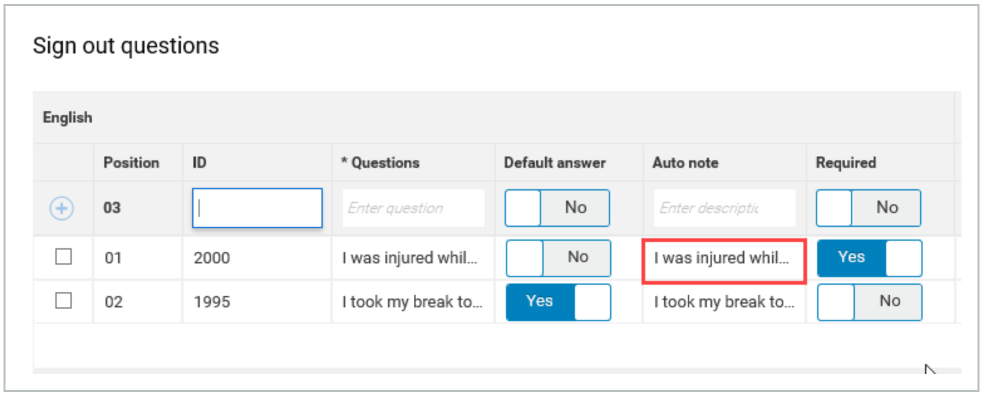
When you are in the process of signing out, questions will pop up like: “Were you injured?”, “Did you take your lunch break?”, or “Were the hours on your timecard correct?” Most questions are based on requirements of the company, as well as laws.

These questions also help with disputes from payroll to the employee. If the answers are answered incorrectly and a worker disputes a pay amount, you can go back into the questions and solve payment issues.

You can add, edit, and make questions mandatory at the project level.



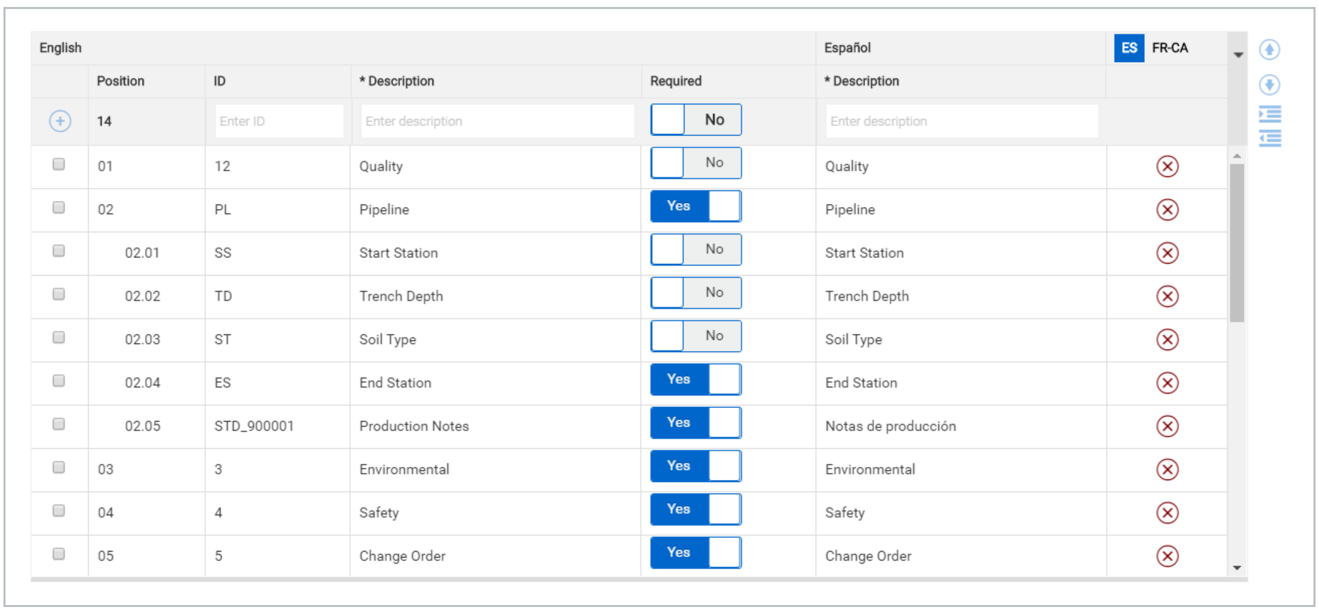
You can create an “auto” note as well. This is used as an extension of the questions. For example, for the question “Were you injured?”, if you answer “Yes”, then the auto note pops up to encourage feedback, requesting how the injury occurred, or requesting a possible incident number to track the incident.



3.1.1.5 Notes

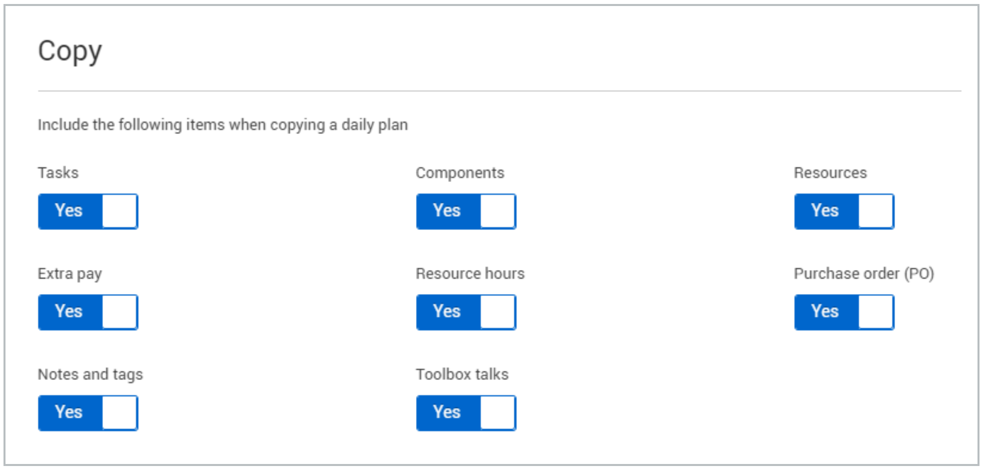
Tags

Tags are used to group similar items for reporting. The tags in the Organizational level are set for the Project Settings.



3.1.1.6 Copy

The Copy section contains toggles to indicate which items to make available when copying a daily plan.



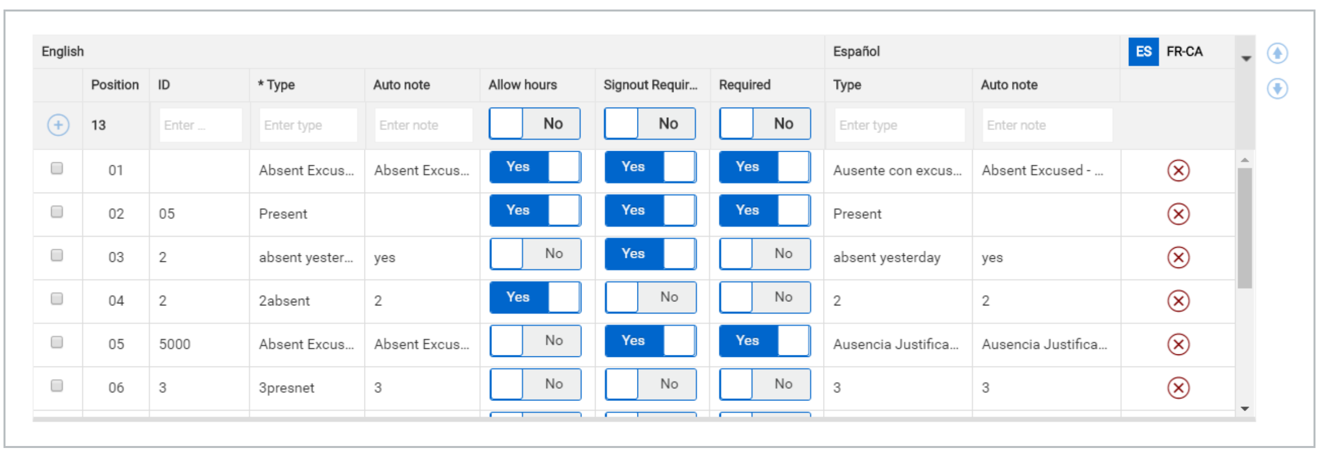
3.1.1.7 Reporting

The Reporting section contains toggles to enable sending client reports to recipients and whether to include notes.

3.1.1.8 Others

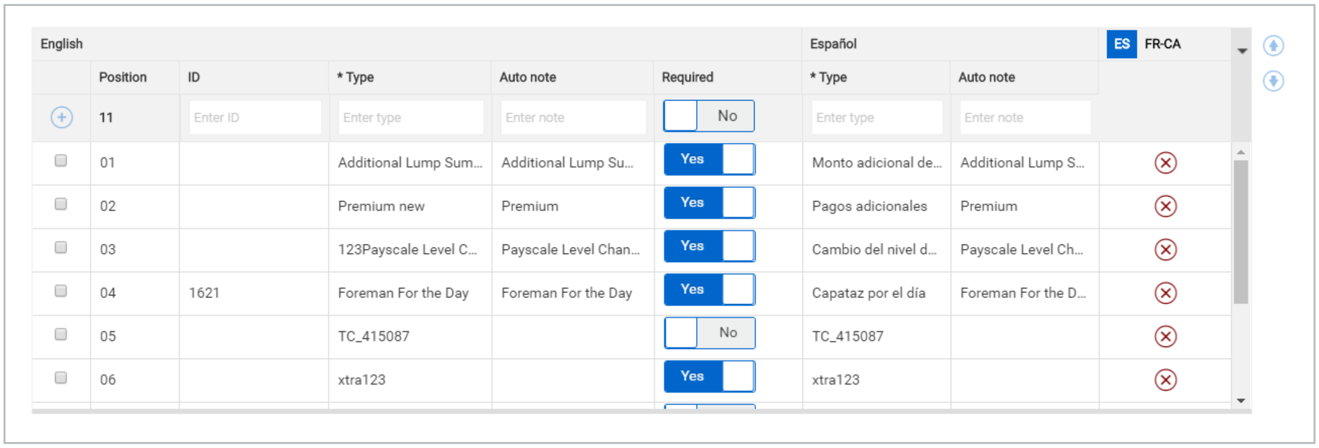
Attendance Types

Custom attendance types can be added at the organization settings level. Users can decide whether these attendance types can have hours, require a sign out, and if they are always required.



Extra Pay (Allowances)

Custom extra pay types can be added in the organization settings. These can be toggled to be required if needed. These extra pay types will show up in project settings and will then show up in daily plans.



3.1.2 Time Center

3.1.2.9 Cost Types

The Time Center tab contains a section for configuring cost type settings. Cost types serve a specific purpose for some InEight customer needs. If your organization is not using cost types, you would leave the **Enable cost types** toggle off.

3.1.2.10 Employee Work Schedule Retention Duration

InEight Time Center includes an integration with ERP systems for employee work schedules. This setting controls how many days historic work schedules are kept in InEight Progress before they are deleted. You can select from 3 to 30 days to control how much work schedule data is maintained before it is purged from the system.

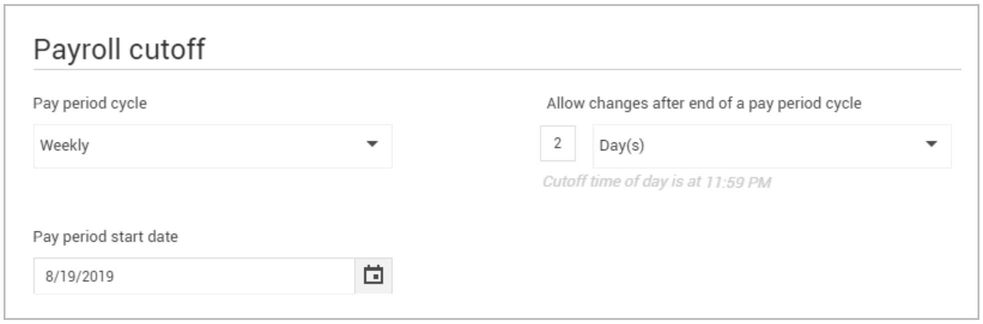
3.1.2.11 Enable Unexpected Timecard Exception

If using the work schedule integration, you can enable this toggle to receive exception errors when timecards in Time Center do not match up correctly with the employee work schedules from your ERP.

3.1.3 Weekly Time Sheet

3.1.3.12 Payroll Cutoff

These settings allow you to define your pay period cycle and start date, and to configure a “grace period” for submitting weekly time sheets after the pay period cycle ends.

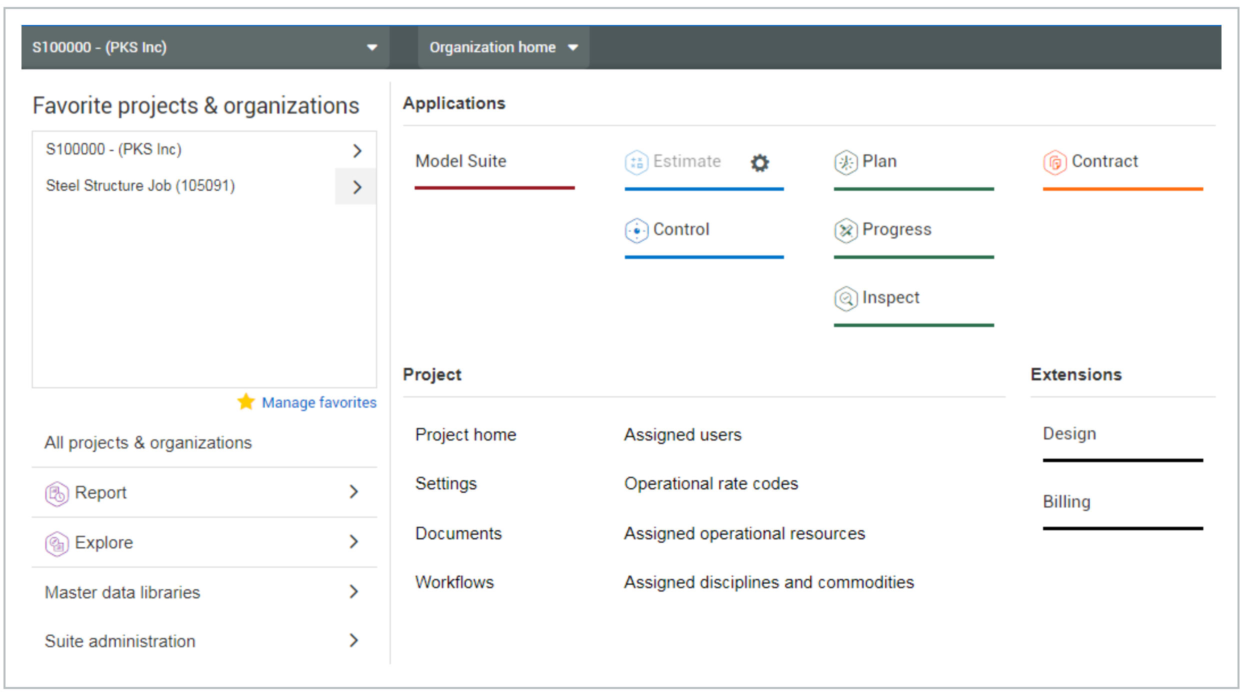


3.2 PROJECT SETTINGS

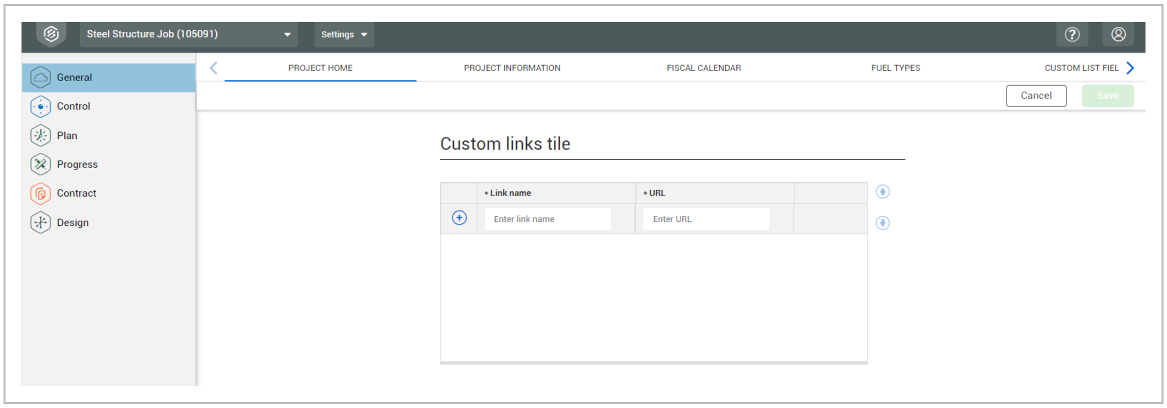
To manage a project successfully within Plan, the correct project settings need to be set up before project initiation. The steps below walk you through how to access Project settings.

3.2 Step by Step 1 — Open Project Settings

1. From the home page for the Steel Structure Training Job, select **Settings.**

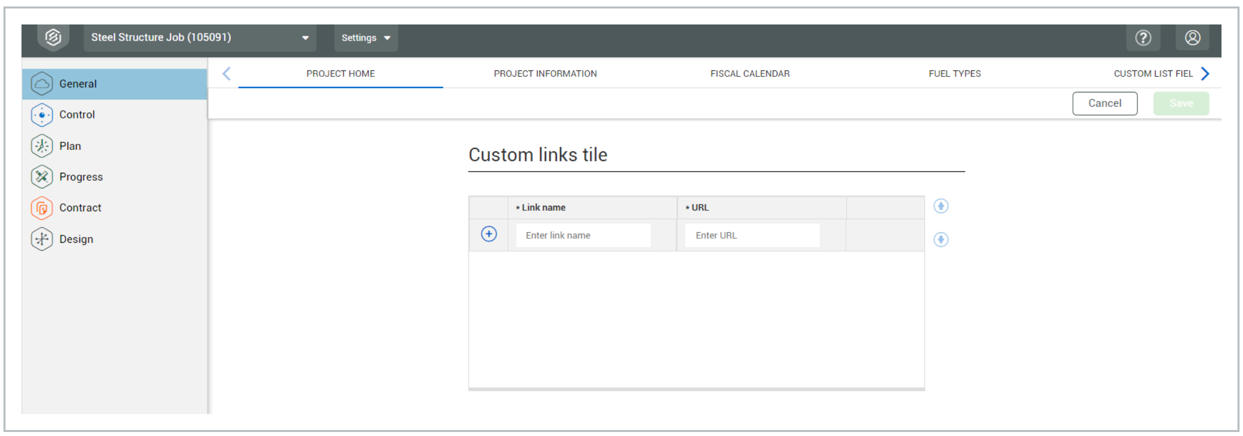


- The Project settings page opens



- Once you access the Project settings page, notice that the screen looks a lot like that of the Organization settings page

2. To access the Progress-related settings, select **Progress** on the left side of the window.



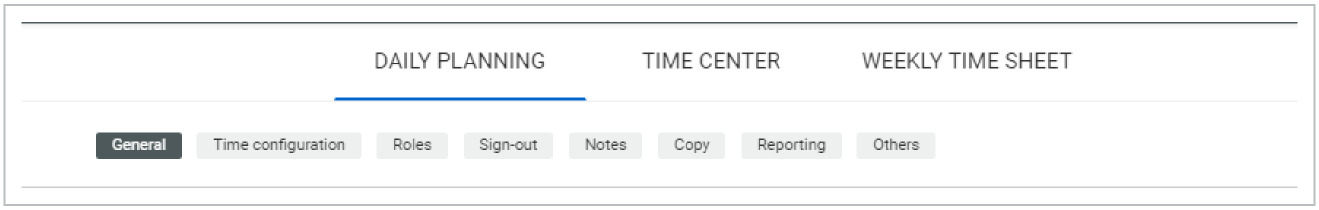
- Many of the settings for each of these tabs are the same as the Organization settings and have been populated from those settings

3.2.1 Project Level Settings

The Project level settings for Progress are set by the administrator for the project. Some of the settings for daily planning are set at the Organization level. However, some of the fields can be customized according to what is required for your project.

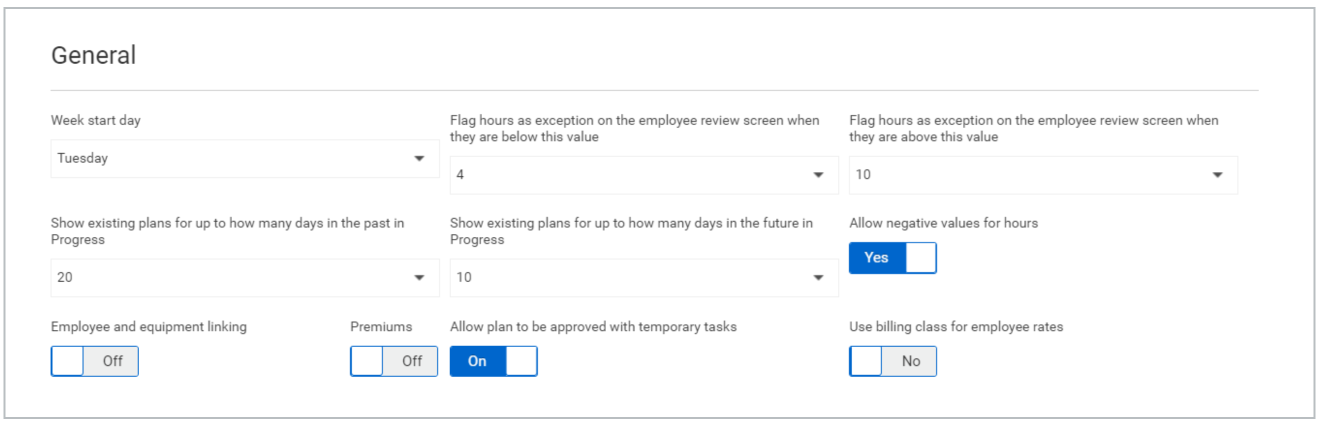
3.2.2 Daily Planning Tab

> **NOTE** Time, Roles and Sign out requirements are those areas which are customizable at the project settings level. You would follow the same guidelines as specified under 1.3 Organization Settings in this lesson.

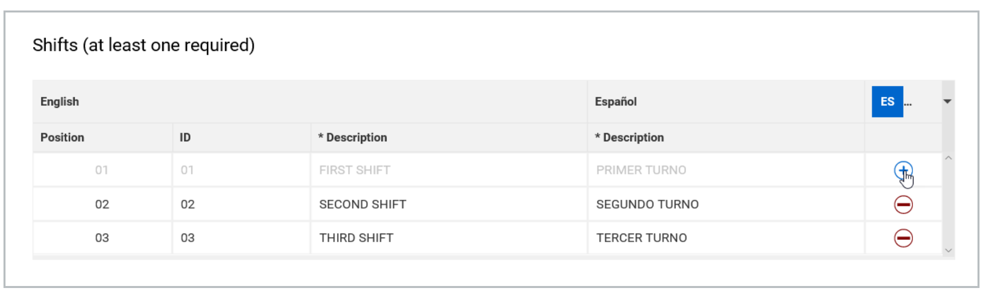


3.2.2.1 General

The time indicators on the screen below are set at the organization level. However, you have the option of customizing the fields at the project settings level to meet your project requirements.



Note in the image below, that there are plus and minus icons on each row of your existing options.



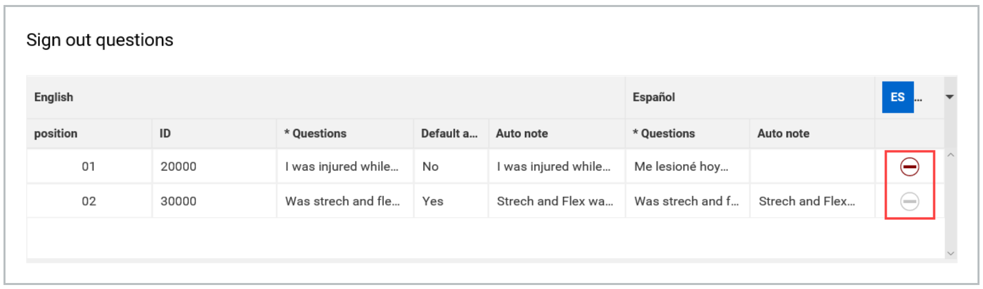
When these icons appear under Shifts, it means these were marked at "Required" at the Organization level. However, you have the option of using these for your project, or not. By selecting the minus icon, it will turn to a plus. This means you have decided to not include it in your project. You can easily add it back by selecting it again and turning back into a minus.

3.2.2.2 Roles

Note that the Roles setting is defined at the project level.

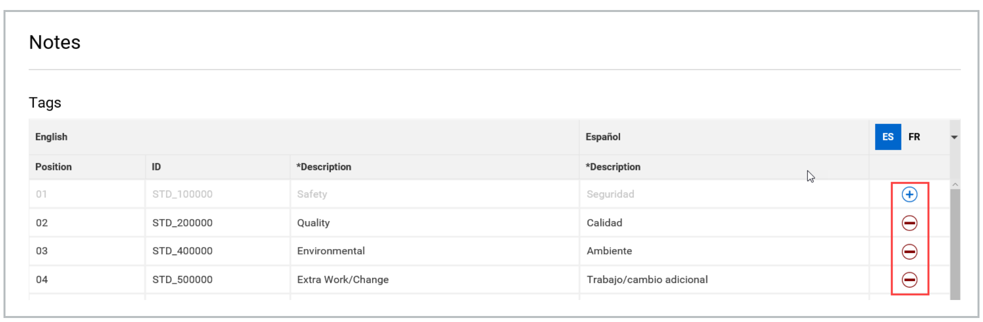
3.2.2.3 Sign out questions

The Sign out questions area functions like that of the Shifts. Again, you can decide whether you want to include these questions in the Sign out by selecting the plus or minus.



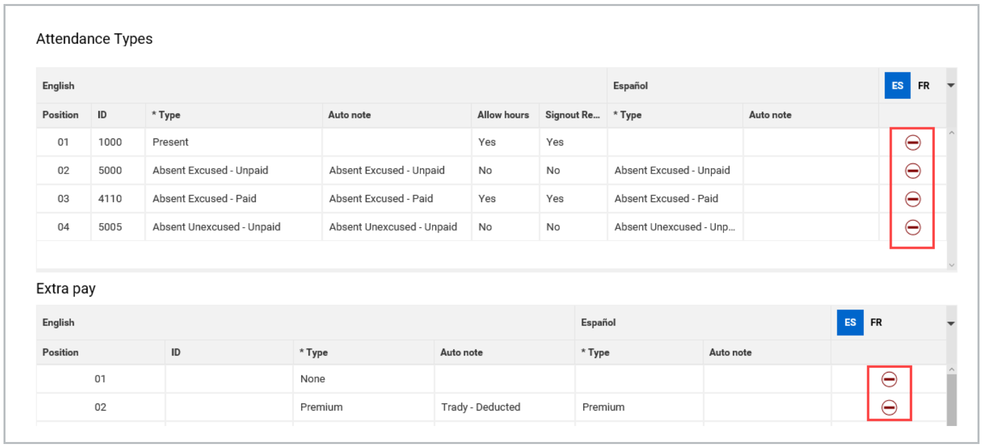
3.2.2.4 Tags

Tags can be turned on or off by using the plus and minus icons. They cannot be edited, and you cannot add any additional tags at this level.



3.2.2.5 Attendance and Extra Pay

This is the last area under the project settings for progress. Again, these are set at the Organization level and cannot be removed or edited. They can be turned on or off for use on your daily plans by using the plus and minus icons.



Once any changes are made, click **Save**.

Lesson 3 Review

1. Where in the InEight cloud platform are settings defined that apply to all projects in the organization?
    a. Organization Breakdown Structure
    b. Master data library
    c. Project settings
    d. Organization settings

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2. Under Organization settings, under which section of the Progress-related settings can you turn on the setting to allow negative values?
    a. General
    b. Time Configuration
    c. Roles
    d. Sign-out

---

3. Where in the InEight cloud platform can you edit or delete attendance and extra pay options?
    a. Project settings
    b. Organization settings
    c. Master data library
    d. Suite administration

Lesson 3 Summary

As a result of this lesson, you should be able to:

- Navigate and define the InEight Progress organization level settings
- Navigate and define the InEight Progress project level settings