

PROGRESS USER GUIDE

Administrator



PROGRESS

Release 26.5
Last Updated: 07 July 2026

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CHAPTER 1 – ADMINISTRATION

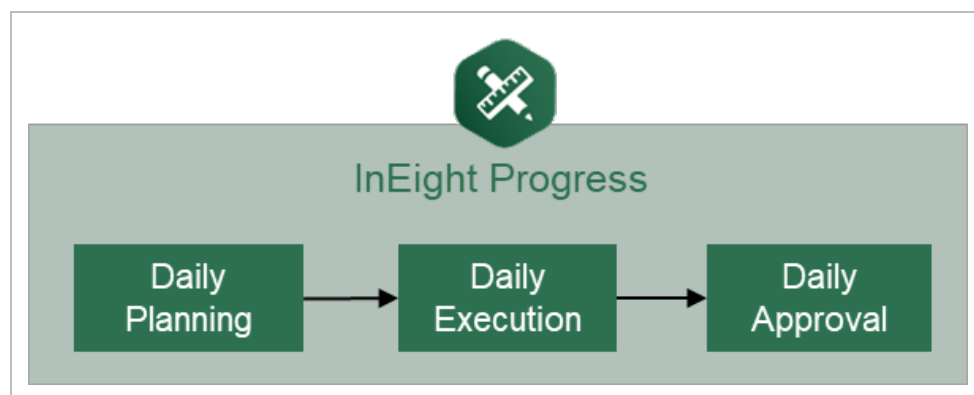
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1.1 INEIGHT PROGRESS OVERVIEW

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 Time sheet and Time center. The Weekly Time sheet 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.



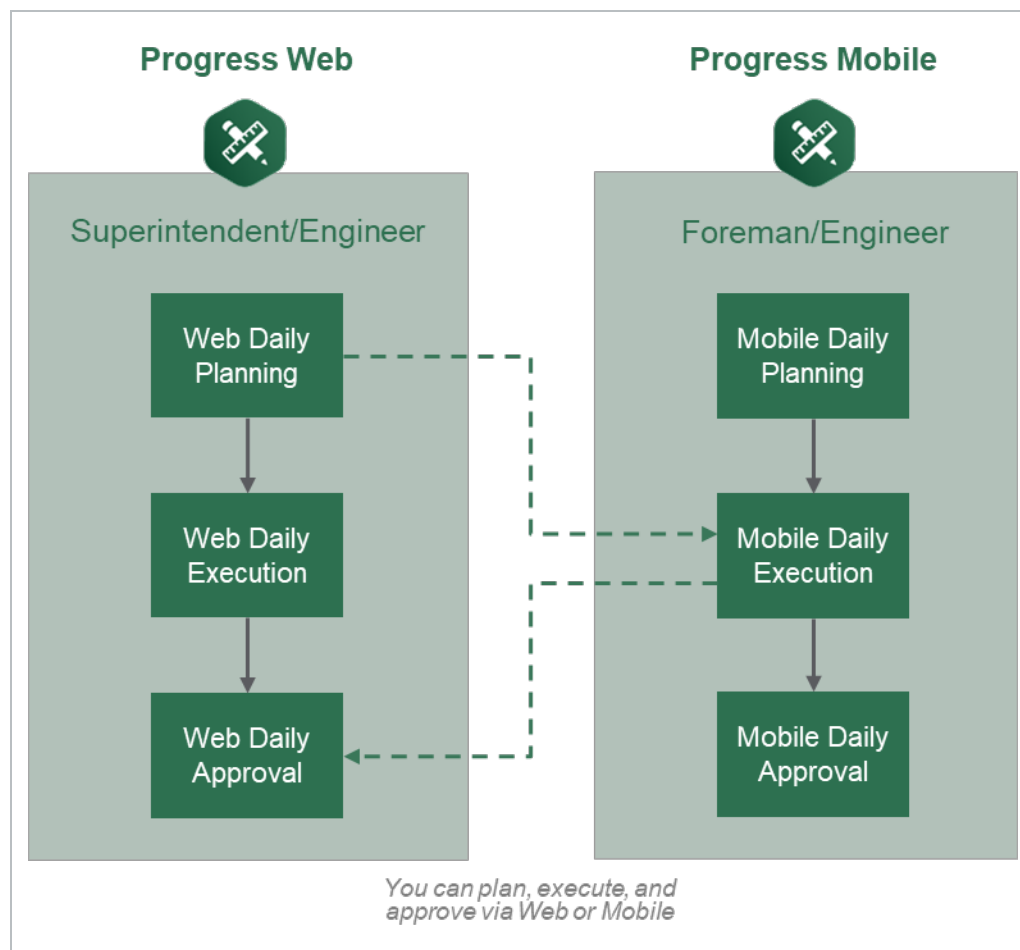
A daily plan is created by a project member to specify the tasks to be completed by a given crew, and to ensure productivity targets are met. Budget, quantity, safety, quality and other details are entered during the Planning phase to provide streamlined communication from the office to the field. Once 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:



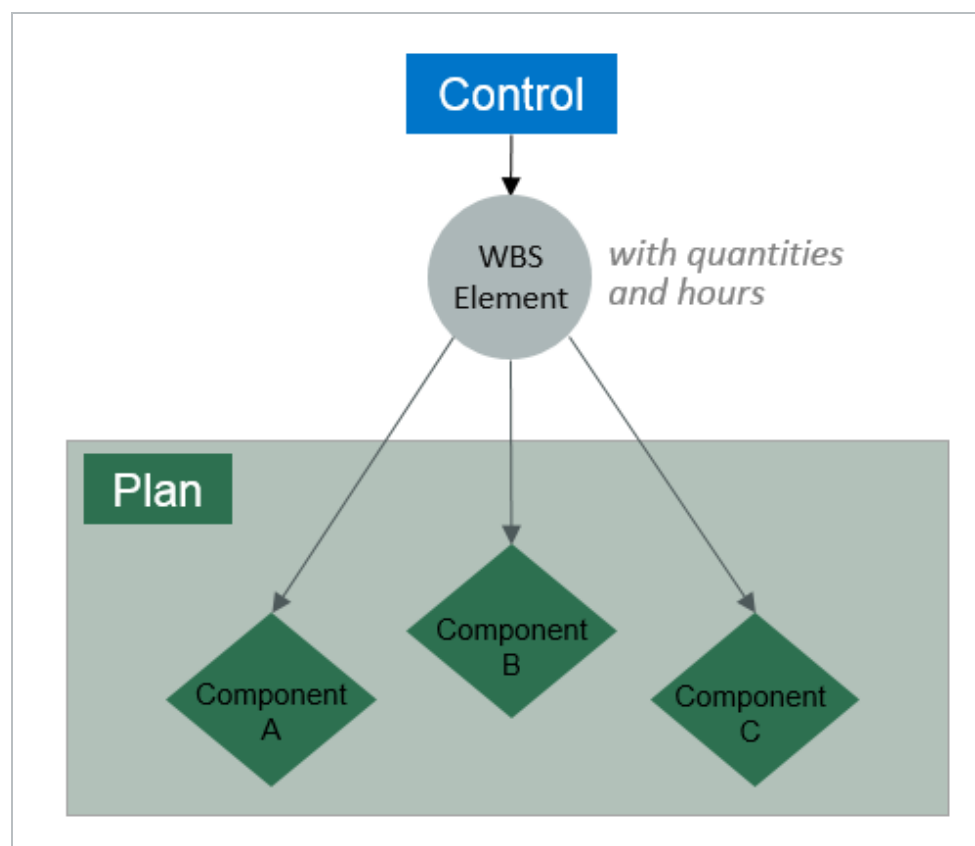
A daily plan can be accessed in either program in any of the phases of daily planning. The program used for a phase may vary from project to project and depends largely on the roles of the project members involved. For example, it may be preferable to have a staff member such as a superintendent or engineer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

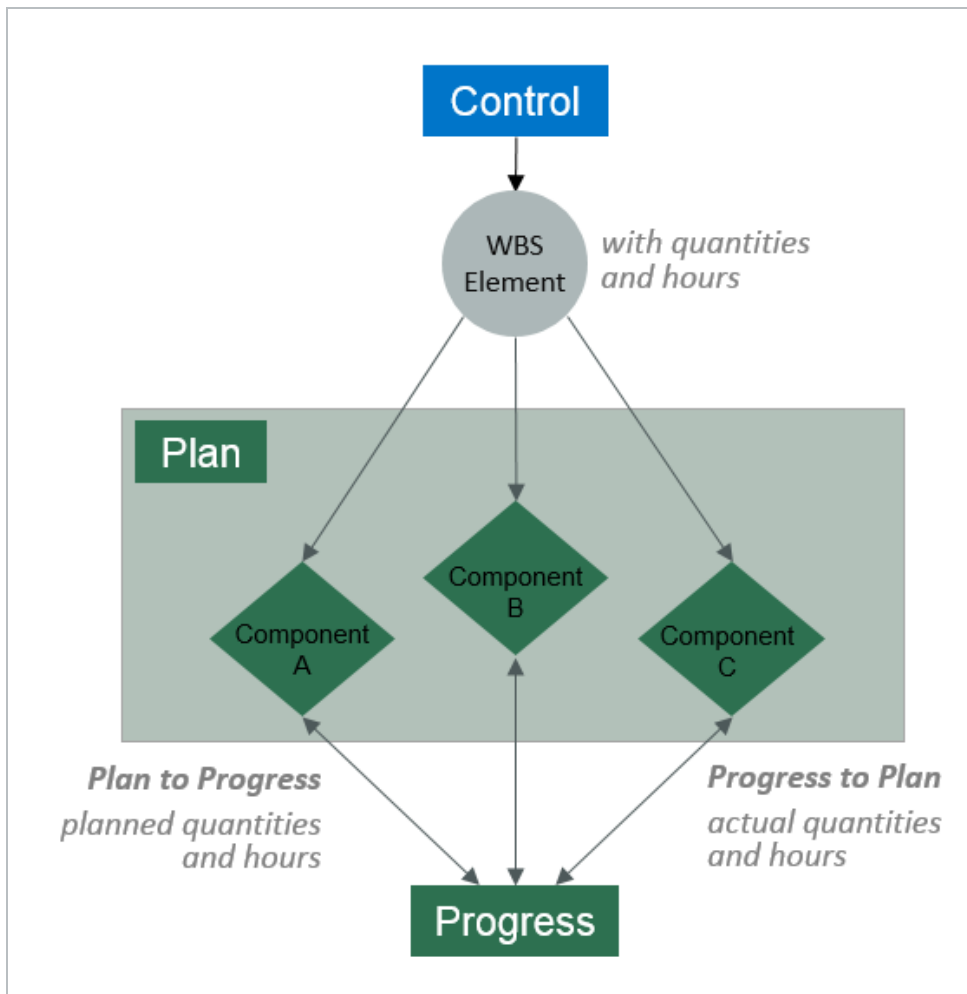
Mobile Daily Planning has all the same functionality as Web Daily Planning for InEight Progress, but is available as a mobile-only application.

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

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

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

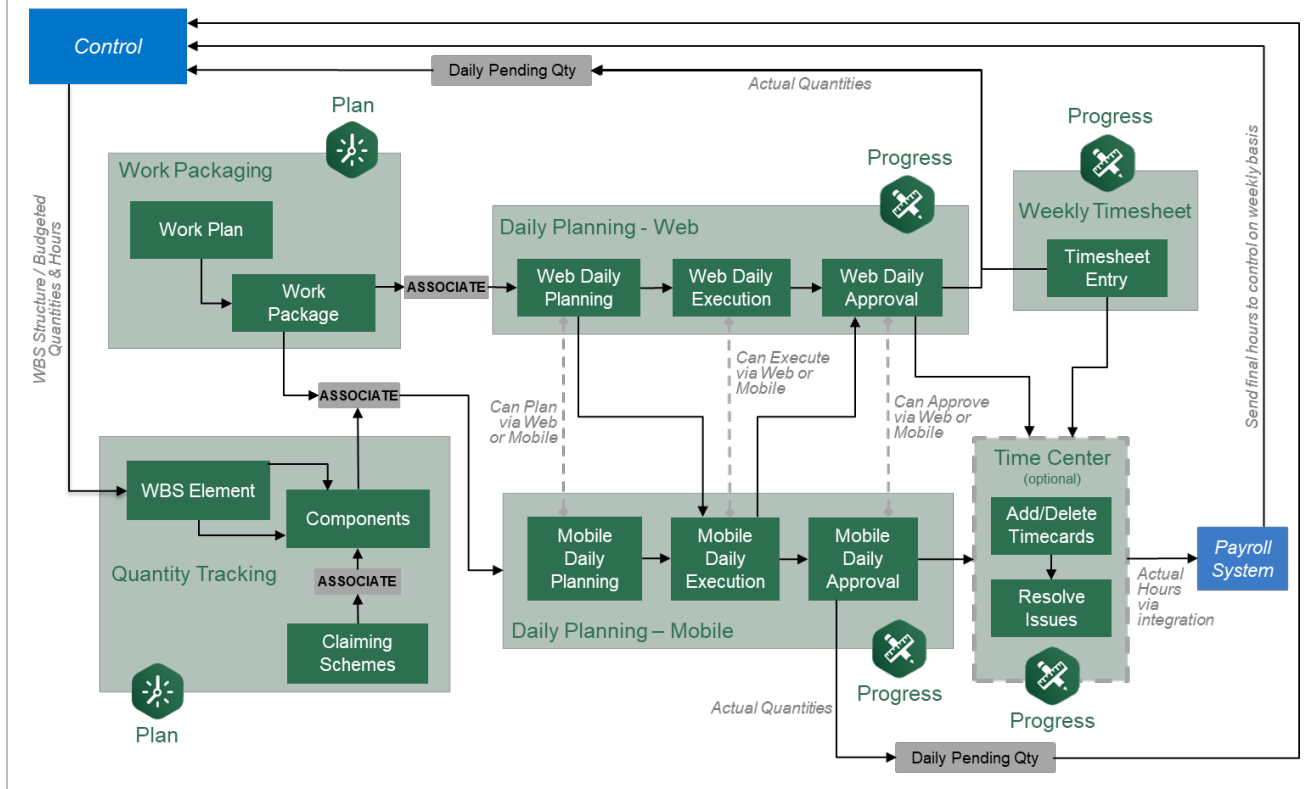
When hours are approved, the hours are sent to your payroll system. Once ERP payroll has processed the hours, as-built hours and costs can then be pulled into InEight Control from ERP payroll (again initiated in InEight Control).

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

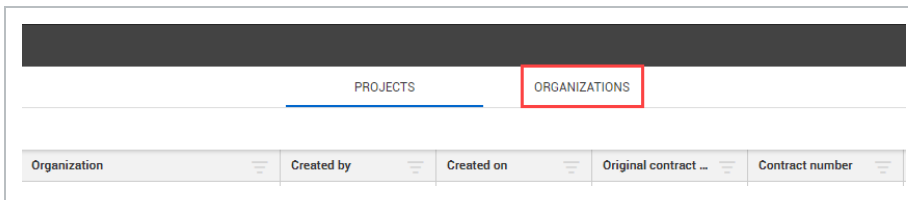


1.2 ORGANIZATION SETTINGS

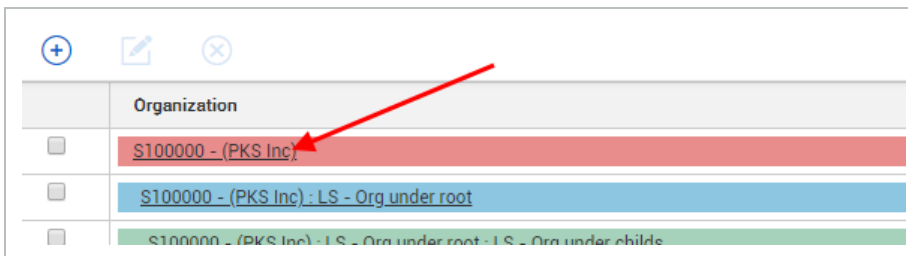
To track time and quantities successfully in Progress, the correct settings need to be set up before project initiation. The Organization level is the highest level where your company sets parameters for all projects. The steps below walk you through how to access the organization settings.

Open Organization Settings

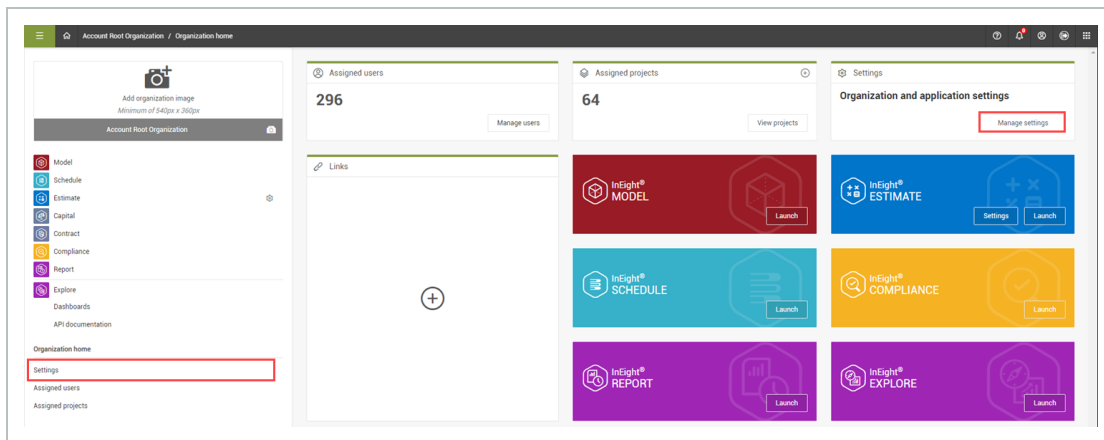
1. From the All projects & organizations page, click on the **Organization** tab.



2. Select an **organization level**.

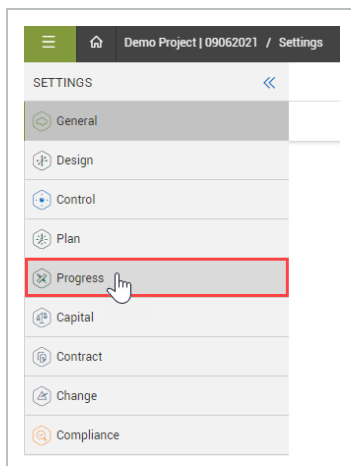


3. From the organization's Home locate the **Settings** tile on the bottom right side of the screen. You might have to scroll to find it.
4. Click on **Manage Settings**.



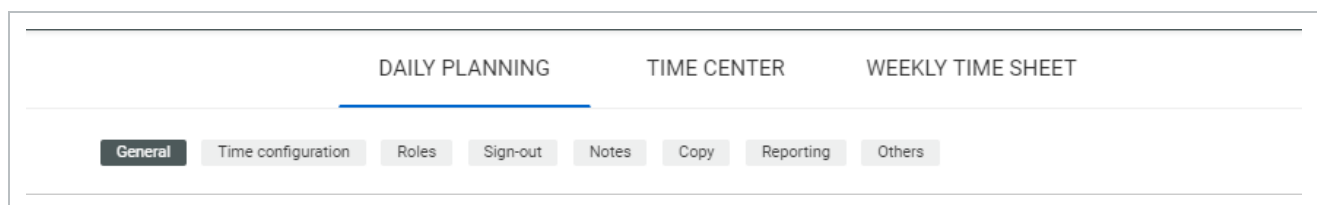
- You can also click on Settings under Project Home in the side bar menu on the left

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



1.2.1 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.

1.2.1.1 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 set by 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 in the past that approved daily plans show 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	Premiums	Enables use of premium pay rates to account for employees that work outside their regular responsibilities for an increased rate.
8	Approve with Temporary Task	Allows daily plans to be approved with temporary tasks on them.
9	Approve with Temporary Resource	Allows daily plans to be approved with temporary resources on them.
10	Enable time center and	Allows access to time center and weekly Time sheet.

Overview - General (continued)

Title	Description
weekly Time sheet	
11 Daily plan rejection	Allows rejection of daily plans.
12 Display cost	Shows employee and equipment billing class.
13 Enforce 15 minute entry	Restricts time entry to the quarter hour. With this option set to <i>off</i> , specific time entry can be entered.

DAILY PLANNING
TIME CENTER
WEEKLY TIME SHEET

General
Time configuration
Roles
Sign-in
Sign-out
Notes
Copy
Reporting

General

Week start day
1
Monday

Flag hours as exception on the employee review screen when they are below this value
2
4

Flag hours as exception on the employee review screen when they are above this value
3
10

Show existing plans for up to how many days in the past in Progress
4
10

Show existing plans for up to how many days in the future in Progress
5
5

Allow negative values for hours
6
ON

Enable premiums by default
7
ON

Allow plan to be approved with temporary tasks
8
ON

Allow plan to be approved with temporary resources
9
ON

Enable time center and weekly timesheet
10
ON

Daily plan rejection
11
ON

Display cost in daily plan productivity during execution phase?
12
ON

Enforce 15 minute time entry
13
OFF

Shifts

You can configure shifts and change descriptions as needed.

Shifts (at least one required)

English	Position	ID	* Description	Required	Shift Default Start time	Shift Default End time	Español (América Latina)	* Description
31		Enter ID	Enter description	☐ No	12:00 AM	12:00 AM		Enter description
☐	01	01	FIRST SHIFT	☒ Yes	06:00 AM	03:30 PM		PRIMER TURNO
☐	02	02	SECOND SHIFT	☒ Yes	12:00 AM	12:00 AM		SEGUNDO TURNO
☐	03	03	THIRD SHIFT	☒ Yes	08:00 PM	04:00 AM		TERCER TURNO

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

* Description	Required
Enter description	☐ No
Breakfast Shift	☐
SECOND SHIFT	☐
THIRD 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.

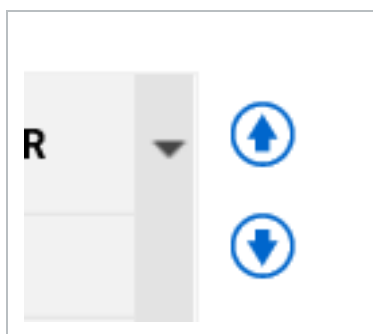
* Description	Required
Enter description	☐ No
FIRST SHIFT	☒ Yes
SECOND SHIFT	☐ Yes No
THIRD SHIFT	☐ No

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.

Shifts (at least one required)

English				
	Position	ID	* Description	Required
	05	I	Enter description	☐ No
☐	01	01	FIRST SHIFT	☒ Yes ☐
☐	02	02	SECOND SHIFT	☐ No
☐	03	03	THIRD SHIFT	☐ No

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.

1.2.1.2 Time Configuration

Time configuration settings determine how hours are calculated for employees and equipment on daily plans. Daily time can be calculated by Standard time, Overtime, and Double time, or by a more advanced reason codes setting. Reason codes allow you to define other categories to designate the type of hours worked. After the reason code setting is enabled, the default reason code is Work, but your organization can add reason codes as needed. You can use the same reason code ID across different reason code types. The ID only needs to be unique within each type, such as Labor or Maintenance. Examples of reason code categories that you might use include Operating equipment, Maintenance, Bereavement, and PTO. To use reason codes, the Default enable reason code time entry toggle must be set to *ON*.

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

Time configuration

Default values for non-reason code projects

Standard time x Overtime x Double time x

Default enable reason code time entry. Required for Time Center and Weekly Timesheet products ☒ ON

Display maintenance in Daily Planning ☐ OFF

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 set 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

Employee reason codes

English									
	Position	ID	Description	Activity type	Hour Type	Billing Code	Display by default	Required	Allow premiums
	06	Enter ID	Enter description	Select one	Standard time	Enter billing code	OFF	OFF	ON
☐	01	OPT	Operate Equipment	Labor	Standard time		OFF	ON	ON
☐	02		Work	Labor	Standard time		OFF	ON	ON
☐	03		Maintenance	Labor	Standard time		OFF	ON	ON
☐	04		Bereavement	Labor	Standard time		OFF	ON	ON
☐	05		Non-reason		Standard time		OFF	ON	ON

For a comparative analysis of Reason codes, used in combination with Premiums , see [Payroll Options Analysis](#).

1.2.1.3 Roles

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

Roles

View quantities/productivity tabs in planning

View quantities/productivity tabs in execution

View quantities/productivity tabs in approval

☒

☒

☒

Role fields required

Approvers

Executors

1

1

A Daily Plan is Approved when the following items are approved

Manhours and Quantities

The Yes/No toggles are used 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 are required for daily plans on your projects. You are allowed up to two approvers and either one or no executor.

Role fields required

Approvers

1

1

2

Executors

1

0

1

The A Daily Plan is Approved... drop-down list indicates the items that need to be approved for the plan to be considered approved. By default, the system is set up to approve the plan when man-hours are 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.

A Daily Plan is Approved when the following items are approved

Manhours

Manhours

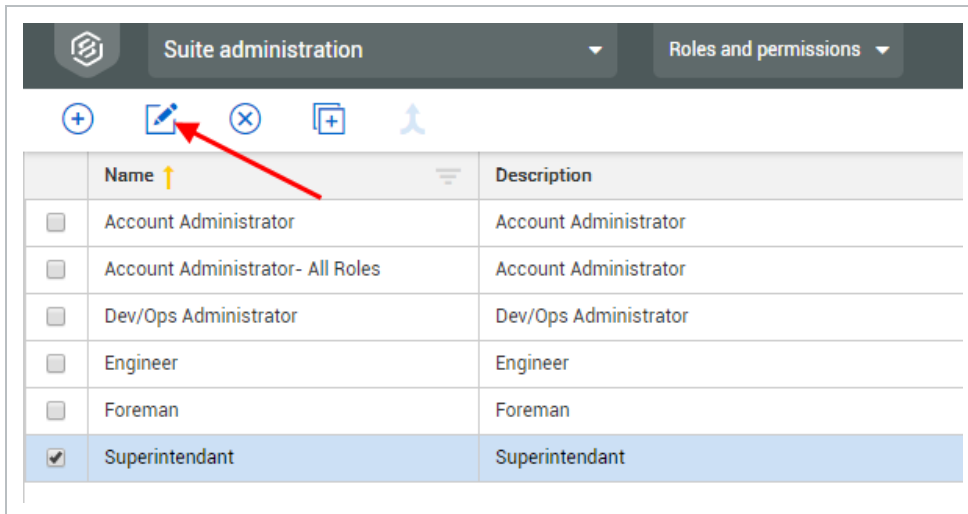
Quantities

Manhours and Quantities

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.



	Name ↑	Description
☐	Account Administrator	Account Administrator
☐	Account Administrator- All Roles	Account Administrator
☐	Dev/Ops Administrator	Dev/Ops Administrator
☐	Engineer	Engineer
☐	Foreman	Foreman
☒	Superintendent	Superintendent

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

Control

Plan

Progress

☐ Select all

Daily planning ☒ Select all

- ☒ View daily plans assigned to me
- ☒ Add daily plans assigned to me
- ☒ Edit daily plans assigned to me
- ☒ Delete daily plans assigned to me ⚠
- ☒ Approve daily plan man hours to me
- ☒ Approve daily plan quantities to me

Weekly

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.

1.2.1.4 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.

Sign-in

Require employees to sign in their own daily hours? ☐ OFF

Allow authorized user to sign in on behalf of employee? ☐ OFF

Sign-in questions

English	Spanish (América Latina)	ES-MX	FR-CA
Position: 02 ID: Enter ID Questions: Enter question Default answer: OFF Auto note: Enter auto note Required: OFF	Questions: Enter question Auto note: Enter auto note		
☐ 01 Questions: I have received today... Default answer: ON Auto note: Required: OFF	Questions: He recibido el inform... Auto note: Required: ☒		

If they 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 they 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.

1.2.1.5 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.

The screenshot displays the 'Sign-out' configuration page. At the top, there are tabs for 'DAILY PLANNING', 'TIME CENTER', and 'WEEKLY TIME SHEET'. Below these are sub-tabs: 'General', 'Time configuration', 'Roles', 'Sign-in', 'Sign-out' (selected), 'Notes', 'Copy', and 'Reporting'. There are 'Cancel' and 'Save' buttons in the top right corner.

The 'Sign-out' section contains the following settings:

- Require employees to sign out their own daily hours?** (ON)
- Allow authorized user to sign out on behalf of employee?** (ON)
- Require client sign-out:** Optional

Below these settings is a section for automated notes when sign-out is made on behalf of an employee. It includes a table with columns for language and the note text.

English	Español (América Latina)	ES-MX	FR-CA
* Auto note	Auto note		
Signed out on behalf of Executor	Horas confirmadas en nombre del ejecutor		

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

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.

English							Español (América Latina)		
	Position	ID	Questions	Default answer	Auto note	Required	Questions	Auto note	
	08	Enter ID	Enter question		Enter auto note		Enter question	Enter auto note	
☐	01	20000	Were you injured whi...		I was injured while w...		¿Se lesionó mientras...		
☐	02		I have been autoriz...				I have been autoriz...		
☐	03		I have not worked m...				I have not worked m...		

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.

1.2.1.6 Tags

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

Tags

English					Español (América Latina)	ES-MX	FR-CA
	Position	* ID	* Description	Required	* Description		
	14	Enter ID	Enter description	☐ OFF	Enter description		
☐	01	STD_100000	Safety	☐ OFF	Seguridad		
☐	02	STD_200000	Quality	☐ OFF	Calidad		
☐	03	STD_400000	Environmental	☐ OFF	Medioambiental		
☐	04	STD_500000	Extra Work/Change	☐ OFF	Trabajo extra/cambio		
☐	04.01	STD_500001	Owner directed	☐ OFF	Dirigido al propietario		
☐	04.02	STD_500002	Backcharge Subcontractor/Su...	☐ OFF	Cargo adicional para subcontratista/s...		
☐	04.03	STD_500004	T&M work	☐ OFF	Trabajo de tiempo y materiales		
☐	04.04	STD_500005	Other	☐ OFF	Otros		

1.2.1.7 Copy

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

Copy

Include the following items when copying a daily plan

Tasks ☒ ON	Components ☒ ON	Resources ☒ ON
Allowance ☒ ON	Resource hours ☒ ON	Notes and tags ☒ ON
Toolbox talks ☒ ON	Premiums ☒ ON	Attachments ☒ ON

1.2.1.8 Reporting

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

Reporting

Send client report to recipients

Include notes with client report

☒

☒

1.2.2 Time Center

1.2.2.9 Cost Types

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

1.2.2.10 Employee Work Schedule Retention Duration

InEight Time Center includes an integration with ERP systems for employee work schedules. This setting controls how many days historic work schedules are kept in 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.

1.2.2.11 Enable Unexpected Timecard Exception

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

1.2.2.12 Update reason code for sent time cards

Enable this option to update reason codes for sent time cards. When disabled, reason codes will lock when a time card is published and changes cannot be made.

1.2.2.13 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.

1.2.3 Weekly Time Sheet

DAILY PLANNING

TIME CENTER

WEEKLY TIME SHEET

Time zone

Time zone

(UTC-06:00) Central Time (US and Canada)

This will be applied to all time settings on this page

Payroll cutoff

Pay period cycle

None

Allow changes after end of a pay period cycle

Week(s)

Cutoff time of day is at 11:59 PM

Supervisor approval

Supervisor approval required

☒

Employee hours must be submitted by

Thursday

6:30 PM

Supervisor approvals must be submitted by

Friday

6:45 PM

1.2.3.14 Time Zone

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

1.2.3.15 Payroll Cutoff

These settings allow you to define your pay period cycle, start date, and configure a grace period for submitting weekly time sheets after the pay period cycle ends. Pay period start date defines the first day of the pay period cycle.

Payroll cutoff

Pay period cycle

Weekly

Allow changes after end of a pay period cycle

2

Day(s)

Cutoff time of day is at 11:59 PM

Pay period start date

8/19/2019

1.2.3.16 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.

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.

Supervisor approval

Supervisor approval required

ON

Employee hours must be submitted by

Monday

5:00 PM

Supervisor approvals must be submitted by

Tuesday

5:00 PM

Allow user to save hours without first selecting a task.

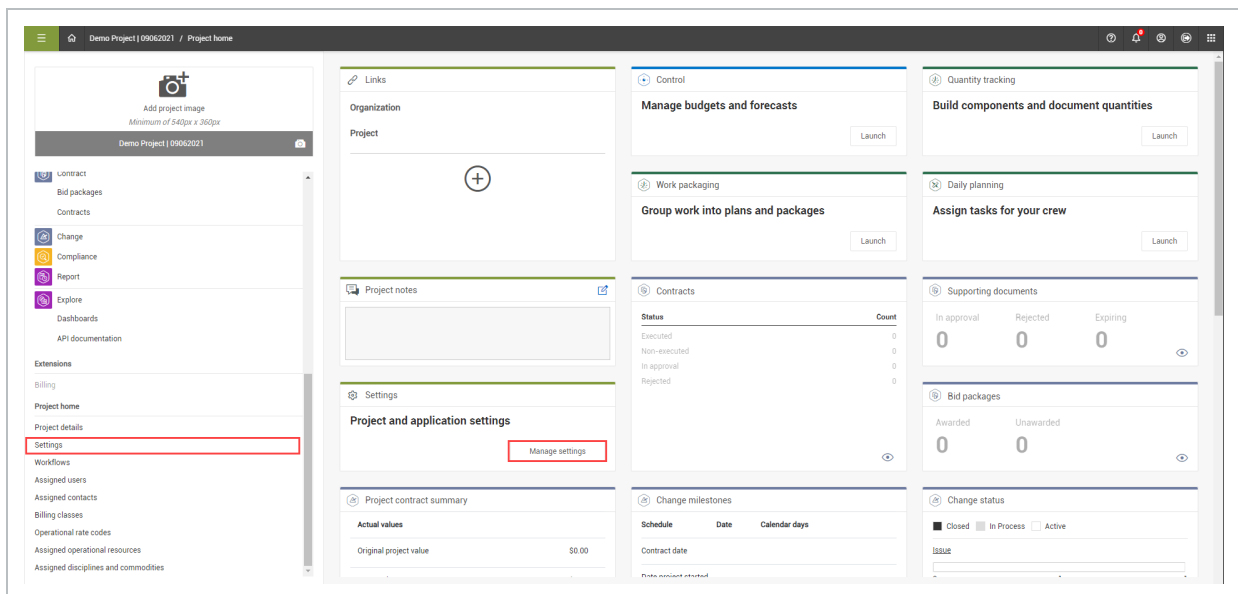
ON

1.3 PROJECT SETTINGS

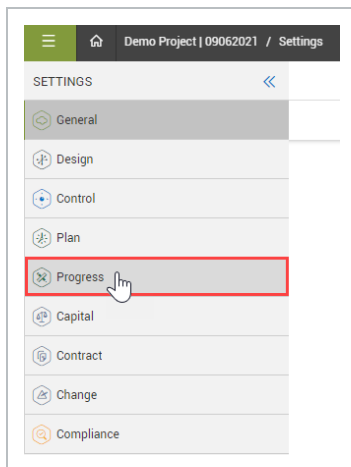
To manage a project successfully within Plan, the correct project settings need to be set up before project initiation. The steps below walk you through how to access Project settings.

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.

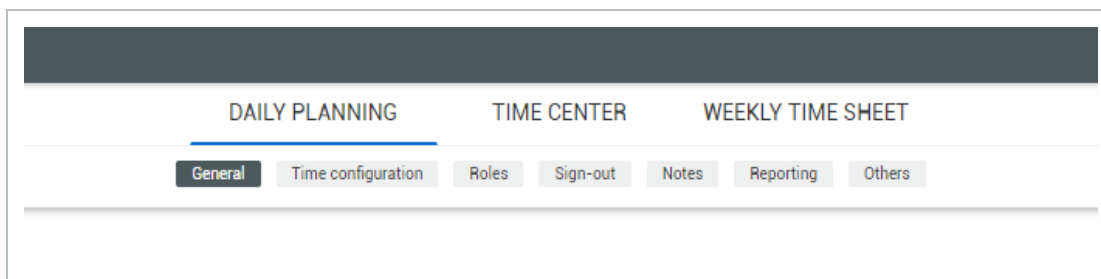


1.3.1 Project Level Settings

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.

1.3.2 Daily Planning Tab

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.



1.3.2.1 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.

General

Week start day

Flag hours as exception on the employee review screen when they are below this value

Flag hours as exception on the employee review screen when they are above this value

Show existing plans for up to how many days in the past in Progress

Show existing plans for up to how many days in the future in Progress

Allow negative values for hours

Enable premiums by default

Display cost in daily plan productivity during execution phase?

Display approve/reject controls on Plan list screen?

Modification only allowed when no plans exist

ON

ON

ON

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

Shifts (at least one required)

English						Español (América Latina)	
						ES-MX	FR-CA
Position	ID	Description	Shift Default Start time	Shift Default End time	Billing Code	Description	
01	01	FIRST SHIFT	12:00 AM	12:00 AM		PRIMER TURNO	-
02	02	SECOND SHIFT	12:00 AM	12:00 AM		SEGUNDO TURNO	+
03	03	THIRD SHIFT	12:00 AM	12:00 AM		TERCER TURNO	+
04	04	FOURTH SHIFT	12:00 AM	12:00 AM		CUARTA TURNO	+

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.

1.3.2.2 Time Configuration

To access projects in Time center the project setting [Use Employee Reason Codes](#) must be toggled on. This setting is required prior to creating daily plans.

Reason codes are mostly read-only at the project level. To make optional reason codes 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.

1.3.2.3 Roles

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

1.3.2.4 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.

Sign-in questions

English					Español (América Latina)			ES	FR-CA
Position	ID	* Questions	Default ans...	Auto note	* Questions	Auto note			
04	No. 6	I have listened to today's ...	Yes	Reason if any.	I have listened to tod...	Reason if any.		+	
05	No. 7	I have listened to today's ...	Yes	Reason if any.	I have listened to tod...	Reason if any.		+	
06	No. 8	I have looked at today's ...	Yes		I have looked at toda...			+	
07	No. 9	I agree to let my supervi...	No		I agree to let my supe...			+	

1.3.2.5 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.

Sign out questions

English					Español			ES	...
position	ID	* Questions	Default a...	Auto note	* Questions	Auto note			
01	20000	I was injured while...	No	I was injured while...	Me lesioné hoy...			+	
02	30000	Was stretch and fle...	Yes	Stretch and Flex wa...	Was stretch and f...	Stretch and Flex...		+	

1.3.2.6 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.

Notes

Tags

English			Español	ES	FR
Position	ID	*Description	*Description		
01	STD_100000	Safety	Seguridad		+
02	STD_200000	Quality	Calidad		-
03	STD_400000	Environmental	Ambiente		-
04	STD_500000	Extra Work/Change	Trabajo/cambio adicional		-