
**PROGRESS USER
GUIDE**

Advanced

FIELD EXECUTION MANAGEMENT

INEIGHT 

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LESSON 1 – ADVANCED OPTIONS

Lesson Duration: 90 minutes

Lesson Objectives

After completing this lesson, you will be able to:

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

Lesson Topics

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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

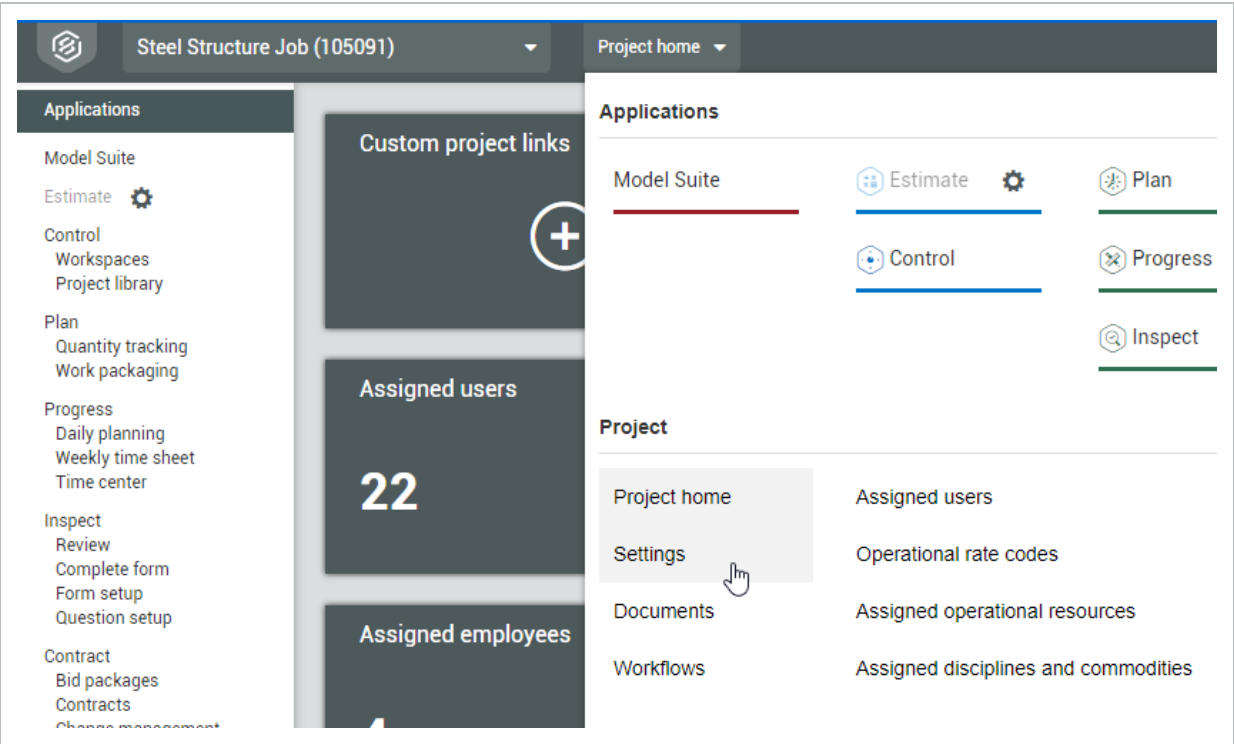
The advanced settings covered in this section can be used for both the Progress web and mobile applications.

- 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

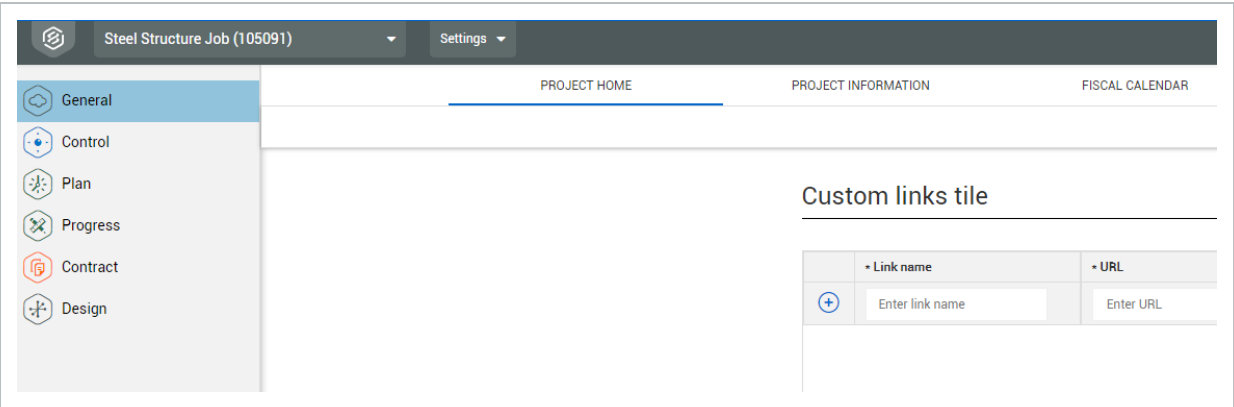
The Step by Step below walks you through how to turn on these advanced options for your daily plans.

1.1 Step by Step 1 — Project Settings in InEight Progress

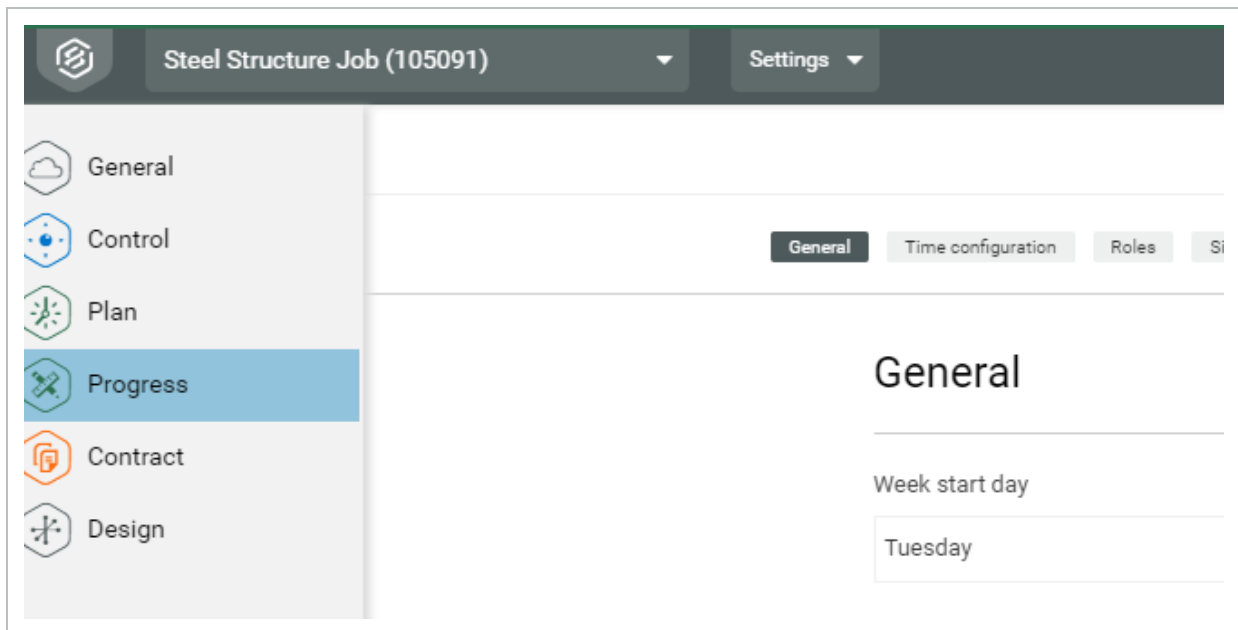
1. From the Steel Structure Job, click on the **2nd level navigation** drop-down and select **Settings**.



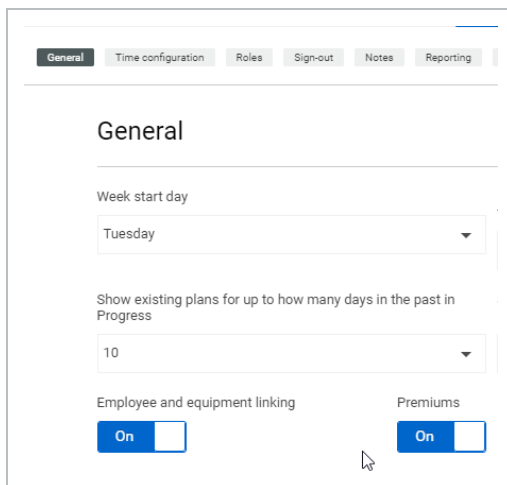
2. Under project settings, click the **Progress** icon on the left.



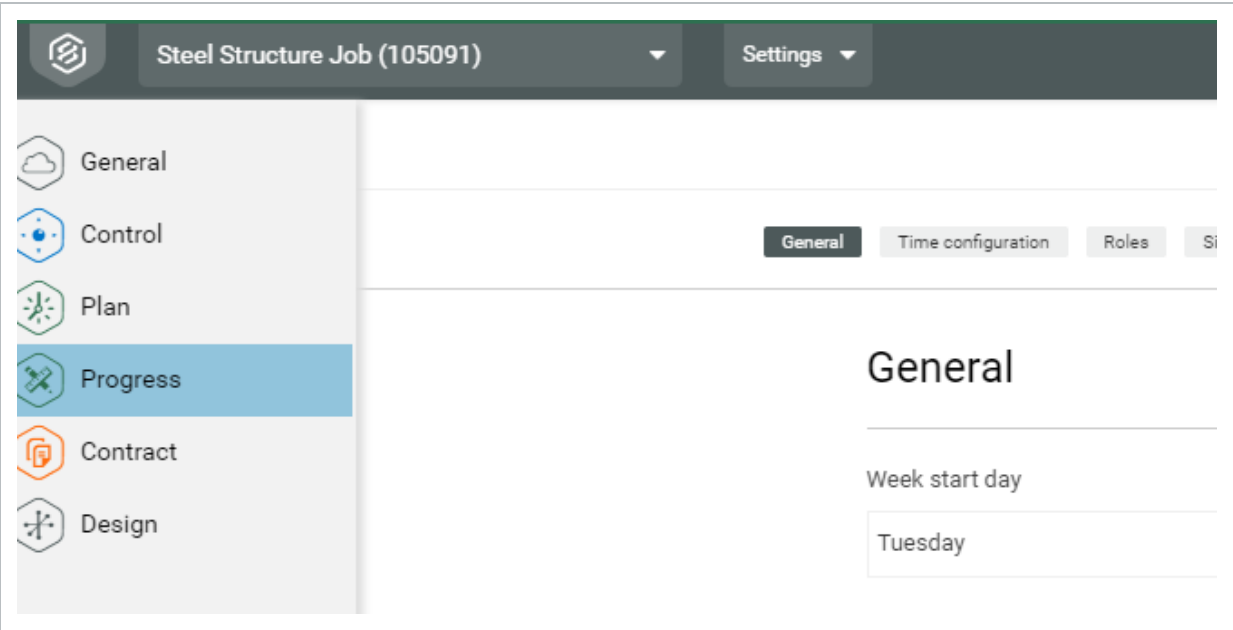
3. Navigate to the General header tab.



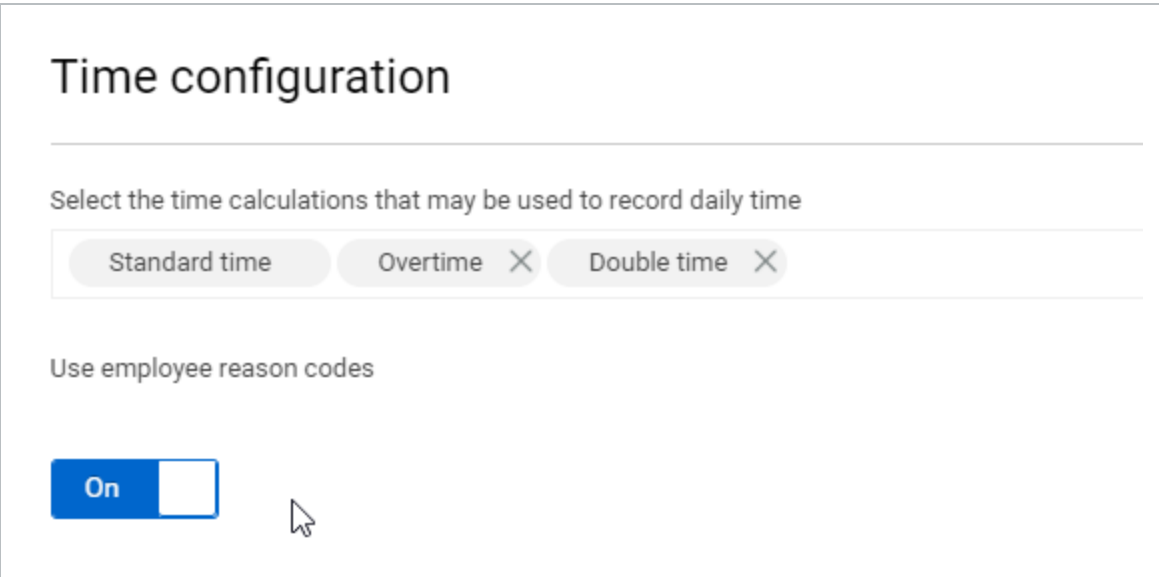
4. Change the toggle buttons to **On** to allow employee and equipment linking on the project and to allow premiums on the project.



5. Navigate to the **Time Configuration** header tab to 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		ES	FR-CA
Position	ID	* Description	* Activity type	Allow premiums	Display in Wee...	* Description			
01	OPT	Operate Equipment	Labor	On ☐	No	Operar maquinaria			⊖
02	1	Maintenance	Maintenance	On ☐	No	Mantenimiento			⊖
03	4	Work	Labor	On ☐	No	Trabajo			⊖
04	3	Vacation	Labor	On ☐	No	Vacaciones			⊖
05	1	Mains	Labor	On ☐	No	Mains			+

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 and French. Use the toggle below to change between Spanish and French to display in addition to English

Employee reason codes

English						Español		ES	FR-CA
Position	ID	* Description	* Activity type	Allow premiums	Display in Wee...	* Description			
01	OPT	Operate Equipment	Labor	On ☐	No	Operar maquinaria			⊖
02	1	Maintenance	Maintenance	On ☐	No	Mantenimiento			⊖
03	4	Work	Labor	On ☐	No	Trabajo			⊖
04	3	Vacation	Labor	On ☐	No	Vacaciones			⊖
05	1	Mains	Labor	☐ Off	No	Mains			+

8. Use the  and  buttons on the right to add or remove the code for your project to use.

Employee reason codes

English						Español	ES	FR-CA	
Position	ID	* Description	* Activity type	Allow premiums	Display in Wee...	* Description			
01	OPT	Operate Equipment	Labor	☒ On	No	Operar maquinaria		⊖	
02	1	Maintenance	Maintenance	☒ On	No	Mantenimiento		⊖	
03	4	Work	Labor	☒ On	No	Trabajo		⊖	
04	3	Vacation	Labor	☒ On	No	Vacaciones		⊖	
05	1	Mains	Labor	☐ Off	No	Mains		⊕	

9. Use the on/off toggle under **Allow Premiums** to identify which codes would allow a premium as set up in your ERP system.

Employee reason codes

English						Español	ES	FR-CA	
Position	ID	* Description	* Activity type	Allow premiums	Display in Wee...	* Description			
01	OPT	Operate Equipment	Labor	☒ On	No	Operar maquinaria		⊖	
02	1	Maintenance	Maintenance	☒ On	No	Mantenimiento		⊖	
03	4	Work	Labor	☒ On	No	Trabajo		⊖	
04	3	Vacation	Labor	☒ On	No	Vacaciones		⊖	
05	1	Mains	Labor	☐ Off	No	Mains		⊕	

1.2 REASON CODES

1.2.1 Reason Codes

Reason codes are categories set up in your Organizational and Project settings to provide more options that are useful to assign hours to. Instead of tracking hours against only standard time, overtime, and double time, these categories can be set up as anything that would be helpful for payroll tracking, such Work, Approved Time Off, Vacation, PTO, etc.

1.2.2 Premiums

When assigning hours to your reason codes, you can also indicate a premium rate. Premiums are assigned on an hourly basis and are used to ensure employees receive the correct pay for the work that is done. If someone works something outside their normal job duties and are awarded more money for those specific hours, a premium would be used. For example, one of your employees may

work at a regular labor rate for 6 hours and as a welder for 2 hours. You can have two reason codes for that employee, one for 6 hours and one for 2, and you can assign a premium code, such as “HSS Welder” to the 2 hours. This will ensure the correct rate gets accounted for when the information goes to payroll.

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

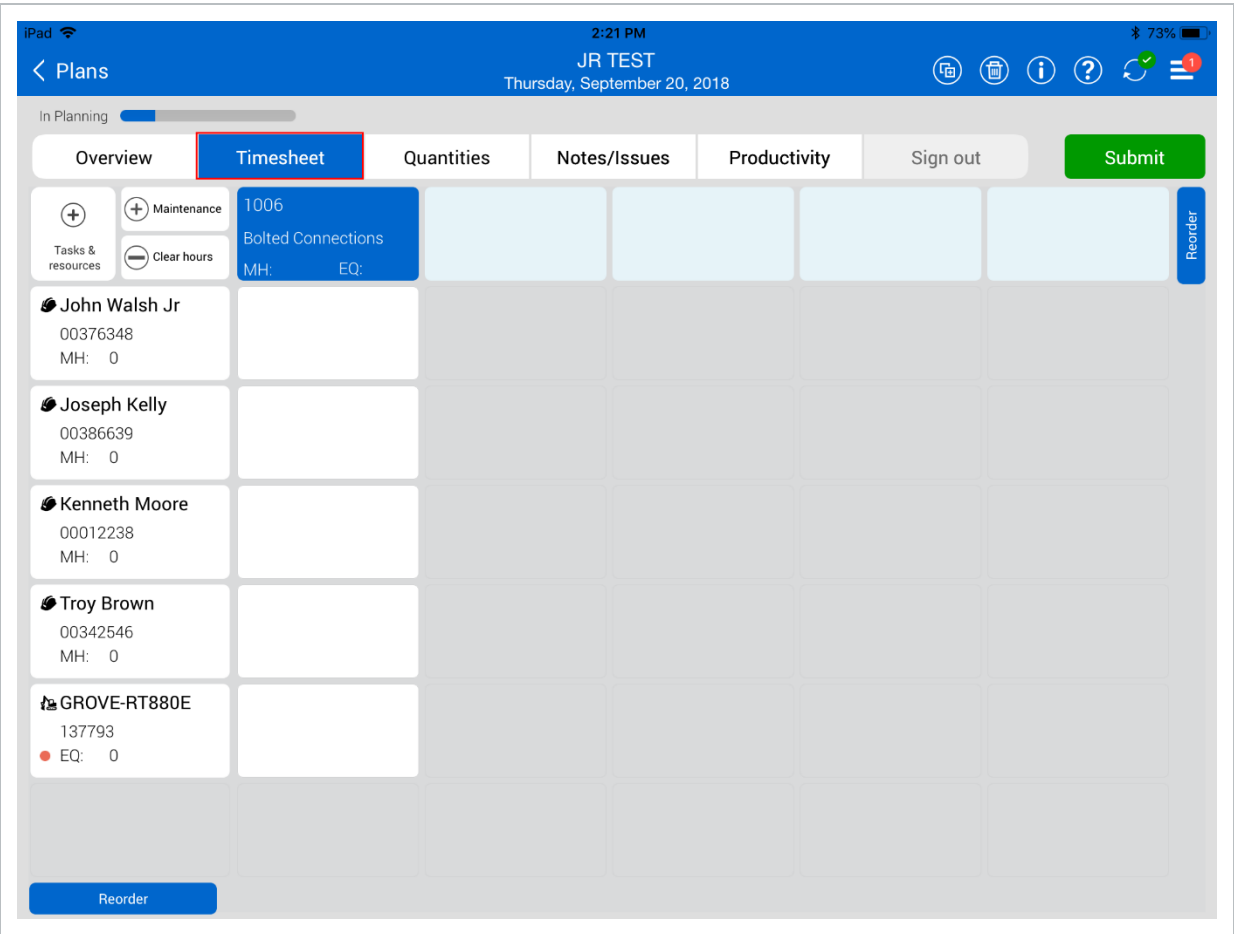
TIP

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

1.2 Step by Step 1 — Assign Hours Using Reason Codes

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

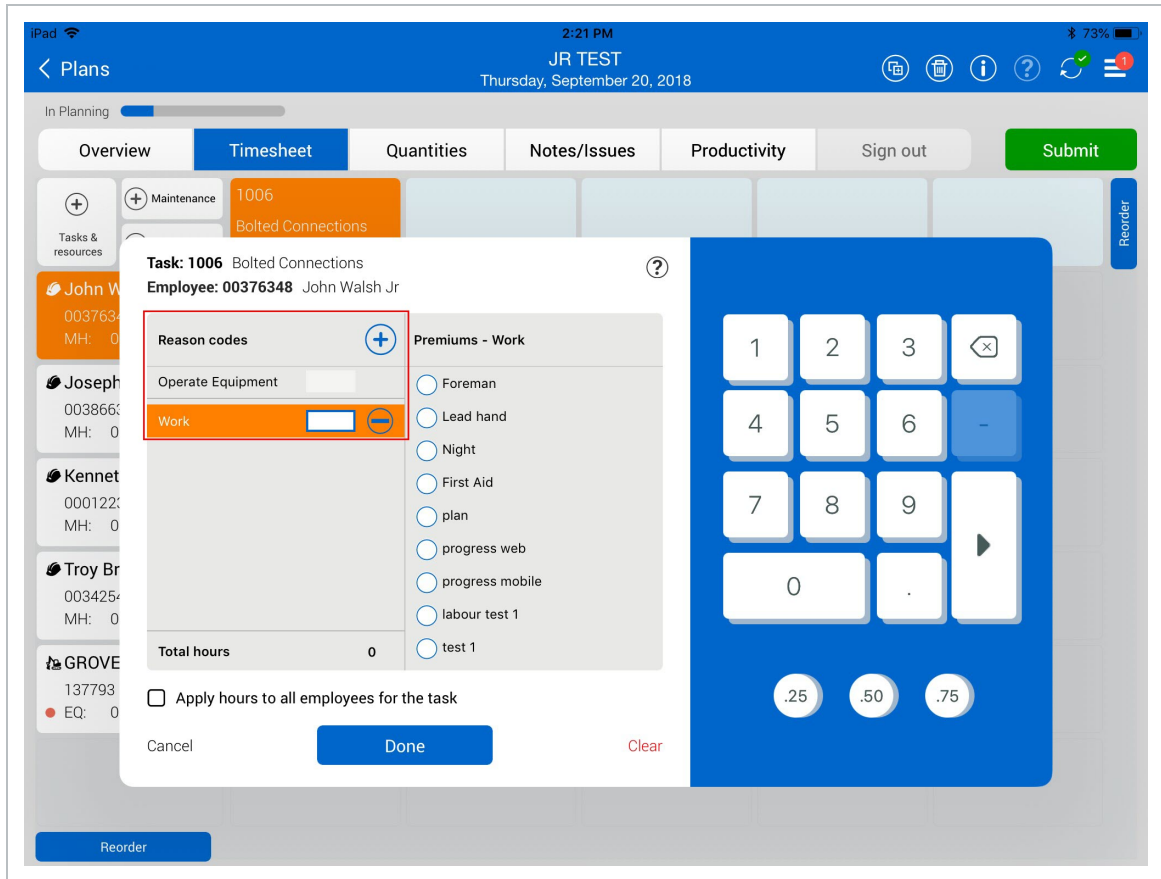
- 1. Open the daily plan you are working in and navigate to the **Timesheet** tab.



- 2. Tap the white tile next to an employee.

The screenshot shows the InEight mobile app interface for a project named "JR TEST" on Thursday, September 20, 2018. The app is running on an iPad, as indicated by the status bar at the top. The main screen is titled "Plans" and features a navigation bar with tabs: Overview, Timesheet (selected), Quantities, Notes/Issues, Productivity, Sign out, and a green Submit button. Below the navigation bar, there's a section for "In Planning" with a progress bar. The main content area is a grid for recording time. The first row is for task "1006 Bolted Connections" with a blue header. Below this, there's a list of resources: John Walsh Jr (00376348, MH: 0), Joseph Kelly (00386639, MH: 0), Kenneth Moore (00012238, MH: 0), Troy Brown (00342546, MH: 0), and GROVE-RT880E (137793, EQ: 0). The grid cells for these resources are currently empty, with a red box highlighting the first cell for John Walsh Jr. A "Reorder" button is visible at the bottom left of the grid.

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



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

- These categories can be set up in the Organization settings as anything that would be helpful for payroll, such as, Work, time off, Vacation, PTO, etc.

Task: 1006 Bolted Connections
Employee: 00376348 John Walsh Jr

Reason codes + Premiums - Work

Operate Equipment

Work ←

☐ Foreman
☐ Lead hand
☐ Night
☐ First Aid
☐ plan
☐ progress web
☐ progress mobile
☐ labour test 1
☐ test 1

Total hours 0

☐ Apply hours to all employees for the task

Cancel Done Clear

Task: 1006 Bolted Connections
Employee: 00376348 John Walsh Jr

Reason codes + Premiums - Work

Operate Equipment

Work ←

☐ Foreman
☐ Lead hand
☐ Night
☐ First Aid
☐ plan
☐ progress web
☐ progress mobile
☐ labour test 1
☐ test 1

Total hours 0

☐ Apply hours to all employees for the task

Cancel Done Clear

4. In the Work code field, input **8** hours for the employee.
5. Under Premiums, select a premium.

Task: 1006 Bolted Connections
Employee: 00376348 John Walsh Jr

Reason codes

Operate Equipment

Work

8

Premiums - Work

☒ Foreman

☐ Lead hand

☐ Night

☐ First Aid

☐ plan

☐ progress web

☐ progress mobile

☐ labour test 1

☐ test 1

Total hours8

☐ Apply hours to all employees for the task

CancelDoneClear

- 6. Tap **Done**.
- 7. Select the white box next to another employee.
- 8. Select the **Add** button next to **Reason codes**.
- 9. Select a reason code.

Task: 1006 Bolted Connections
Employee: 00386639 Joseph Kelly

Reason codes

Oper

Work

0

Premiums - Work

☐ Work

☒ Vacation

☐ Attendence 2

Total hours0

☐ Apply hours to all employees for the task

CancelDoneClear

- Now the reason code appears as a field to enter hours
- 10. Enter **8** hours under the reason code for the employee.

Task: 1006 Bolted Connections ?
Employee: 00386639 Joseph Kelly

Reason codes	Premiums - Vacation
Operate Equipment	☐ Foreman
Work	☐ Lead hand
Vacation 8	☐ Night
	☐ First Aid
	☐ plan
	☐ progress web
	☐ progress mobile
	☐ labour test 1
	☐ test 1
Total hours 8	

☐ Apply hours to all employees for the task

Cancel **Done** Clear

11. Tap **Done**.

NOTE

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

1.3 EMPLOYEE EQUIPMENT LINKING

Scenario

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

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

With employee equipment linking enabled, when you input hours for your equipment, you can also specify the operator and their hours.

Equipment hours

Task: 1074 - Erect Steel - Heavy

Equipment: 150693 131113 - Pickup - 1/...

Planned hours:

0

Operators

John Walsh Jr 003...

8

Nick J Cole 002406...

Troy Brown 003425...

Operator total

8

Status

Operate

8

Idle

Down

Standby

Equipment total

8

Clear

Cancel

Done

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

Troy Brown

00342546

MH: 18

8

131113 - Pickup - 1

150693

EQ: 13

Operated 8

Other

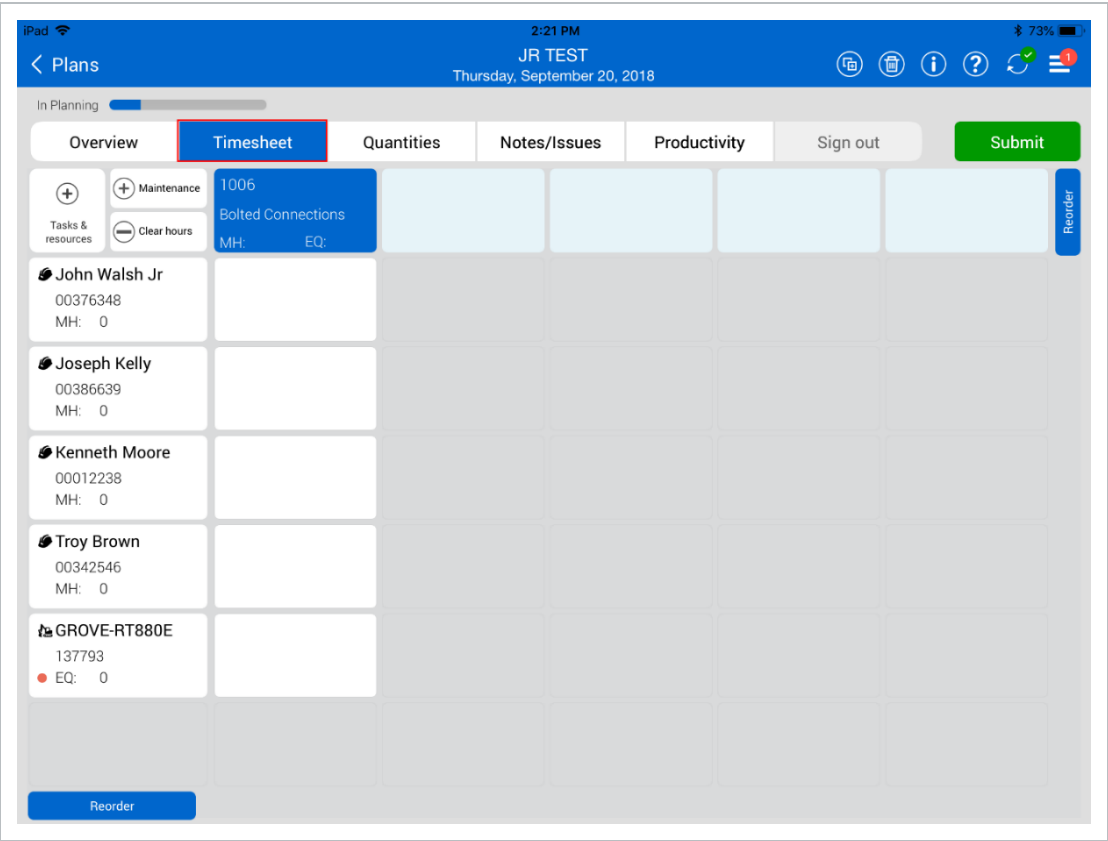
In the Progress mobile application, employee and equipment links are indicated by dots.

	1005 Erect Steel - Light MH:10 EQ:5	1006 Bolted Connections MH:3 EQ:3
Conlin Connolly 00000002 MH: 8	5	3
Darrel P. Lewis 00240370 MH: 5	5	
Grove-RT880E Crane MC-10000000 EQ: 8	Opt 5	Opt 3

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

1.3 Step by Step 1 — Linking Employees and Equipment

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



2. Tap the **white tile** next to a piece of equipment.

The screenshot shows the 'Plans' screen on an iPad. The top bar indicates the time is 2:23 PM and the date is Thursday, August 29, 2019. The 'Timesheet' tab is active. A table lists tasks and equipment with input fields for hours. The 'Grove-RT880E Crane' row is highlighted with a red box.

Task	Equipment	Planned Hours	Operate	Idle	Down	Standby
1005 Erect Steel - Light						
Conlin Connolly	00000002					
Darrel P. Lewis	00240370					
Grove-RT880E Crane	MC-10000000					

3. Enter **8** into the Operate field to indicate the number of hours the equipment is operated.

The screenshot shows the 'Task: 1005 Erect Steel - Light' screen. The 'Equipment: MC-10000000 Grove-RT880E Crane' is selected. The 'Planned Hours' field is set to 8. The 'Operate' field is highlighted with a red box and contains the value 8. A numeric keypad is visible on the right.

Task: 1005 Erect Steel - Light
Equipment: MC-10000000 Grove-RT880E Crane

Operators

Operator	Planned Hours	Operate	Idle	Down	Standby
Conlin Connolly					
Darrel P. Lewis					

Total hours: 8

☐ Apply hours to all equipment for the task

Cancel Done Clear

4. Under Operators, enter **8** hours in the field next to one of the listed employees.

5. Click **Done**.

Task: 1005 Erect Steel - Light

Equipment: MC-10000000 Grove-RT880E Crane

Operators

Conlin Connolly

Darrel P. Lewis 8

Planned Hours 8

Operate 8

Idle

Down

Standby

Total hours 8

☐ Apply hours to all equipment for the task

Cancel Done Clear

1234567890. .25 .50 .75

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

Plans

2:28 PM

Structural Crew 08-29-19

Thursday, August 29, 2019

In Planning

Overview Timesheet Quantities Notes/Issues Productivity

Tasks & resources

Clear hours

1005 Erect Steel - Light

MH:8 EQ:8

Conlin Connolly

00000002

MH: 0

Darrel P. Lewis

00240370

MH: 8

Grove-RT880E Crane

MC-10000000

EQ: 8

8

Opt

8

- Also, if you click on the white box next to the employee's name, you can see his hours went

into the **Operate Equipment** code

Task: 1005 Erect Steel - Light

Employee: 00240370 Darrel P. Lewis - Iron Worker (Structural)

Reason codes

Operate Equipment

8

Work

Total hours 8

Premiums - Work

☐ Foreman

☐ Lead hand

☐ Night

☐ First Aid

☐ Apply hours to selected employees

☐ Apply hours to all employees for the task

Cancel

Done

Clear

Lesson 1 Review

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

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

3. How can you tell an Employee and Equipment are linked?
 - a. They will have the same color dot or bar
 - b. There is a note
 - c. A line is shown connecting them
 - d. All of the above

Lesson 1 Summary

As a result of this lesson, you can:

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

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LESSON 2 – MAINTENANCE WORK ORDERS

Lesson Duration: 15 minutes

Lesson Objectives

After completing this lesson, you will be able to:

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

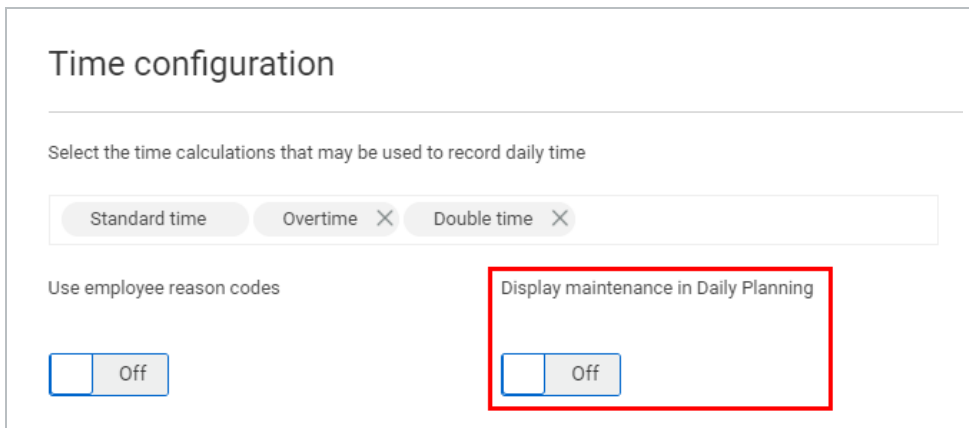
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2.1 MAINTENANCE WORK ORDER OVERVIEW

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.



Time configuration

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

Standard time Overtime X Double time X

Use employee reason codes

Off

Display maintenance in Daily Planning

Off

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

2.1.2 Overview

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

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

2.2 UTILIZING MAINTENANCE WORK ORDERS

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

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

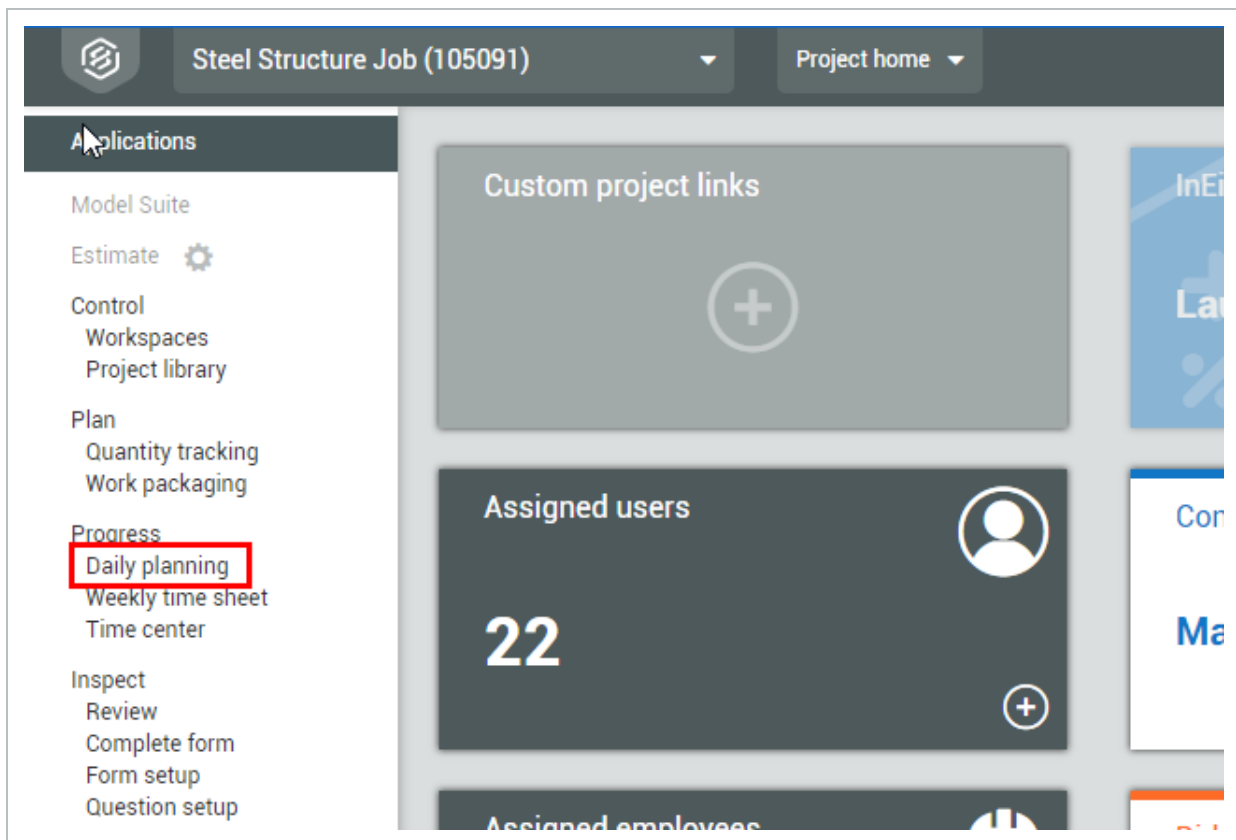
TIP

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

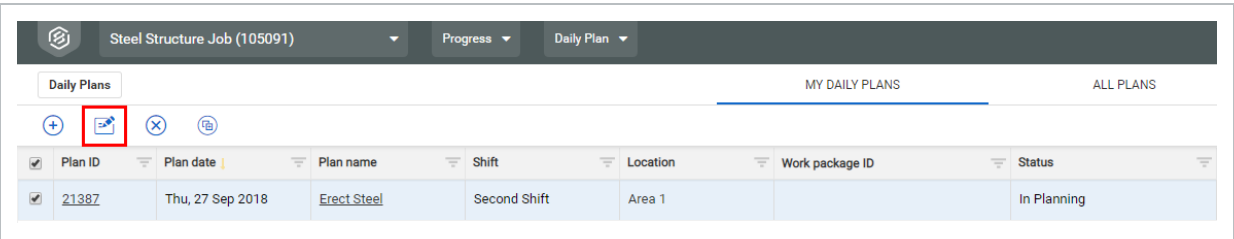
2.2 Step by Step 1 — Add Maintenance Work Order to Time Sheet

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

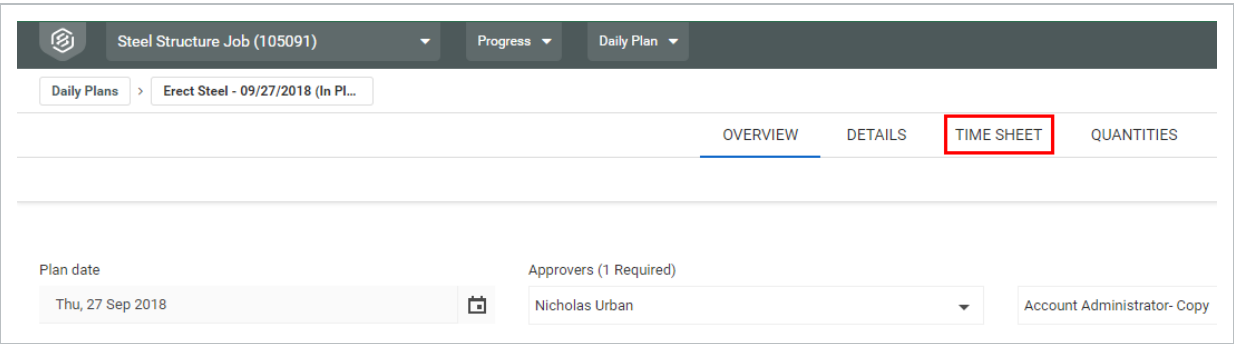
1. On the project dashboard, select the **Daily Planning** application under **Progress**.



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



3. Navigate to the **Time Sheet** tab.



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

Steel Structure Job (105091)

Progress

Daily Plan

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

OVERVIEWDETAILSTIME SHEET

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

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

order” so that maintenance-related hours can be tracked

Add maintenance

BY WORK ORDERS

BY COST CODE

Enter equipment ID or description

Enter work order or maintenance component

- 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.

Add maintenance

BY WORK ORDERS

BY COST CODE

1

Select from equipment below

137793 - GROVE-RT880E

150693 - 131113 - Pickup - 1/2 Ton

152687 - Rental - Manlift - 150' - 1500SJ

Enter work order or maintenance component

	Work orders	Maintenance components
	4051418 - Mounted Tank 1Y Ce...	540 - Undercarriage Or Tires
	5056209 - 82 - 6M Fire Suppres...	540 - Undercarriage Or Tires

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

Add maintenance

BY WORK ORDERS

BY COST CODE

1

Select from equipment below

137793 - GROVE-RT880E

150693 - 131113 - Pickup - 1/2 Ton

152687 - Rental - Manlift - 150' - 1500SJ

Enter work order or maintenance component

	Work orders	Maintenance components
	4051418 - Mounted Tank 1Y Cert	540 - Undercarriage Or Tires
	5056209 - 82 - 6M Fire Suppres...	540 - Undercarriage Or Tires

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

Steel Structure Job (105091)

Progress

Daily Plan

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

OVERVIEWDETAILSTIME SHEET

+ Add tasks and resources	+ Add maintenance	1005 Erect Steel - Light MH: 32 EQ: 8	EQ ID : 137793 4051418 - Mounted Tank 1Y Cert MH: 0		
John Walsh Jr 00376348 MH: 8	8				
Kenneth Moore 00012238 MH: 8	8				
Joseph Kelly 00386639 MH: 8	8				
Troy Brown 00342546 MH: 8	8				
GROVE-RT880E 137793 EQ: 8	Operated 4 Other 4				

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

Lesson 2 Review

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

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

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

Lesson 2 Summary

As a result of this lesson, you can:

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



LESSON 3 – WEEKLY TIME SHEET

Lesson Duration: 20 minutes

Lesson Objectives

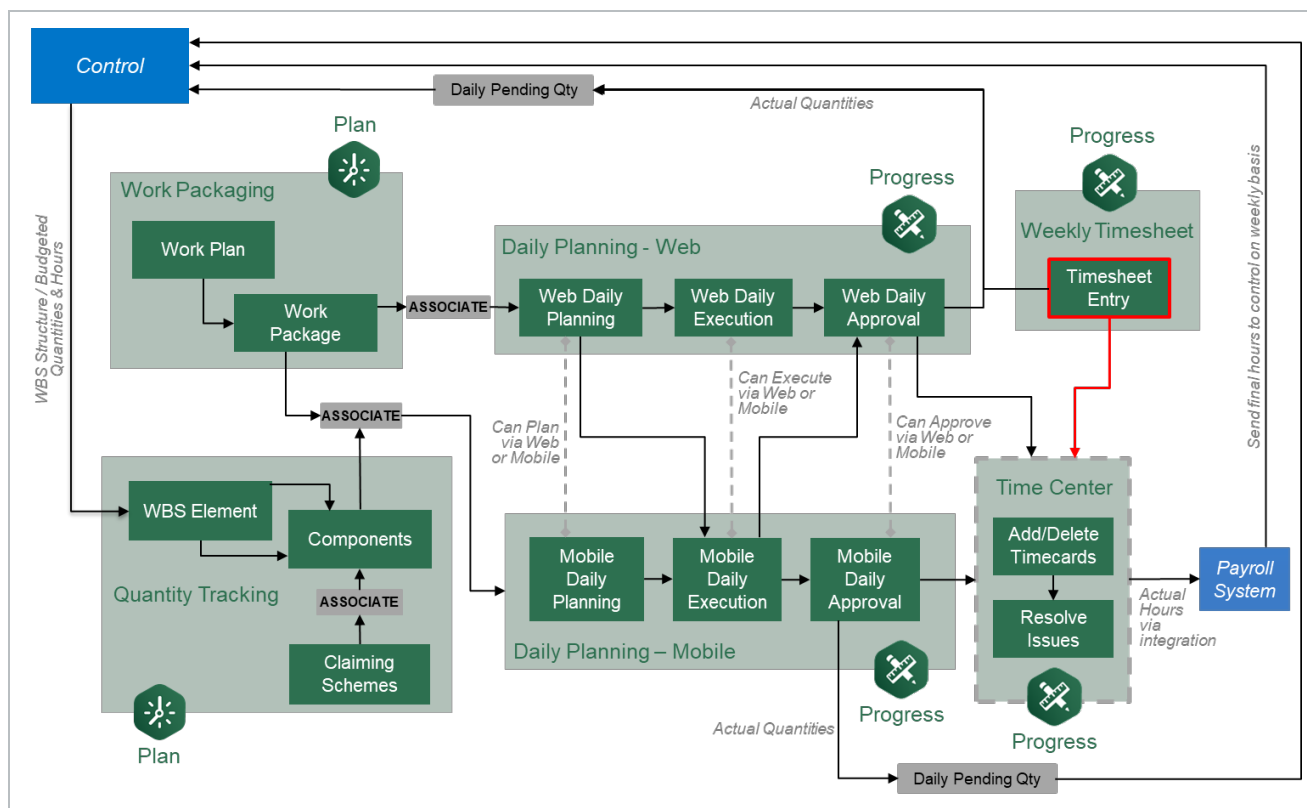
After completing this lesson, you will be able to:

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

Lesson Topics

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3.2 Weekly Timesheet Navigation	38
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3.1 INEIGHT PROGRESS WORKFLOW - WEEKLY TIMESHEET



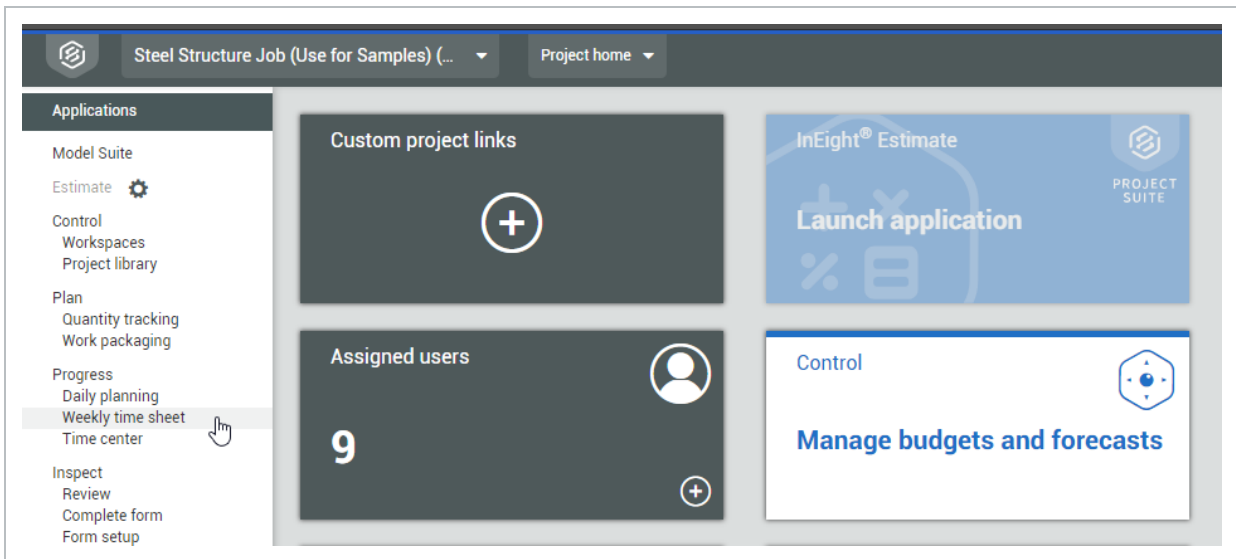
3.2 WEEKLY TIMESHEET NAVIGATION

3.2.1 Overview

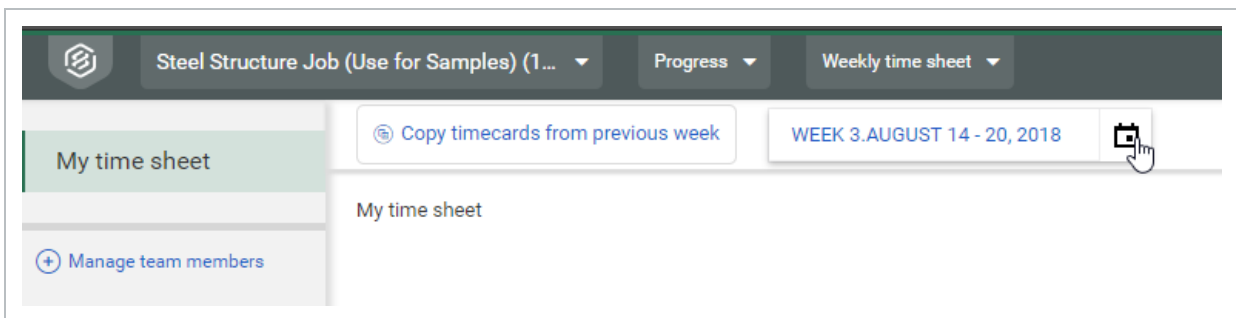
Weekly Time Sheet is a module in the InEight Progress application that allows you to see the weekly time that is entered for a project team. The time can be allocated to a single project or across multiple projects. The time that is entered either comes from daily plans or can be entered on the Weekly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

3.2 Step by Step 1 — Navigate Weekly Time Sheet

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



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



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

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

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

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

3.3 WEEKLY TIME SHEET CREATION

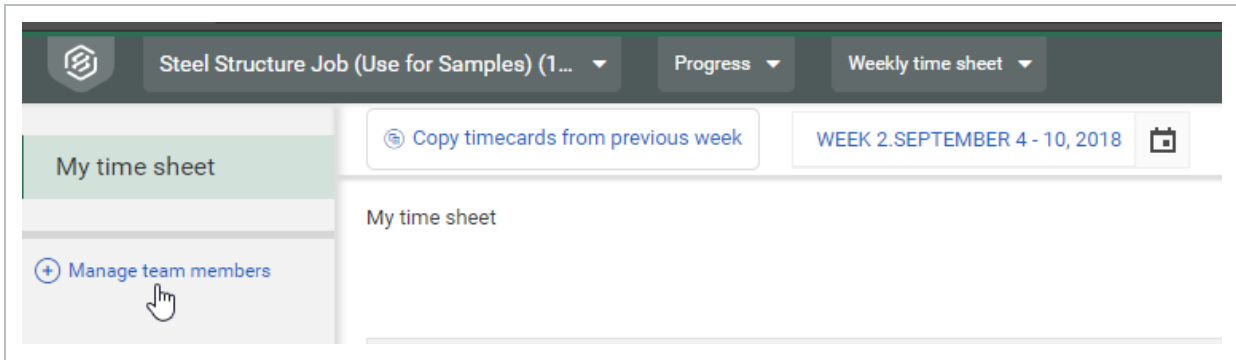
3.3.1 Set Up Members

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

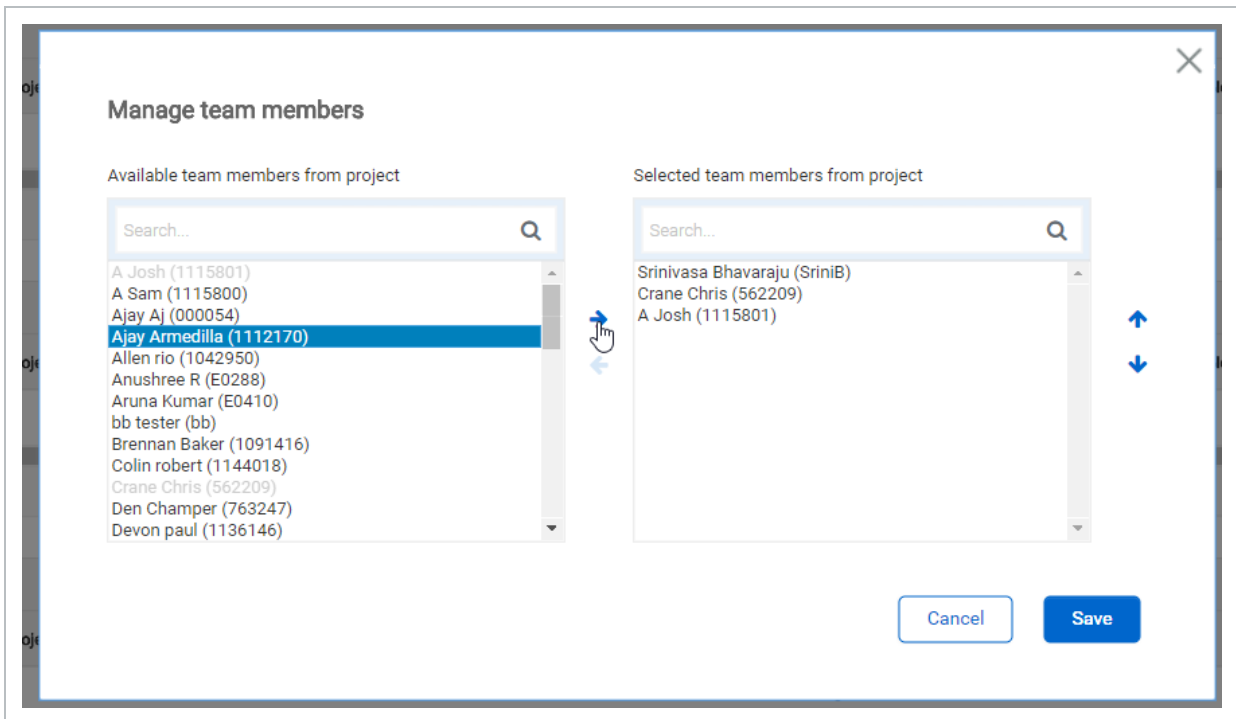
The following steps walk you through how to set up members in Weekly Time Sheet.

3.3 Step by Step 1 — Add Members to Weekly Time Sheet

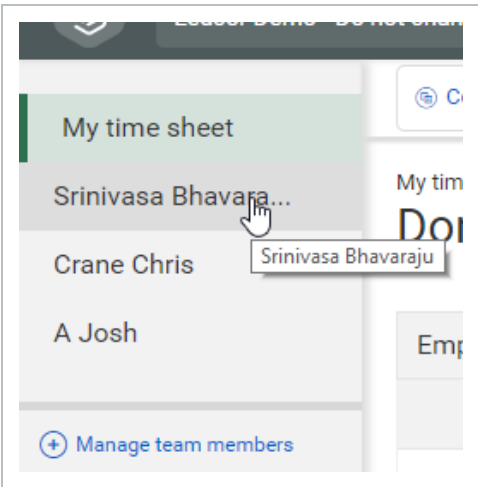
1. From the Weekly time sheet page, select + **Manage team members**.



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



- Once selected, the team members’ names show under My time sheet on the left



3.3.2 Input Time

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

Copy timecards from previous week

WEEK 4 APRIL 22 - 28, 2019

Cancel

Save

Submit all hours

My time sheet

Michael Thorp(1248)

Total Employee Hours
52

Display: ☒ Allowances ☒ Equipment

Employee

son code	Reason code description	Task ID	Task description	Plan ID	Notes	Mon 22	Tue 23	Wed 24	Thu 25	Fri 26	Sat 27	Sun 28	Total
SON	Reason1	25062018.001_ES.01	With def L & E	7668					8				8
	Operate Equipment	25062018.001_ES.01	With def L & E	7668					4				4
	Work	25062018.1234.890	DE Task			8	8	8	8	8			40
						8	8	8	20	8	0	0	52

Allowances

TIP

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

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

3.3 Step by Step 2 — Input Time on Weekly Time Sheet

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

The screenshot shows the 'Weekly time sheet' page for 'Steel Structure Job (105091)'. The 'Team member' section displays 'Chace Shelley(00939249)'. A red box highlights the 'Chace Shelley' name in the list, with a red arrow pointing to it. Below the team member selection, there is an 'Employee' grid with columns for 'Project ID', 'Project name', 'Reason code', and 'Reason code description'.

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

The screenshot shows the 'Employee grid' with columns for days of the week (Tue 23, Wed 24, Thu 25, Fri 26, Sat 27, Sun 28, Mon 29) and a 'Total' column. A red box highlights the '+' icon in the 'Total' column, with a red arrow pointing to it. Above the grid, there are buttons for 'Cancel', 'Save', and 'Send to Payroll'. The 'Total Employee Hours' is displayed as 0. The 'Display' section shows checkboxes for 'Allowances' and 'Equipment', both of which are checked.

3. Ensure that the Structural Steel Job is the selected Project.

The screenshot shows the 'Project' and 'Reason codes' section. The 'Project' dropdown is set to '123456 - Steel Structures'. The 'Reason codes' dropdown is empty. A red box highlights the '+' icon next to the 'Reason codes' dropdown, with a red arrow pointing to it. The 'Display' section shows checkboxes for 'Allowances' and 'Equipment', both of which are checked.

4. For the Reason Code, select **AWK Work**.

- 5. For the Task ID, select **Unallocated Costs**.
- 6. Enter **8** in the Monday and Wednesday fields.

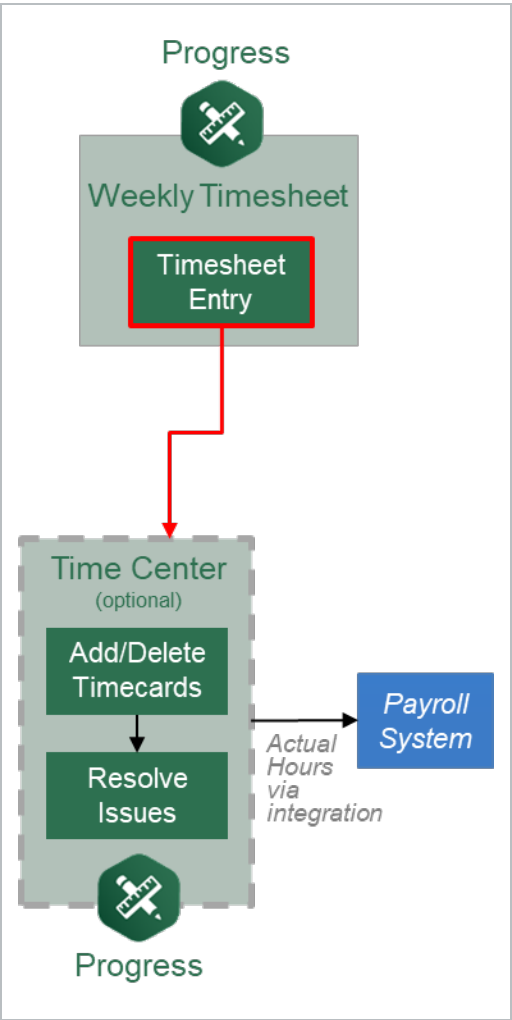
The screenshot shows a web application interface for an 'Employee' time sheet. It features a table with columns for 'Task ID', 'Task description', 'Plan ID', 'Notes', and days of the week from Sunday to Saturday. The first row of data shows '123456 295116.888' for the Task ID, 'Unallocated Costs' for the Task description, and '8' entered in the Monday and Wednesday columns. The '8' is entered in a small input field within the cell. The 'Notes' column contains a small icon. The table is part of a larger form with a header 'Employee' and a footer with a small number '4'.

Task ID	Task description	Plan ID	Notes	Sun 23	Mon 24	Tue 25	Wed 26	Thu 27	Fri 28	Sat 29
123456 295116.888	Unallocated Costs			0	8	0	8	0	0	0

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

3.3.3 Submit Hours

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



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

The screenshot shows a user interface for the Time Center. At the top, there are three buttons: 'Cancel', 'Save', and 'Submit all hours' (which is highlighted in green). Below these buttons, the text 'Total Employee Hours' is displayed above the number '52'. At the bottom, there is a 'Display:' section with two checked checkboxes: 'Allowances' and 'Equipment'.

Lesson 3 Review

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

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

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

Lesson 3 Summary

As a result of this lesson, you can:

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



LESSON 4 – TIME CENTER

Lesson Duration: 20 minutes

Lesson Objectives

After completing this lesson, you will be able to:

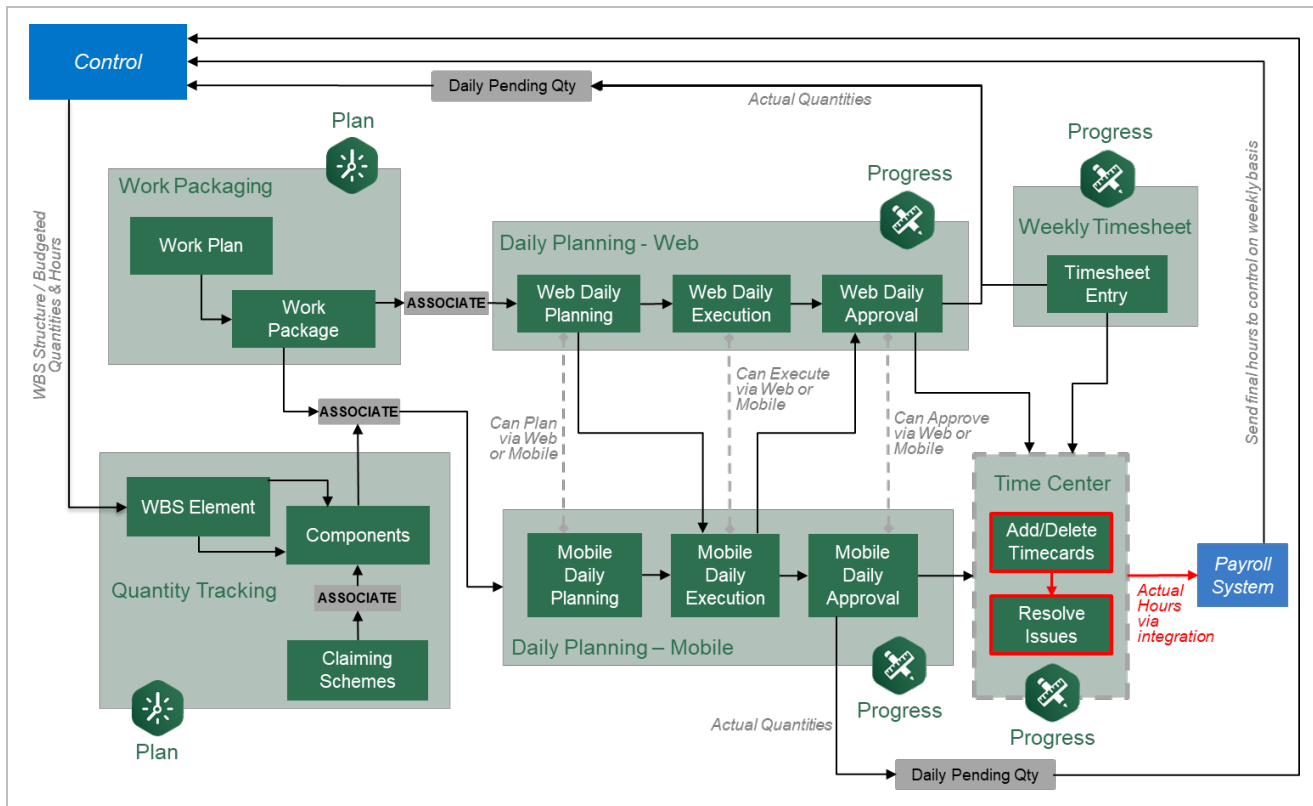
- Navigate the Time Center module
- Create, edit, and send timecards

Lesson Topics

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4.1 INEIGHT PROGRESS WORKFLOW - TIME CENTER

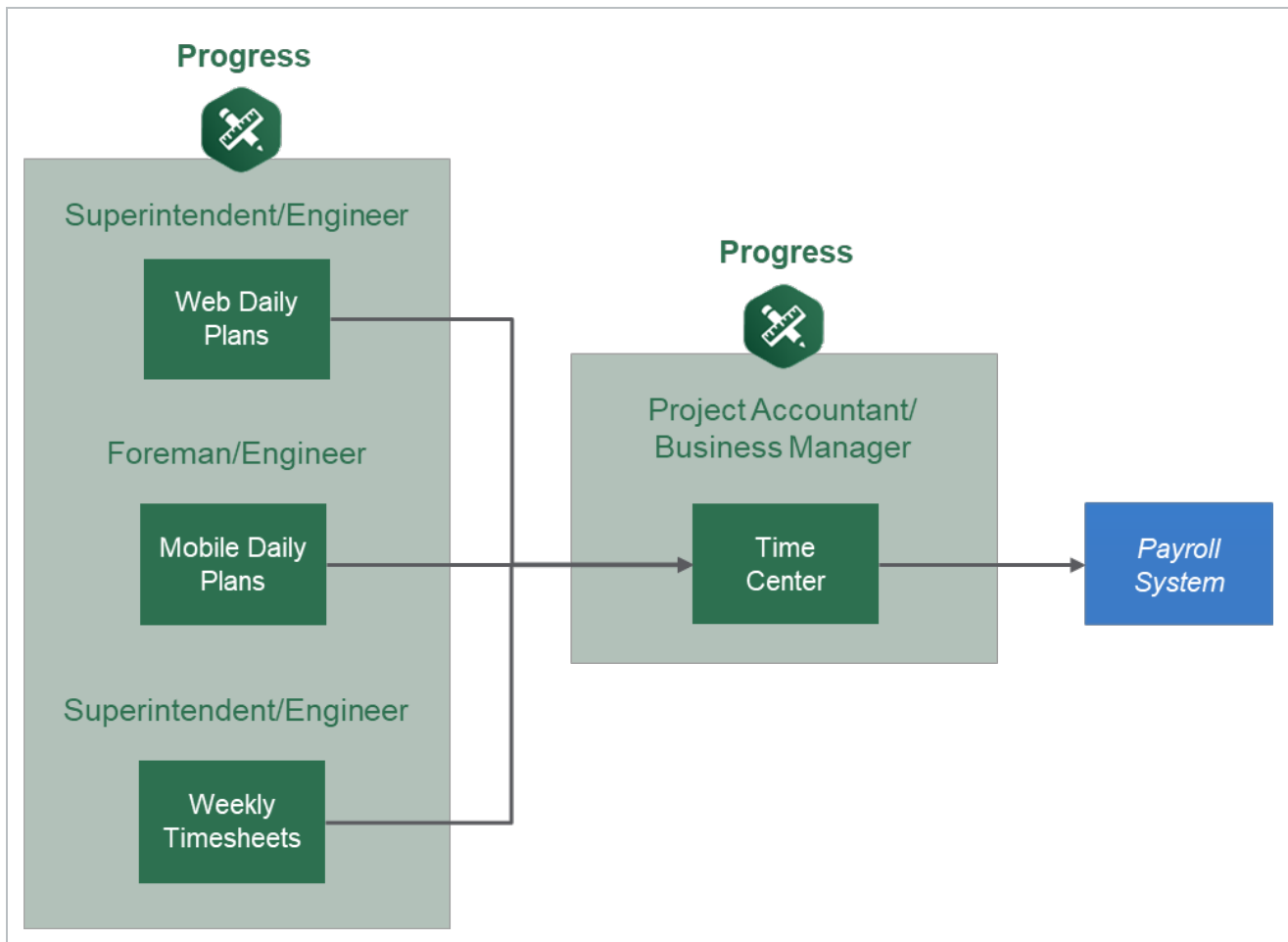


4.2 TIME CENTER NAVIGATION

4.2.1 Time Center Overview

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

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



4.2.1.1 Time Center Purpose

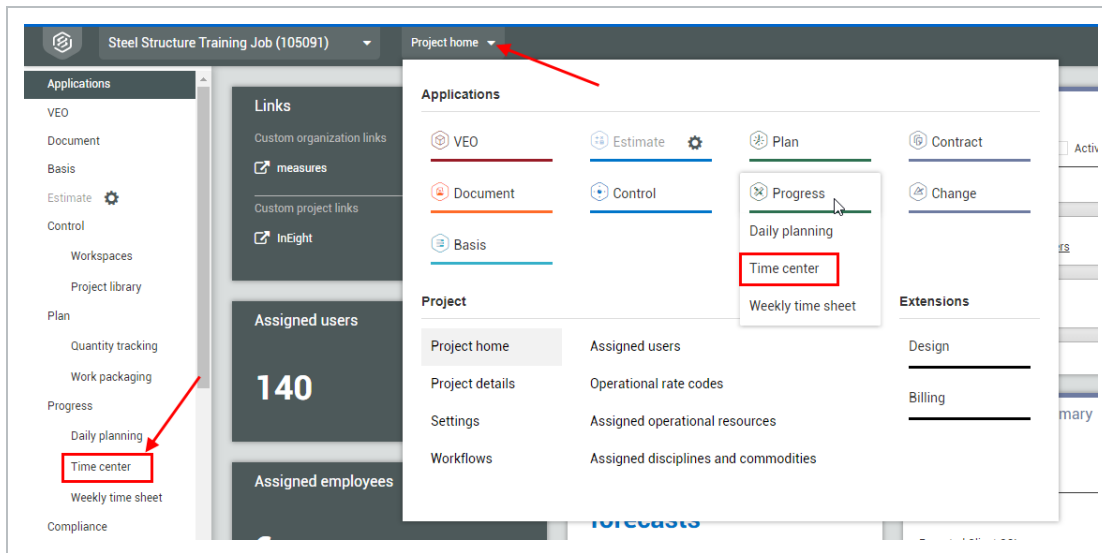
The purpose of Time Center is to:

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

4.2.1.2 Time Center Access

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

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

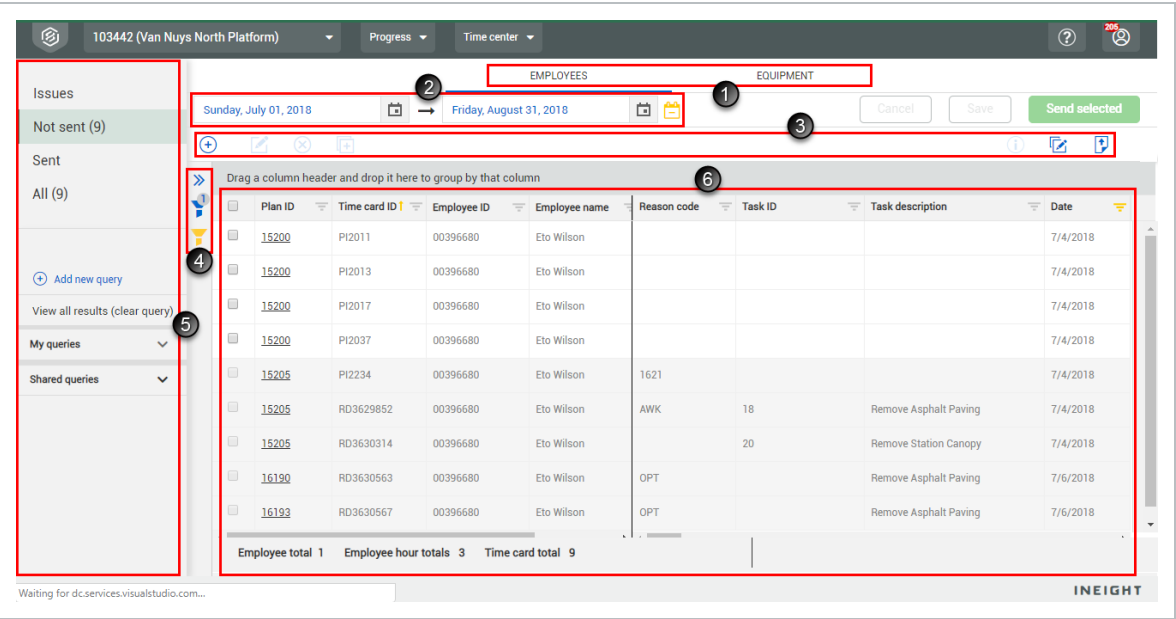


Overview – Time Center Register Page

Title		Description
1	Employee / Equipment Tabs	Select the appropriate tab to view the timecards for either employees or equipment.
2	Date Filter	Select the date to filter using the field on the left or click the add date icon to search by a date range.
3	Toolbar	Add, edit, delete or copy timecards using the toolbar on the left. View summary information, make bulk edits, and export timecards using the toolbar on the right.
4	Query Shortcut Icons	The double arrow is a shortcut to expand the Query builder slide out panel. The blue filter icon indicates how many queries are applied. Yellow filter icons appear for each filter applied.
5	Side Panel	The upper portion contains preset filters to view just timecards with issues, timecards not sent, timecards sent, or all timecards. The lower portion contains the Query builder to create queries to search for specific timecards. You can save your queries under My queries, and access Shared queries.

Overview – Time Center Register Page (continued)

Title	Description
6 Timecard register	Contains rows and columns that house all timecard data imported from daily plans and weekly timesheets.



4.2.2 Time Center Register Columns

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

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

Column	Editable in Time Center?
Plan Level Fields	

Column	Editable in Time Center?
Plan Status	No
Daily Plan name	No
Date	No
Approver 1 ID	Automatic
Approver 1 name	Yes
Approver 1 Role	Yes-Conditional
Approver 2 ID	Automatic
Approver 2 name	Yes
Approver 2 Role	Yes-Conditional
Client approver name	No
Executor name	Yes
Executor ID	Automatic
Executor Role	Yes
Shift	Yes
Employee Fields	
Employee ID	Yes-Conditional
Employee Name	No
Labor Hours	Yes
Reason Code	Yes
Reason Description	Automatic
Trade ID	No
Trade description	No
Employee Fields (Continued)	
Craft ID	No
Craft description	No

Column	Editable in Time Center?
Override trade	Automatic
Override trade description	Automatic
Override craft	Yes
Override craft description	Automatic
Union code	No
Billing class	No
Uplift	No
Uplift override	Yes
Employer company	No
Premium 1-6	Yes
Timesheet Entry Fields	
Timecard ID	No
Task ID	Yes
Task description	Automatic
Budget Code - Segment 1 (e.g., Cost Center)	Automatic
Budget Code - Segment 2	Automatic
Budget Code - Segment 3	Automatic
Budget Code - Segment 4	Automatic
Timecard Type	No
Labor Cost type	Yes
Equipment cost type	Yes
Notes	No
Equipment Fields	
Equipment ID	Yes
Equipment description	Automatic

Column	Editable in Time Center?
Equipment hours	Yes
Equipment reason code	Yes
Equipment reason code description	No
Equipment location	No
Maintenance Fields	
Work order	Yes
Work order description	Automatic
Equipment repair number	Yes
Equipment repair description	Automatic
Status Fields	
Modified by	Automatic
Modified date	Automatic
Integration status	Automatic
Timecard status	Automatic
Validation issue?	Automatic

NOTE

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

4.2.2.3 Sort Columns

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

Time card ID ↑
PI12549
PI14226
PI14227
PI14396

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

4.2.2.4 Move Columns

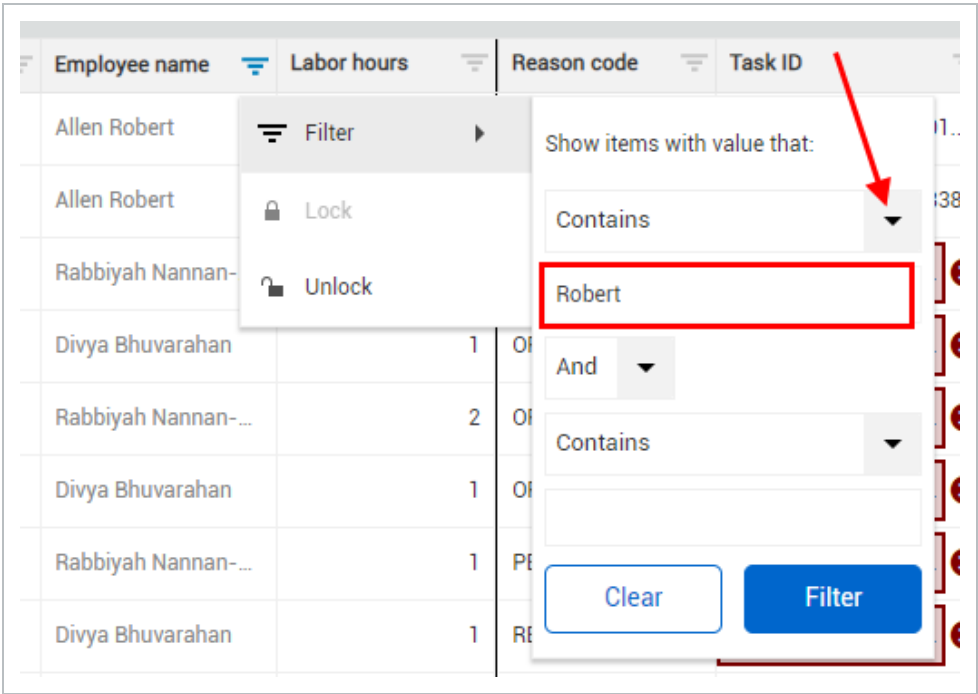
You can move columns using drag and drop to rearrange them as needed and the system will remember the column order the next time you log in.

4.2.2.5 Filter columns

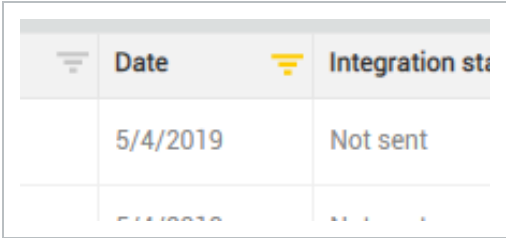
Depending on the project, you may have thousands of timecards to sift through. You can filter your timecards using column filters to drill down by date, employee, or whatever other criteria you need. To filter on a column, select the filter icon on the column’s header, then hover over the Filter menu option.

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

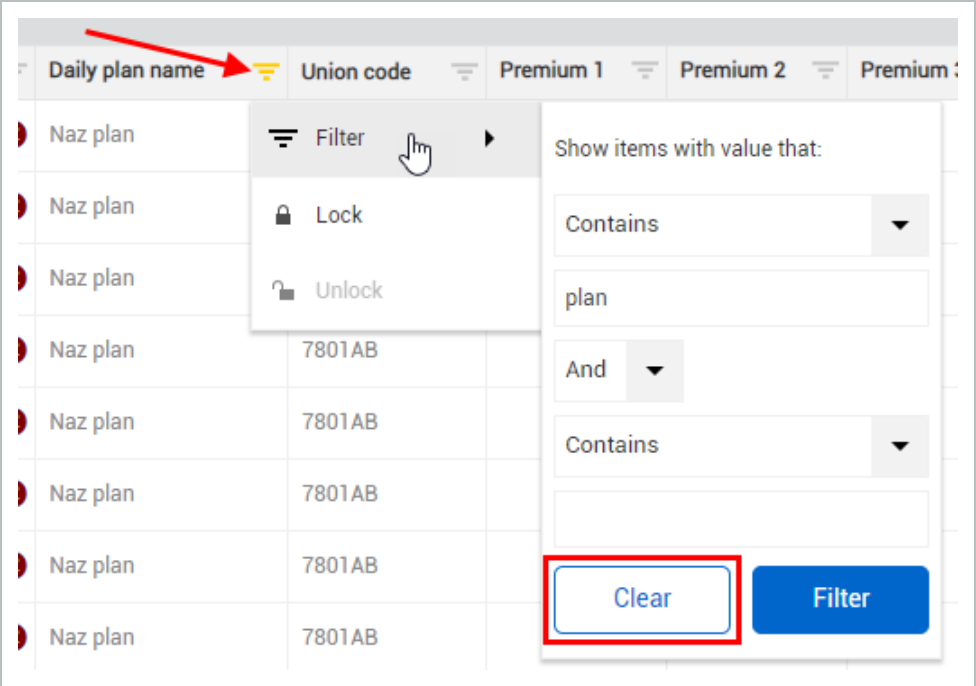
On the resulting Filter window, you can select an operator and value to filter by.



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



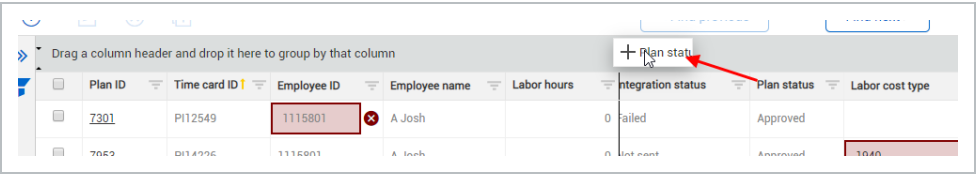
To clear the filter, you would click on the columns filter icon and select Clear.



4.2.2.6 Group Columns

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

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



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

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

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

Plan status 				
☐	Plan ID	Time card ID	Emp	
^ Plan status: Approved Labor Hours: 313.25				
☐	7301	PI12549	11	

The column will return to its placement within the register.

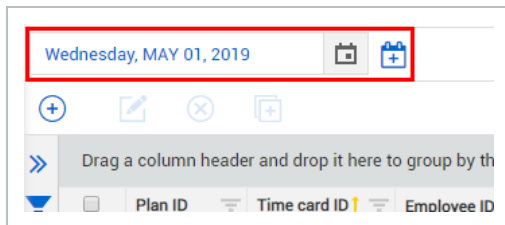
4.2.3 Unapproved Timecards

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

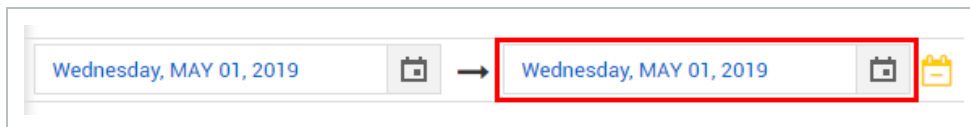
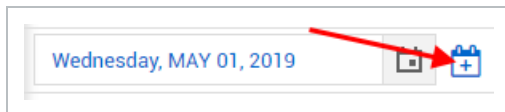
☐	Plan ID	Plan status	Time card ID	Employee ID	Employee name	Notes
☐	16202	Approved	RD127687	0046 ×	Ajay Aj	
☐	16202	Approved	RD127690	0046 ×	Ajay Aj	
☐	16202	Approved	RD127695	0046 ×	Ajay Aj	
☐	16303	Approved	RD129094	1018552	Nick v	
☐	16303	Approved	RD129098	1018552	Nick v	
☐	16321	Awaiting Appr...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

4.2.4 Date Filter

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



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

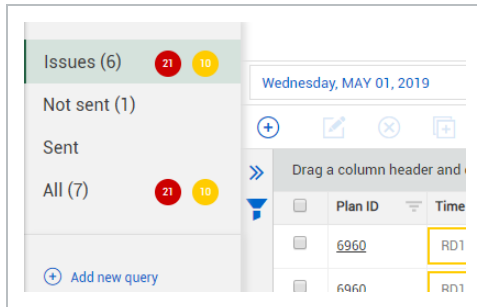


4.2.5 Timecard Pre-Set Filters

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

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

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

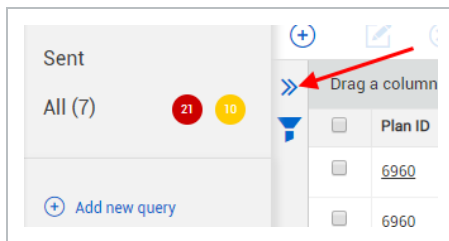


4.2.6 Query Builder

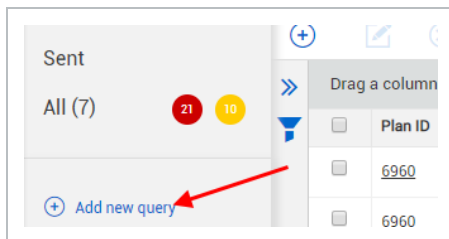
In addition to the filters you can set on individual columns, you can also add filters using the Query Builder. The following steps walk you through creating a query using the Query Builder.

4.2 Step by Step 1 — Query Builder

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

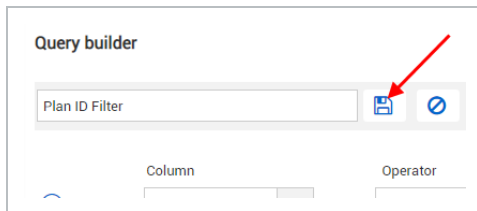


- Click the **Add new query** link on the left side bar.

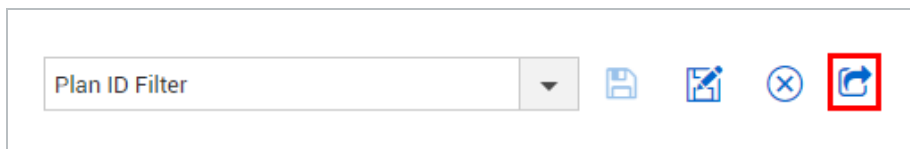


2. Type the name of the query in the New query name field.
3. Select **Plan ID** from the Column drop-down list.

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



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



- The query will now show up under Shared queries.

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

4.2.6.7 Filter Indicators

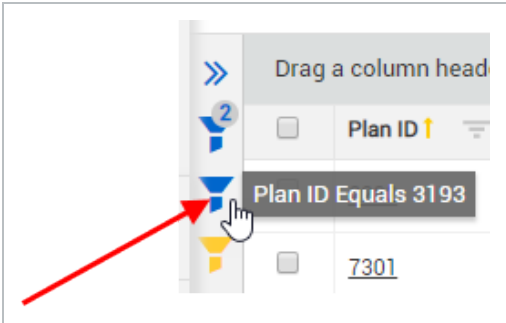
The number next to the top filter indicator shows how many queries have been applied.



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



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



4.2.7 Error Indicators

4.2.7.8 Errors

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

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

4.2.7.9 Warnings

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

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

4.3 TIMECARD MANAGEMENT

4.3.1 Timecard Management Overview

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

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

4.3.2 Timecard Review

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

These Employee IDs may be invalid for several reasons such as:

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

4.3.2.1 Data Validation Errors

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

Error	Causes
Invalid Work Order Number	Work Order status is not active and is assigned to the Equipment Repaired Number. Work Order status is active and is not assigned to the Equipment Repaired Number.
Invalid Equipment Repaired Number	Equipment status is not active. Equipment status is active, but not assigned to current project.
Invalid Allowances	Employee has an allowance assigned that is not valid for that type of employee or for the union it belongs to.

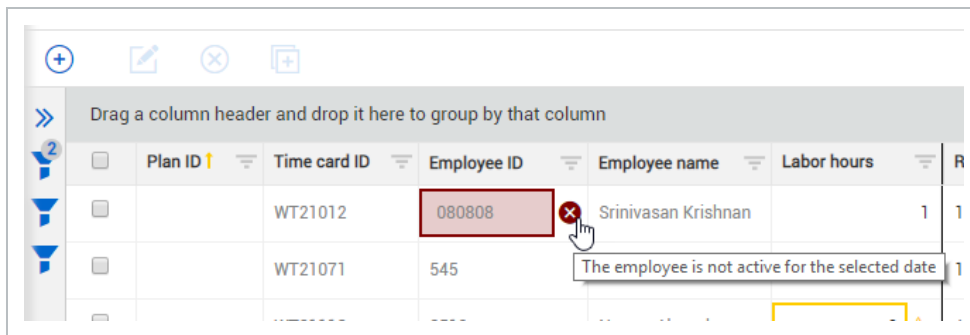
Error	Causes
Invalid Employees	Timecard date is not between the employee start and end dates. Employee status is not active. Employee status is set to not report time. Employee is not currently assigned to the project. Timecard has an operated equipment reason code and the Employee ID is blank.
Invalid Equipment	Equipment status is not active. Equipment is not assigned to the project. Employee reason code is "operated", but Equipment ID is blank.
Invalid Task ID	Task is closed for either employees or equipment. The task is a TEMP (temporary) task. Cost code is not active. Cost code is a TEMP (temporary) cost code. Cost code is not active.
Invalid Labor Cost Type and Invalid Equipment Cost Type	Cost Type value is not found in the list of available cost types for the Task ID.
Invalid Reason Code - Maintenance Record	Reason code is something other than the AWK (Work) reason code.

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

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

4.3.2.2 Correcting Issues Outside of Time Center

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

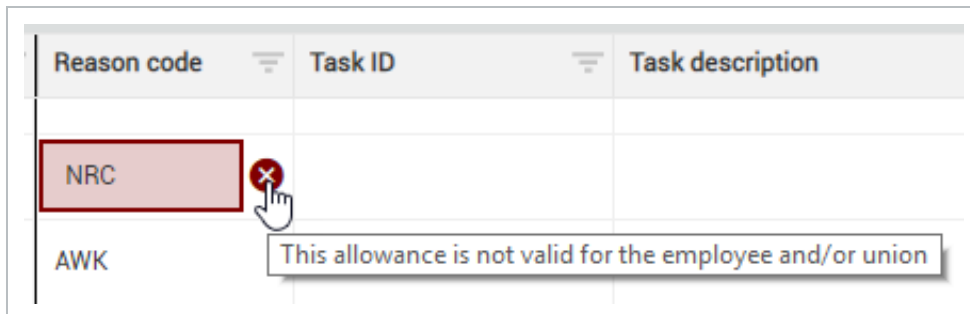


Plan ID	Time card ID	Employee ID	Employee name	Labor hours	R
	WT21012	080808	Srinivasan Krishnan	1	1
	WT21071	545			1

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

4.3.2.3 Correcting Issues in Time Center

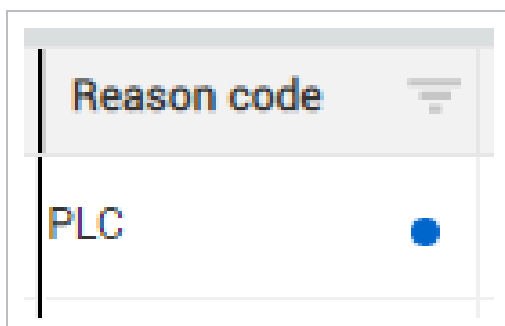
Many of the fields within Time Center are editable. Errors can therefore be corrected directly in Time Center. For example, perhaps a Reason Code is used on a timecard that is associated with an allowance that is not available.



Reason code	Task ID	Task description
NRC		
AWK		

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

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



Reason code
PLC

4.3.2.4 Other Timecard Adjustments

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

Cancel

Save

Send selected

IT

Monday, April 16, 2018

Time card ID	Employee ID	Employee name	Notes	Trade description	Override craft	Override craft
ID125887	162769	Rawle M Alexander				
ID127643	1115800	A Sam		QC Coordinator/Inspecto...	3QAP3	QA/QC Coord
ID127647	1115800	A Sam				
ID127656	1115800	A Sam				
ID127687	0046	Ajay Aj			AUTO.TECH - Automat...	
ID127690	0046	Ajay Aj			Ledcortest - QA/QC C...	
ID127695	0046	Ajay Aj			3EQP3 - Equipment C...	
ID129094	1018552	Nick v			3QAP3 - QA/QC Coord...	
ID129098	1018552	Nick v			3FAB3 - Actg Admin Cl...	
ID129437	1144018	Colin robert				
ID129439	1144018	Colin robert				

NOTE

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

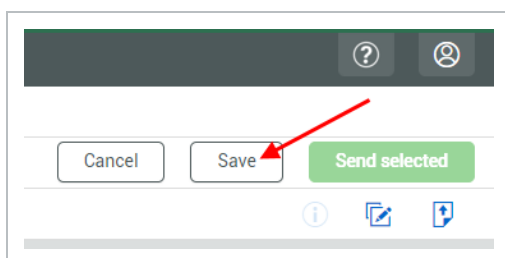
You can also assign or correct premiums. There are identified premiums which are created at the Project level which you can choose from.

+ × ▼ Cancel Save Send selected							
NT Monday, April 16, 2018 📅 📅							
Time card ID	Employee ID	Employee name	Notes	Employer company	Premium 1	Premium 2	P
RD125887	162769	Rawle M Alexander					
RD127643	1115800	✖ A Sam					
RD127647	1115800	✖ A Sam					
RD127656	1115800	✖ A Sam					
RD127687	0046	✖ Ajay Aj		Pk	Enter Pre...		
RD127690	0046	✖ Ajay Aj		Pk	14thMar18-...		
RD127695	0046	✖ Ajay Aj		Pk	Act Premium		
RD129094	1018552	Nick v			Add Premiu...		
RD129098	1018552	Nick v			Alloy Welding		
RD129437	1144018	Colin robert			Day/Night		
RD129439	1144018	Colin robert			Extra Timings		
					First Aid		

Premiums are not to be confused with allowances (known as Extra Pay in the Progress application). Unlike Premiums, allowances apply for the entire day.

4.3.3 Saving Changes

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

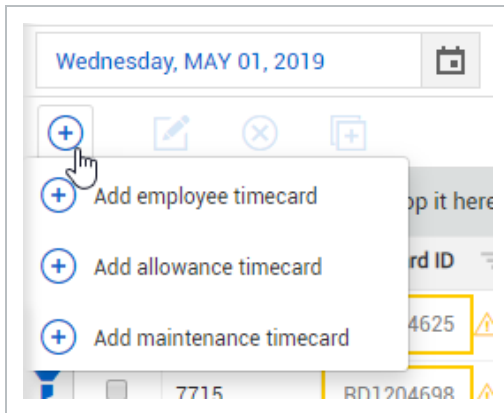


Any changes made in Time Center will update automatically in the daily plans of the InEight Progress application.

4.3.4 Add Timecard

At times you may need to account for employee hours, allowances, or maintenance hours that were not captured in a daily plan or weekly timesheet. Perhaps they were missed, or you need to make a

quick adjustment without going back to the InEight Progress application. You can add a new timecard to record the hours by clicking the **Add timecard** button and selecting the type of timecard to add.



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

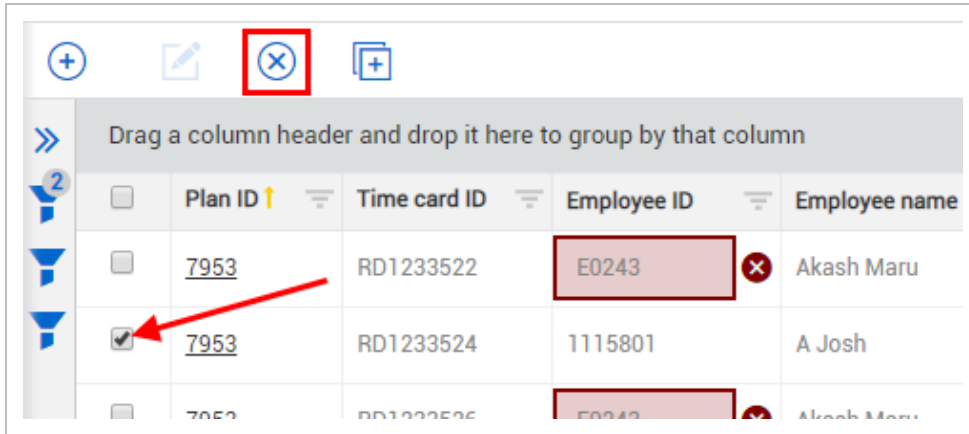
A slide out panel opens on the right to fill out and add the timecard.

A screenshot of the 'Add employee timecard' slide-out panel in the InEight Progress application. The panel has a title bar with a question mark and a close button. Below the title bar are buttons for 'Cancel', 'Save', and 'Send selected'. The main content area is titled 'Add employee timecard' and has two tabs: 'BY DAILY PLAN' (selected) and 'BY WEEKLY TIMESHEET'. Under the 'BY DAILY PLAN' tab, there are several input fields: 'Plan' (a dropdown menu with 'Select one' and a hint 'Type plan name or ID'), 'Employee' (a text input field with a hint 'Type employee name or ID'), 'Task' (a text input field with a hint 'Type task ID or description'), 'Reason code' (a dropdown menu with 'Select one'), 'Hours' (a text input field), 'Override craft' (a dropdown menu with 'Select one'), 'Uplift override' (a toggle switch), and 'Premiums' (a text input field with a hint 'Enter premium name; Select up to 6 premiums'). At the bottom of the panel are 'Cancel' and 'Add' buttons.

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

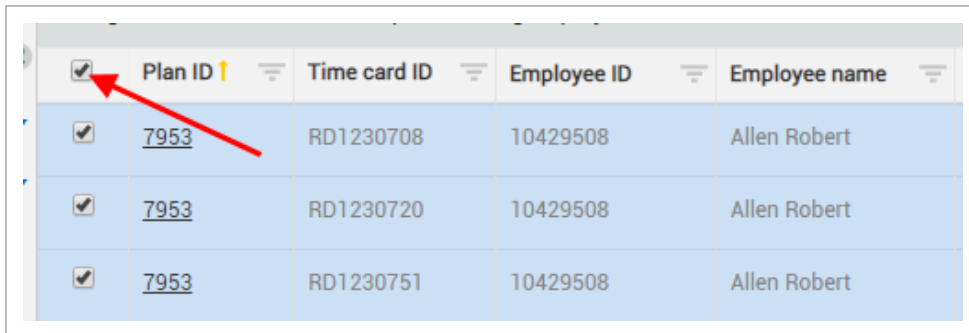
4.3.5 Delete Timecard

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

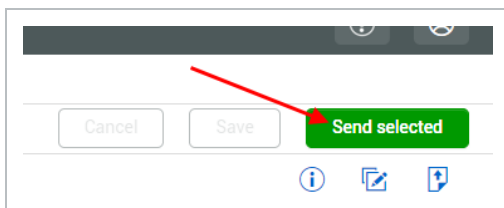


4.3.6 Submit to Payroll

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



With the timecards selected, click the Send Selected button.



This sends the selected timecards to your Payroll system.

4.3.6.5 Integration Validation

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

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

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

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

Lesson 4 Review

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

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

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

4. Once timecards are reviewed and issues resolved, how do you submit selected timecards to Payroll?
 - a. Select **Submit to payroll** from the Actions menu
 - b. Right click on the selected timecards and select **Submit to payroll**
 - c. Click the **Save** button
 - d. Click the **Send selected** button

Lesson 4 Summary

As a result of this lesson, you can:

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