PROGRESS USER GUIDE

Administrator

FIELD EXECUTION MANAGEMENT

INEIGHT

Release 23.12
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CONTENTS

STEP-BY-STEP PROCEDURES

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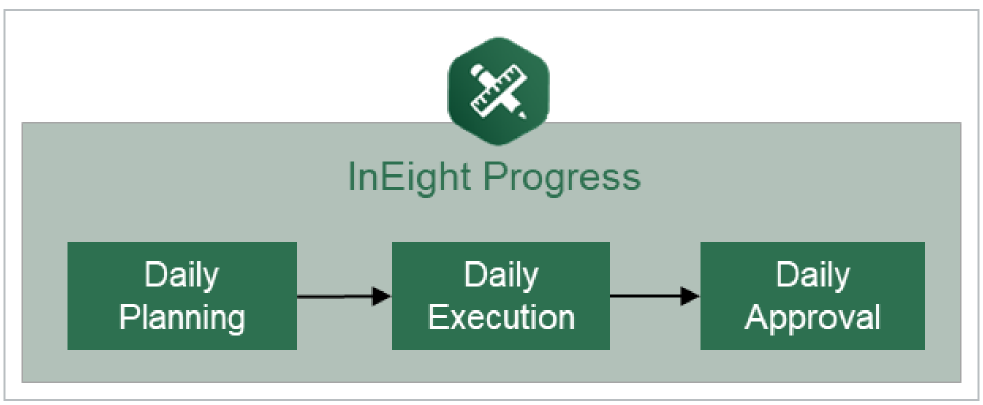
1.1 INEIGHT PROGRESS OVERVIEW

InEight Progress is one of the applications within the InEight portfolio of products. It is an integrated electronic time, equipment and quantity collection tool as well as a daily field log. The InEight Progress solution includes three submodules: Daily Planning, Weekly Timesheet and Time center. The Weekly Timesheet and Time center solutions are covered in the Progress – Advanced User Guide. This Guide will cover the Daily Planning portion of InEight Progress.

1.1.1 InEight Progress Daily Planning Phases

Daily planning is broken down into three distinct phases in the application: Planning, Execution, and Approval.



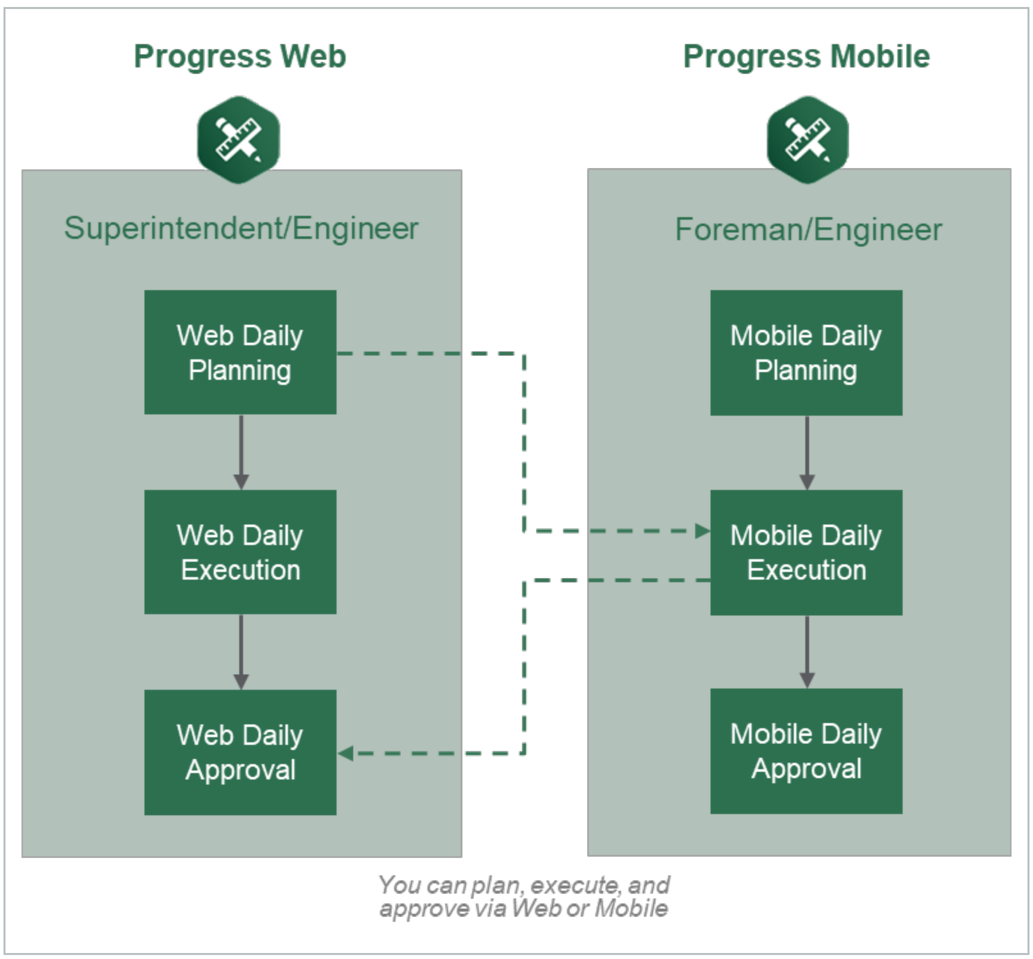
A daily plan is created by a project member to specify the tasks to be completed by a given crew, and to ensure productivity targets are met. Budget, quantity, safety, quality and other details are entered during the Planning phase to provide streamlined communication from the office to the field. Once the planner, typically a superintendent, field engineer or indirect supervisor is satisfied with the daily plan details and planned productivity, they will submit the plan to the Execution Phase.

In the 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, 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 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. The approver can approve the hours submitted, the quantities submitted or both. Approving the hours will send them to payroll for processing and approving the quantities will send them to the quantity tracking module of InEight Plan which syncs directly with InEight Control.

1.1.2 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:

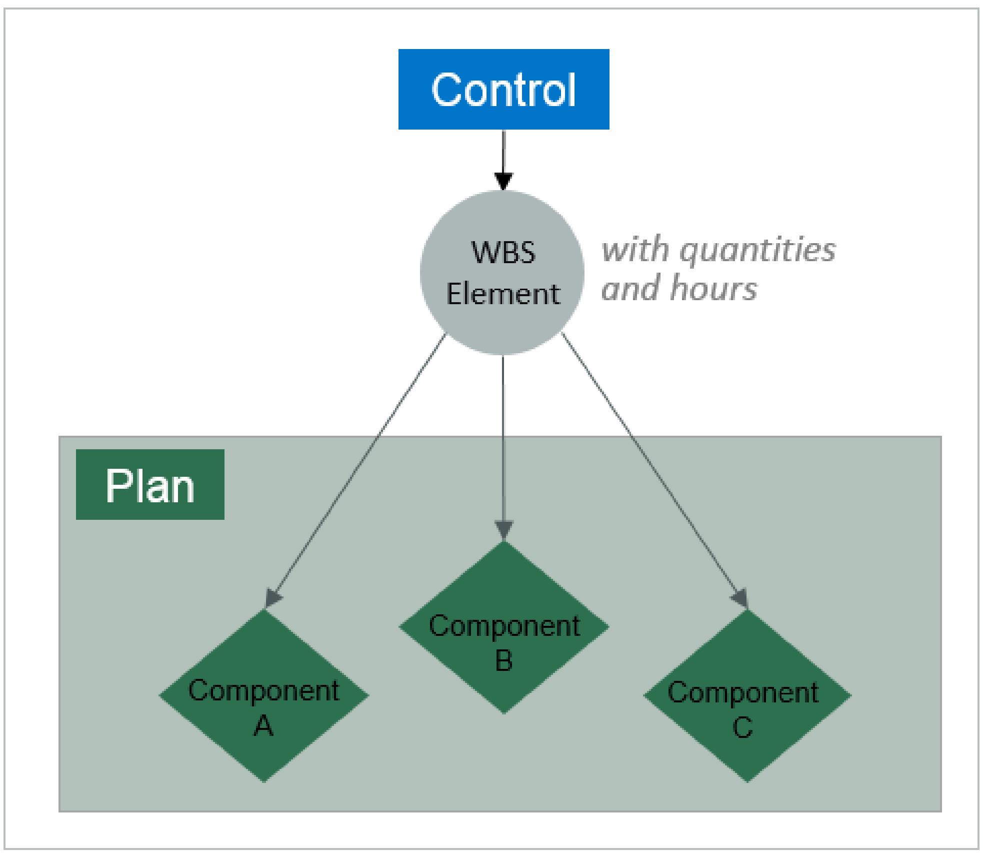


A daily plan can be accessed in either program in any of the phases of daily planning. The program used for a phase may vary from project to project and depends largely on the roles of the project members involved. For example, it may be preferable to have a staff member such as a superintendent or engineer 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 their 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 their office computer.

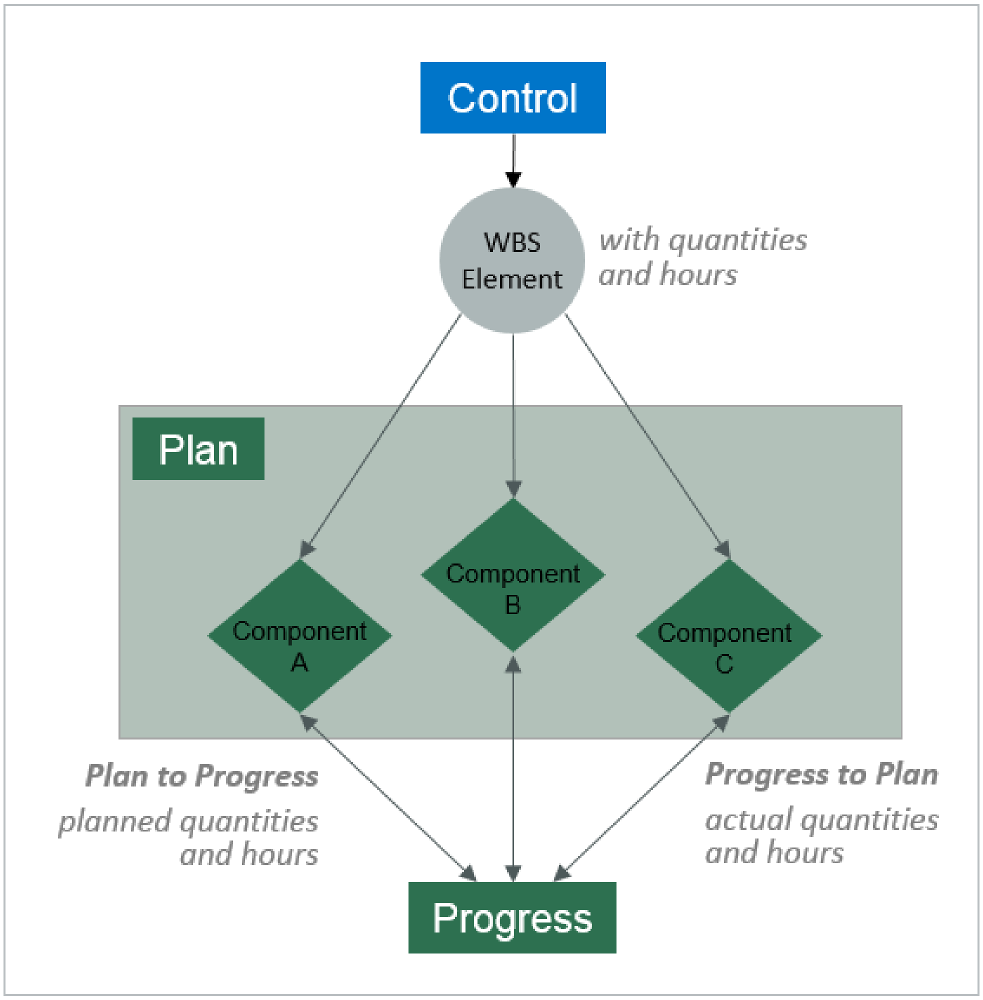
TIP	Mobile Daily Planning has all the same functionality as Web Daily Planning for InEight Progress, but is available as a mobile-only application.

1.1.3 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.

1.1.4 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 and 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 or current 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.

1.1.5 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 seven 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

1.1.6 Daily Approval

Daily approval allows you to review actual hours, quantities, notes/issues, and productivity that were entered during the execution phase. This gives supervisors a chance to review 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.

1.1.7 Work Flow Beyond InEight Progress

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

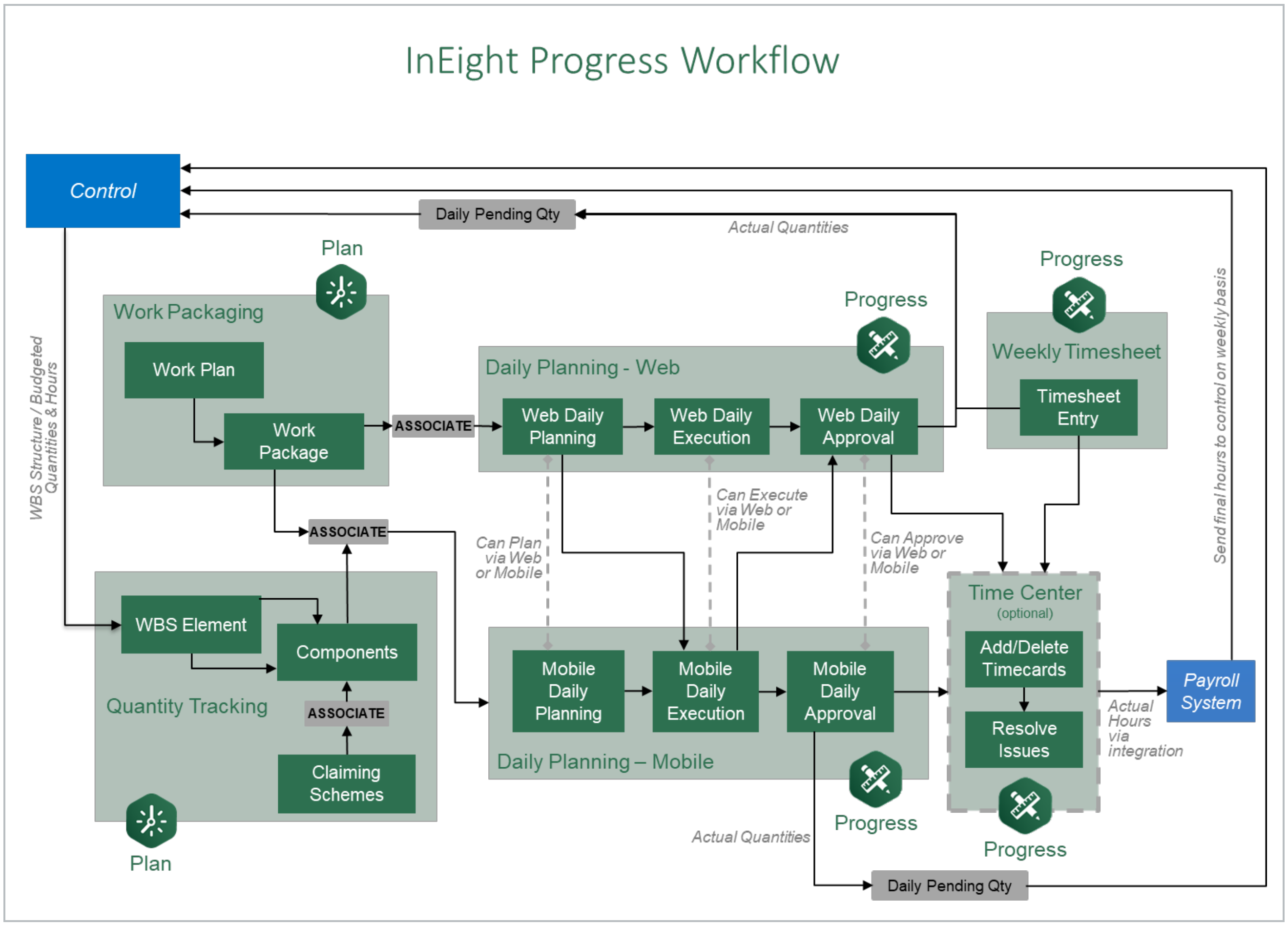
1.1.7.1 Hours

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).

1.1.7.2 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 timely 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
ASSOCIATE
Can Plan via Web or Mobile
Can Execute via Web or Mobile
Can Approve via Web or Mobile
Send final hours to control on weekly basis
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

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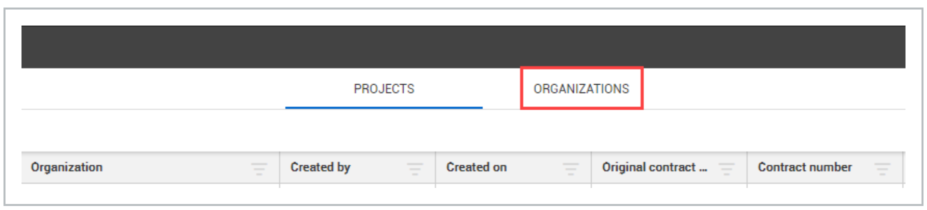
2.1 ORGANIZATION SETTINGS

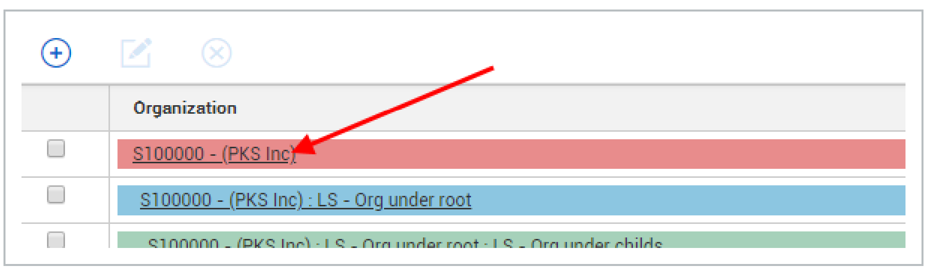
To track time and quantities successfully in Progress, the correct settings need to be set up before project initiation. The Organization level is the highest level where your company sets parameters for all projects. The steps below walk you through how to access the organization settings.

Open Organization Settings

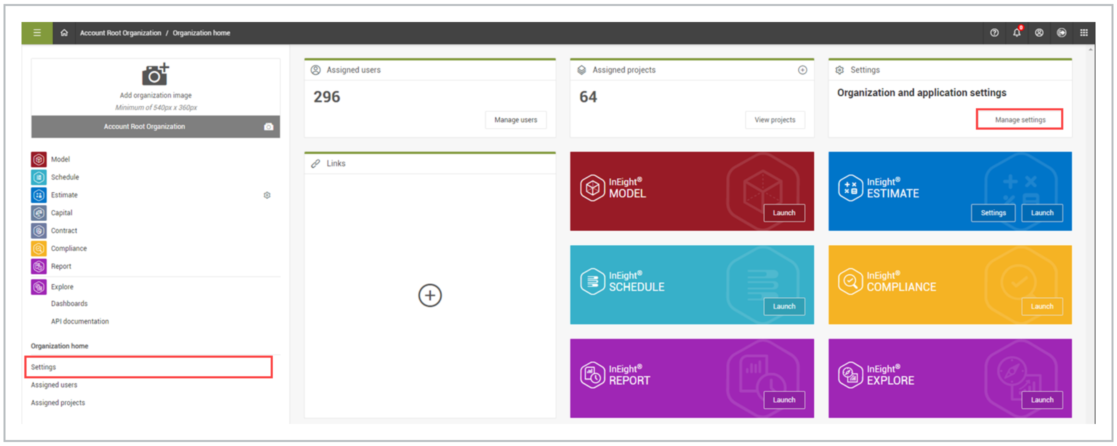
1. From the All projects & organizations page, click on the **Organization** tab.



2. Select an **organization level**.

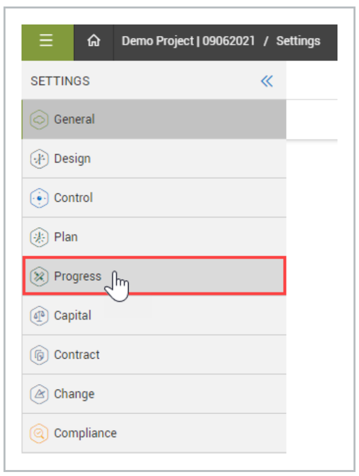


3. From the organization's Home locate the **Settings** tile on the bottom right side of the screen. You might have to scroll to find it.
4. Click on **Manage Settings**.



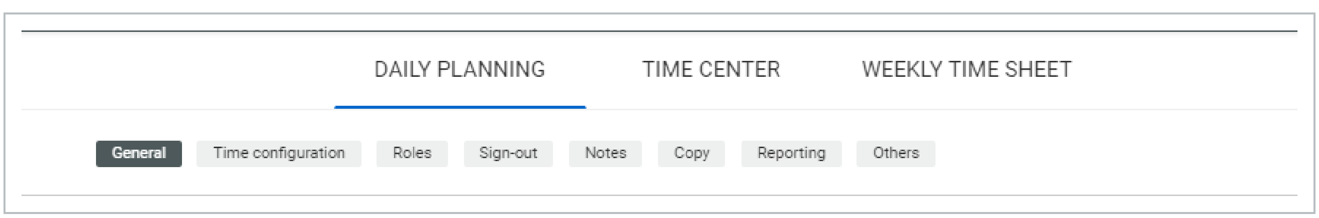
- You can also click on Settings under Project Home in the side bar menu on the left

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



2.1.1 Daily Planning

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



The tabs are bookmarks that let you easily navigate through the page.

2.1.1.1 General

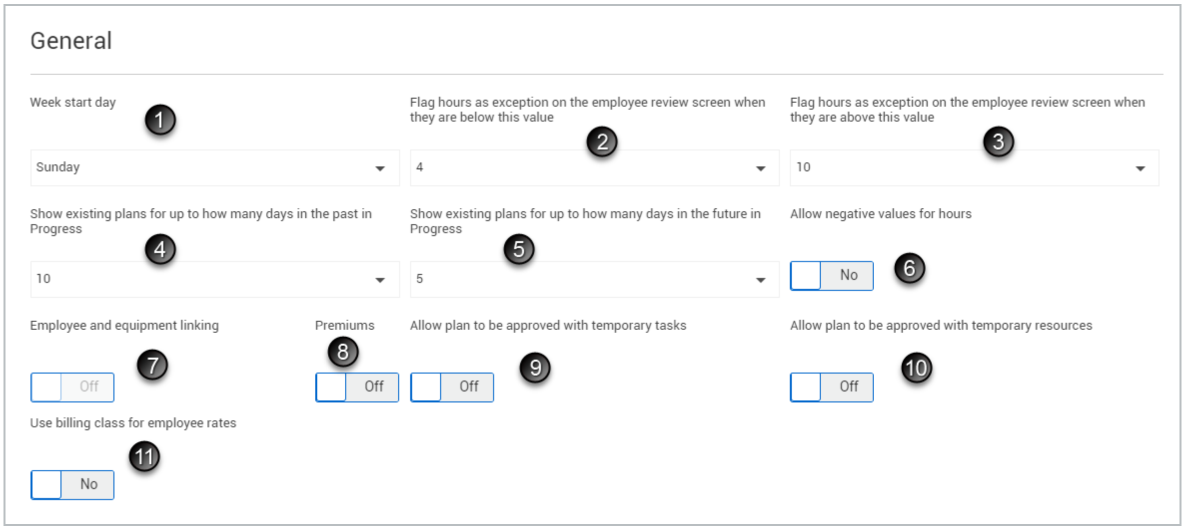
At the organization level, you can set the number of days that you want to see the plans (in the past or the future) in Progress. You can set the minimum and maximum value for the number of hours an employee has worked. You can also add new items, adjust the display order, choose whether the item is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

Overview – General

Title		Description
1	Week start day	The first day of the week in terms of payroll. This setting also applies to Weekly time sheet.
2	Flag hours below value	Sets the lower threshold to flag an employee as an exception on the employee review screen if their total hours for the day are below this amount.
3	Flag hours above value	Sets the upper threshold to flag an employee as an exception on the employee review screen if their total hours for the day exceed this amount.
4	How many days in past	The number of days past that approved 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 to be entered on daily plans. This setting also applies to Weekly time sheet.
7	Employee & Equipment Link	Allows employees and equipment to be linked together on daily plans.
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.

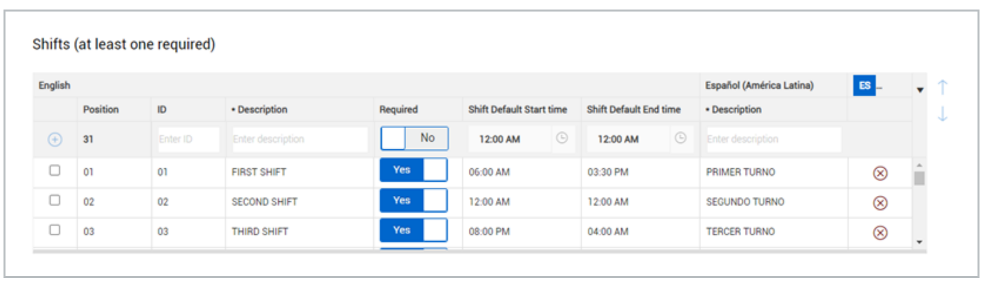
Overview – General (continued)

Title		Description
11	Billing Class for Employee Rates	Displays the billing class of the employee under their name, instead of their trade/class.

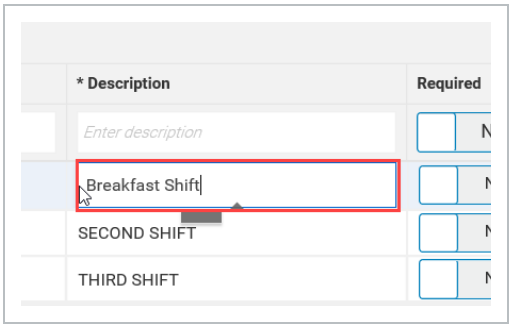


Shifts

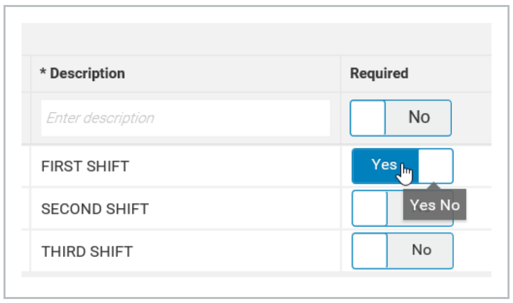
You can configure shifts and change descriptions as needed.



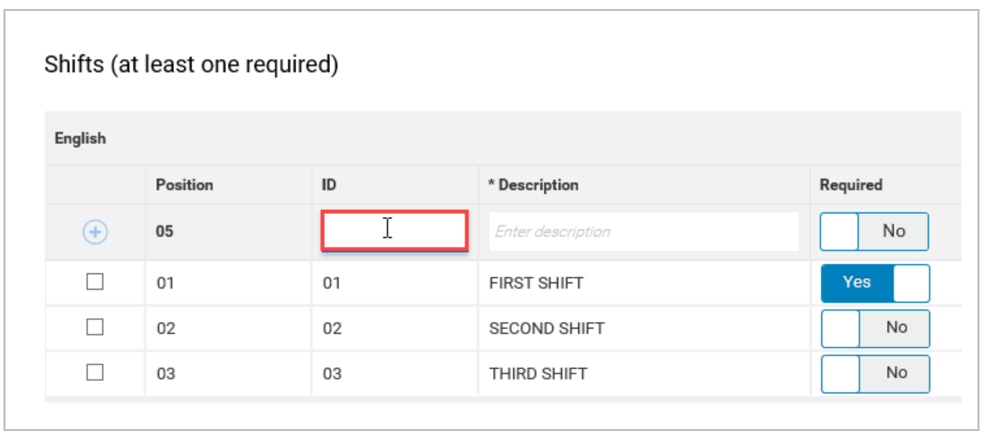
For example, you can change first shift to “breakfast shift”.



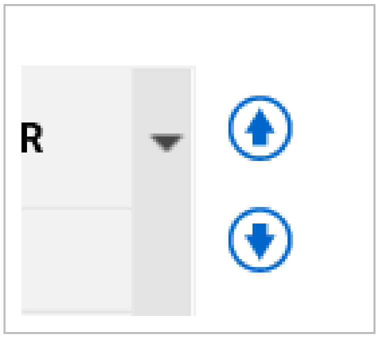
The shift can be required at the project level, meaning if you select **Yes** for required, then it will appear at the project level and cannot be removed or modified.



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 alters the viewing sequence to match the order that the program displays. Whatever you have in the first position, is the default display.



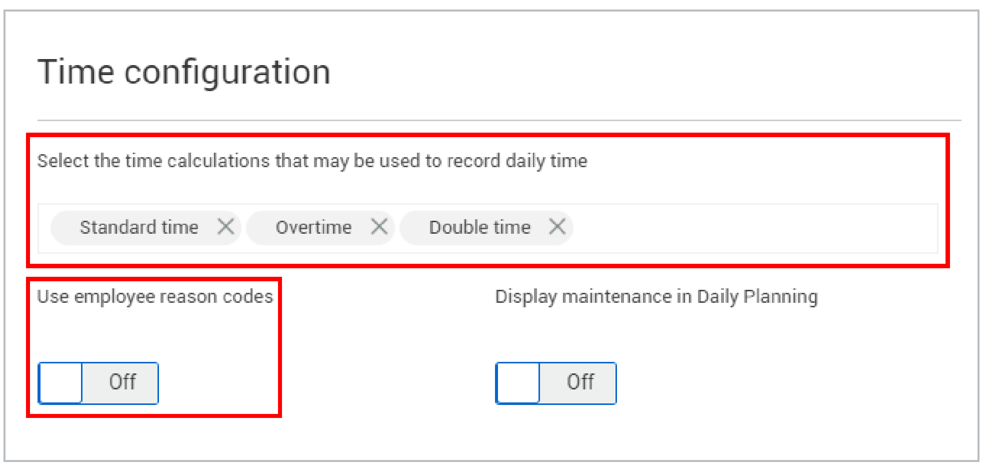
The shift section also lets you add translation to your shifts.

You can use the Shift Default start and end time columns to set defaults for each shift that are filled automatically in the Sign In/Sign Out tab of daily plans.

2.1.1.2 Time Configuration

NOTE To access projects in Timecenter the setting **Use Employee Reason Codes** must be toggled on. This setting is turned on at the org level and needs to be on prior to creating daily plans.

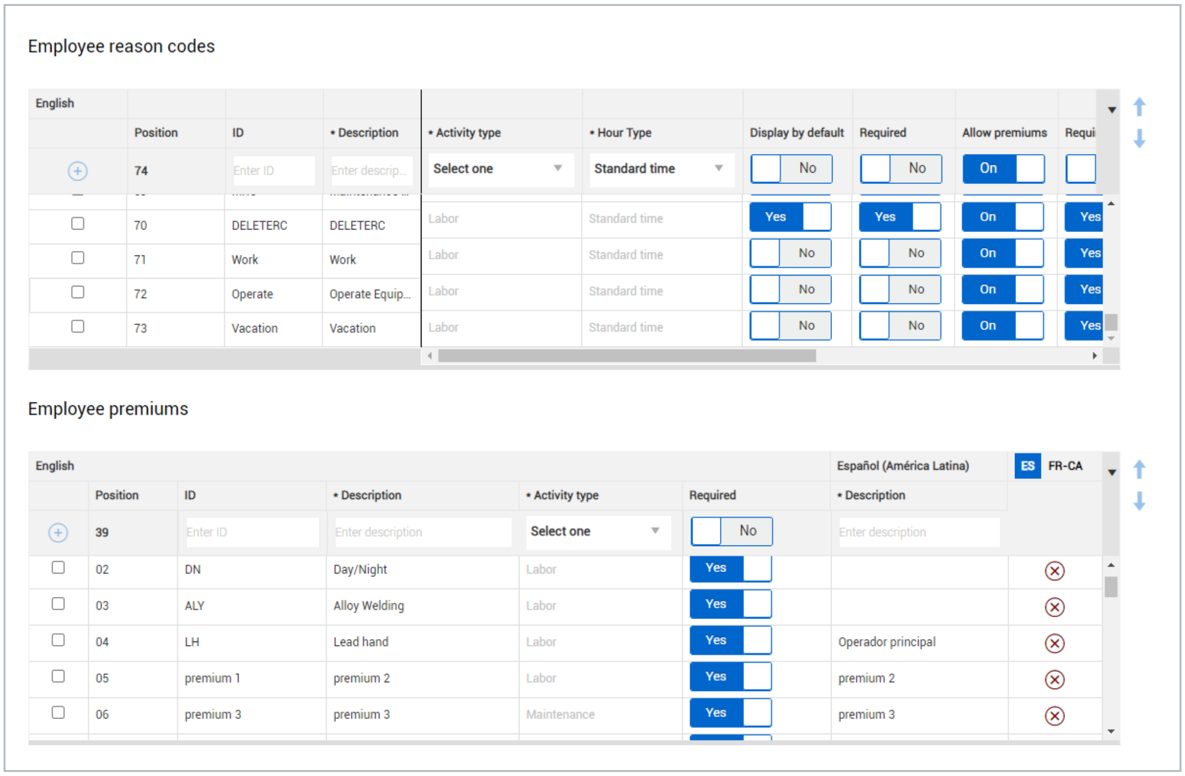
Time configuration settings determine how hours are calculated for employees and equipment on daily plans. Daily time can be calculated by Standard time, Overtime, and/or Double time, or by a more advanced setting called Reason codes.



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

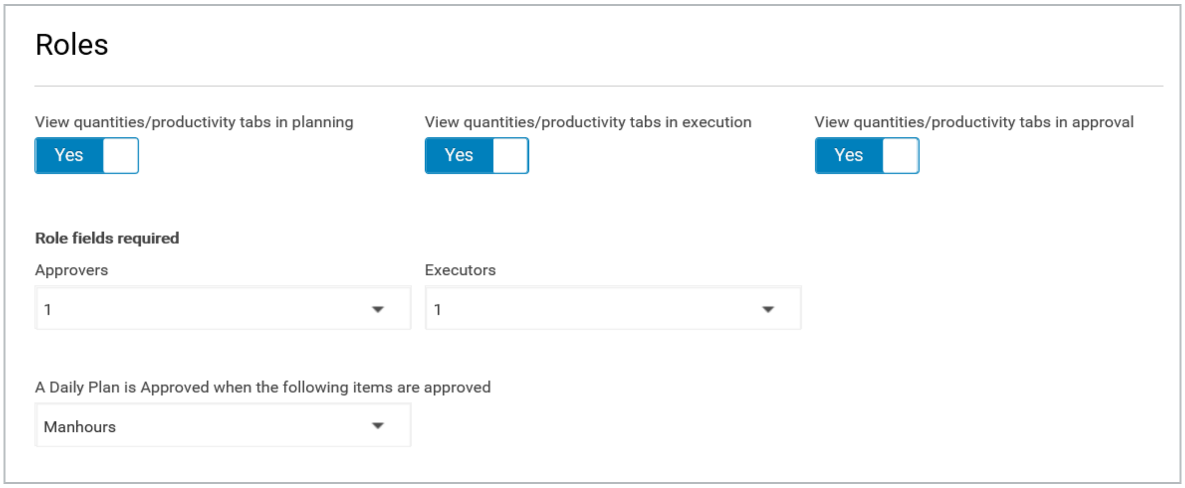
- Require task associations
- Allow multiple uses of the same code
- Are shown only in weekly time sheets
- Are associated with specific hour types



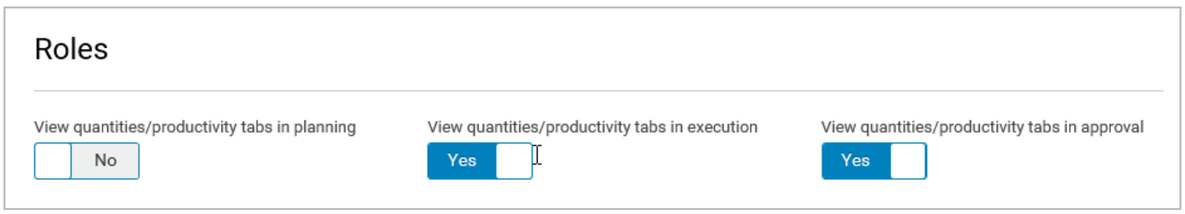
Reason codes, used in combination with Premiums are covered in more detail in the *InEight Progress Advanced* training course.

2.1.1.3 Roles

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

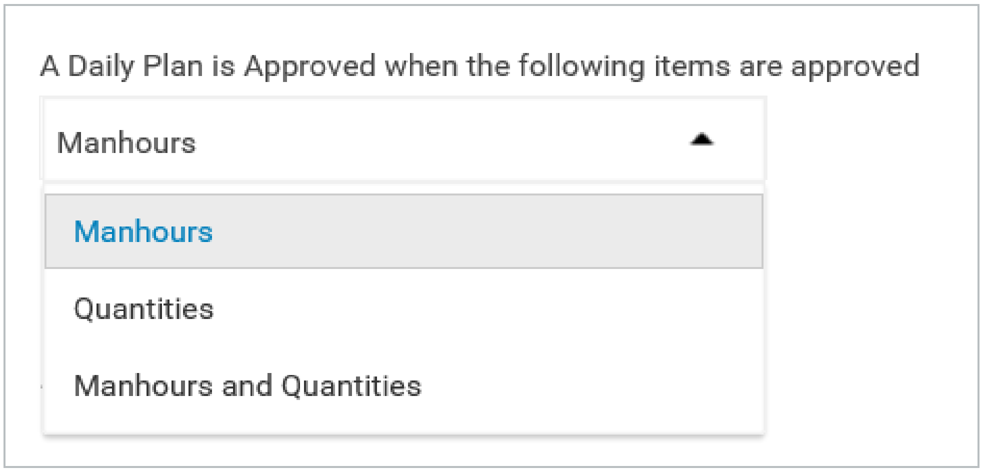


The Yes/No toggle switches are to enable or disable views for the Approvers and Executors at different phases of the project.



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.

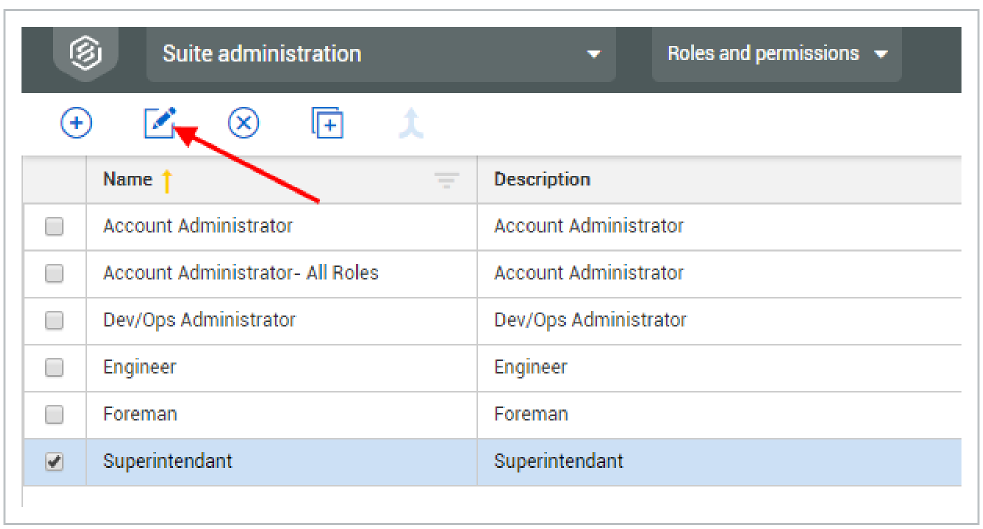
The Daily Plan is Approved drop-down list indicates what needs to be approved for the plan to be considered approved. By default, the system is set up to approve the plan when man-hours is selected. The approved plan will then be sent to and processed by your ERP system. Quantities are optional, by default,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



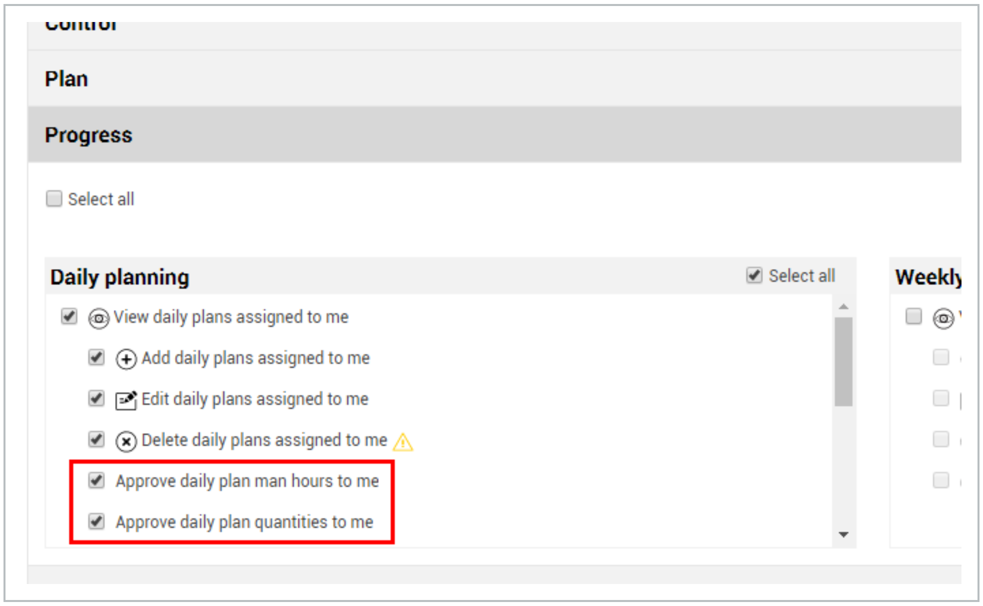
Approvers and Executors

When deciding on Approver and Executor roles for daily plans, it is important to note that if you require 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 first level menu > Suite administration > **Roles and permissions** you can edit the Superintendent role's permissions by checking the check box next to Superintendent and selecting edit.



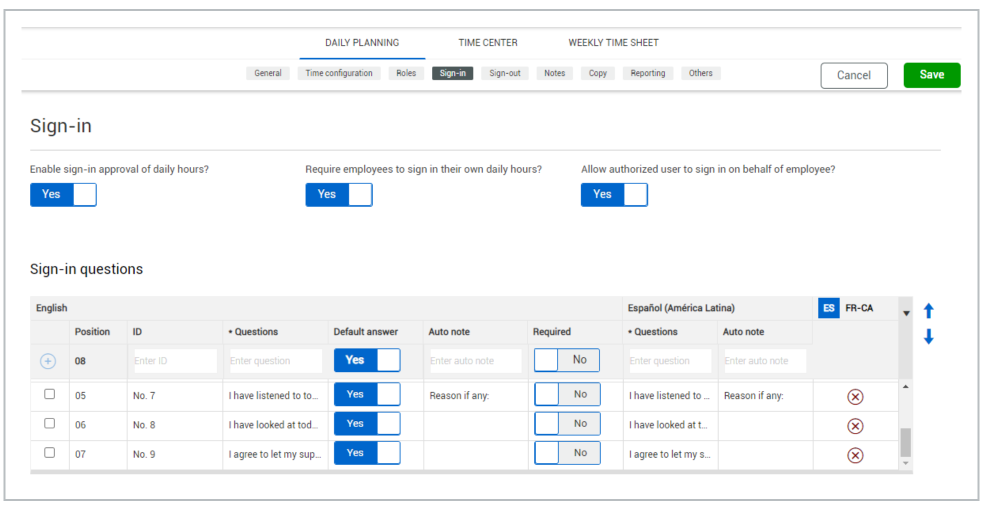
Under the Progress settings, you would ensure that the **Approve daily plan** options are checked, then click **Save**.



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.

2.1.1.4 Sign-In

At the organization level, the Sign-in section is set up to expedite sign-in. Either just an employee or both an employee and an executor or approver are required to sign in for approval.



When Enable sign-in approval of daily hours is the only toggle turned on, you can approve shift start time and answer sign-in questions, but you cannot manually sign in for the employee.

If the Require employees to sign in their own daily hours toggle is turned on, employees must sign in their own shift start time. This means each employee has to enter their PIN or signature to answer the questions, and then sign in.

If the Require employees toggle is turned off, then the foreman can sign in on behalf of their crew and each person does not have to sign in on their own.

If both toggles are turned on and the foreman signs someone out, a note asks the foreman to give a reason why they signed that worker out.

Sign-In Questions

Sign-in questions are shown during the sign-in process.

When you are in the process of signing in, questions such as I have listened to today's tooltalks and understand my tasks for today are shown. Most questions are based on requirements of the company and governing labor laws.

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

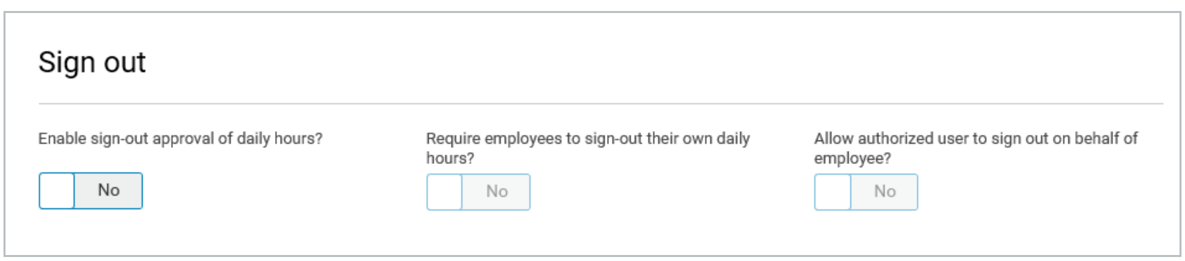
You can add, edit, and make questions mandatory at the project level.

You can create an auto note as well. This is used as an extension of the questions.

2.1.1.5 Sign-Out

At the organization level, the Sign-out section is set up to expedite time sheet sign-out. Either an employee alone or both an employee and an executor or approver are required to sign out time sheets for approval.

The top half of this Sign-out section has three Yes/No toggle switches.



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

When Enable sign-out approval of daily hours is the only toggle turned on, you can approve hours and answer the sign-out questions, but you cannot manually sign out for the employee.

If the Require employees to sign out their own daily hours toggle is turned on, employees must sign out their own hours. This means each employee has to enter their PIN or signature to answer the questions, and then sign out.

If the Require employees toggle is turned off, then the foreman can sign out on behalf of their crew and each person does not have to sign out on their own.

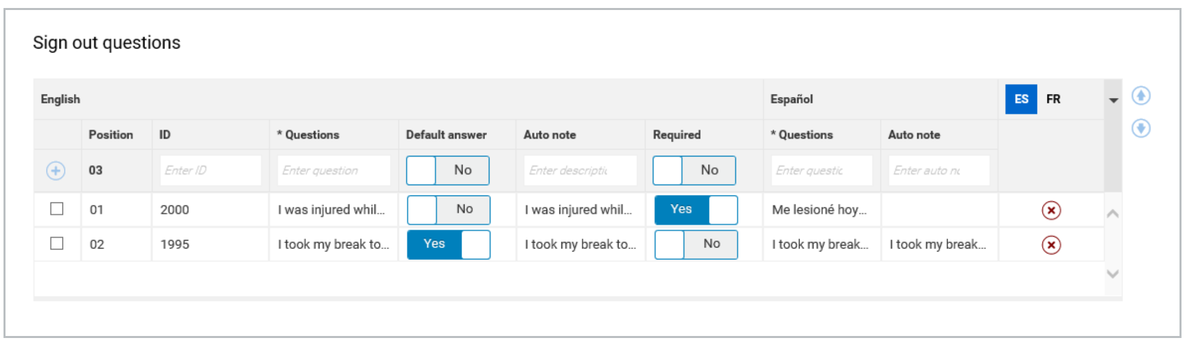
If both toggles are turned on and the foreman signs someone out, a note asks the foreman to give a reason why they signed that worker out. As an example, the foreman might enter *Worker was unable to sign out for themselves due to a sudden illness, and had to leave work*. This is a legal requirement in some states because the sign-outs can be tracked.

TIP	Both the Require employees and Allow authorize user settings should 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 are shown during the sign-out process.



When you are in the process of signing out, questions are shown 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 and governing labor 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.

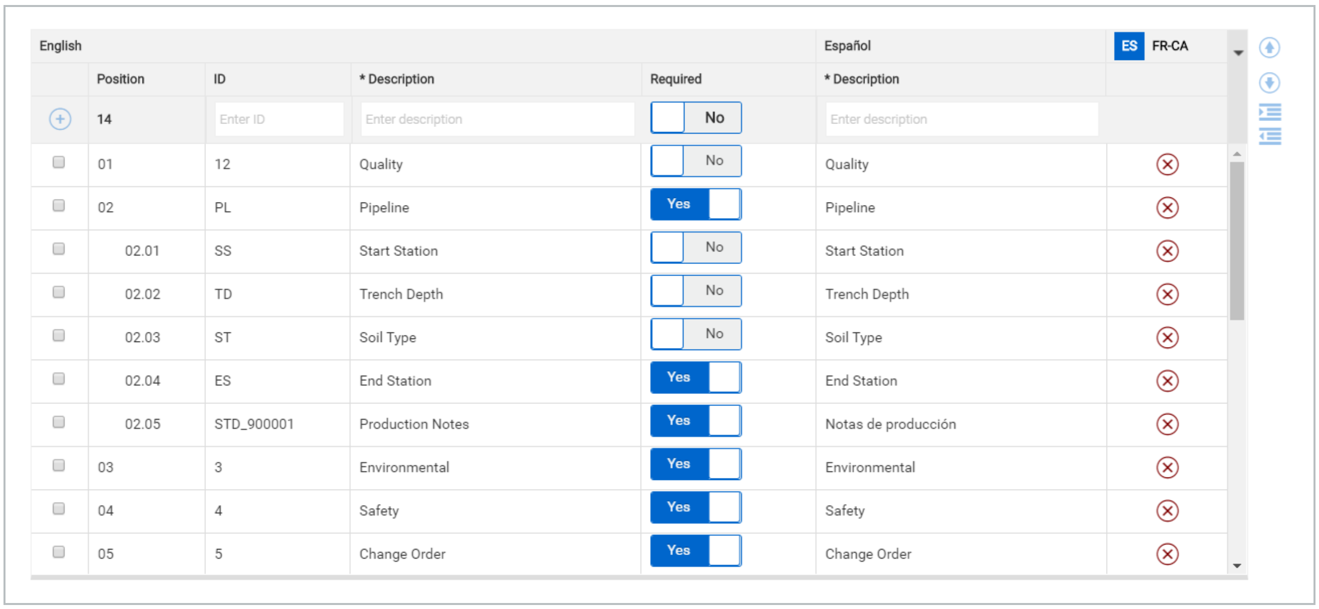
You can add, edit, and make questions mandatory at the project level.

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 opens to encourage feedback, requesting how the injury occurred, or requesting a possible incident number to track the incident.

2.1.1.6 Notes

Tags

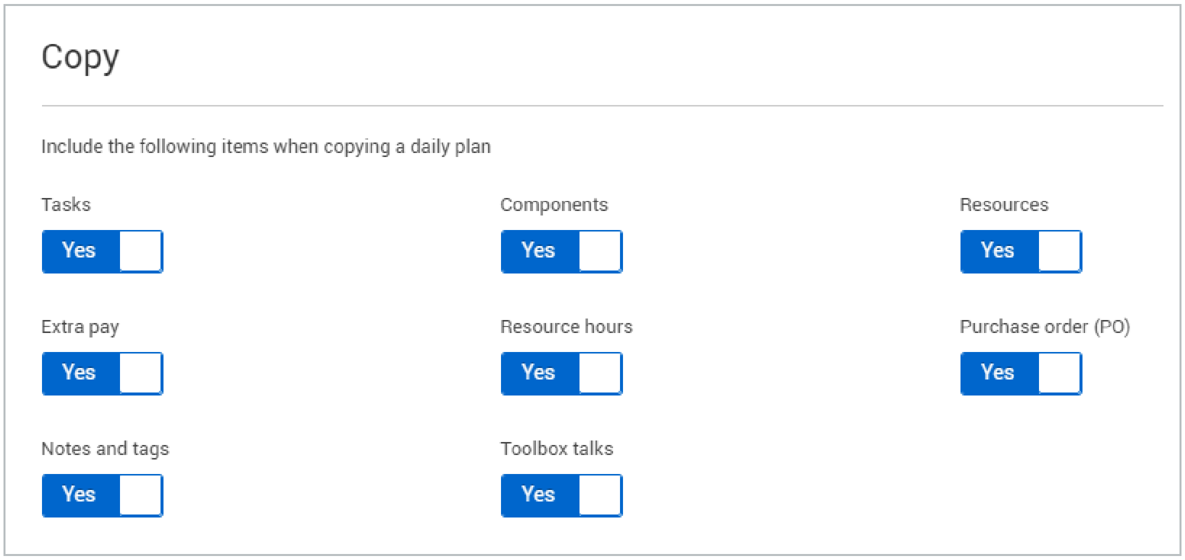
Tags are used to group similar items for reporting. The tags in the Organizational level are set for the Project Settings.



English					Español	ES FR-CA
	Position	ID	* Description	Required	* Description	
	14	Enter ID	Enter description	No	Enter description	
	01	12	Quality	No	Quality	
	02	PL	Pipeline	Yes	Pipeline	
	02.01	SS	Start Station	No	Start Station	
	02.02	TD	Trench Depth	No	Trench Depth	
	02.03	ST	Soil Type	No	Soil Type	
	02.04	ES	End Station	Yes	End Station	
	02.05	STD_900001	Production Notes	Yes	Notas de producción	
	03	3	Environmental	Yes	Environmental	
	04	4	Safety	Yes	Safety	
	05	5	Change Order	Yes	Change Order	

2.1.1.7 Copy

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



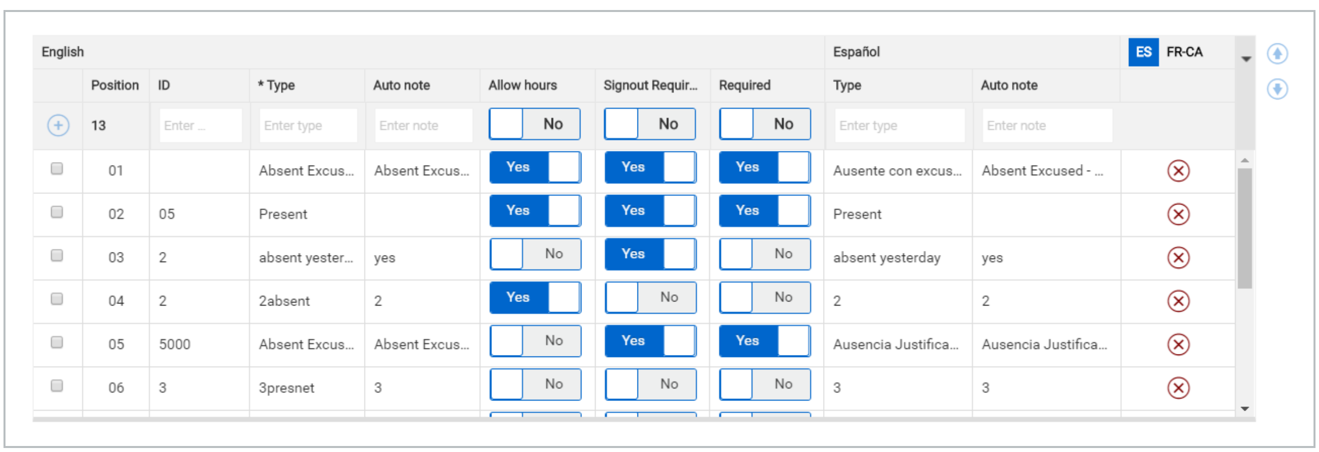
2.1.1.8 Reporting

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

2.1.1.9 Others

Attendance Types

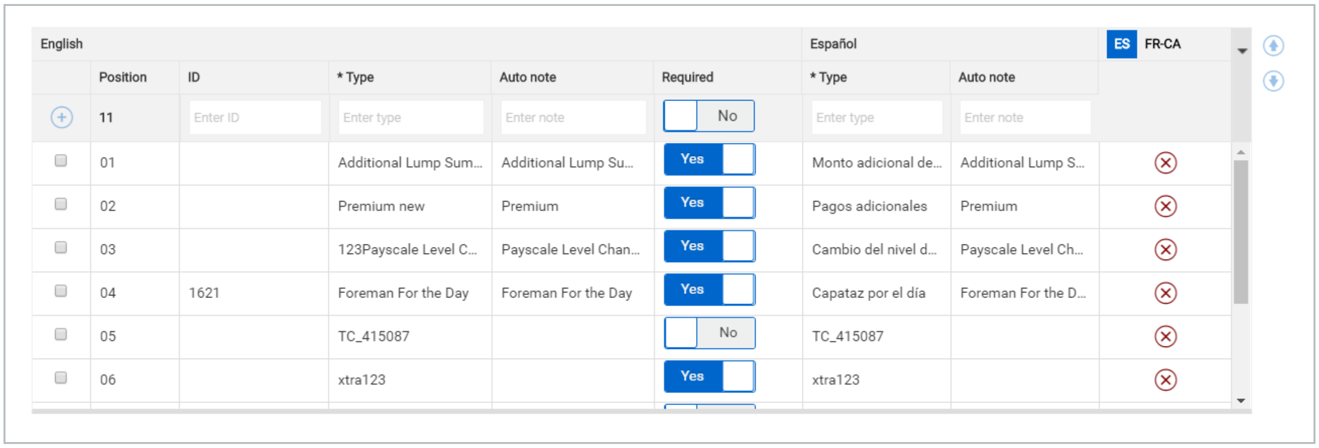
Custom attendance types can be added at the organization settings level. Users can decide whether these attendance types can have hours, require a sign out, and if they are always required.



English								Español		ES FR-CA
	Position	ID	* Type	Auto note	Allow hours	Signout Requir...	Required	Type	Auto note	
	13	Enter ...	Enter type	Enter note	No	No	No	Enter type	Enter note	
	01		Absent Excus...	Absent Excus...	Yes	Yes	Yes	Ausente con excus...	Absent Excused - ...	
	02	05	Present		Yes	Yes	Yes	Present		
	03	2	absent yester...	yes	No	Yes	No	absent yesterday	yes	
	04	2	2absent	2	Yes	No	No	2	2	
	05	5000	Absent Excus...	Absent Excus...	No	Yes	Yes	Ausencia Justifica...	Ausencia Justifica...	
	06	3	3presnet	3	No	No	No	3	3	

Extra Pay (Allowances)

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



2.1.2 Time Center

2.1.2.10 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.

2.1.2.11 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 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.

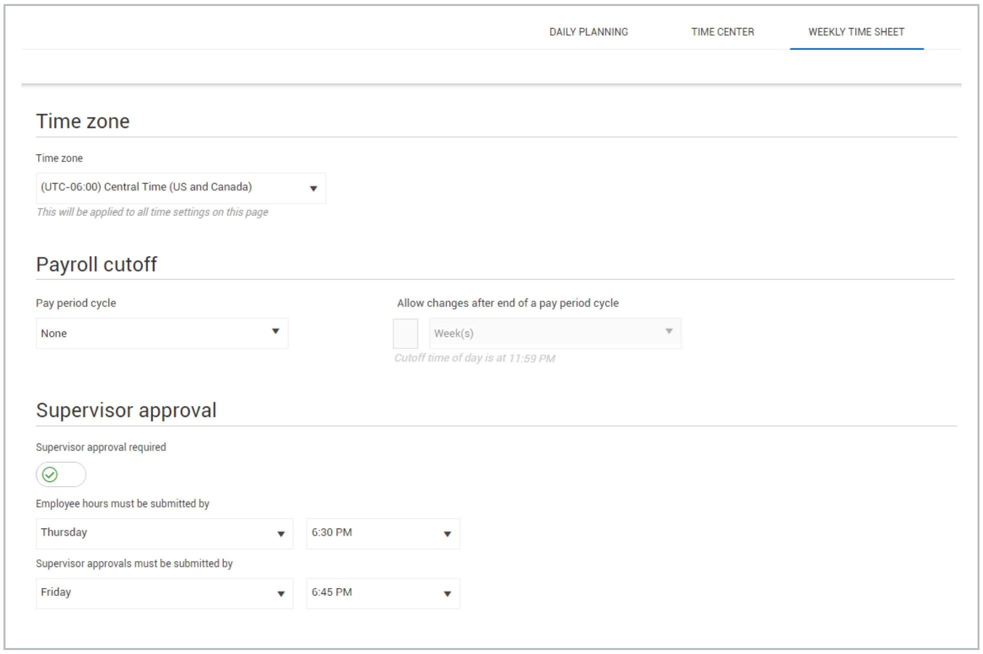
2.1.2.12 Enable Unexpected Timecard Exception

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 system.

2.1.2.13 Emergency Send

Click **Emergency send - In progress timecards** to resend all time cards on all projects that are in progress in case of integration failure.

2.1.3 Weekly Time Sheet

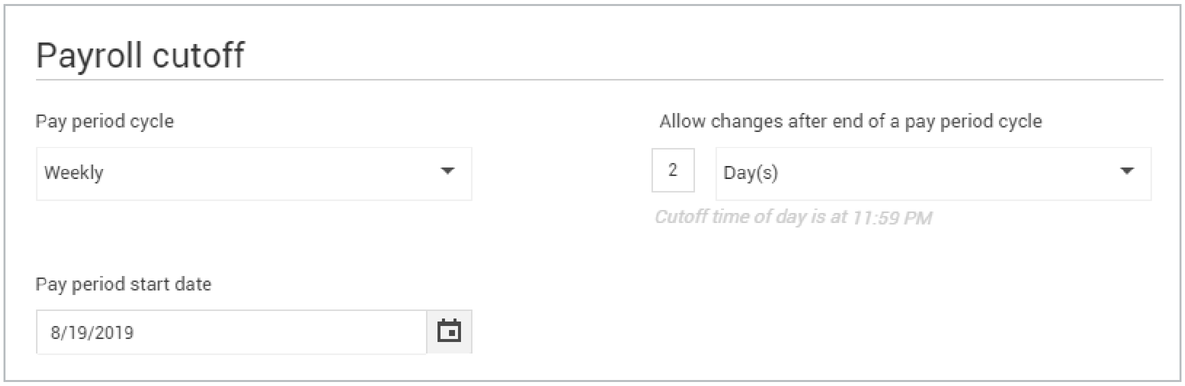


2.1.3.14 Time Zone

You can set the time zone for all time settings on this page.

2.1.3.15 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.

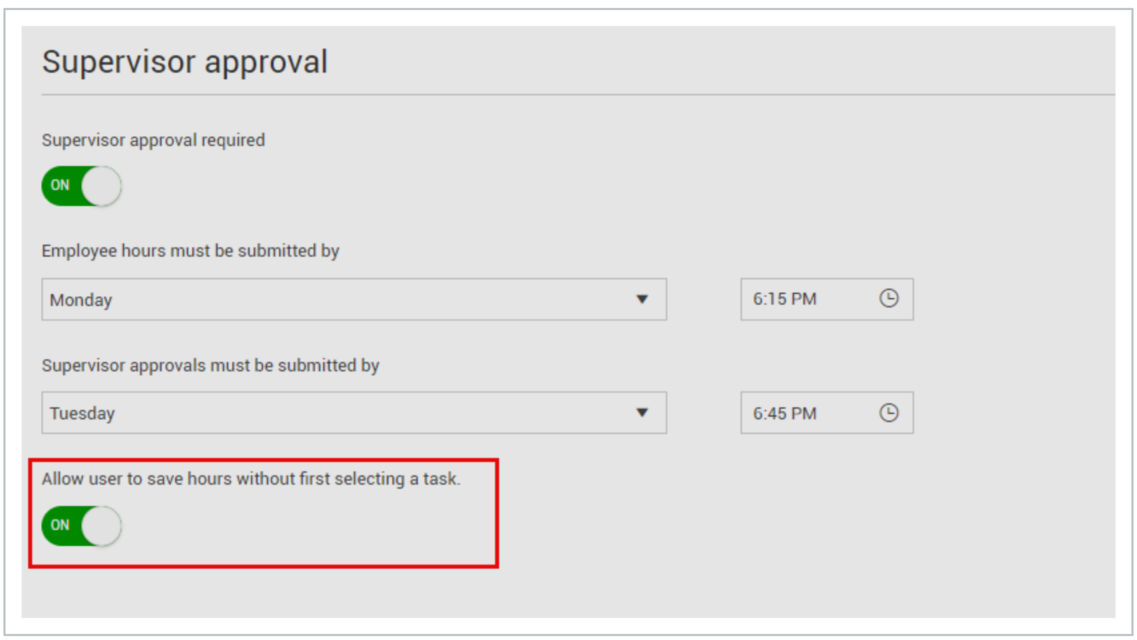


2.1.3.16 Supervisor Approval

When the Supervisor approval required toggle is set to ON, time sheets must be approved or rejected by supervisors. You must also set the days and times of the week that employees must submit their hours and when supervisors must submit their approvals.

NOTE	An employee must have a supervisor assigned to them in Master data libraries > **Operational resources**.

You can control whether users are allowed to save hours without first selecting the task in the Weekly time sheet by setting the toggle for **Allow user** to save hours without first selecting a task to ON.

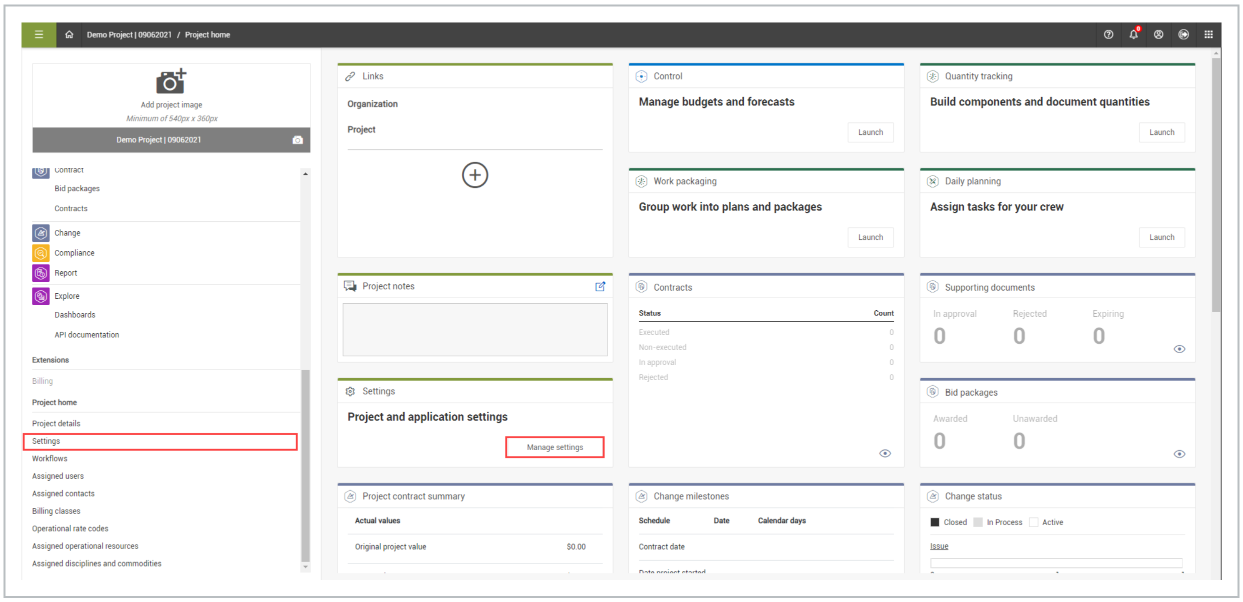


2.2 PROJECT SETTINGS

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.

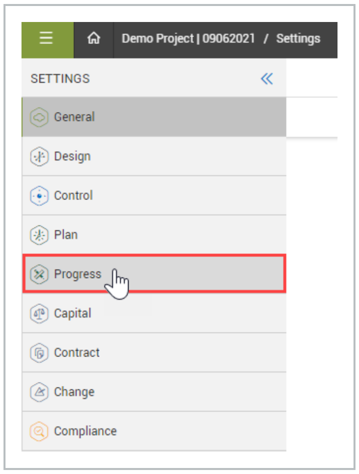
Open Project Settings

1. From your project home page, select the **Settings** tile in the bottom right (you may need to scroll for it), or select **Settings** from the left menu.



- The Project settings page opens

2. To access the Progress-related settings, select **Progress** in the side panel.

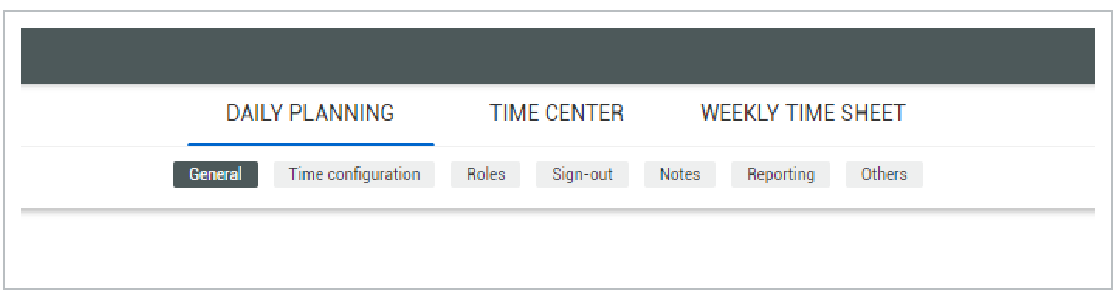


2.2.1 Project Level Settings

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.

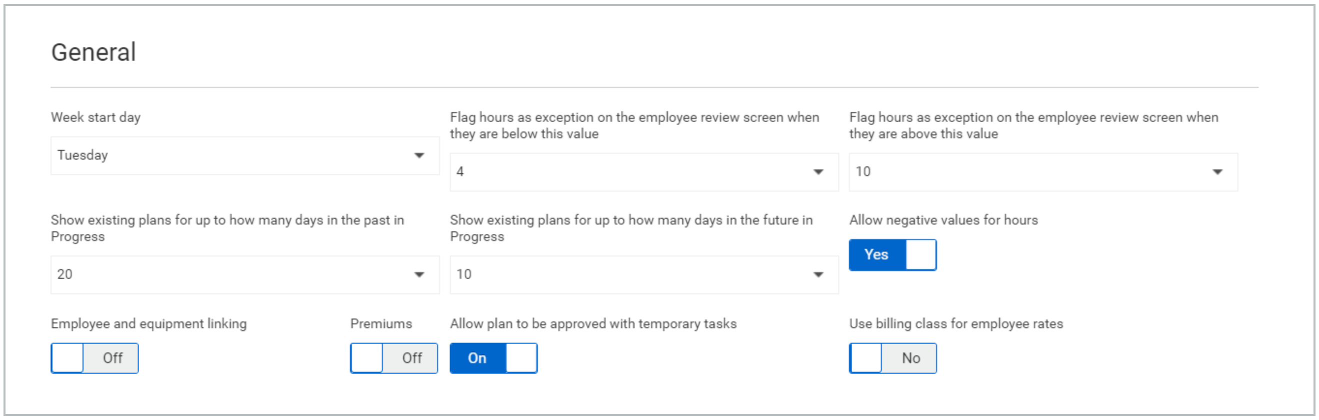
2.2.2 Daily Planning Tab

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 the Organization Settings topic.

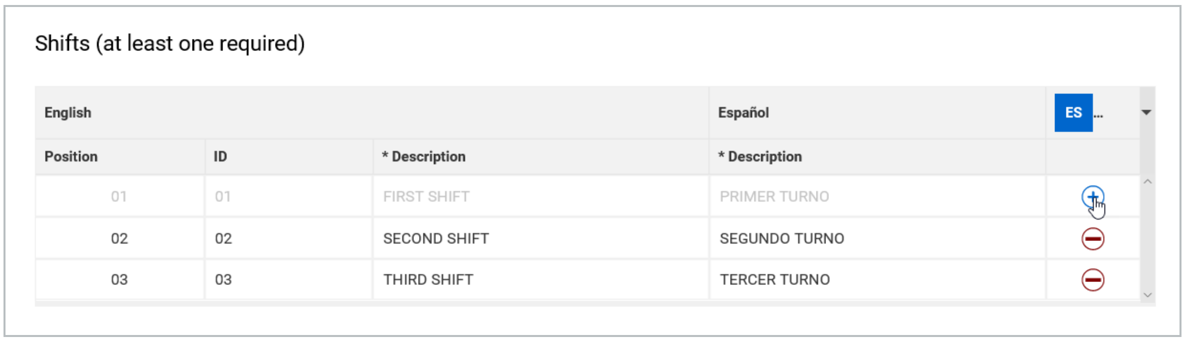


2.2.2.1 General

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 as required at the organization level. However, you have the option of using these for your project, or not. By selecting the minus icon, it turns 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.

2.2.2.2 Time Configuration

NOTE To access projects in Timecenter the project setting Use Employee Reason Codes must be toggled on. This setting is required prior to creating daily plans.

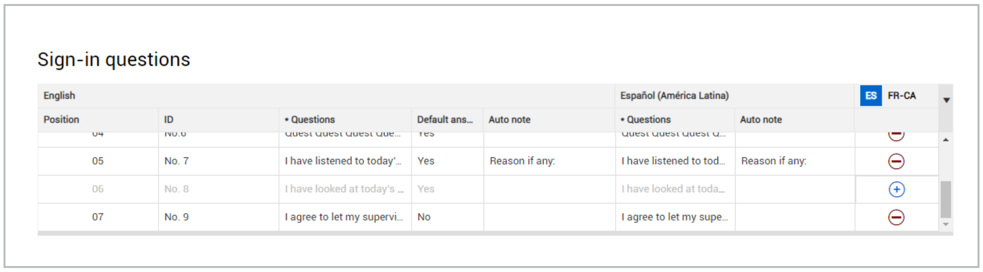
Reason codes and premiums are mostly read-only at the project level. To make optional reason codes and premiums show or be hidden in the project, use the **Add** and **Remove** icons on the right side of the tables. You can also set whether each employee reason code allows premiums.

2.2.2.3 Roles

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

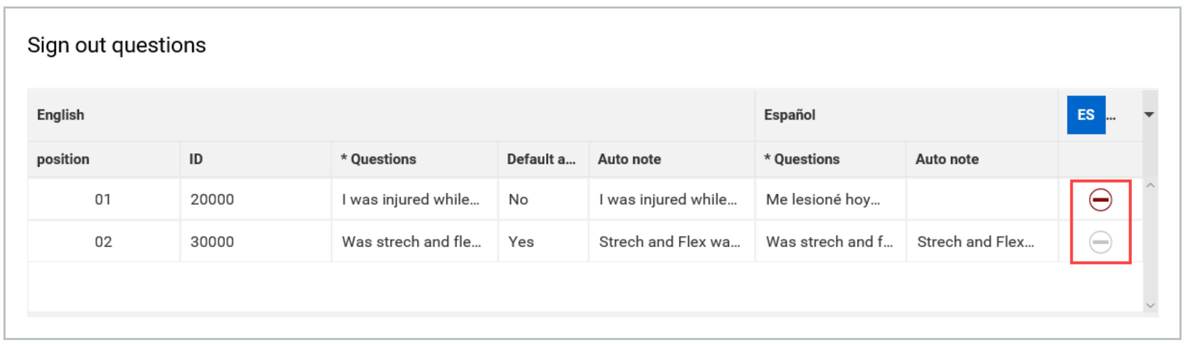
2.2.2.4 Sign-In Questions

Sign-in questions are created and maintained at the organization level. At the project level, you can decide whether to include questions in the Sign In subtab with the **Add** and **Remove** icons.



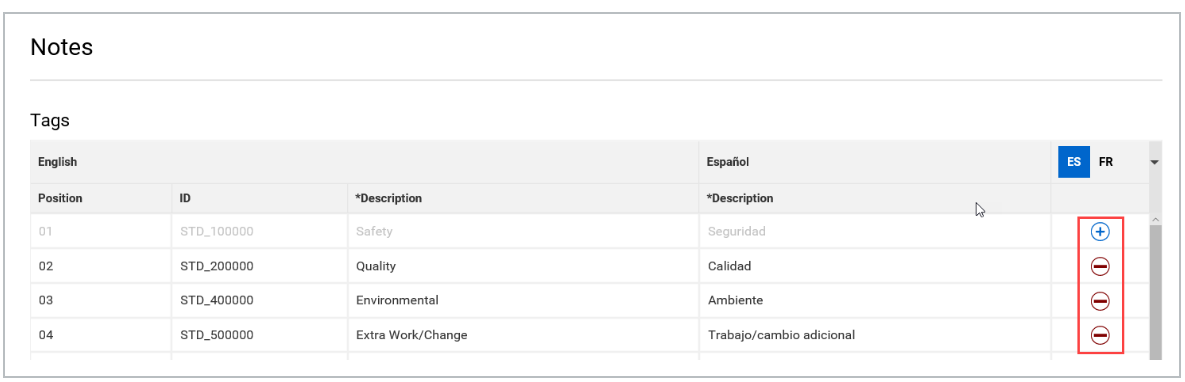
2.2.2.5 Sign-Out Questions

Sign-out questions are created and maintained at the organization level. At the project level, you can decide whether to include questions in the Sign Out subtab with the Add and Remove icons.



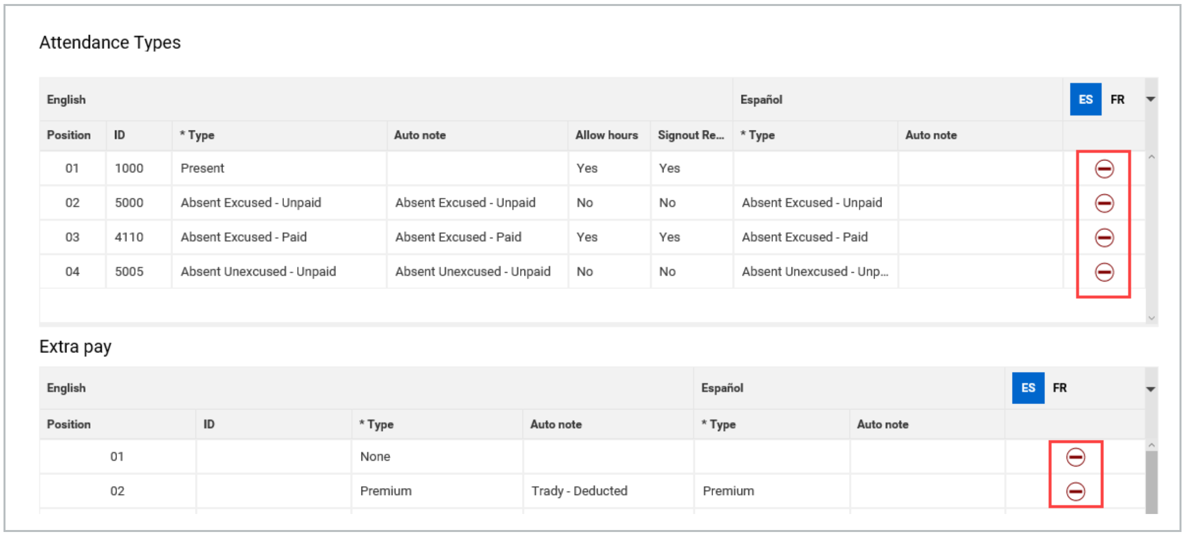
2.2.2.6 Tags

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.



2.2.2.7 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**.