PROGRESS USER GUIDE

Daily Plan Mobile

FIELD EXECUTION MANAGEMENT

INEIGHT

Release 20.2
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INEIGHT

LESSON 1 – INEIGHT PROGRESS OVERVIEW

Lesson Duration: 30 minutes

Lesson Objectives

After completing this lesson, you will be able to:

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

Lesson Topics

1.1 INEIGHT CLOUD PLATFORM OVERVIEW

1.1.1 Project Management and Lifecycle

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

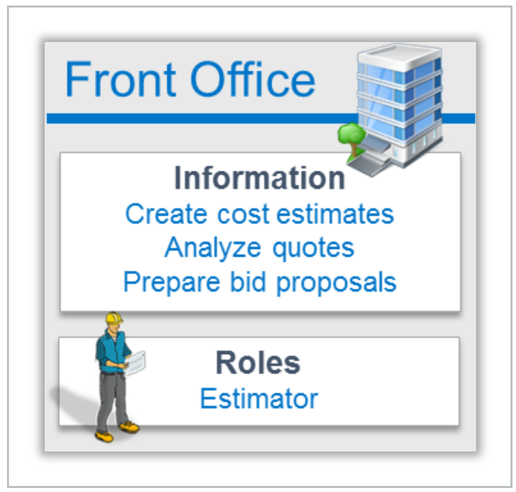
- Front office
- Field office
- Jobsite
- Back office

1.1.1.1 Front Office

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

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

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



1.1.1.2 Field Office

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

Budgeting and Forecasting

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

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

Contract Procurement

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

Work Planning and Quantity Tracking

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

Change Management

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

Inspections Management

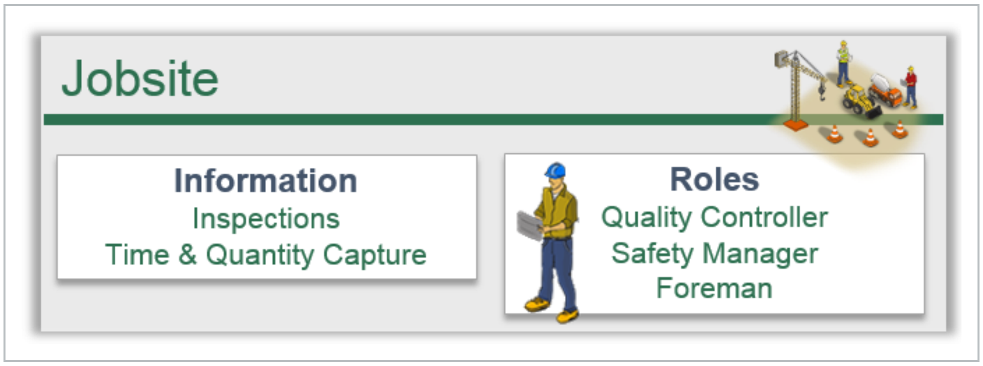
Inspections, as well as actual time and quantities from the jobsite, come back to the field office where they are review and approval before going to the back office.

1.1.1.3 Jobsite

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

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

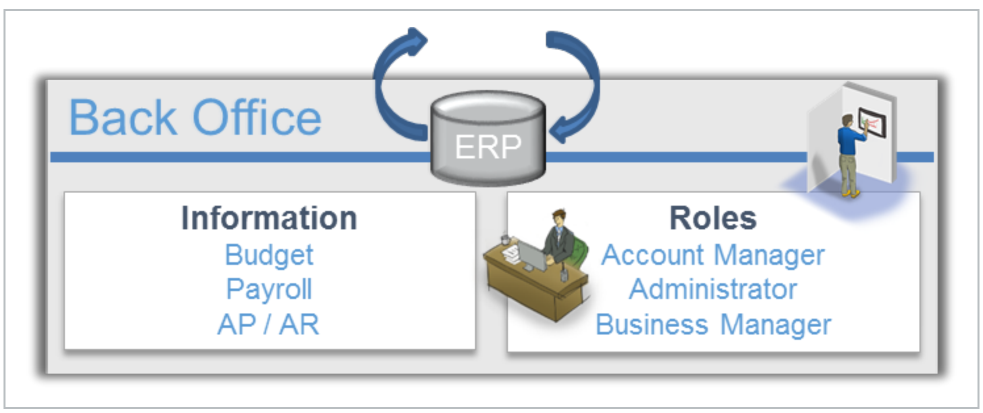
All this information is relayed back to the field office where it can be verified and approved.



1.1.1.4 Back Office

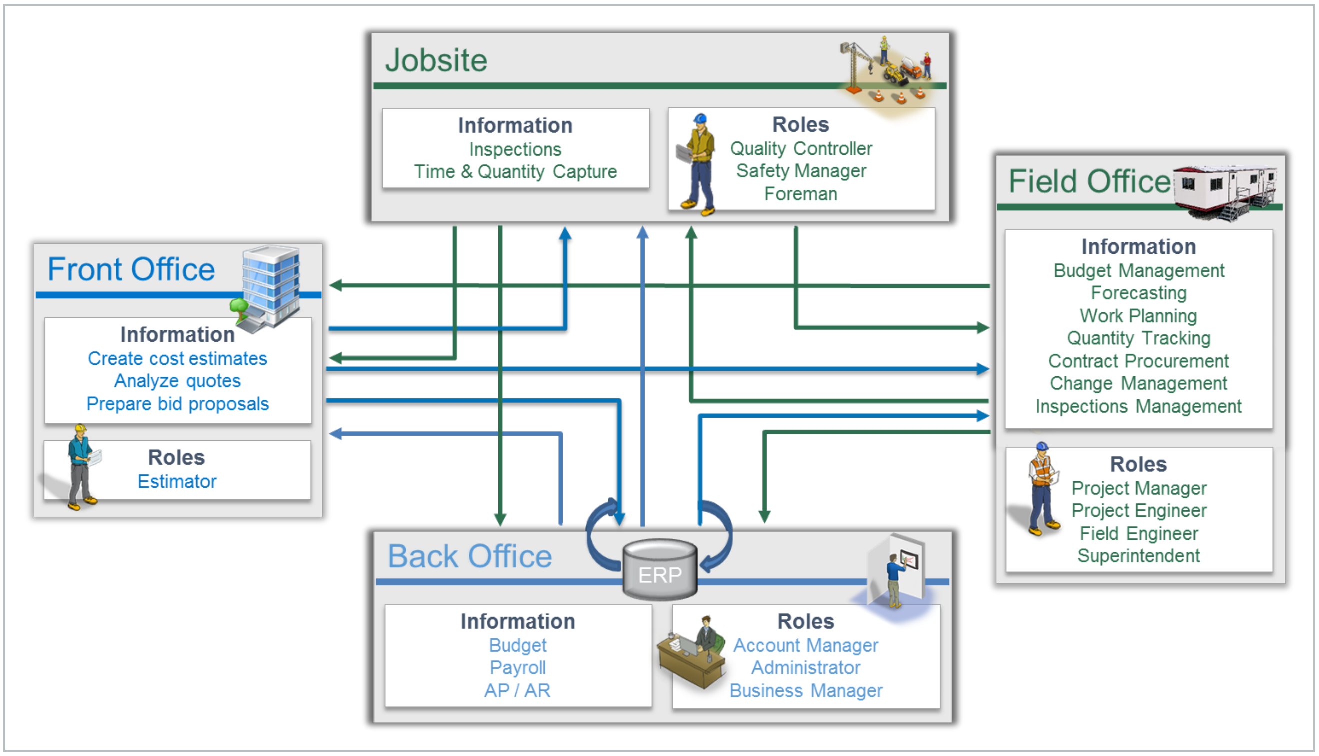
What functions take place in the back office, related to the project? Why is the back office a critical element of managing the project?

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



1.1.1.5 Problems with Existing Systems

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



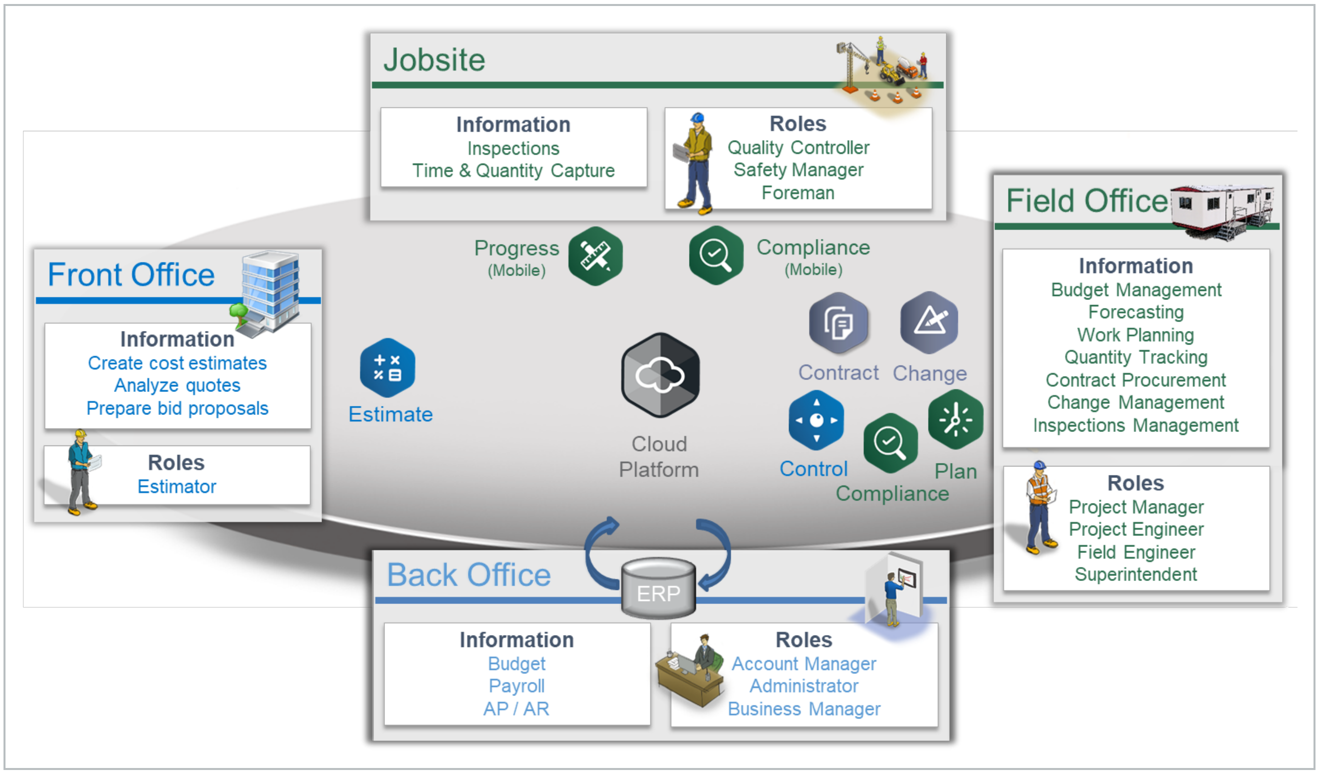
Employing too many systems to transmit information on a project can result in duplication, which is not efficient. Here are a few examples of such inefficiencies:

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

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

1.1.2 What is InEight Cloud Platform?

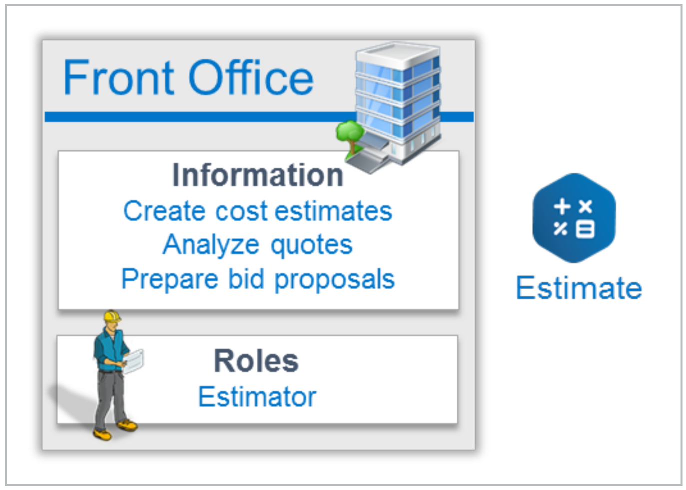
The InEight cloud platform was designed and is continually updated to address these issues. The cloud platform of software applications designed to help companies visualize, estimate, manage, control, and connect all aspects of capital and maintenance projects. The cloud platform is built so all the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



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

Scenario: Step 1

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

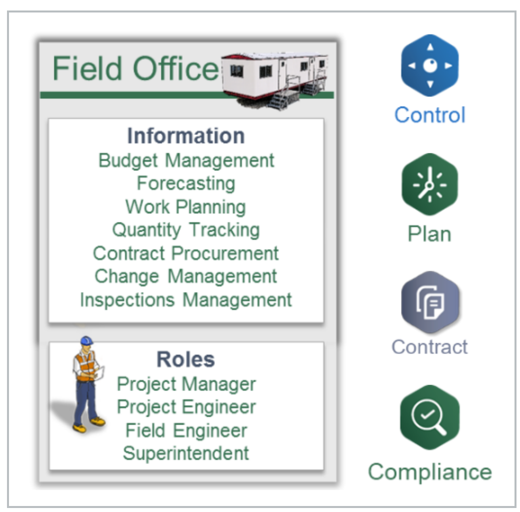


Using the **InEight Estimate** application, the estimating team in the front office builds the cost estimate and submits the bid proposal, including awarded quotes and all bid documents.

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

Scenario: Step 2

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



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

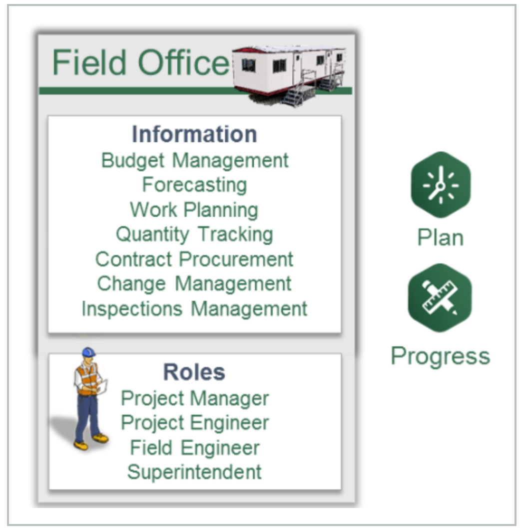
Project Engineers use **InEight Contract** to create bid packages and submit them to vendors and subs and solicit contracts.

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

Scenario: Step 3

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

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

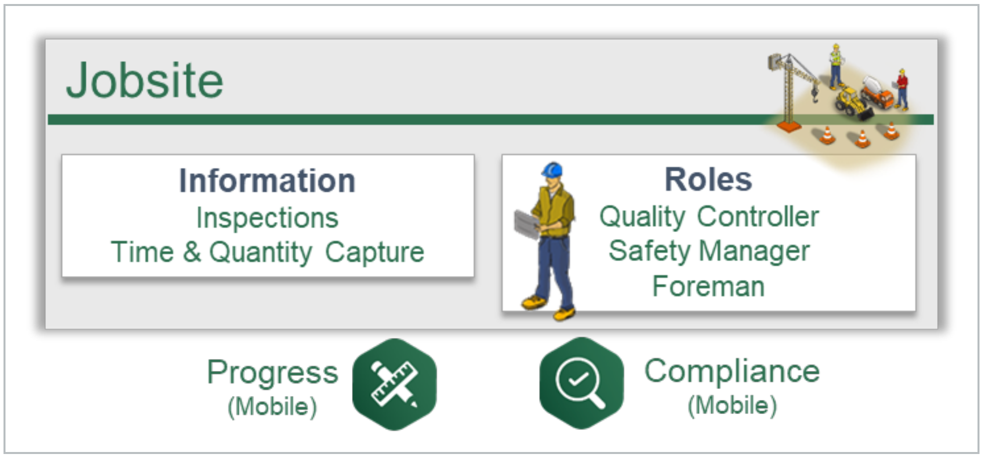


Scenario: Step 4

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

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

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

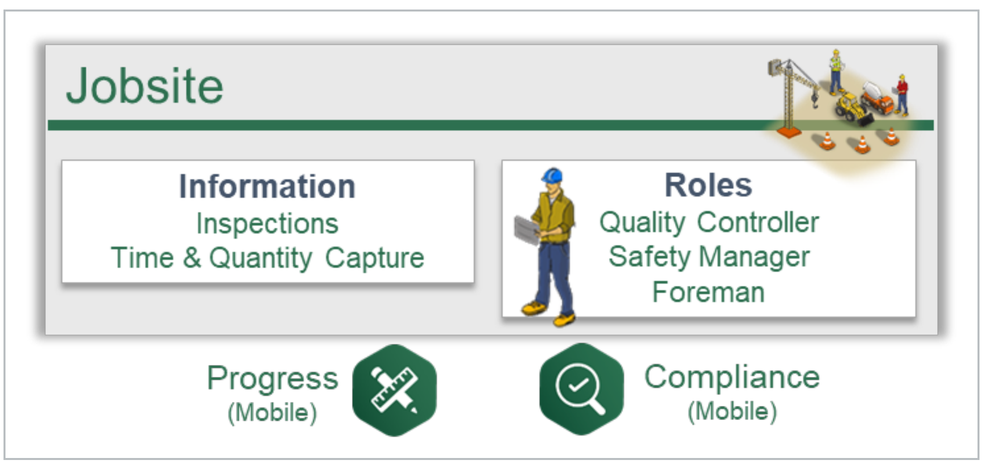


Scenario: Step 5

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

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

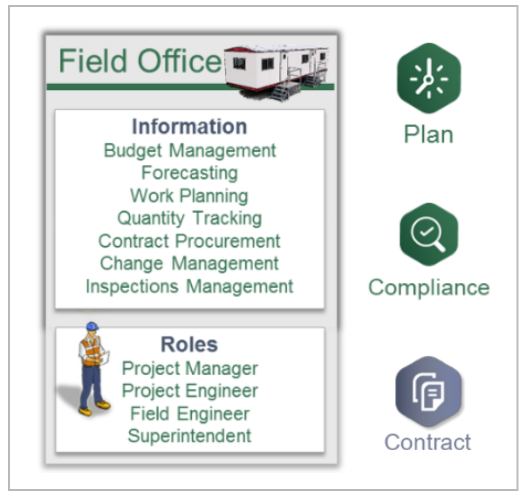
Once complete, she approves the daily plan and synchronizes it, so it can be reviewed by the superintendent in the field office.



Scenario: Step 6

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

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



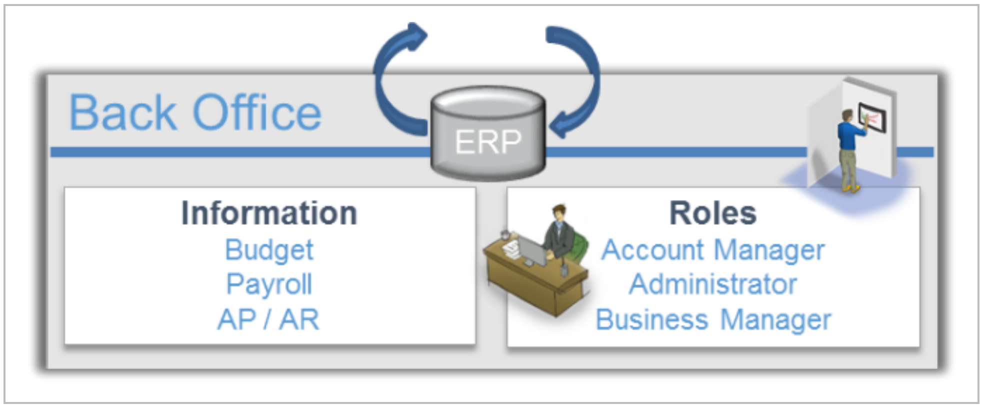
The field engineer is can also verify the inspections were completed in the **InEight Compliance** application.

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

Scenario: Step 7

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

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

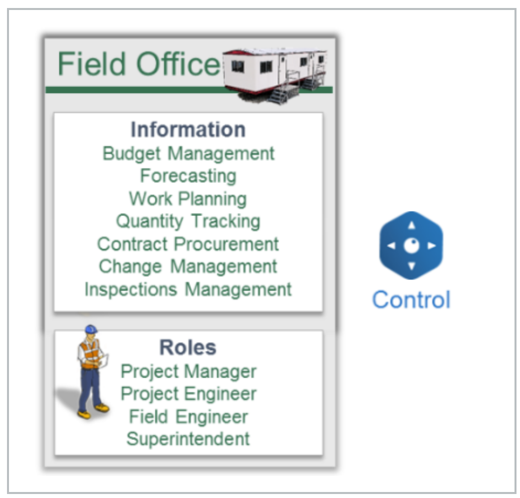


Scenario: Step 8

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

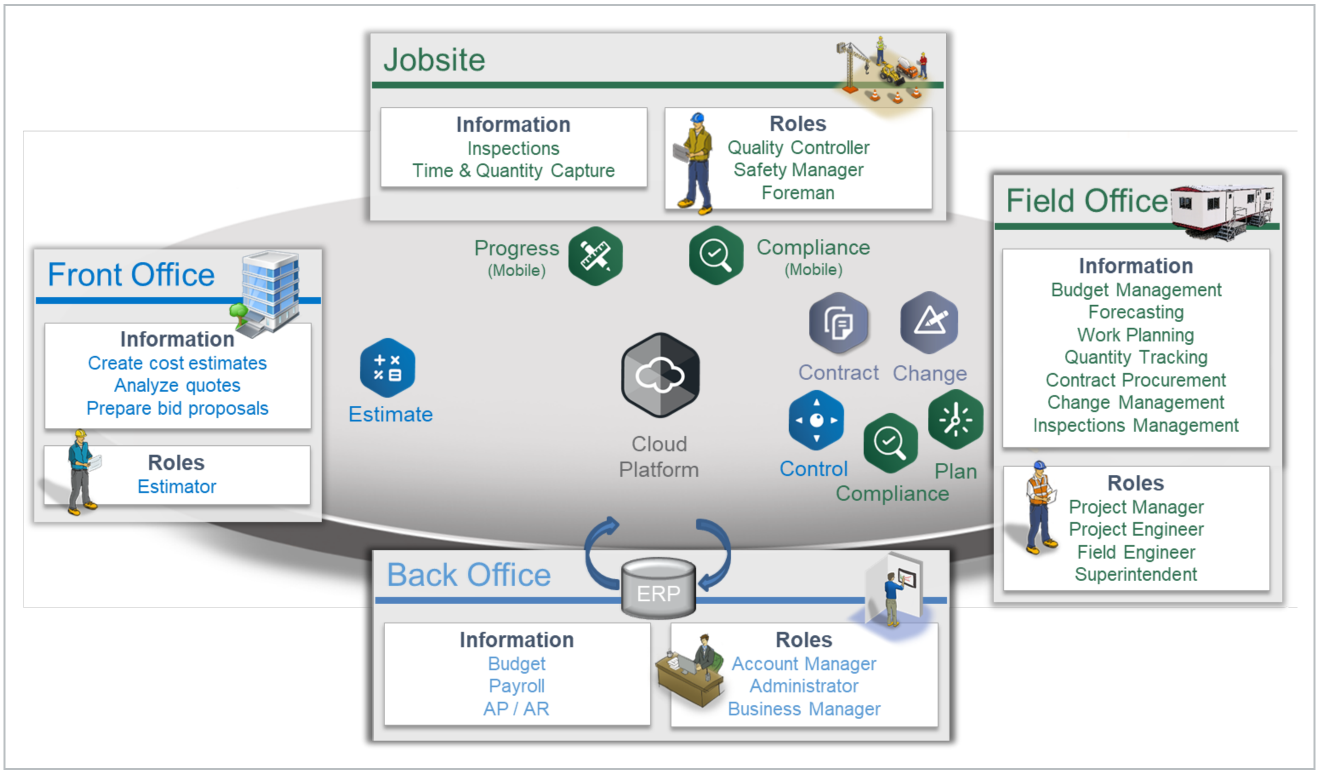
In **InEight Control**, project engineers and managers can view all the actual quantities and costs from the jobsite and analyze the information to determine if they are going to meet their budgets. If, after review, they see that a few operations are spending more time and money due to weather delays,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

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



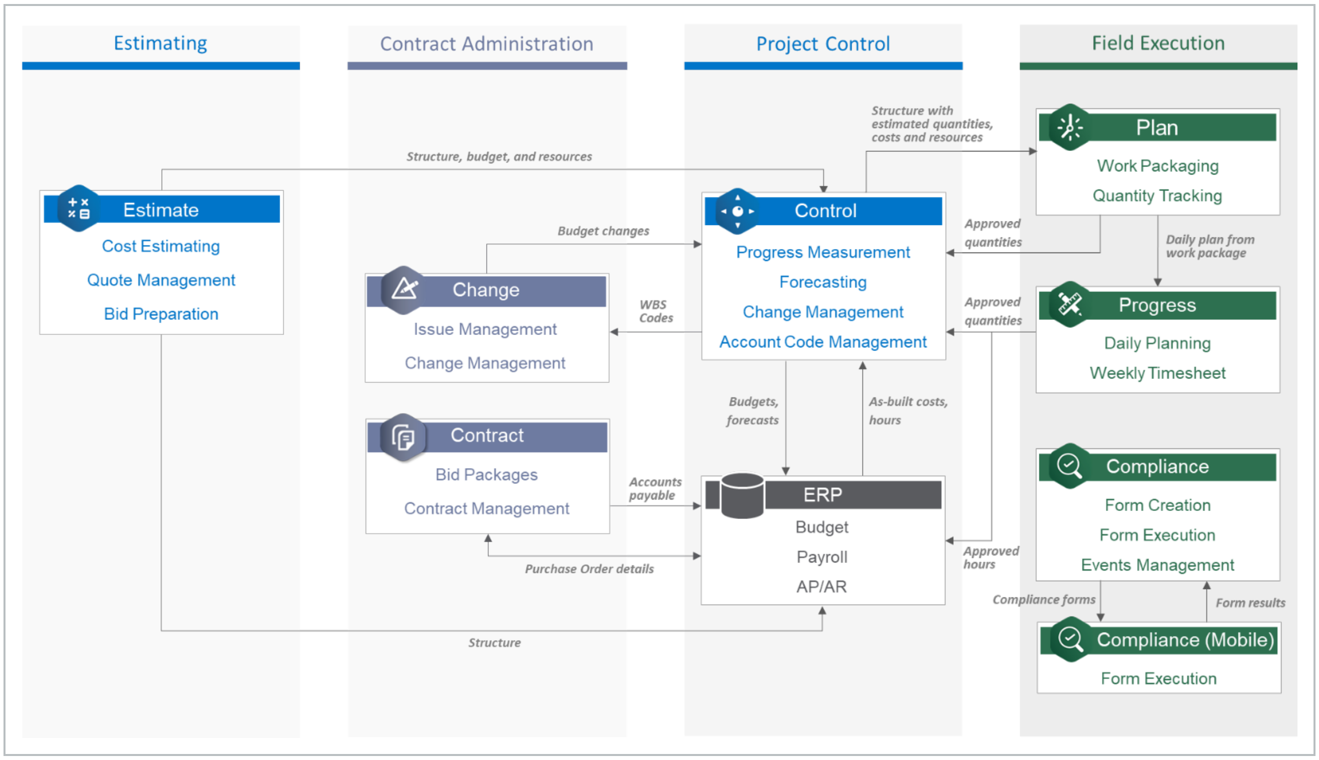
1.1.4 Summary

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



1.1.5 InEight cloud platform Workflow

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

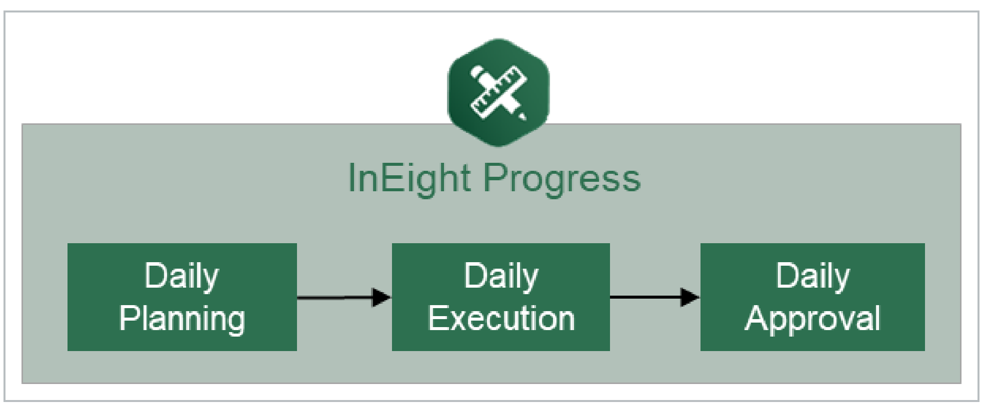


1.2 INEIGHT PROGRESS OVERVIEW

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

1.2.1 InEight Progress Phases

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



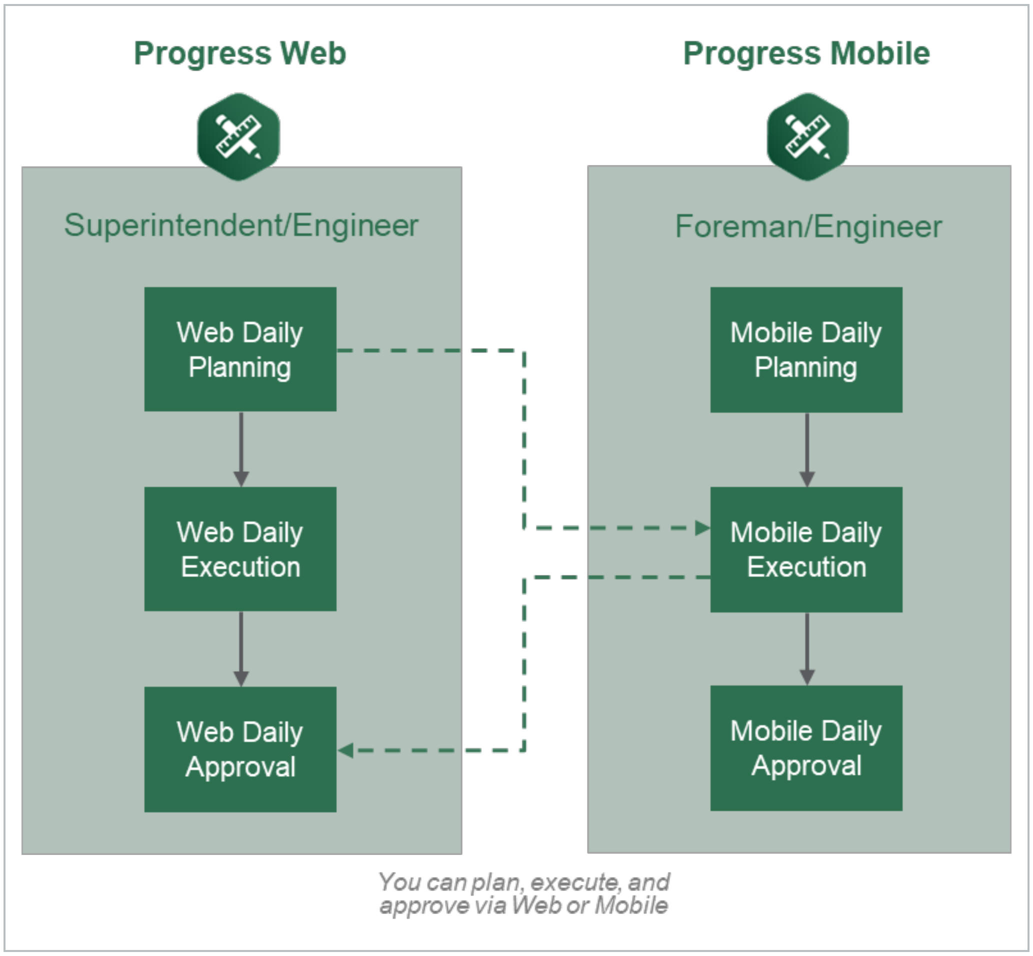
A daily plan is created by a project member to specify the tasks to be completed and to help ensure productivity targets are met. These details are entered in the Daily Planning Phase and provide streamlined communication from the office to the field. Once all the details are entered and the daily plan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

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

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

1.2.2 Daily Plan Work Flow

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

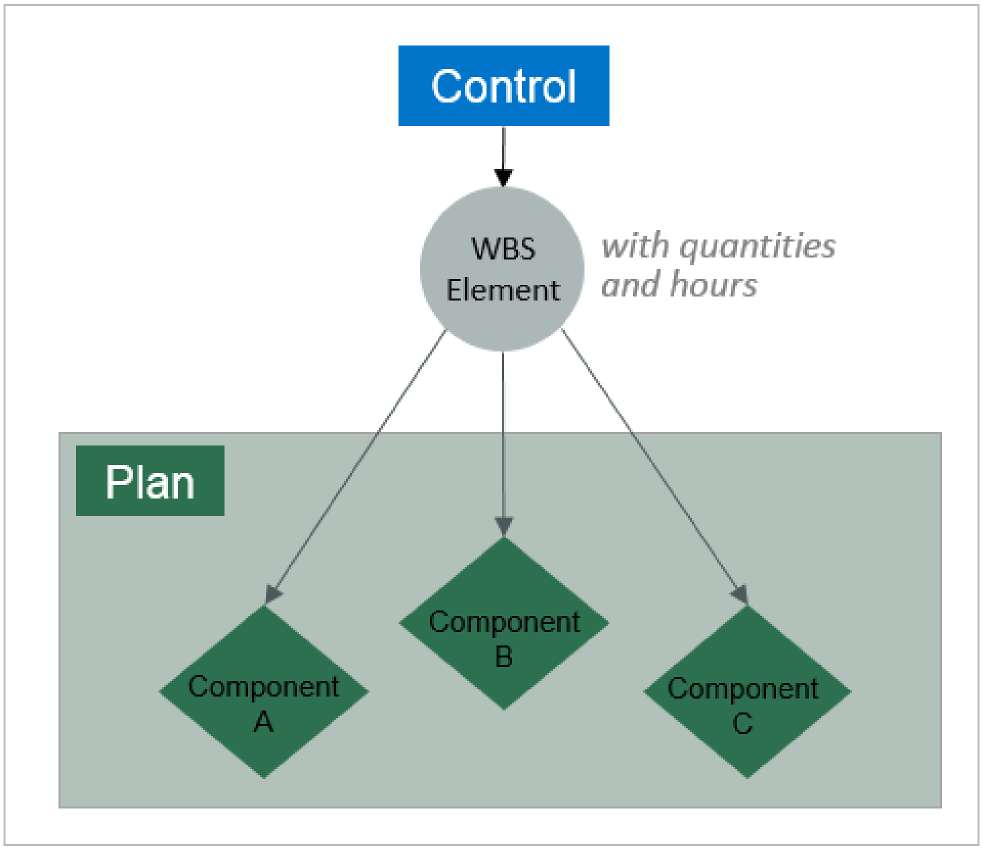


A daily plan can be accessed in either program in any of the phases of daily planning. The program used for a phase may vary from project to project and depends largely on the roles of the project members involved. For example, it may be preferable to have a staff member such as a superintendent or engineer complete daily planning in the InEight Progress web application because they prefer to work from a computer in an office location. The Execution Phase of that same daily plan may be completed by a foreman who spends 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 the office computer.

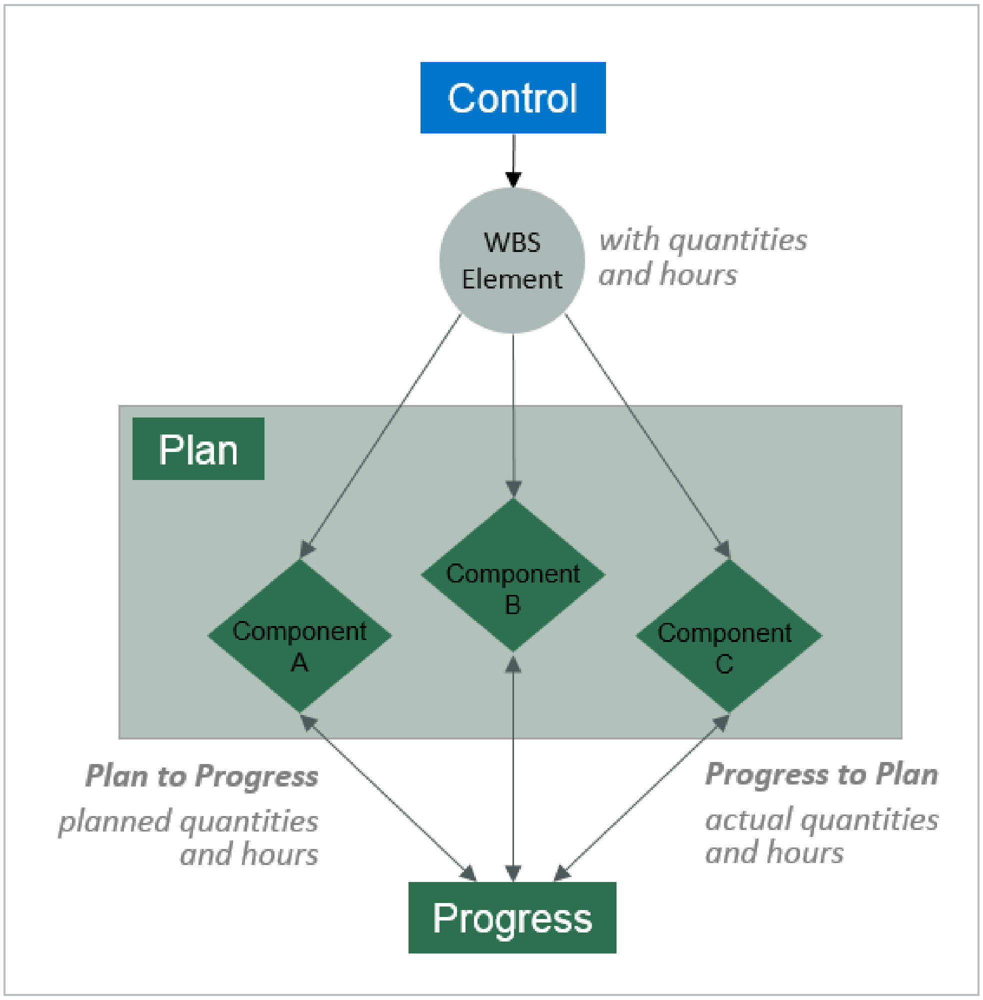
TIP	Mobile Daily Planning has all the same functionality as Web Daily Planning for InEight Progress, but is available as a mobile-only application.

1.2.3 InEight Control Integration

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



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



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

1.2.4 Daily Planning

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

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

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

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

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

1.2.5 Daily Execution

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

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

Daily execution is completed by navigating through the 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

1.2.6 Daily Approval

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

There are 3 options in the Approval Phase:

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

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

1.2.7 Work Flow Beyond InEight Progress

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

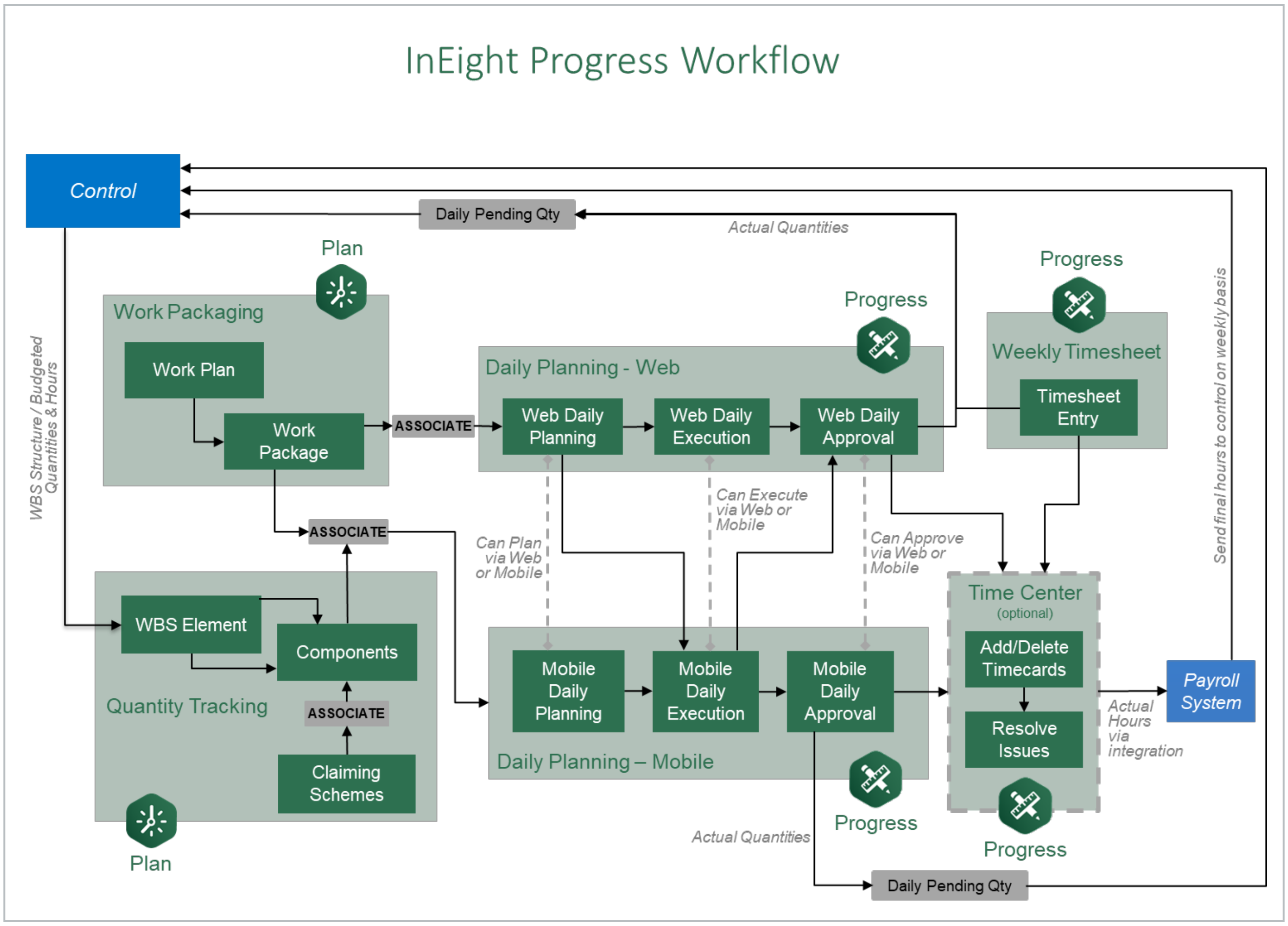
1.2.7.1 Hours

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

1.2.7.2 Quantities and Costs

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

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


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

Lesson 1 Review

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

Lesson 1 Summary

As a result of this lesson, you can:

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

LESSON 2 – GENERAL NAVIGATION

Lesson Duration: 45 minutes

Lesson Objectives

After completing this lesson, you will be able to:

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

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

Lesson Topics

2.1 MOBILE OVERVIEW

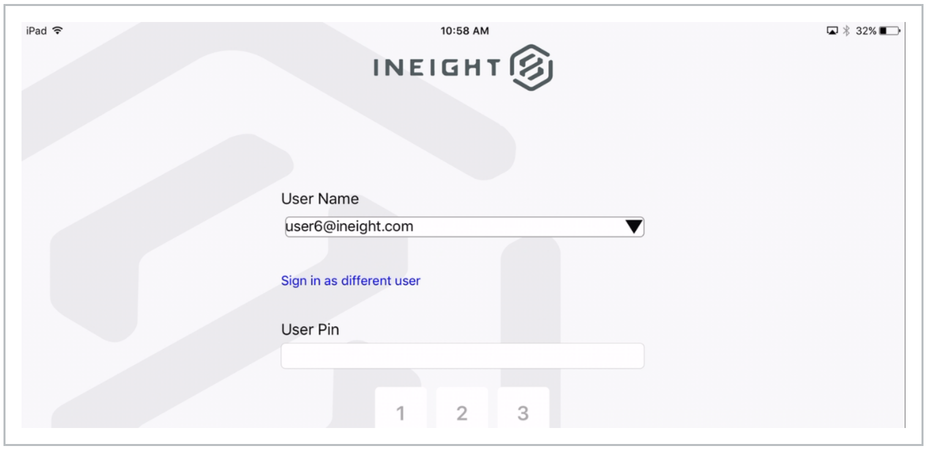
2.1.1 Login

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

2.1 Step by Step 1 — Log into InEight Progress

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

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



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

2.1.2 Kiosk Mode

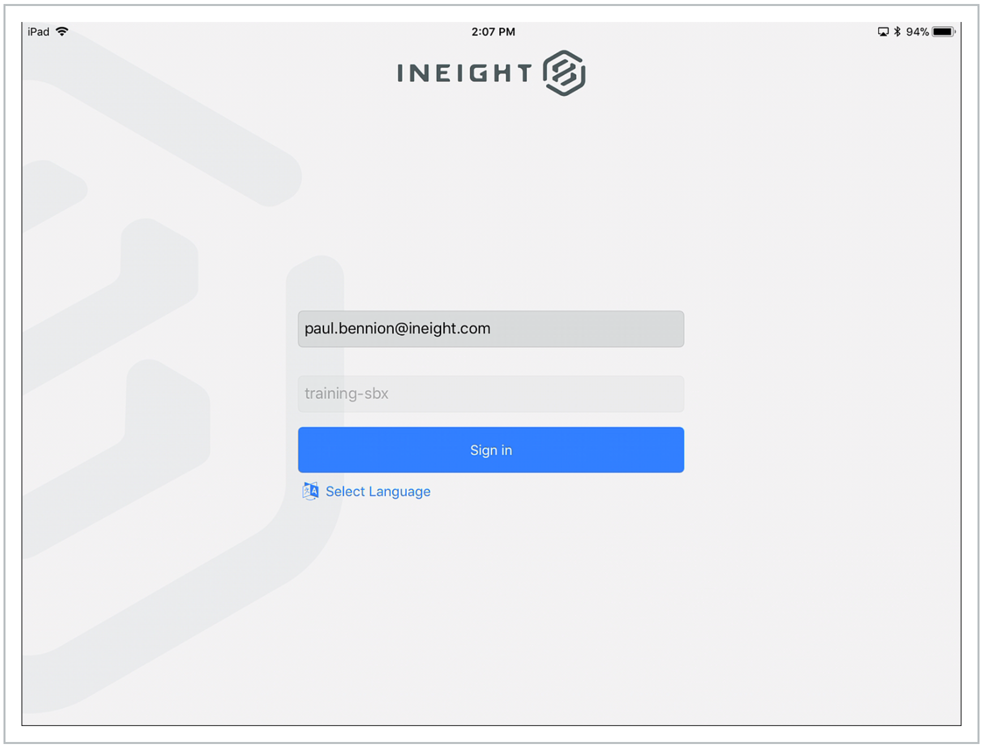
Progress Mobile allows multiple users to log in on the same device using Kiosk Mode, so that only one device is needed for multiple users to perform their daily activities.

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

2.1.2.1 Kiosk Workflow

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

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



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

2.1.3 Project List

Scenario

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

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

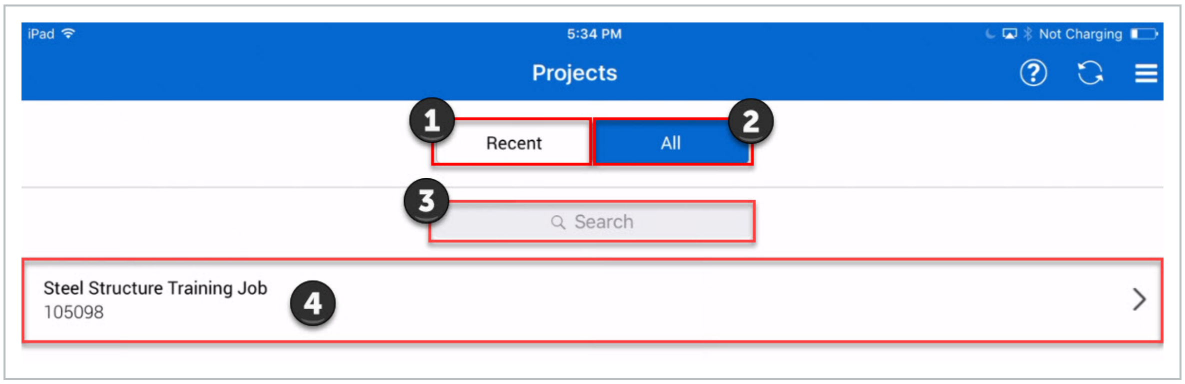
The project list shows all projects available for you. You must have the role of Superintendent, Engineer or Foreman assigned in the InEight cloud platform under Suite Administration > User Management, for a project to appear in the project list.

Overview – Project List

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

Overview – Project List (continued)

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



2.1.4 Plan List

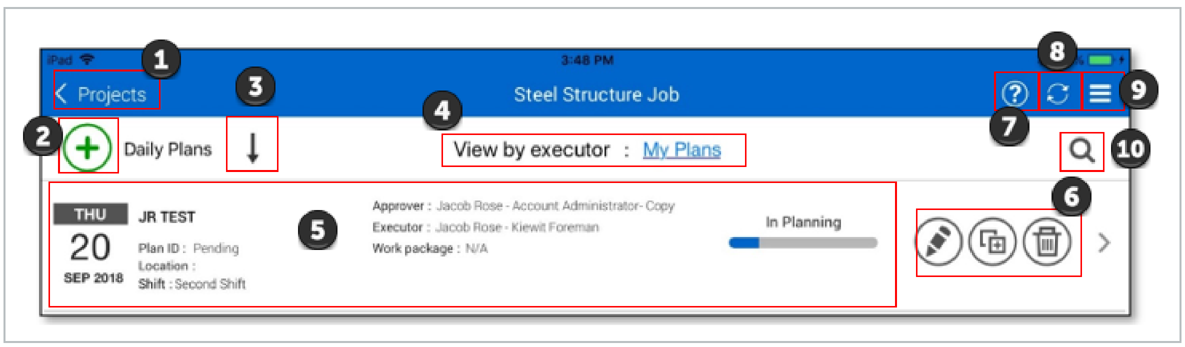
The plan list shows all the daily plans already created and assigned to you within a specified date range. You can configure the date range in the project settings, but the default is ten days in the past and five days in the future. Tapping on an existing plan opens that plan.

Overview – Plan List

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

Overview – Plan List (continued)

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



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

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

2.2 DAILY PLANNING

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

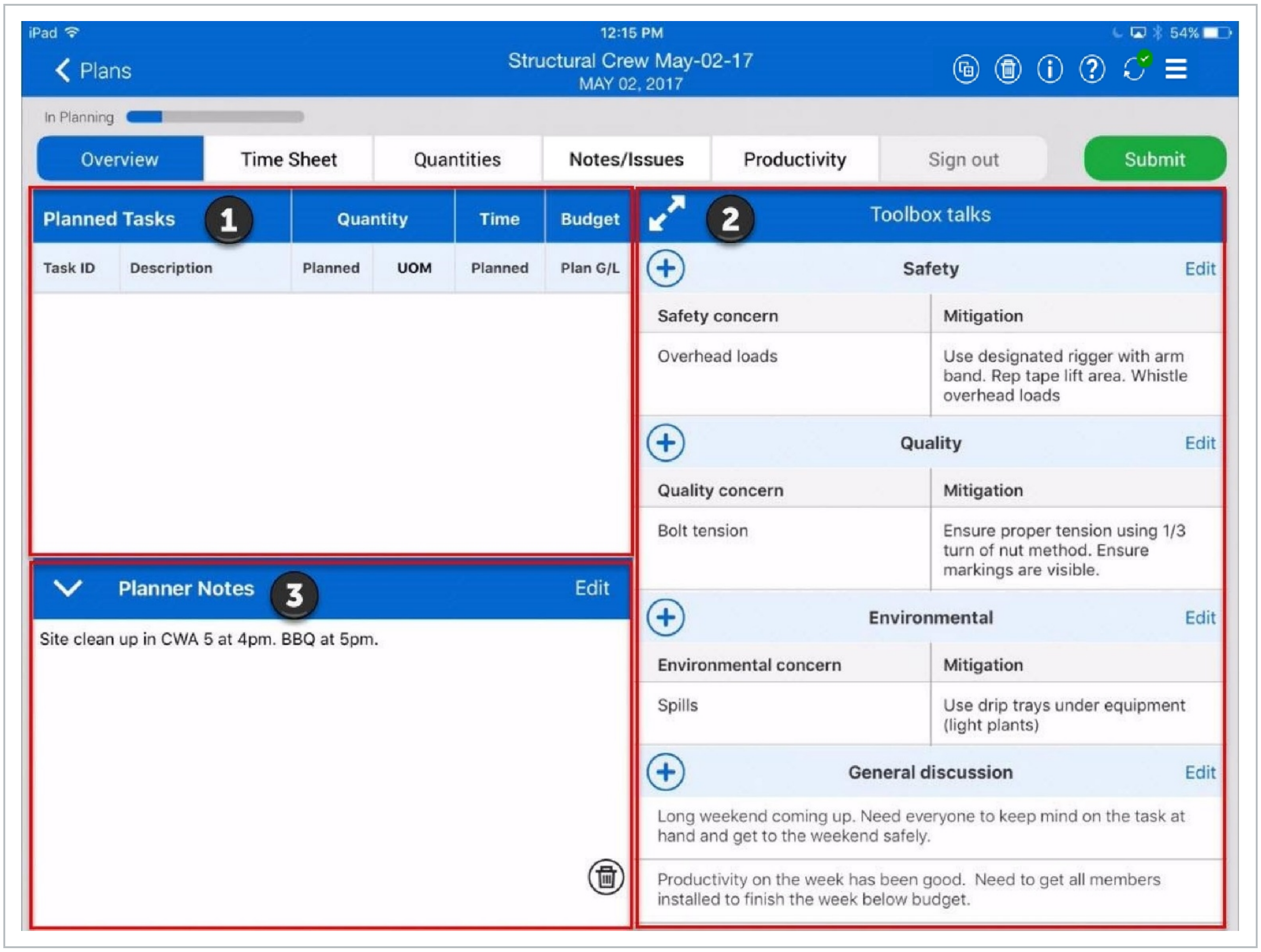
TIP While in the Planning Phase, the screen is highlighted with a blue accent. When in the Execution Phase, this changes to green. This helps to remind yourself which phase of the process you are in.

2.2.1 Overview

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

Overview – Overview Tab

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



On the Overview tab, you can:

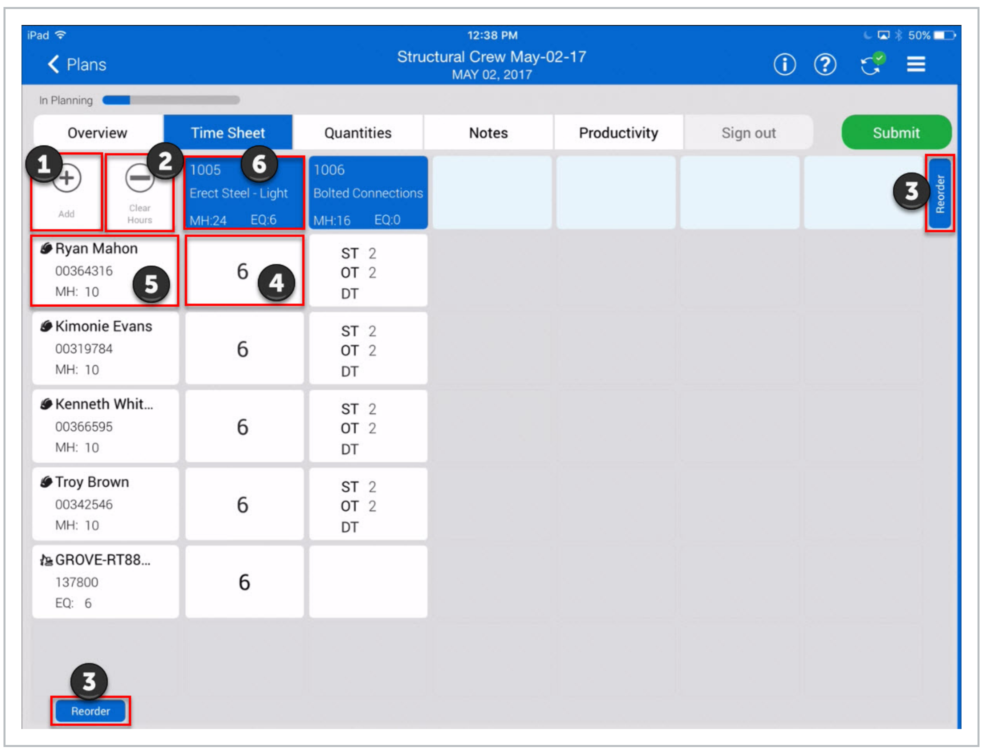
- Add tool box talk items by tapping the  icon
- Tap the  icon to expand to a larger view
- Minimize planner notes by tapping the  icon

2.2.2 Time Sheet

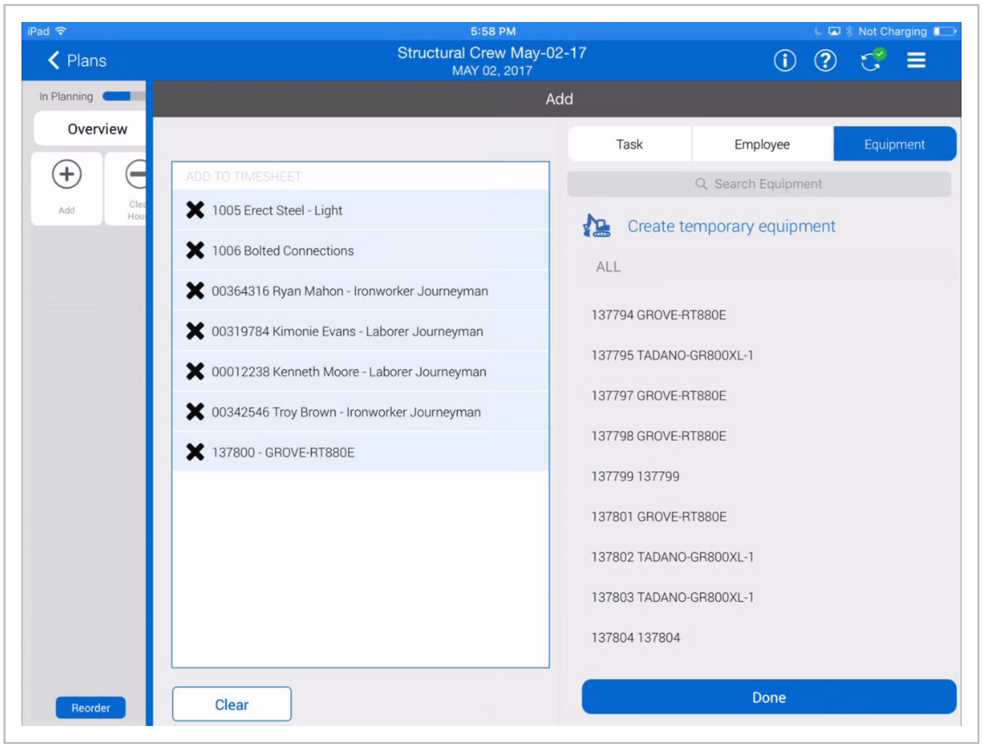
On the Time Sheet tab, you can enter all your tasks, employees and equipment and assign hours to each. The table below explains key navigation points.

Overview – Time Sheet Tab

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



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



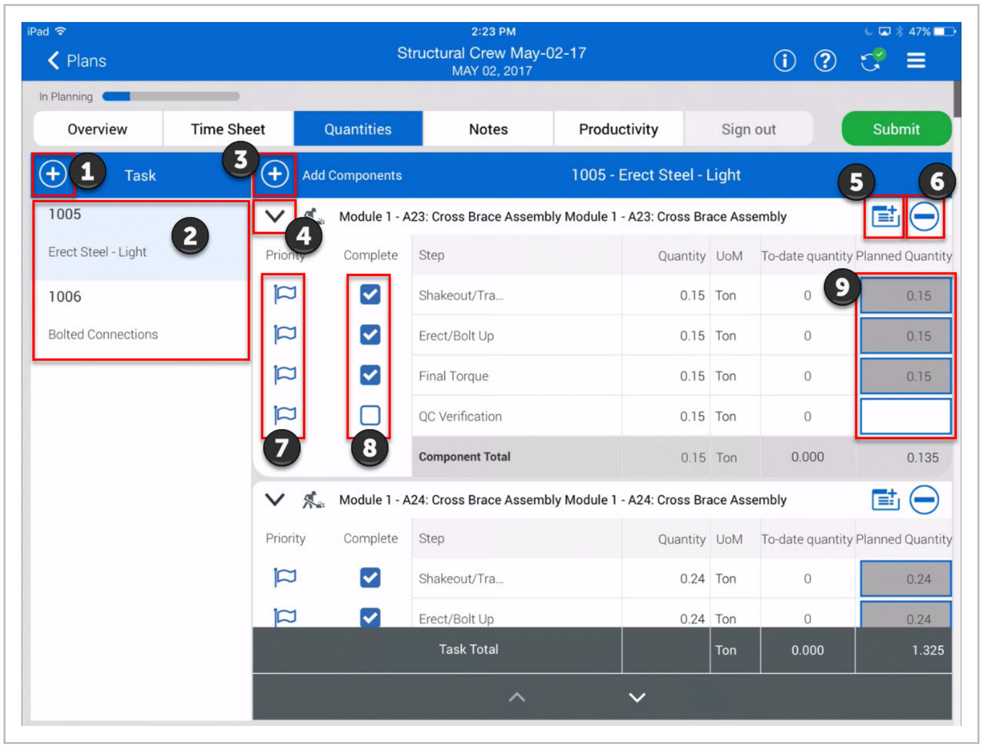
- View your lists of all available tasks, employees and equipment by tapping on the appropriate tab at the top of the window
- Once selected from a list, items appear on the left-hand side of the window under Add To Time Sheet as shown above
- Tapping on the **X** next to an item removes it from the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

2.2.3 Quantities

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

Overview – Quantities Tab

	Title	Description
1	Add Task	Tap here to add additional tasks. Resource hours must be assigned back in the Time Sheet tab.
2	Select Task	Tap here to display components for the selected task.
3	Add Components	Tap here to add components by selecting from a list.
4	Expand / Collapse	Tap here to expand and collapse individual component details.
5	Add Note	Tap here to add a note associated with an individual component.
6	Delete Component	Tap here to delete a component.
7	Priority	Tap here to mark a component step as a priority.
8	Complete	Tap here to select a component step to complete as part of the daily plan and add the corresponding quantity to the planned quantity.
9	Planned Quantity	Tap here to enter the planned quantity for a component step, providing the planned quantity does not exceed the component quantity.
10	View Planning Slide-out	(Not pictured - See Lesson 3.1 Daily Plan from Scratch) Tap here to view the quantity needed to break even for the selected task. Or you can manually enter any quantity to see how it would affect the gain/loss for the selected task.

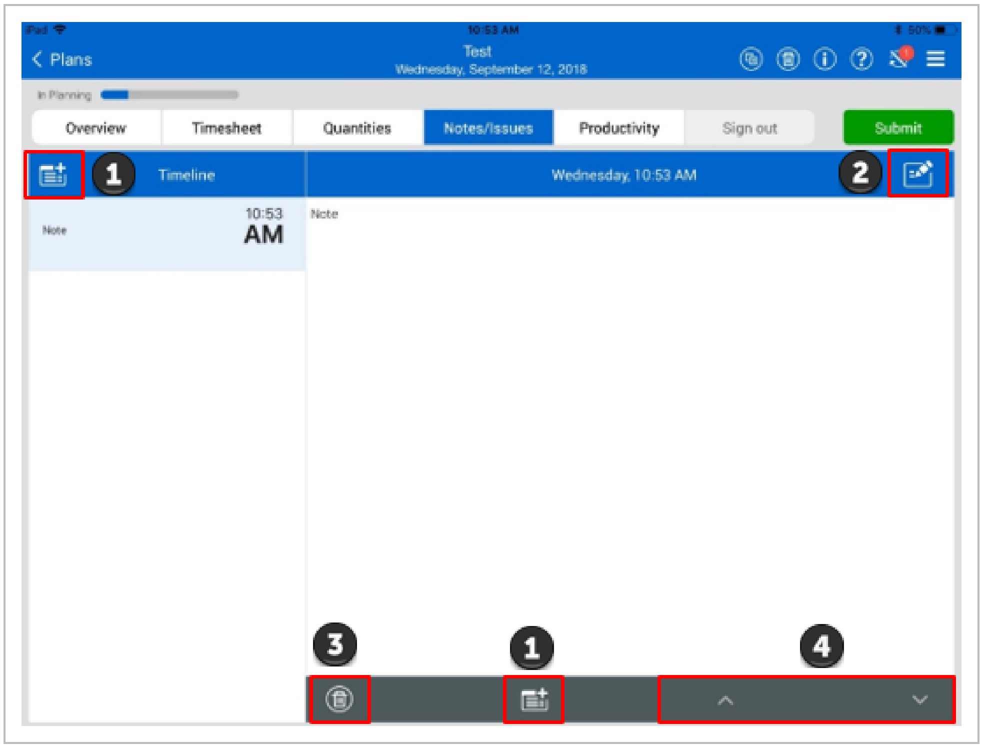


2.2.4 Notes/Issues

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

Overview – Notes/Issue Tab

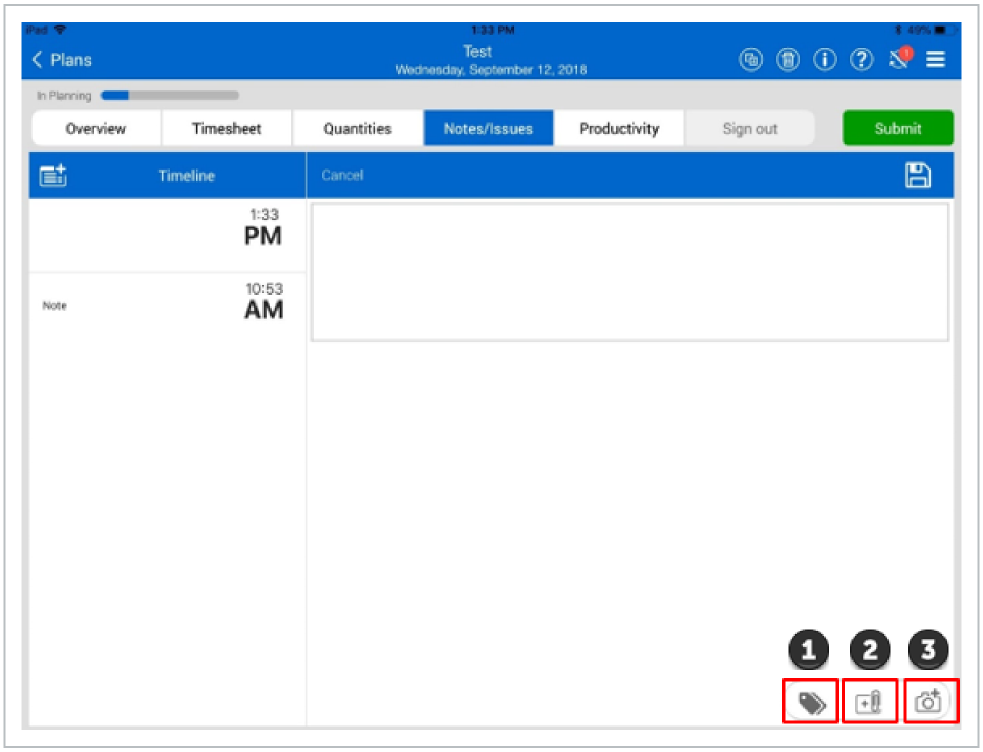
Title		Icon	Description
1	Add		The Add button allows you to add a note or issue under the Notes/Issues tab.
2	Edit		The Edit button allows you to make changes to an existing note.
3	Delete		The Delete button allows you to remove existing notes.
4	Arrow Up Arrow Down		The Arrow button allows you to navigate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



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

Overview – Tags & Associations

Title		Icon	Description
1	Tags		The Tags button allows you to add tags to your notes. The following tags are available: • Safety • Quality • Environmental • Extra Work/Changes • Delay • Production Notes
2	Associations		The Associations button allows you to associate the note with a specific task, employee, equipment, or components.
3			The Photo button allows you to add a picture to a note. The photo can either be taken from the device's camera or from the saved photos on the device.

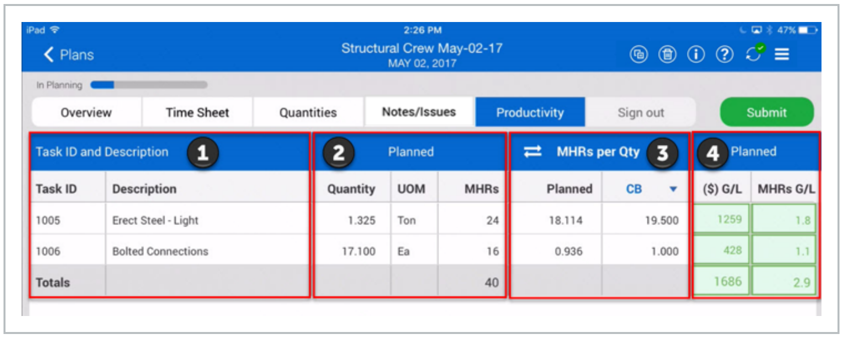


2.2.5 Productivity

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

Overview – Productivity Tab

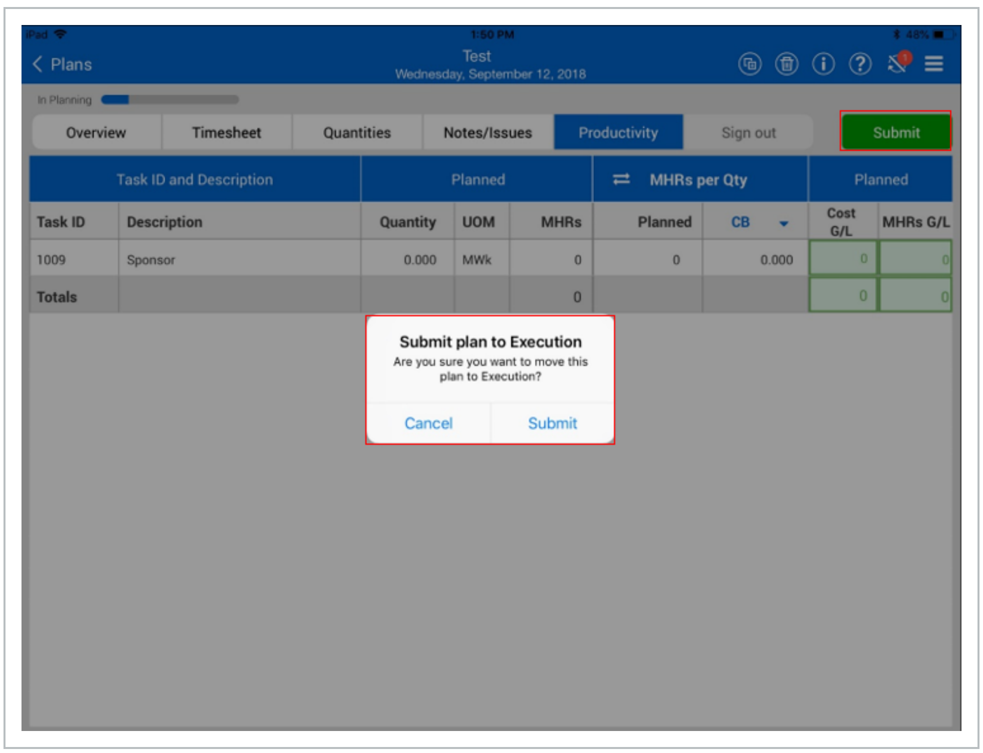
Title		Description
1	Task ID and Description	Indicates the tasks planned for the crew to perform that day.
2	Planned	Displays the plan information you entered in the Quantity tab (quantity, unit of measure, and man-hours).
3	MHRs per Qty	Compares the planned values to the current budget values.
4	Planned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



2.2.6 Submit & Sync

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

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



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

Scenario Recap

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

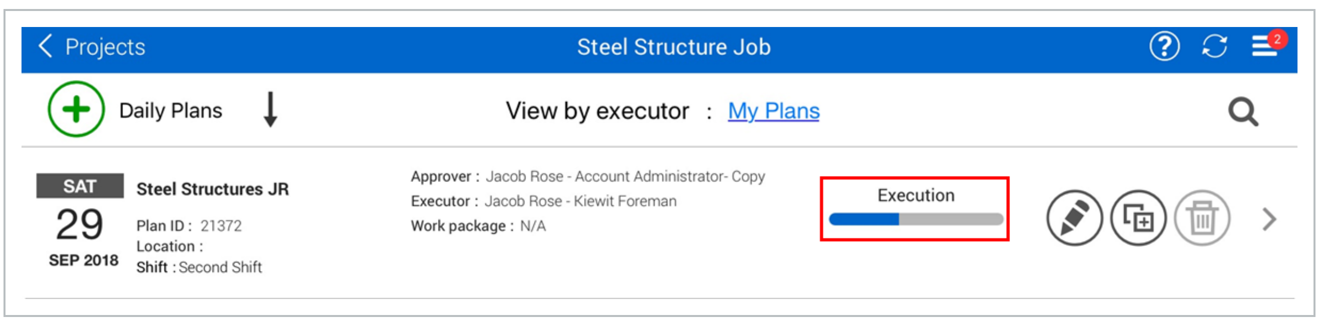
2.3 DAILY EXECUTION

Scenario

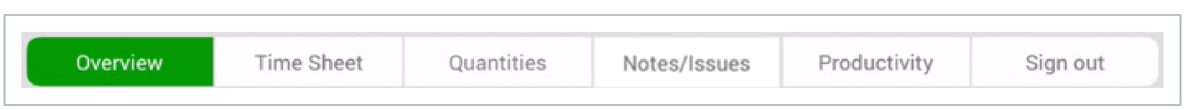
> Steve is an electrical foreman on a project. Yesterday he created a daily plan that was reviewed by his superintendent, Paul. He is now preparing for the morning meeting and getting ready to execute the daily plan.

2.3.1 Plan List

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



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



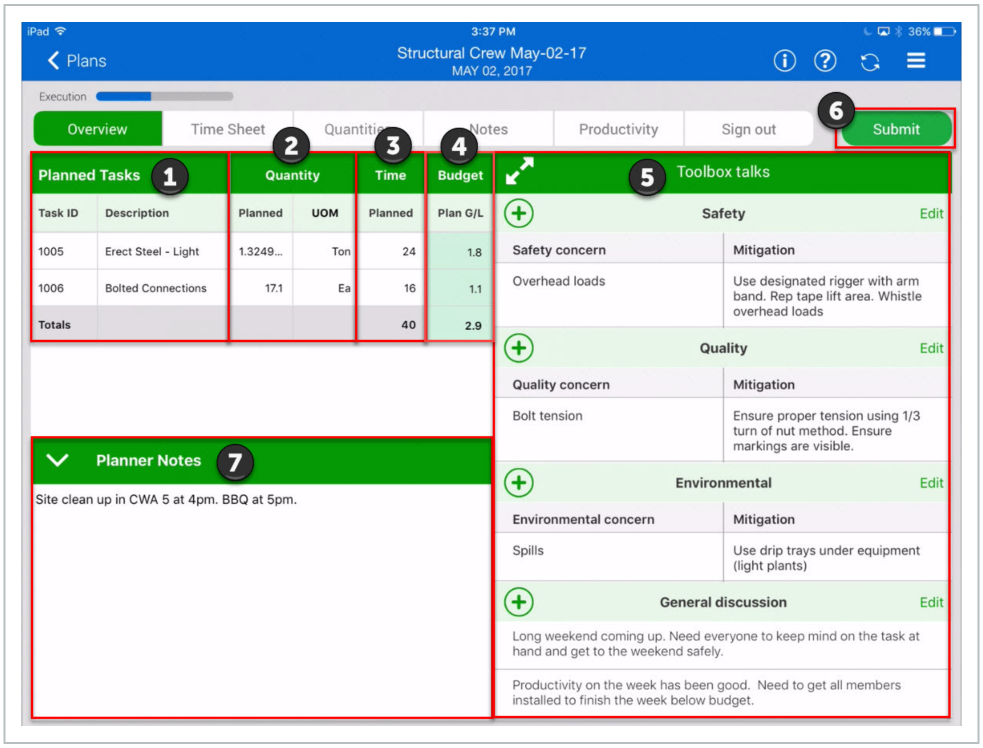
2.3.2 Overview

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

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

Overview – Overview Tab

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



2.3.3 Time Sheet

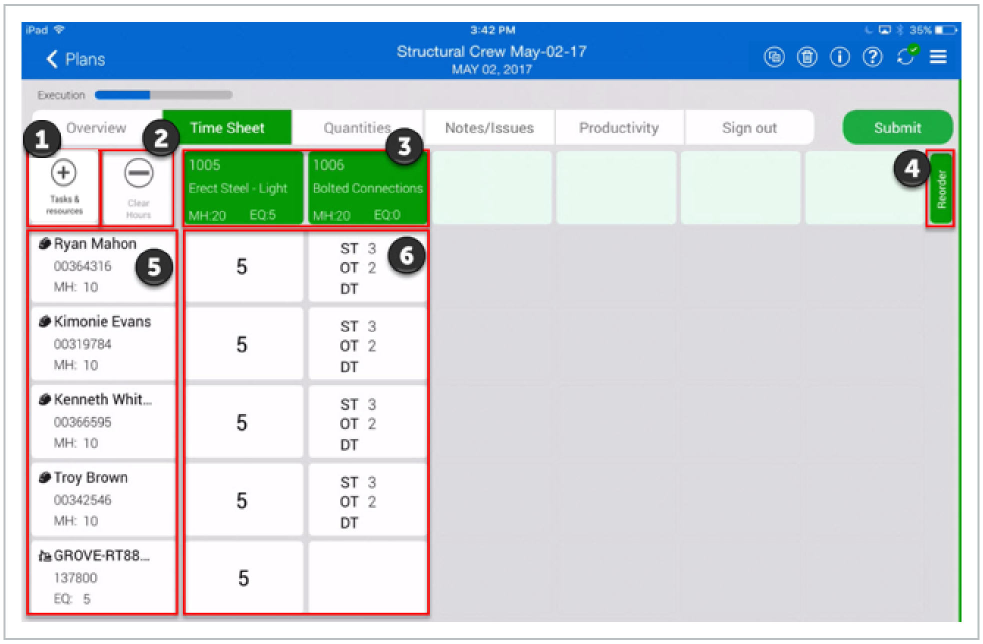
In the Time Sheet tab, the planned tasks, resources and hours are all displayed. As the day progresses you can enter in actual hours for each resource and task. If you need to add tasks or resources, you can do it here as well.

Time Sheet Tab

Title		Description
1	Add ⊕	Allows you to add additional tasks, employees, and equipment to the Time Sheet. You can also create temporary tasks, employees, and equipment.
2	Clear Hours	Allows you to clear all the hours from the Time Sheet. For instance, if you copied a daily plan and copied in the hours worked by the employees you can clear it out for the new task.
3	Tasks	The pieces of work to be completed.
4	Reorder	Allows you to reorder the list of items in the time sheet any way you want, by tapping and dragging the item.

Time Sheet Tab (continued)

Title		Description
5	Employees & Equipment	Displays the employees and equipment assigned to the Time Sheet.
6	Hours	Displays the actual hours each employee worked.

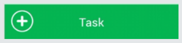
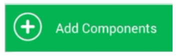
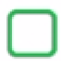
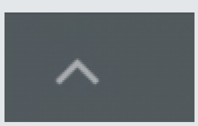


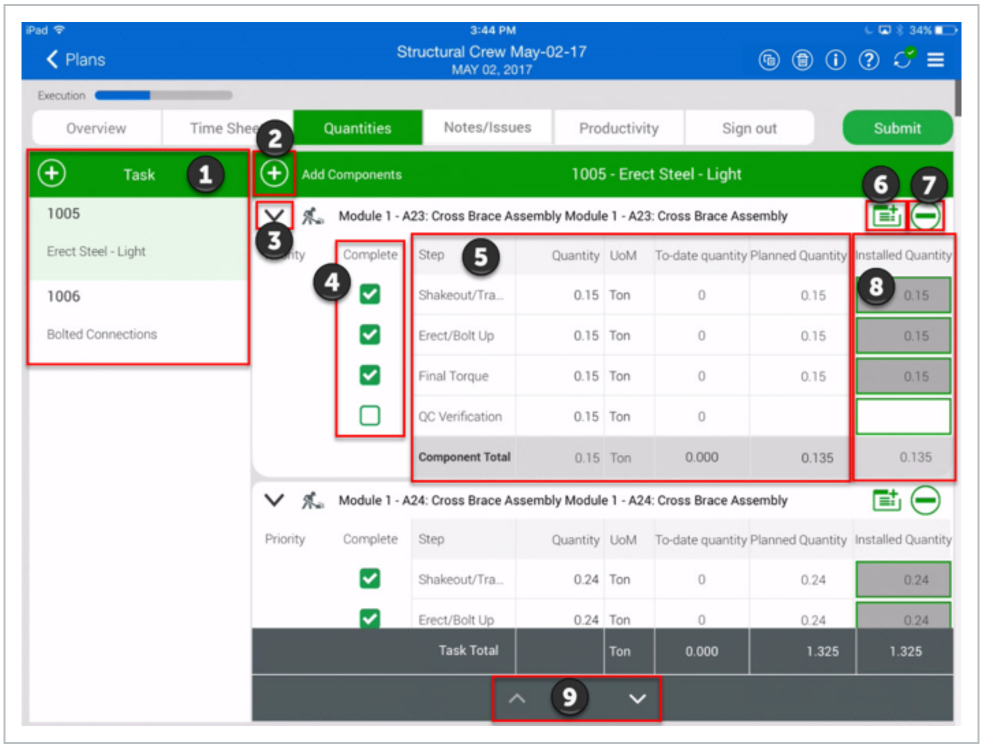
- To enter hours for equipment and crewmembers, you click on the hour box under each task and next to the crewmembers' name
- A window appears where you can enter ST (Straight Time), OT (Over Time), or DT (Double Time)

2.3.4 Quantities

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

Overview – Quantities Tab

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

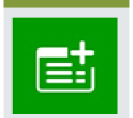
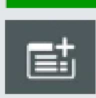


2.3.5 Notes/Issues

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

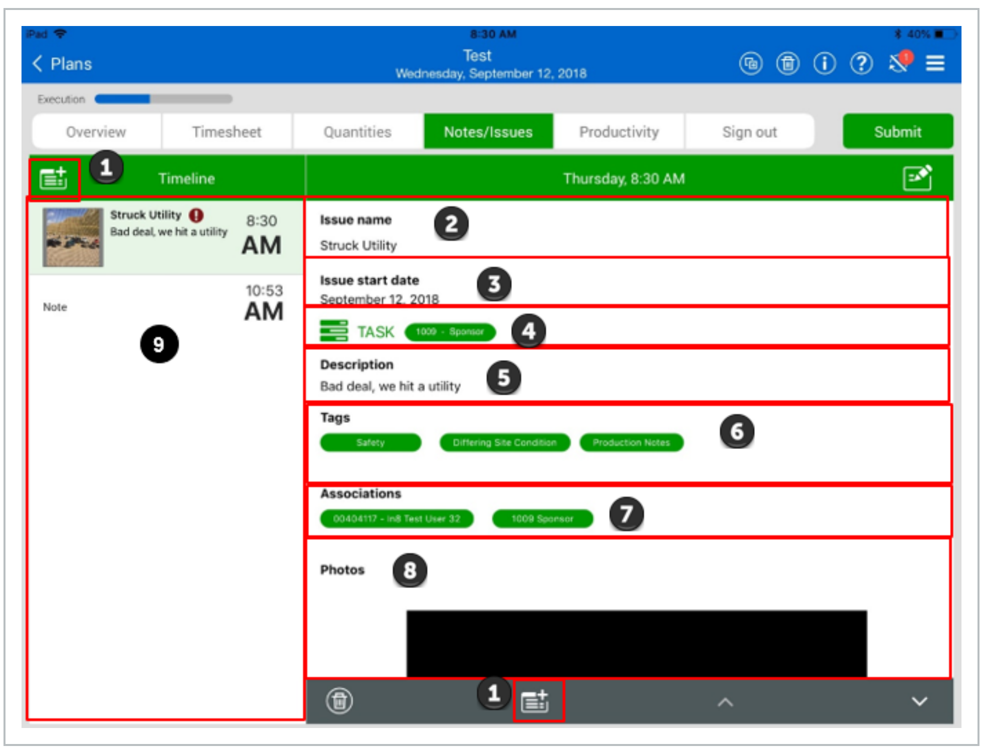
Along with the note/issue, you can add tags to associate the notes/issues with a pre-defined category. You also can add photos with your notes/issues.

Overview – Notes/Issues Tab

Title			Description
1	Add	 	Allows you to add notes/issues to InEight Progress.
2	Name		Displays the name of the note or issue.

Overview – Notes/Issues Tab (continued)

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

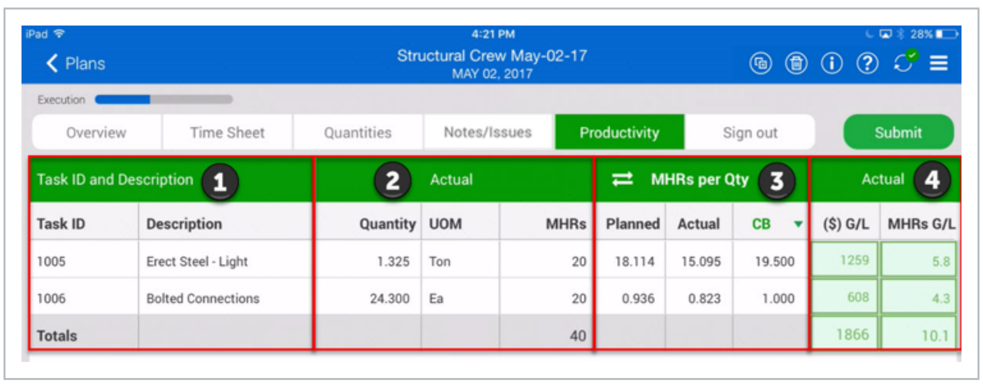


2.3.6 Productivity

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

Overview – Productivity Tab

Title		Description
1	Task ID and Description	Displays the task ID and description.
2	Actuals (UoM and MHRs)	Displays the actual claimed quantities and man-hours.
3	MHRs per Qty	Compares the Planned versus Actual MHRs per Qty. You can select CE (Current Estimate) or CB (Current Budget).
5	Actual (G/L)	Compares actual cost or MHRs to budgeted cost or MHRs for each task and shows the gain or loss for each task.



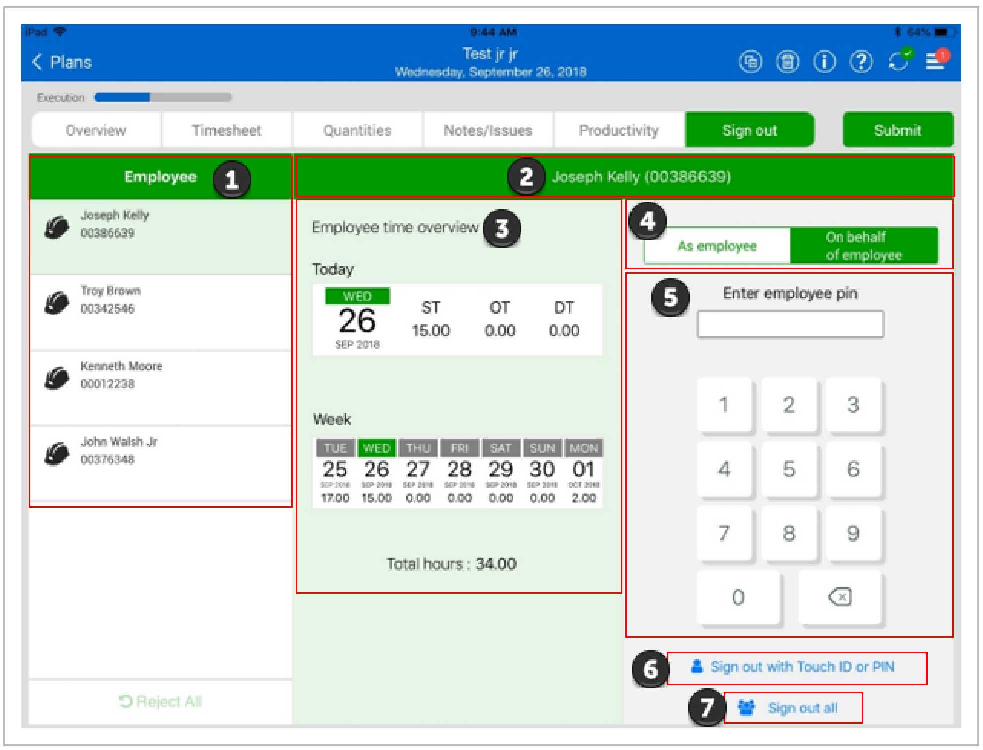
2.3.7 Sign Out

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

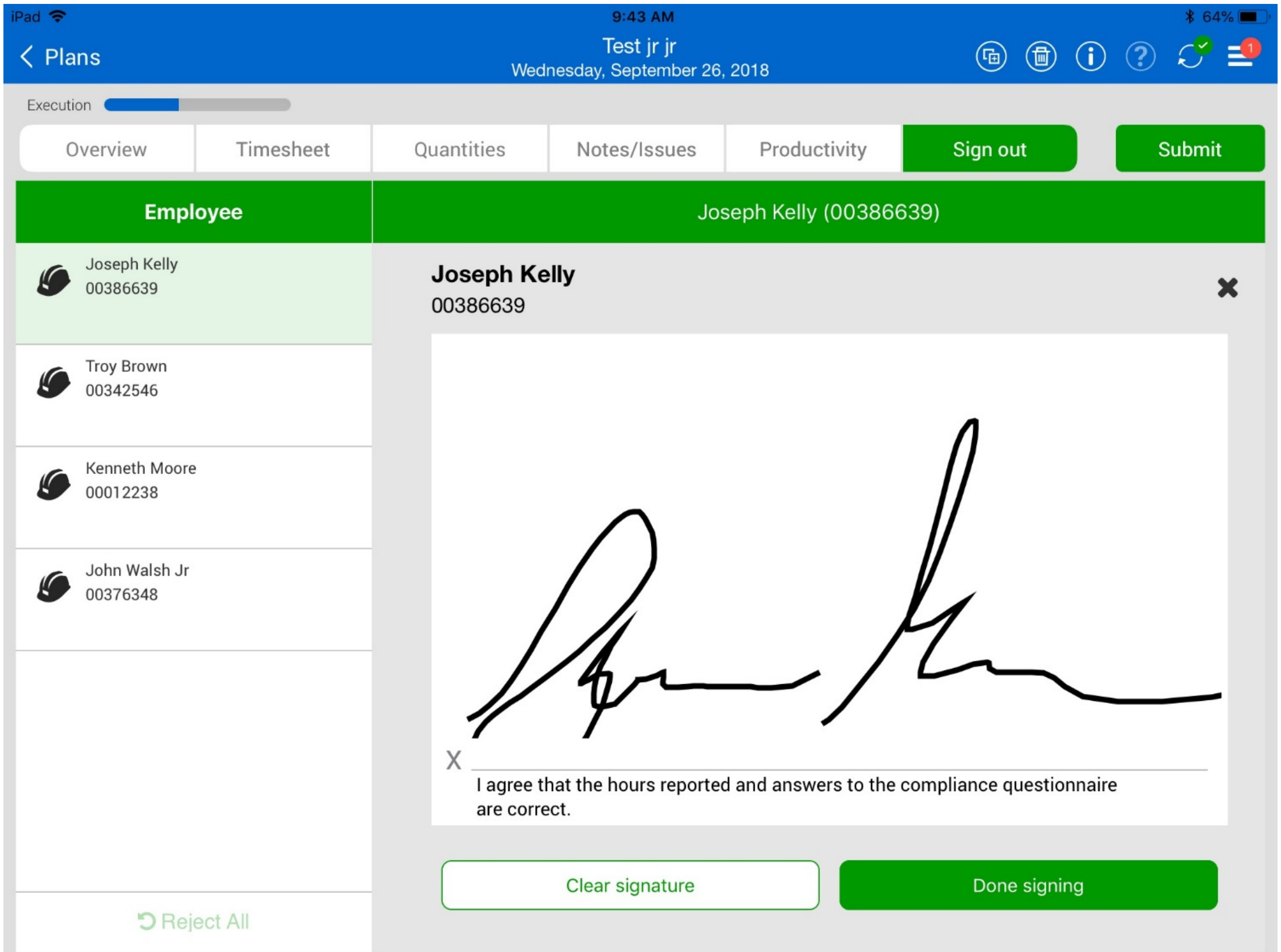
The employee will be able to review the hours input by the Foreman before signing the card. At this point, they can agree or disagree with the hours and negotiate the hours before signing out.

Overview – Sign out Tab

Title		Description
1	Employee	Displays all the employees including the foreman on a specific daily plan.
2	Employee Name	Displays the name of the employee selected to sign out.
3	Employee Time Overview	Displays a summary of hours for the day and week entered for that employee.
4	As Employee/On Behalf of Employee	There are two options for signing out: the employee can sign out, or the foreman with permissions can sign out for the employee.
5	Employee Pin	Where the employees enter their pins.
6	Touch ID Signout	User can use iPad thumb-print to sign out rather than entering pin.
7	Sign out all	Allows user to sign out all employees by signing out only once.



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



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

2.3.8 Submit and Sync

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

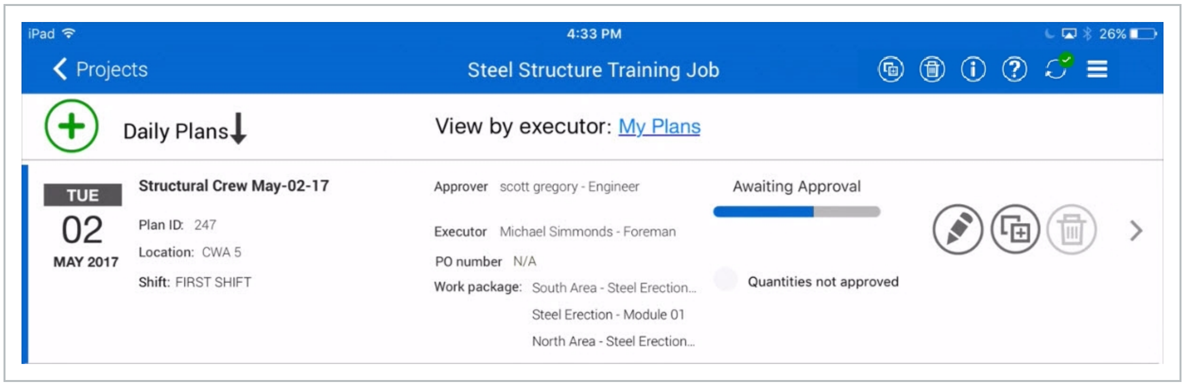
Scenario Recap

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

2.4 DAILY PLAN APPROVAL

2.4.1 Plan List

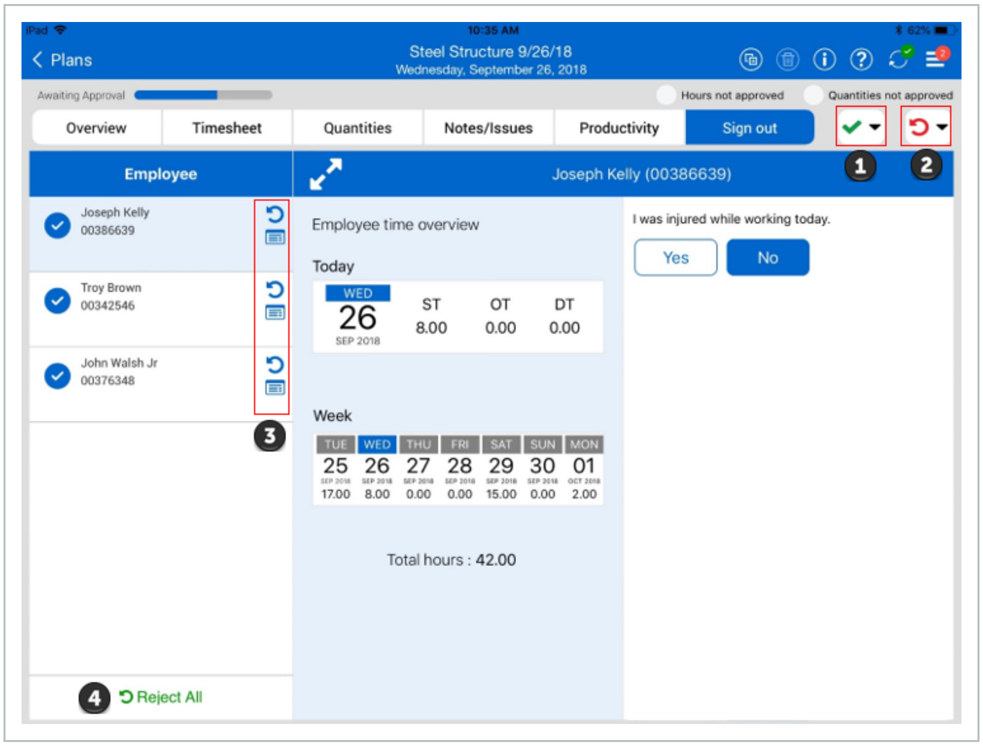
You access a daily plan from the list of daily plans. Note that the current status is now Awaiting Approval. There is also a note indicating that the quantities have not been approved.



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

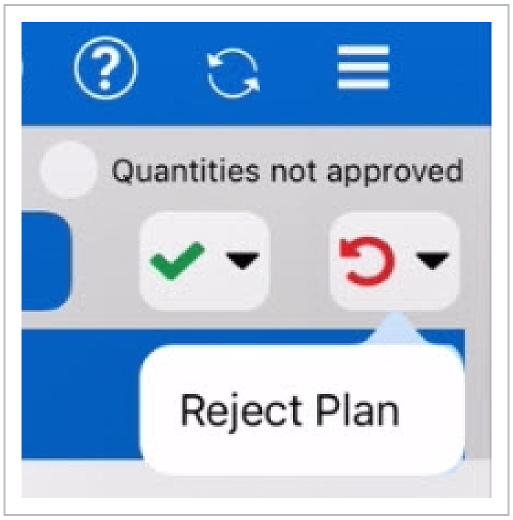
Overview – Sign out Tab

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



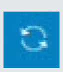
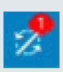
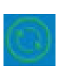
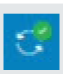
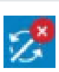
There is no requirement to enter new information in the Approval Phase. If the information is all correct, the plan can simply be approved by selecting "Approve Quantity and Hours". If there are changes to be made that affect quantities, but the hours are correct, then you can select "Approve Hours"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

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



2.5 DATA SYNC

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

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

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

Exercise 2.1 — Navigate InEight Progress

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

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

Congratulations, you have completed this exercise!

Lesson 2 Review

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

---

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

---

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

---

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

Lesson 2 Summary

As a result of this lesson, you can:

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

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LESSON 3 – DAILY PLAN CREATION

Lesson Duration: 45 minutes

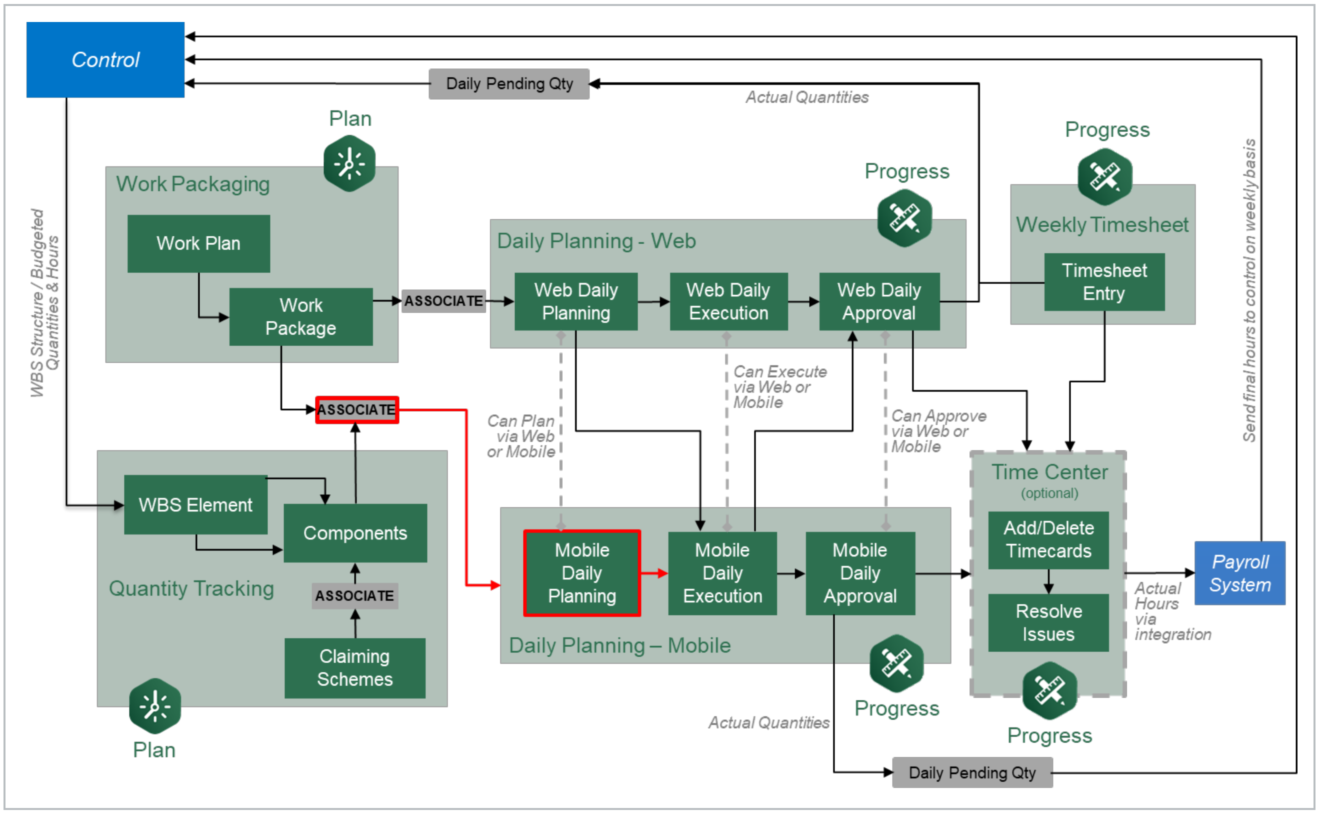
Lesson Objectives

After completing this lesson, you will be able to:

- Create a daily plan from scratch
- Create a daily plan from copy

Lesson Topics

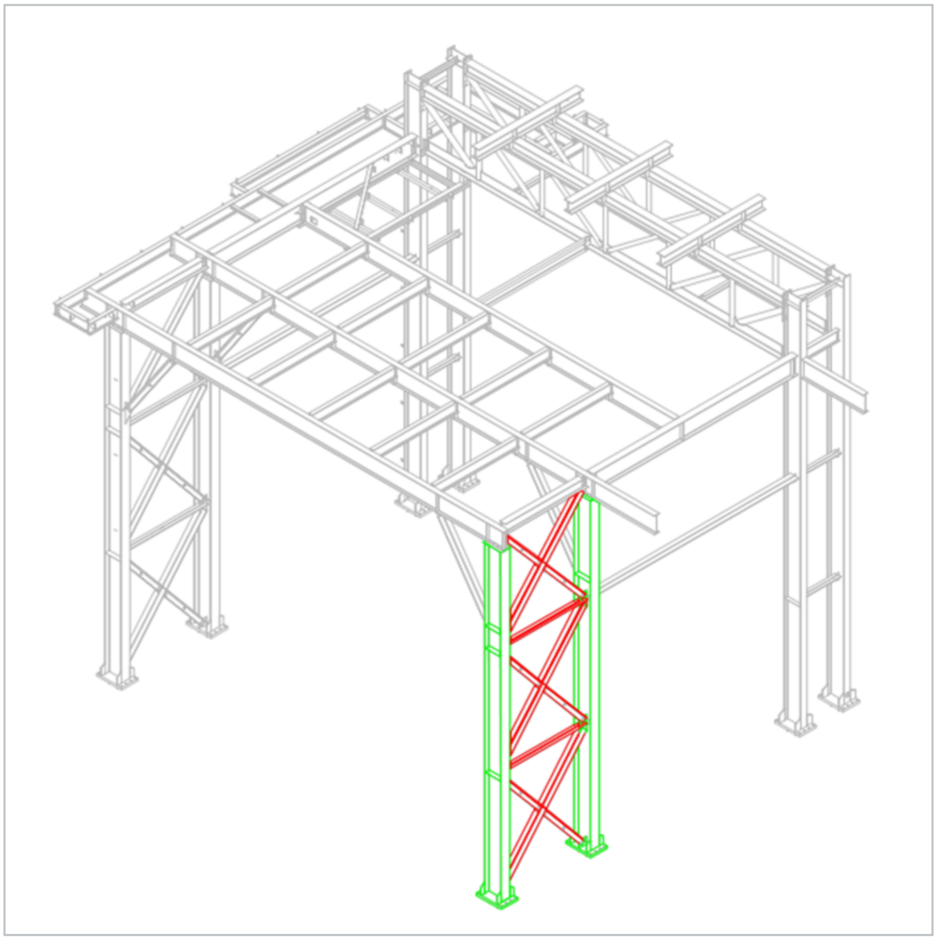
3.1 INEIGHT PROGRESS WORKFLOW - DAILY PLAN CREATION MOBILE



3.2 DAILY PLAN FROM SCRATCH

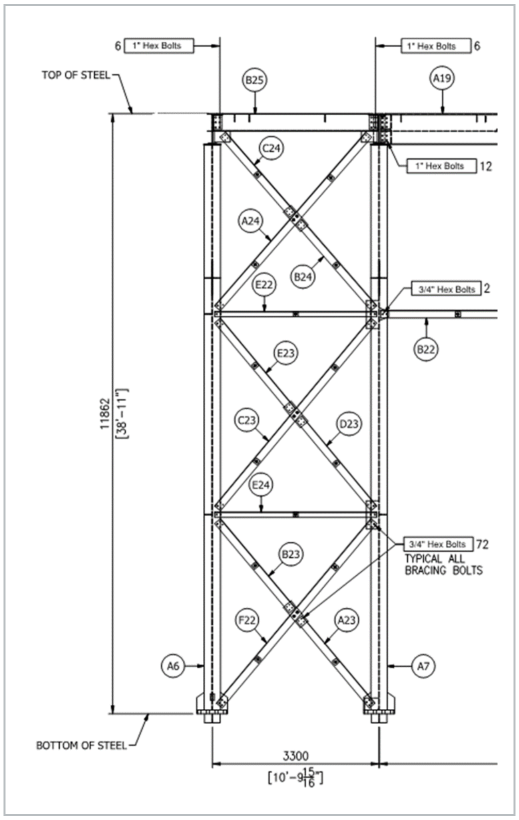
Scenario

> Today, your crew is installing two columns of the Support Steel Structure 1 (green columns). Your plan for tomorrow is to install the horizontal and cross member assemblies (red columns).



The steel members you will be installing are:

- *A23*
- *A24*
- *B23*
- *B24*
- *C23*
- *C24*
- *D23*
- *E22*
- *E23*
- *E24*
- *F22*



> The plan for our crew tommorrow will be to shakeout and transport the steel members by truck to the work area. We will also plan to erect and bolt up members C23, D23, E23, and E24. We will use a JLG to help with erection.

A plan is a list of steps that includes the time and resources (material and human) that is used to achieve a goal or objective.

Within InEight Progress Mobile, you can create a plan from scratch, if there is no existing plan to use that was previously created on the project. A plan can be created by either a foreman or an engineer.

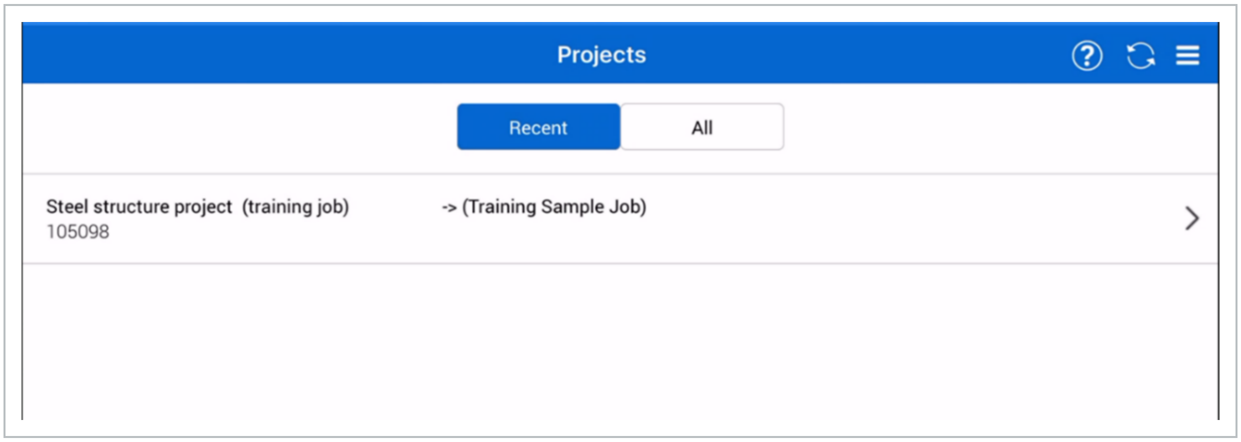
3.2.1 Plan Creation

To create a plan from scratch, you are required to provide:

- The date the plan will be executed
- The approver of the plan (normally the originator of the plan, such as a field engineer or superintendent)
- The executer of the plan (normally the overseer of the work, such as a foreman)

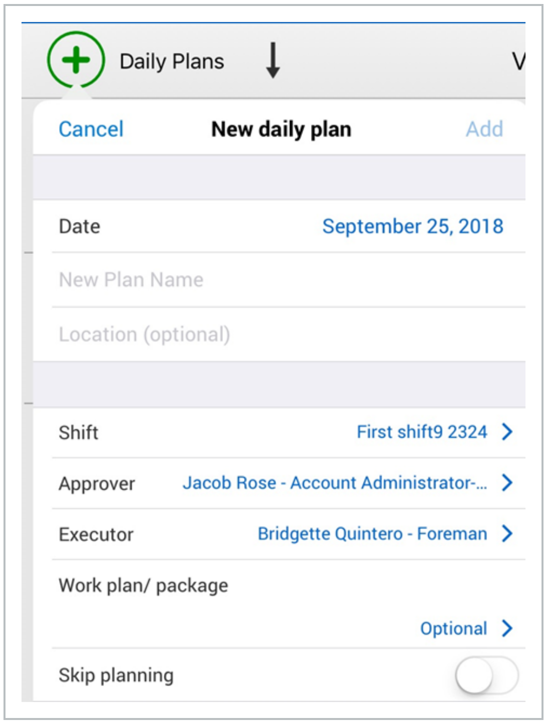
NOTE	You must provide a date of when the plan will be executed, select an approver, and select an executer when you create a plan from scratch. If an executor or approver is removed from the project, an error will appear in the Progress Mobile application prompting you to replace them on your daily plan.

After logging into the Progress Mobile app, you will land on the Projects home page where you can select one of your assigned projects.



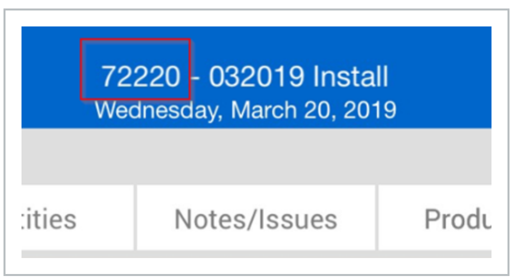
When you select the project you want to create a daily plan for, you will open the Daily plans page, where you will see the **Add** **button**.

The Add button opens a slide out panel from the left where you can provide a plan description, location and date. You can also select an approver, executer, and Work Plan/ Package ID. When you have completed the plan information, you create the plan by selecting **Add** in the top right corner.

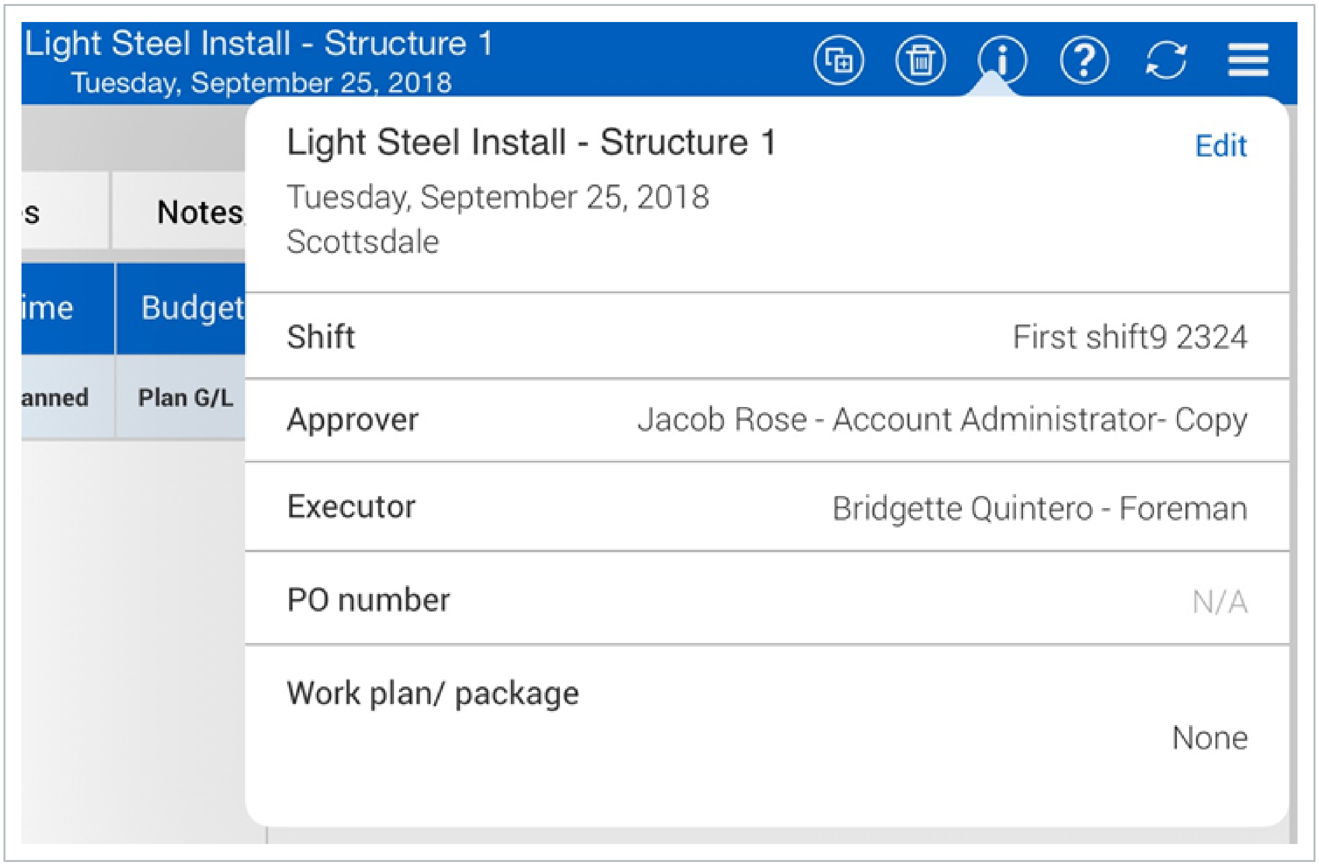


3.2.1.1 Daily Plan ID

When you create a new daily plan in the Progress Mobile application, the daily plan ID will be pending until it is synced with the Progress Web application. Once a daily plan ID is assigned to the plan, it will be visible along with the plan description at the top of the screen.



Once you create your plan, you will open to the Overview tab of the plan where you can enter information such as Planner Notes, Safety, Quality, Environmental, and General Discussion notes. To review or edit this initial information from any screen, you can select the icon.



3.2.1.2 Overview Tab

After you create a plan, within the Overview page you can provide key plan information, including:

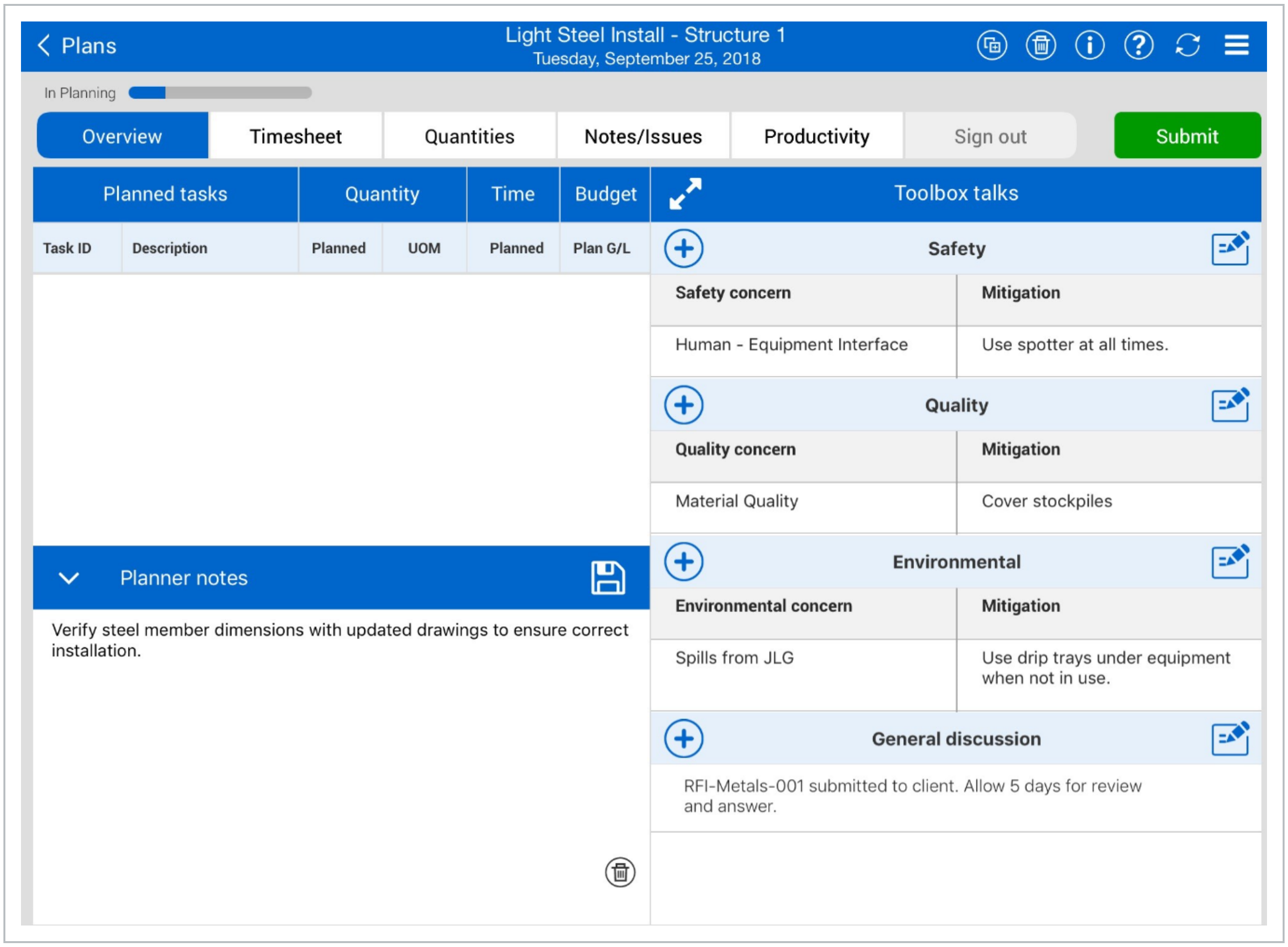
- The safety information pertaining to the Operation
- Quality concerns or holdpoints required by the owner or contract that will stop you from proceeding with your work if not inspected
- Environmental concerns regarding your work or the area near your work
- Other notes regarding best practices

These notes become a reminder as you execute and review the plan, to ensure the required inspections for a particular section of your work are completed.

Within the General Discussion section is a note field, where you can include information to talk to your crew or foreman about, that doesn’t fit in the three major categories: Safety, Quality, and Environmental. Examples include:

- A pending RFI for the engineer that you are waiting for in order to perform a section of work due to a design change
- A pending permanent material submittal that you need to order to avoide pushing your schedule to complete the work

Aside from entering notes, you will be able to view your planned tasks information on the Overview tab after you enter your resources, quantites, and time into the other tabs.

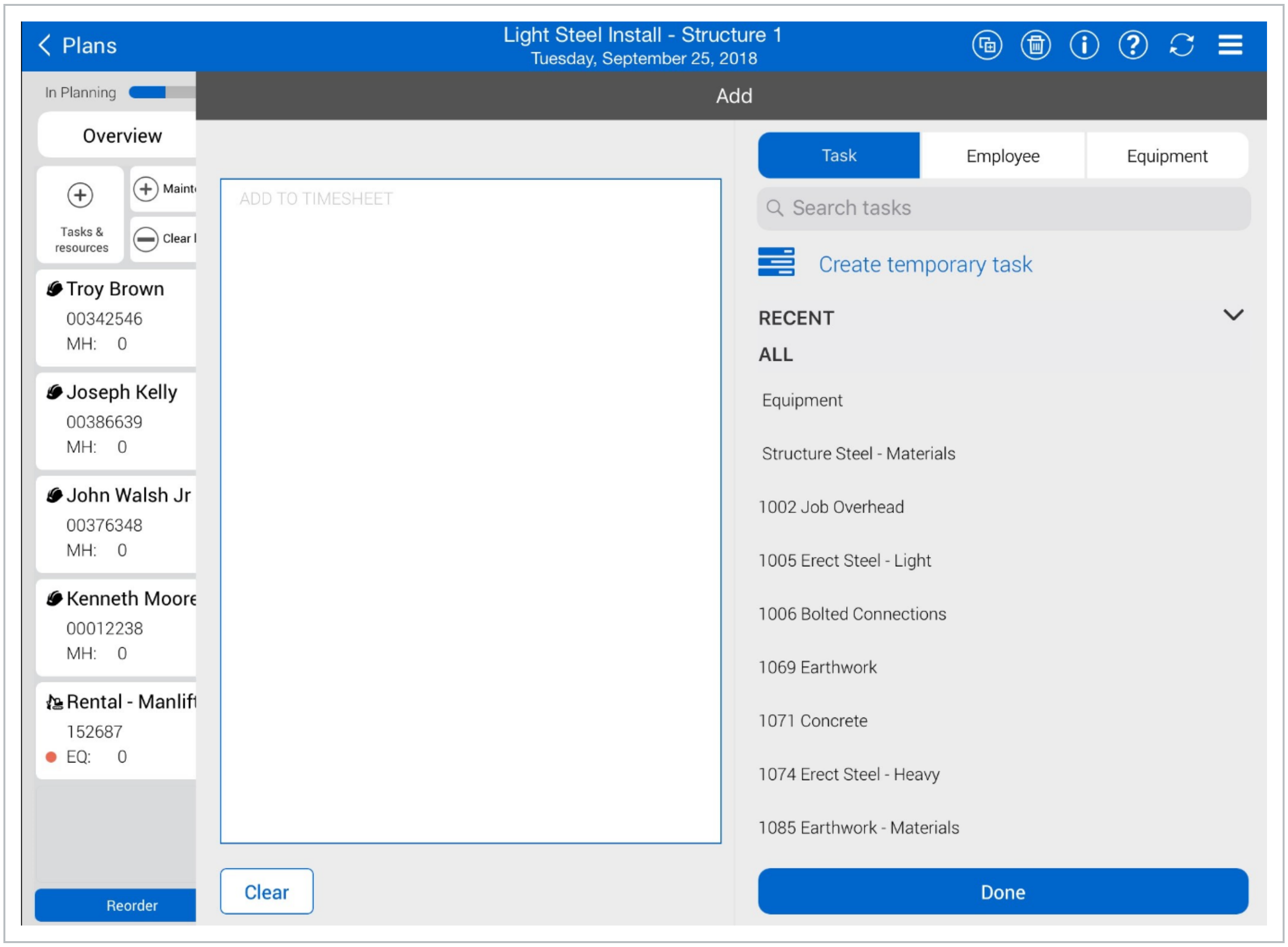


3.2.2 Timesheet Tab

3.2.2.3 Add Tasks

The key aspect to planning work is the task or objective that needs to be completed. You add tasks under the Timesheet tab. Tasks are pieces of work that need to be completed throughout the project.

Tasks can range from a concrete pour; rebar installation, systems testing, to clean-up crew. Tasks are designated by a WBS number which is set up in InEight Control.

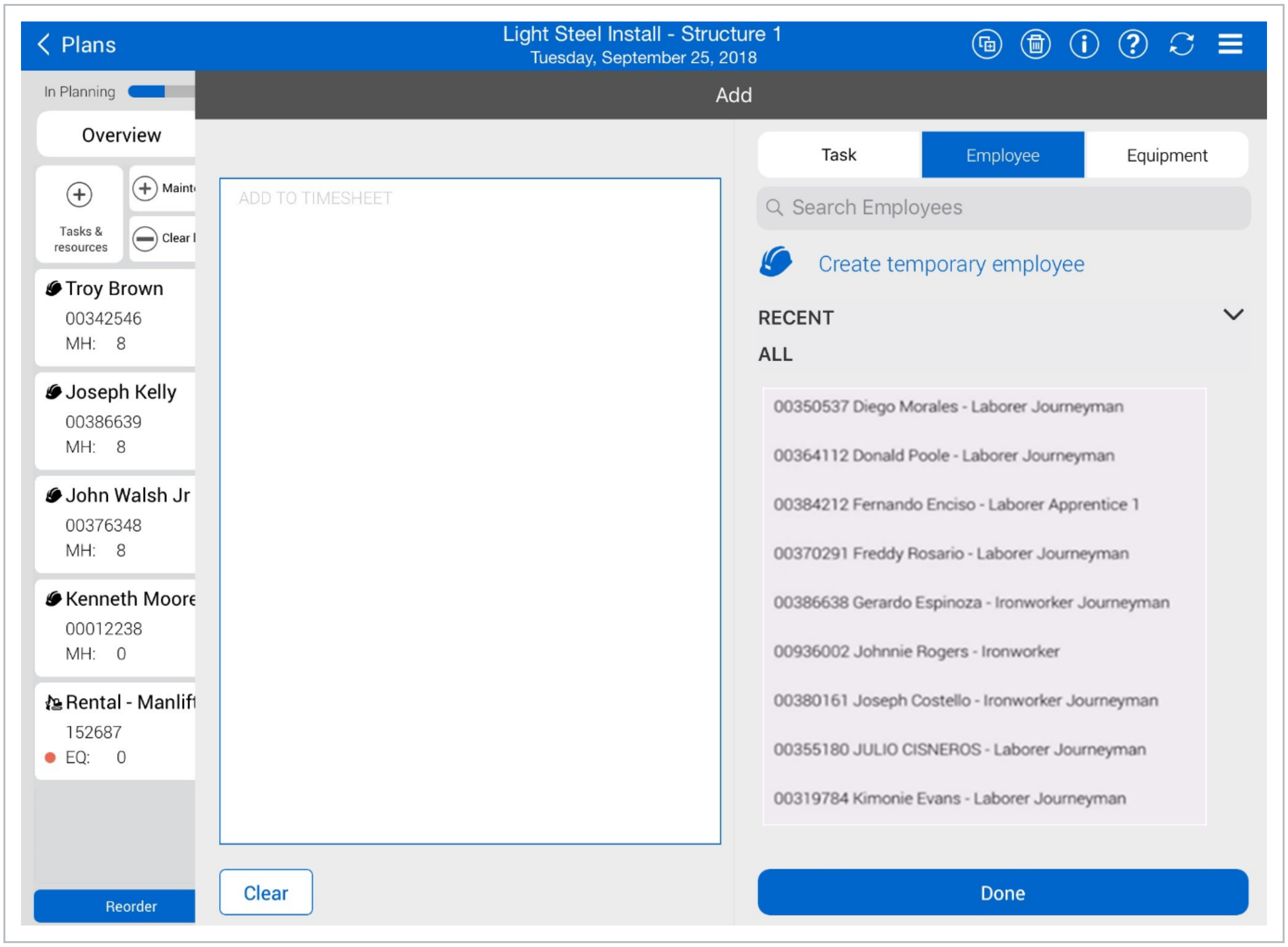


3.2.2.4 Add Employees and Equipment

Part of planning the work includes planning the work hours for your labor and equipment resources to accomplish each task.

On the Timesheet tab, the foreman and/or engineer plans how long each crewmember and piece of equipment will be used to perform a specific task in your plan to maximize the crew's productivity and reduce cost, so there is no equipment standing by or crewmember roaming around with no work to perform.

You can select employees from the projects list or add a temporary employee. Same for the equipment, you can select from the projects list or add a temporary piece of equipment.



3.2.2.5 Temporary Employees and Equipment

As you are going through the list of equipment for your project, if you cannot find the right equipment for the operation, you can create a temporary piece of equipment in InEight Progress. To create a temporary piece of equipment you will need to have a Temporary Equipment ID and Name.

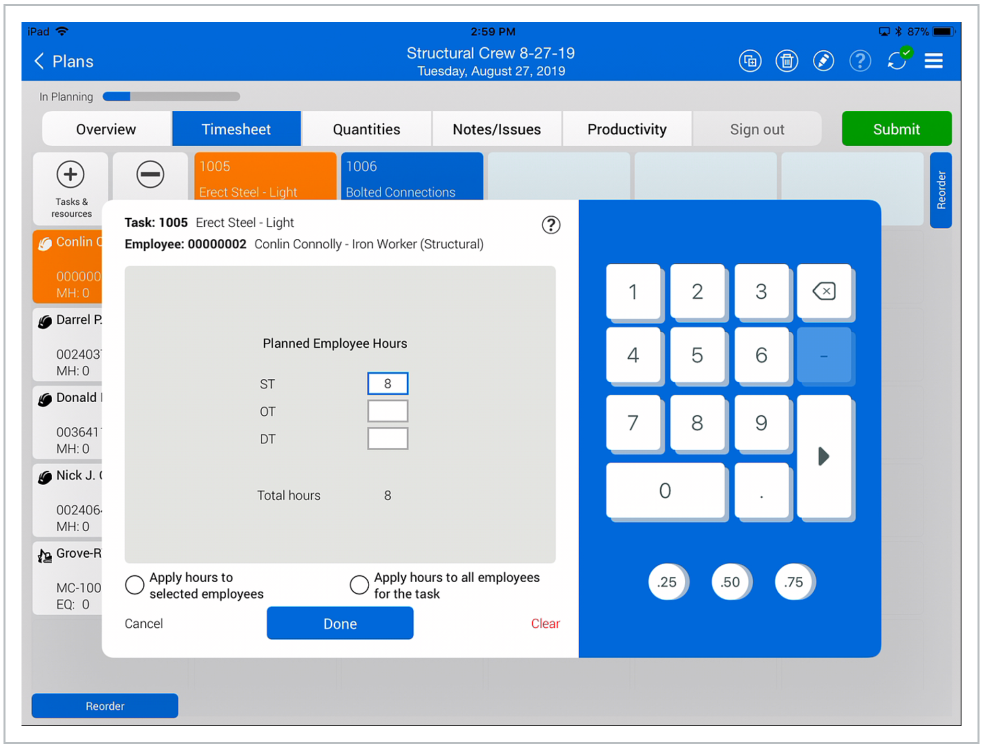
3.2.2.6 Add Hours

After you add tasks, labor, and equipment resources to the project, you can add time to the tasks and resources.

- Time units are in hours
- You can plan the work for straight time, overtime, or double time
- To enter hours, you tap on the hour box
- If you want to apply the same hours to other selected employees, you can select the **Apply hours**

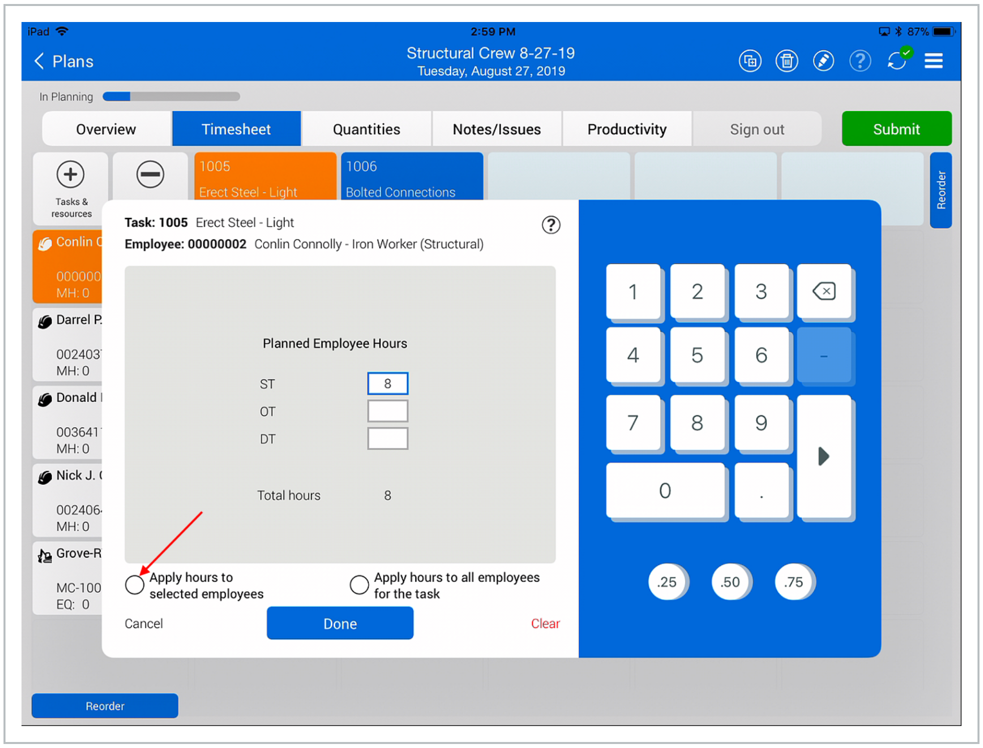
to selected employees option

- If the planned hours for all employees will be the same, you can select the option **Apply hours to all employees for the task**
- If you select the ? icon, you can bring up the help screen

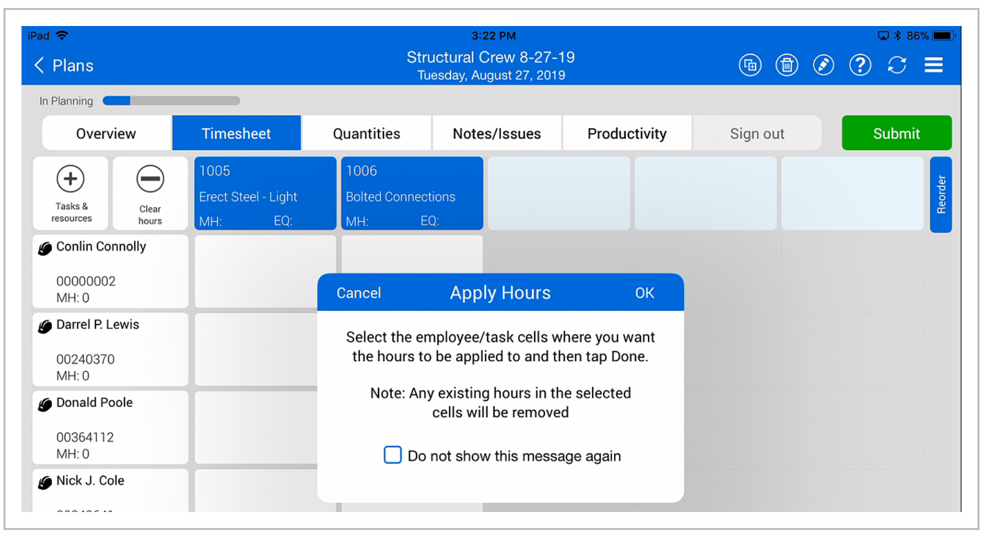


3.2.2.7 Apply Hours to Selected Employees

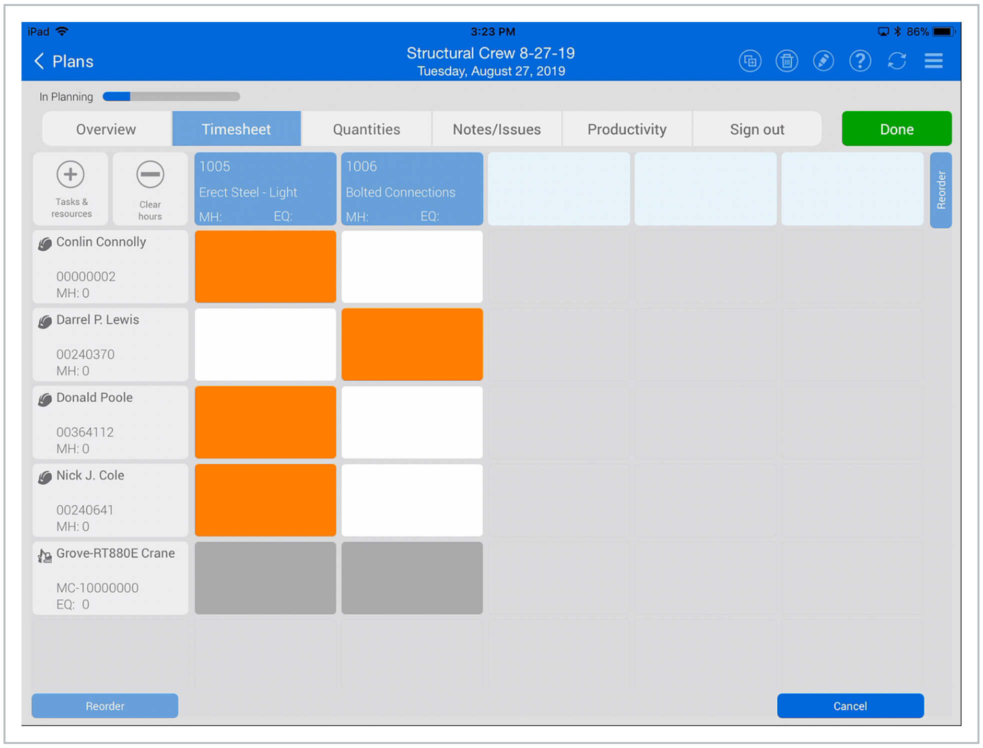
To save time, you can add hours to multiple employees at once. To do so, you would tap on the hours box for an employee and enter the number of hours you plan for them to work. You can then select **Apply hours to selected employees**.



The Apply Hours dialogue box appears with further instructions. You can check the box to not show the message again, to avoid it in the future.

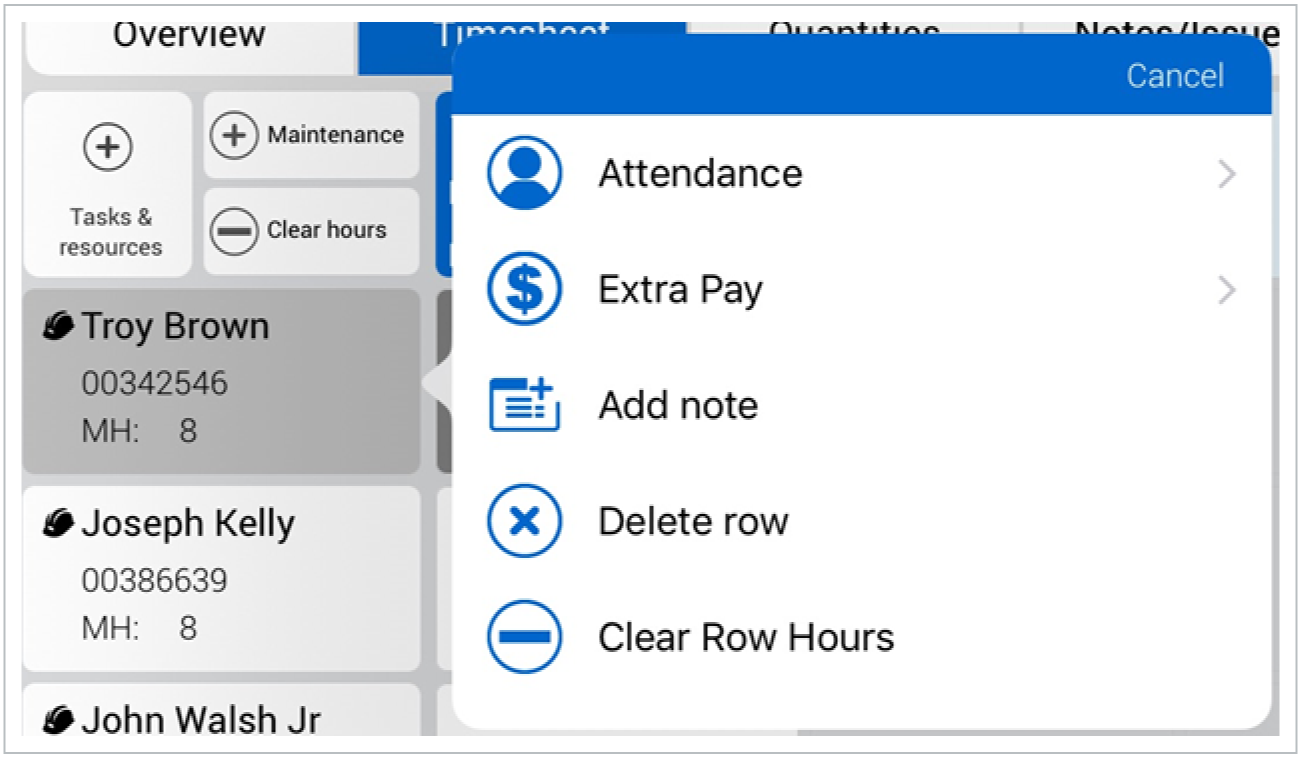


When you tap OK to close the dialogue, you can then select the hours boxes for all the employees you want to assign the same number of hours to, then tap Done.

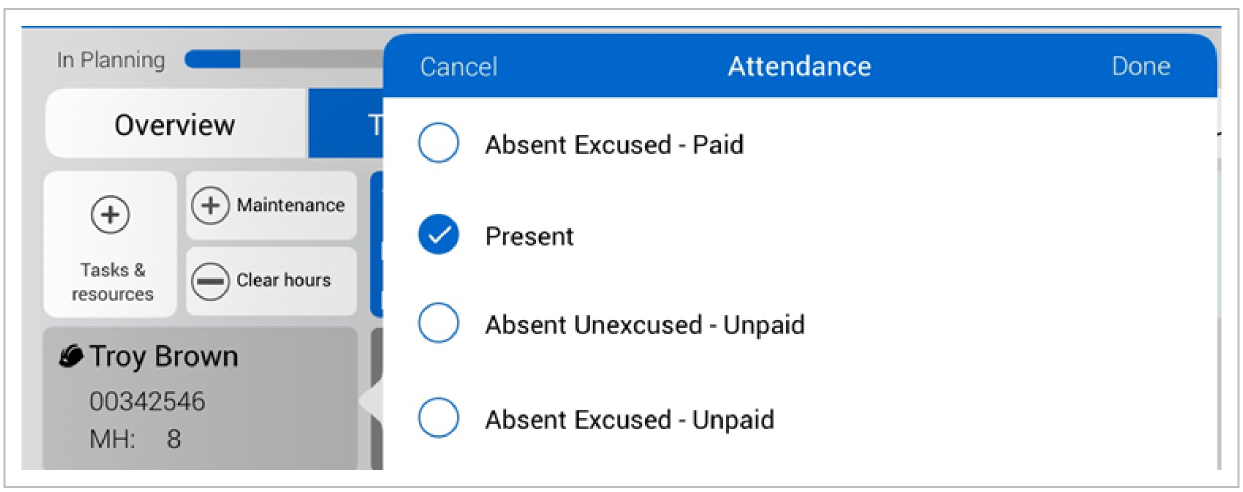


3.2.2.8 Additional Options

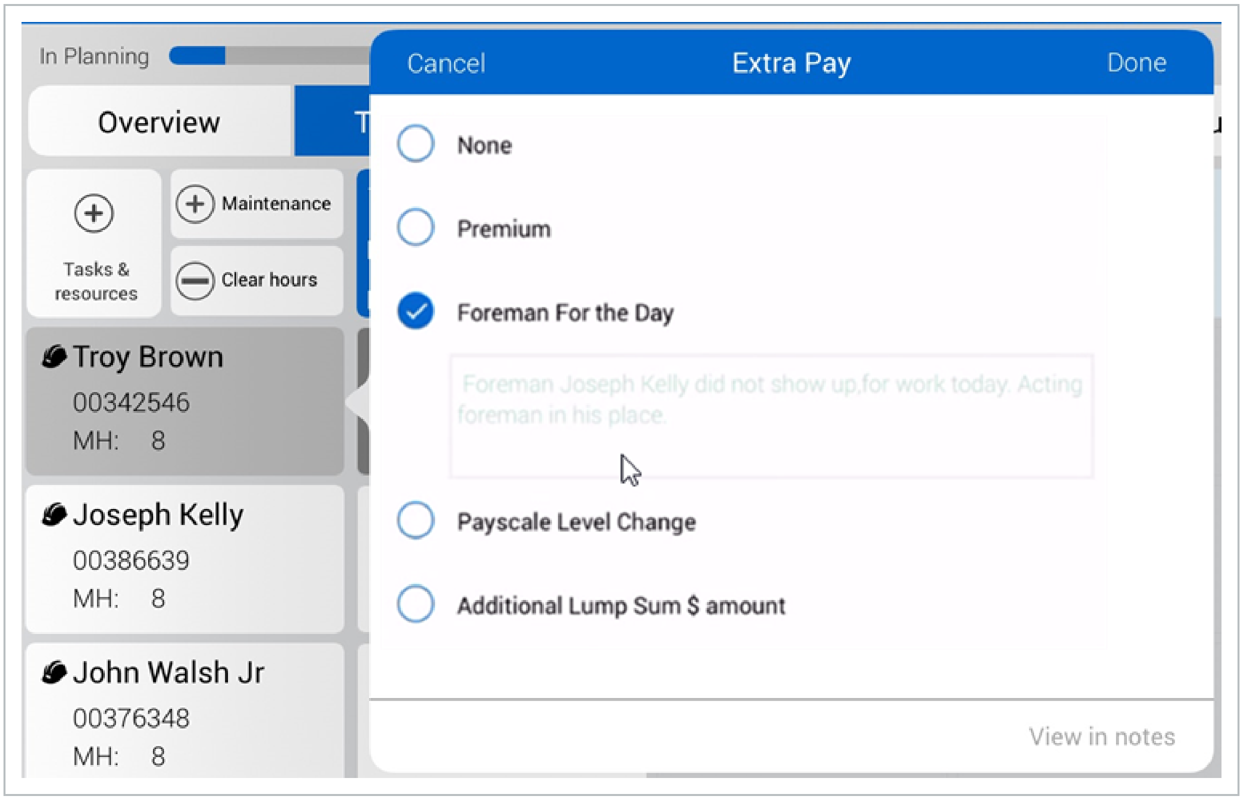
By tapping on the individual employee box, you will have the following options:



- When you select **Attendance**, you can mark an employee present, absent excused – unpaid, absent excused – paid, and absent unexcused – unpaid



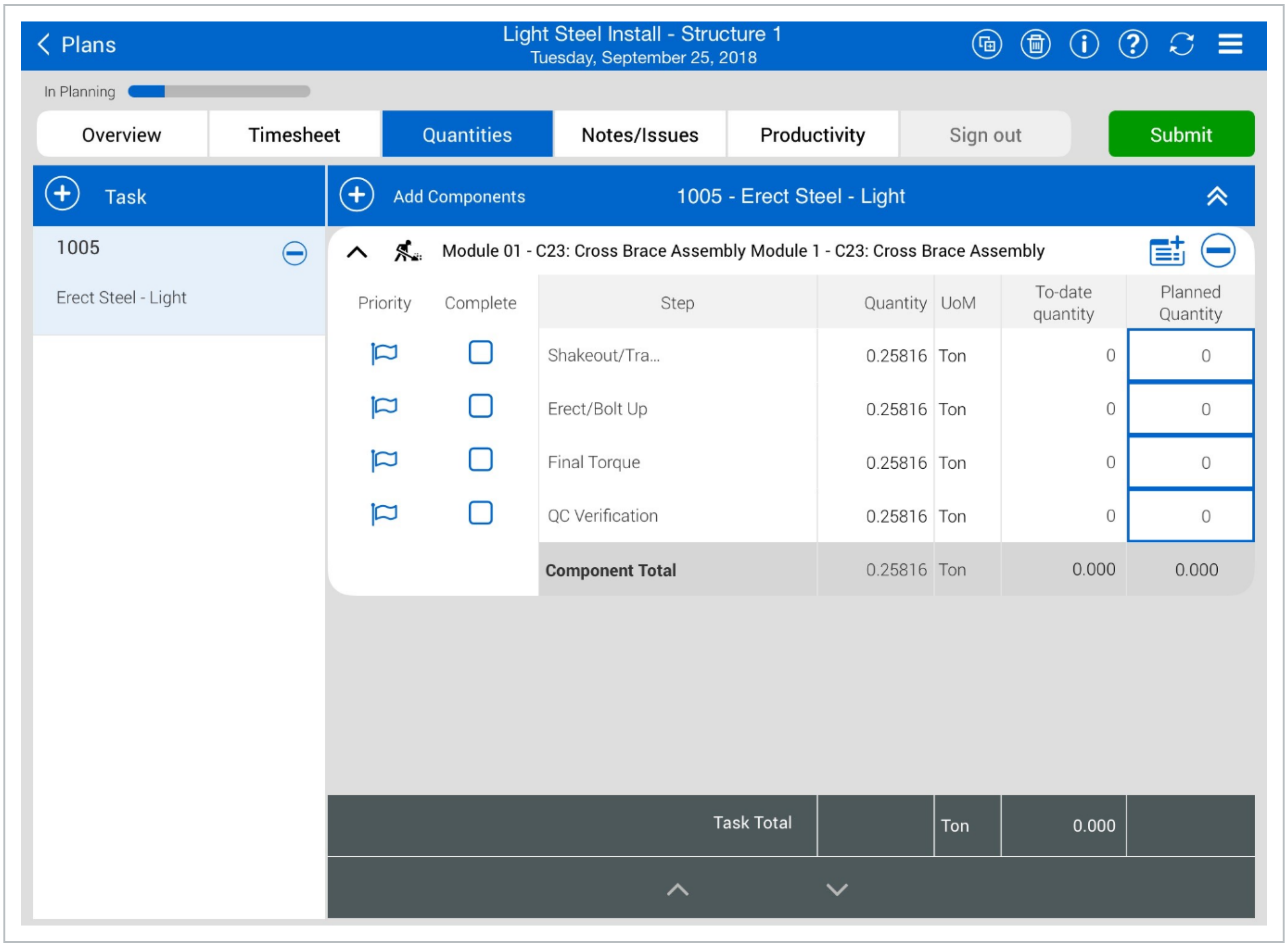
- When you select **Add extra pay**, you have the choice from none, premium, Foreman for the day, pay scale level change, and additional lump sum amount



- Add a note
- Delete row
- Clear row hours

3.2.3 Quantities Tab

Progress pulls in budgeted quantities from Plan to the Quantities tab, where you can compare them against the plan quantities.

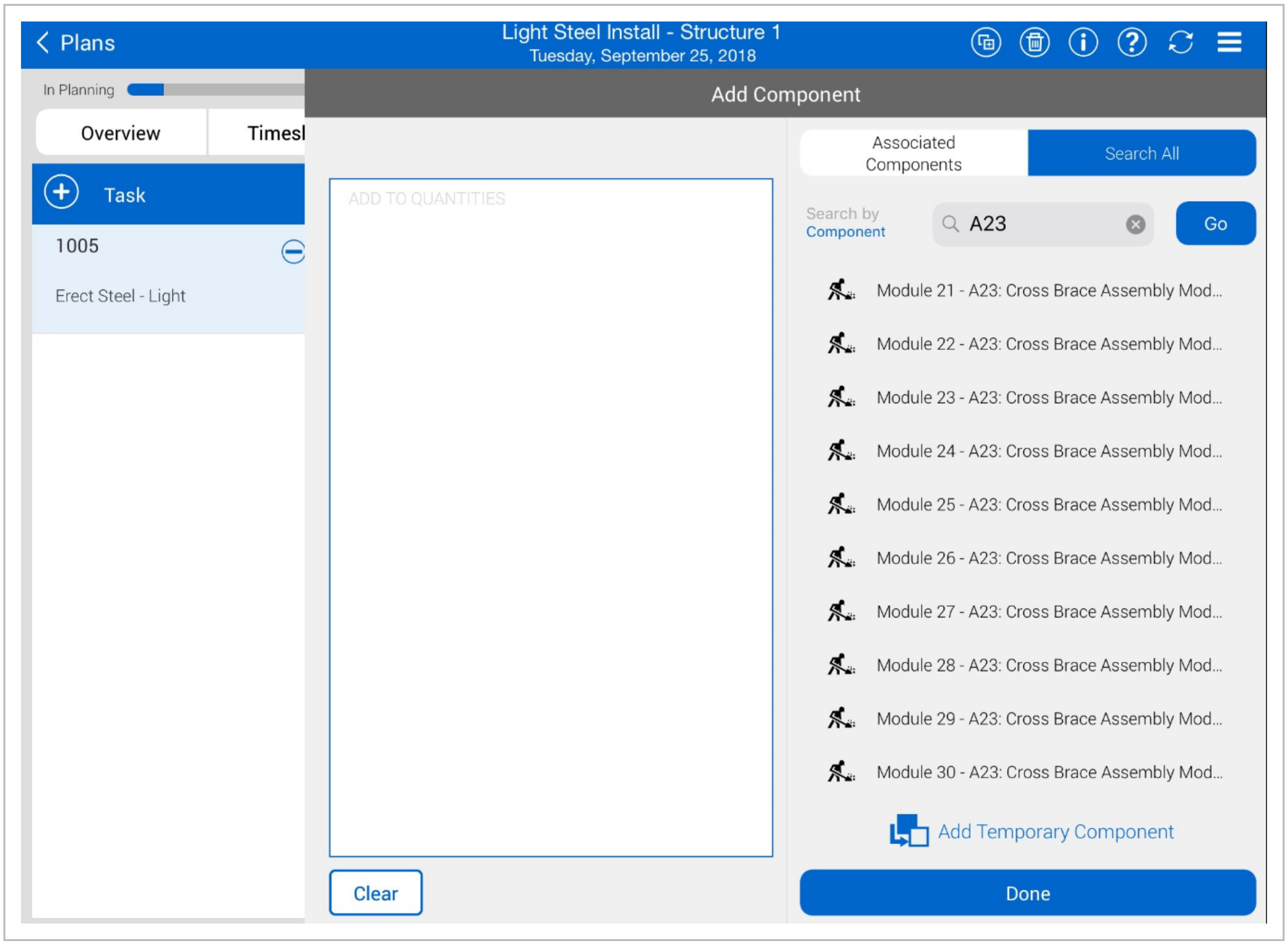


3.2.3.9 Components

Components are portions of a cost item created to divide cost item quantities into smaller pieces, so they are easier to track out in the field. A component can be a beam, light pole, systems testing for a switchgear, a jet fan, etc. Within the components, you will see a breakdown of steps for completing the component.

On the Quantities tab, you can add tasks from your project list or add a temporary task.

- If you select a task from the project list, you will be able to see components loaded for that task, if they are associated with a Daily plan
- If no work plan was associated, you can go back to the Daily plans page and add a work plan
- If the Daily plan cannot be associated to any work plan, then within the Quantities tab, you can add a temporary component

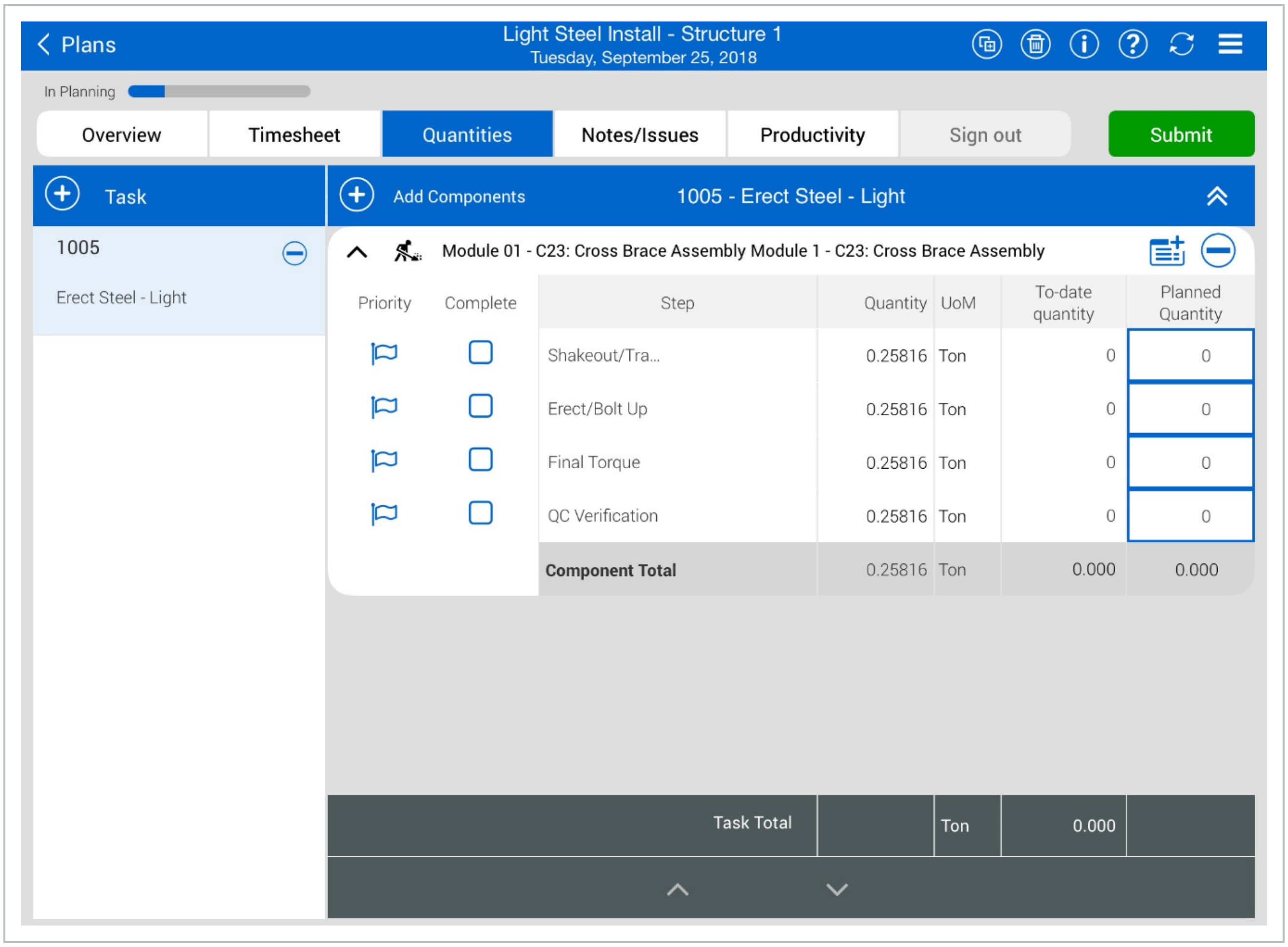


There are two types of components:

- Disciplines which show claiming schemes for physical work such as electrical
  - Denoted by 
- Commodities which show claiming schemes for materials such as anchor bolts
  - Denoted by 

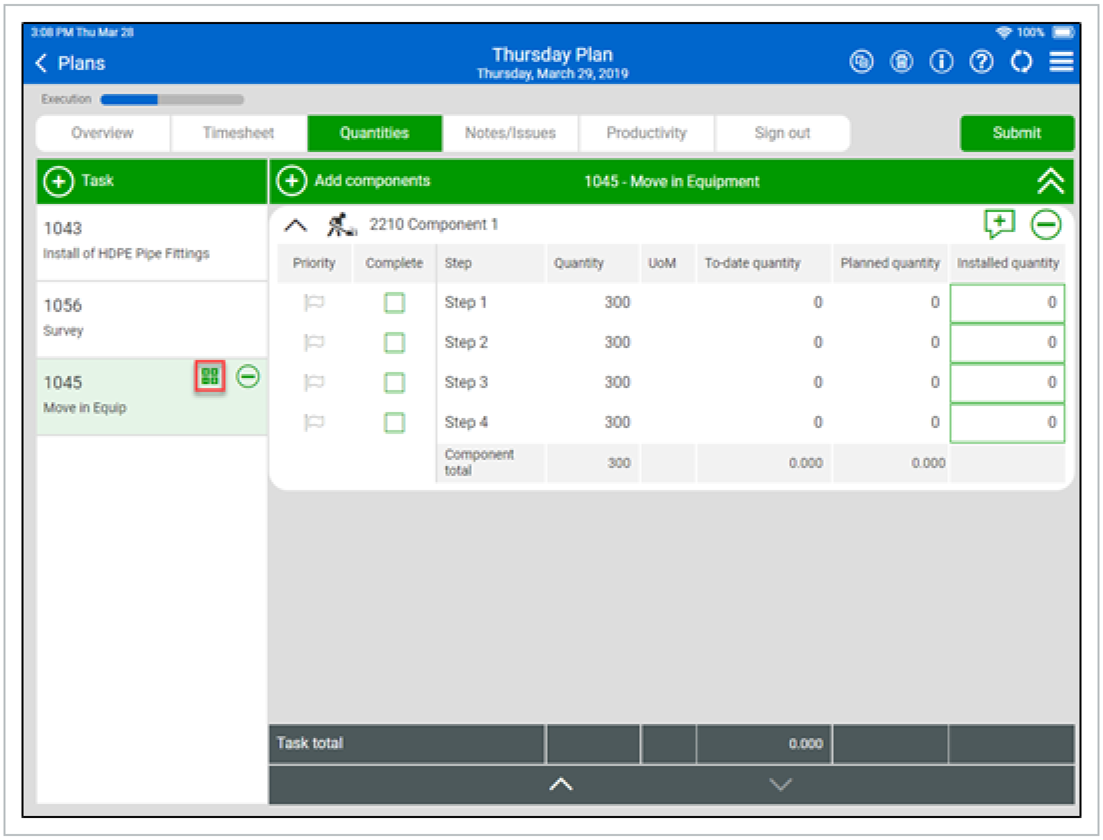
3.2.3.10 Planned Quantity

The planned quantity gives you an idea of what to work towards as a goal. Meeting the planned quantity goal will keep you on schedule with completing the task and let you know how much quantity should be complete by the end of the day.

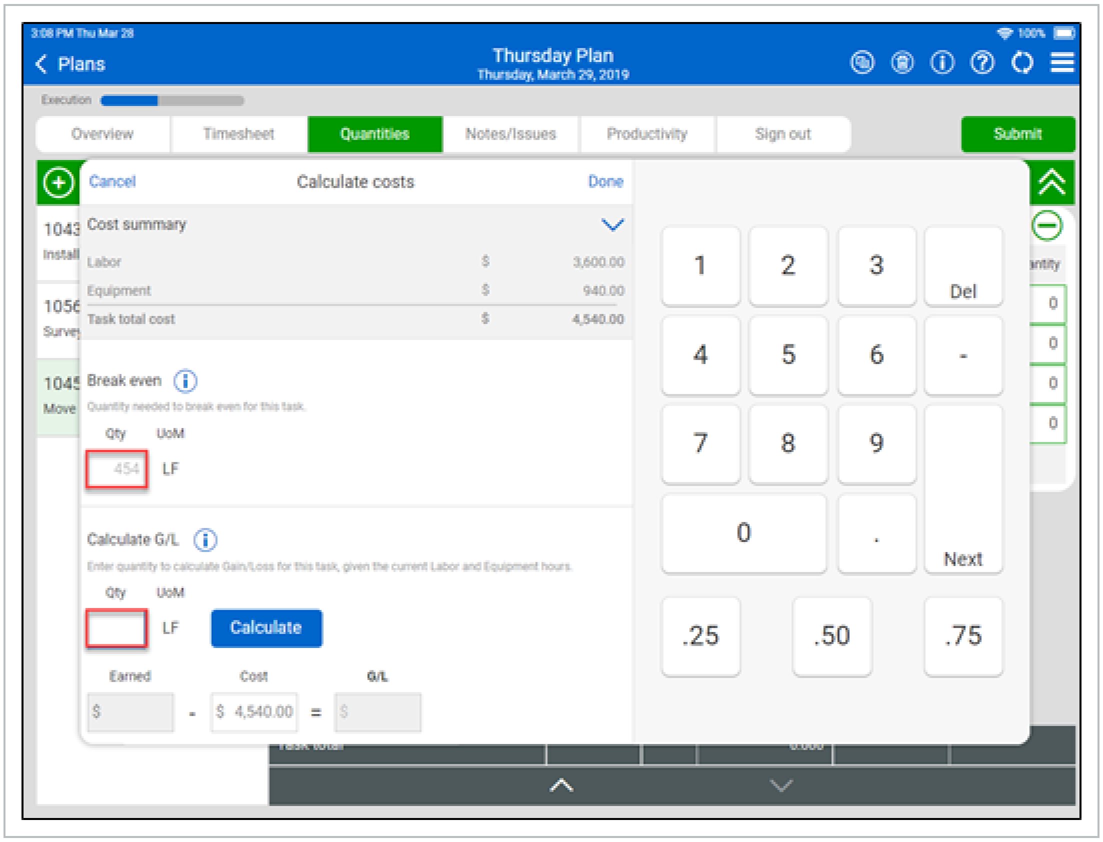


3.2.4 Planning Slide-Out

You can access the Planning Slide-Out by tapping on this icon in the Tasks column.



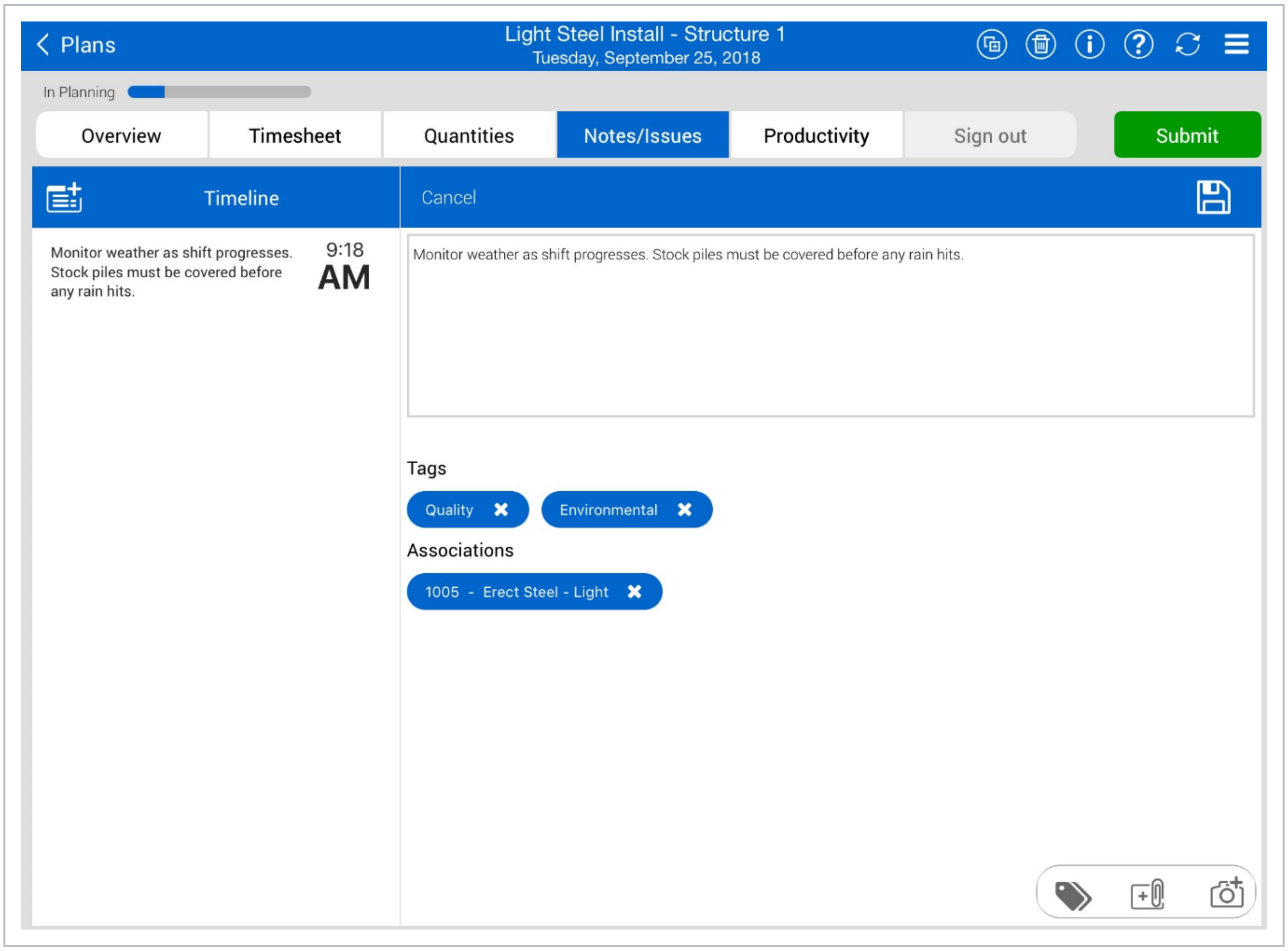
On this slide-out, you can view the quantity needed to break even for the selected task. Additionally, you can manually enter any quantity to see how it would affect the gain/loss for the selected task.



3.2.5 Notes/Issues Tab

The Notes/Issues tab is where you can note important information critical to your daily plan. If you forgot to note the information in the Overview tab, you can make notes in this tab, tag it to appropriate categories and they will appear in the Overview tab. Example notes include:

- A permanent material needed as part of the installation work
- A Request for Information involving a change in the design that impacts the installation and Daily plan
- An environmental concern
- Leave of Absence or extra pay for an employee

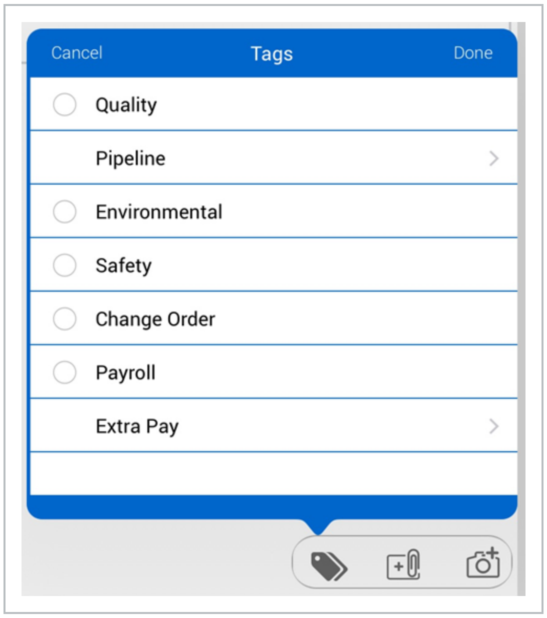


When you enter a note or issue, you can associate it with a tag, association and/or picture.

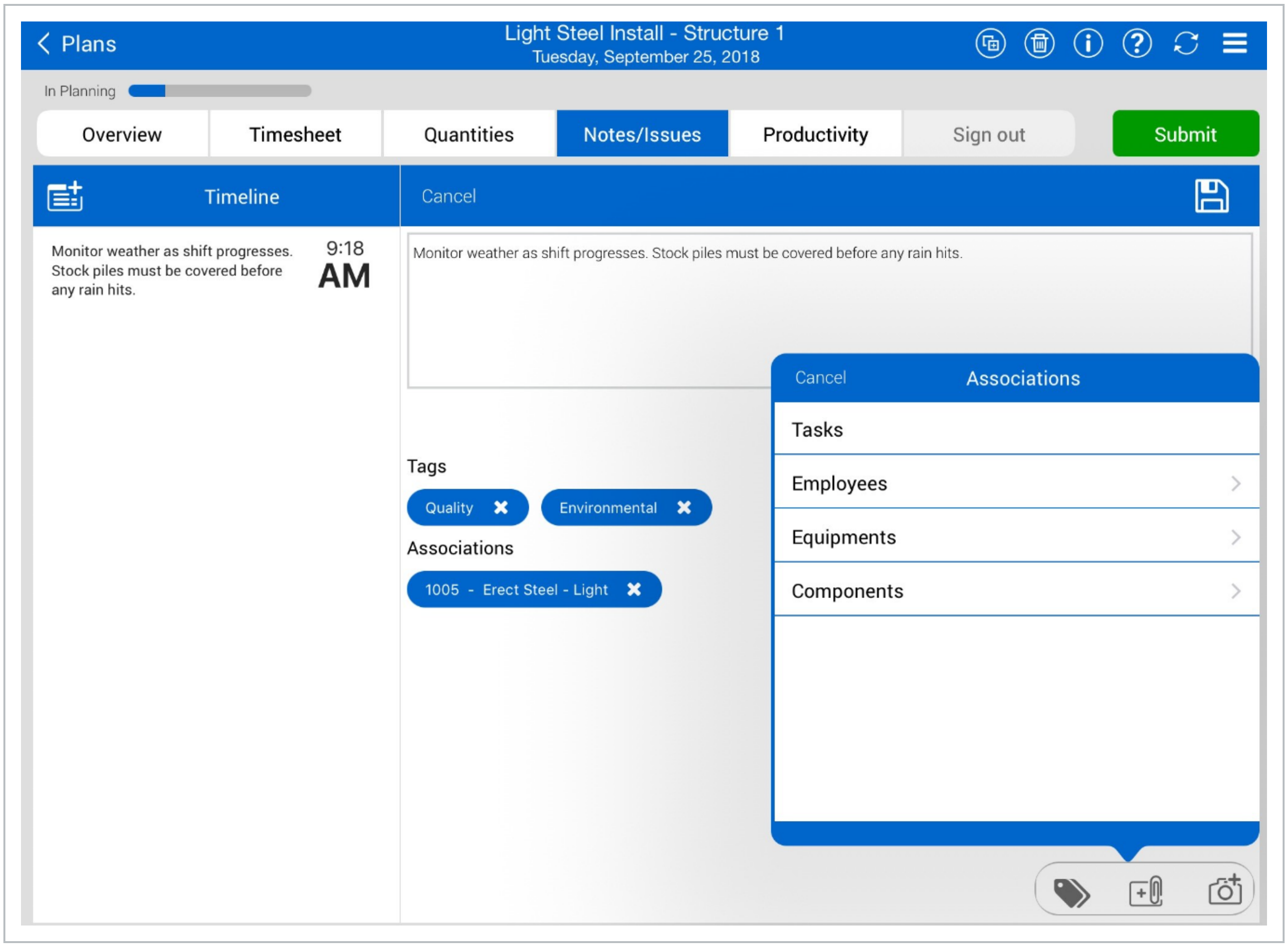
3.2.5.11 Tags and Associations

You can tag your notes to the following selections:

- Safety
- Quality
- Environmental
- Extra Work/Changes
- Payroll
- Production Notes
- Change order request

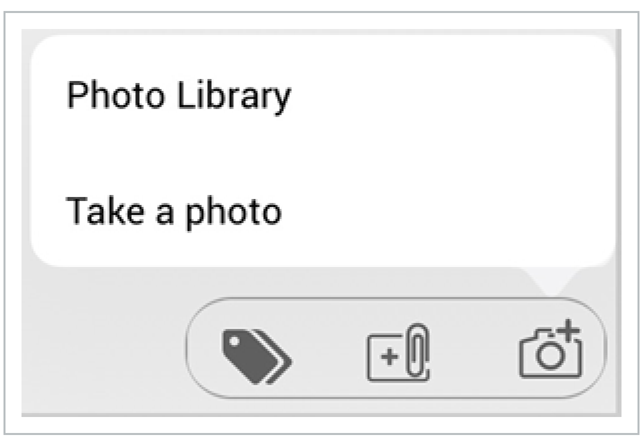


Aside from tagging your notes/issues, you also can associate your notes to any of four categories: Task, Employee, Equipment, and Components. After you select an association, there will be a list for you to select from. This allows you to be very detailed with your associations.

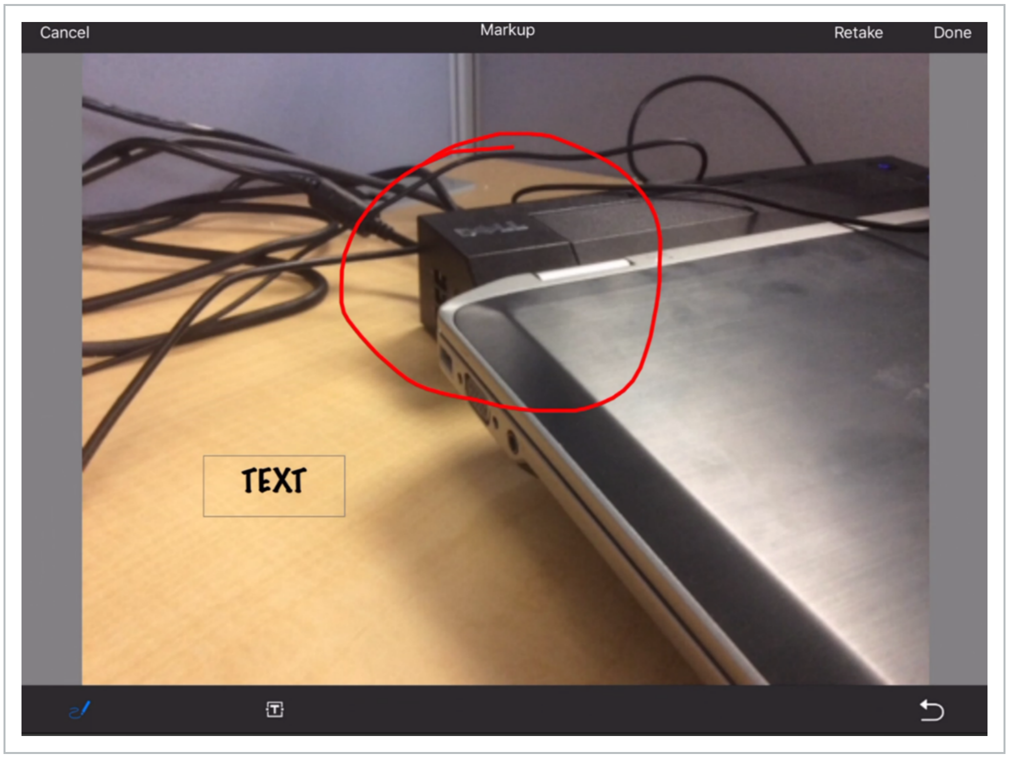


3.2.5.12 Adding and Editing a Picture

You can also add pictures to your notes/issues in the Planning Phase of your daily plan. You can either add a picture from your Photo Library or take one.



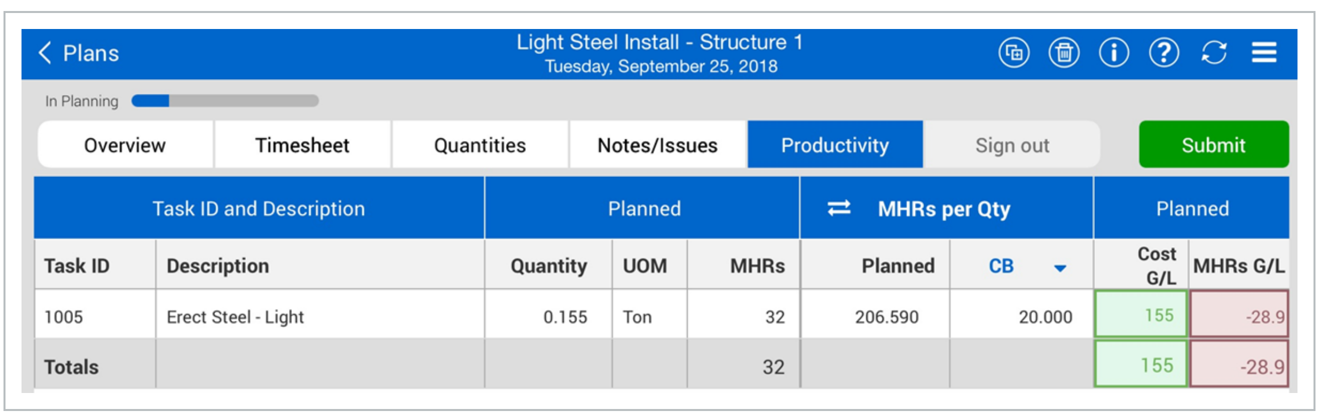
You can then add markups to your photos. You can use the pen icon, or you can add a text box.



3.2.6 Productivity Tab

After planning your work within the Timesheet and Quantities tabs, you can view the quantities and man-hours within the Productivity tab.

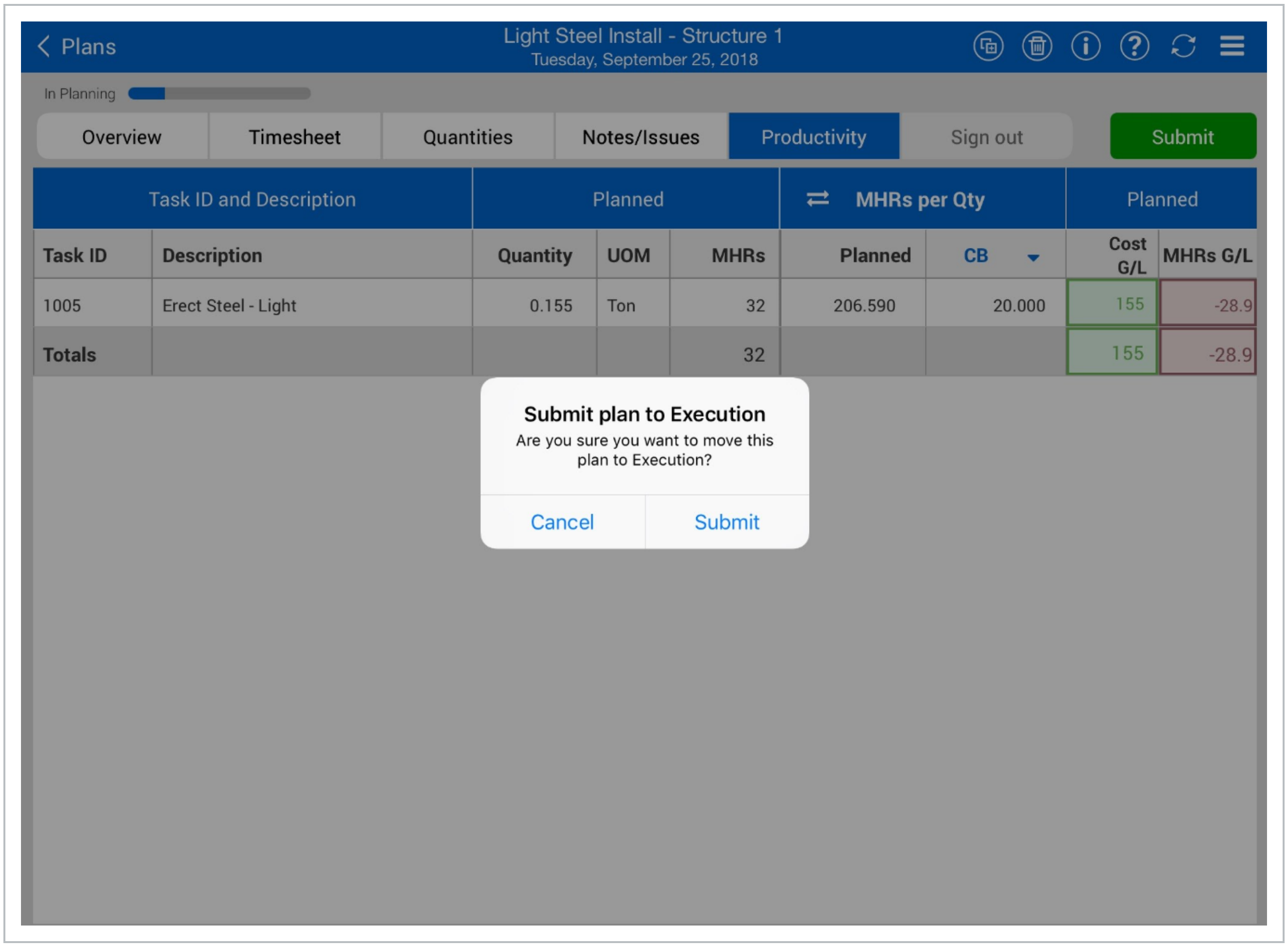
On the Productivity tab, you can compare your planned quantities and man-hours against the budget. If there is an error for your planned quantities or man-hours, you can go back to the other tabs and revise.



3.2.7 Submit and Sync Button

Once you are complete with reviewing the Daily plan that you put together, you can now Submit and Sync the information, which updates the information to Plan. The engineer or superintendent that oversees Plan will then review and either approve or reject the Daily plan.

> **NOTE** Once you tap Submit, you can no longer edit the Daily plan. Daily plan information will reside in the sync platform until you, the engineer, or superintendent clicks on the sync button.

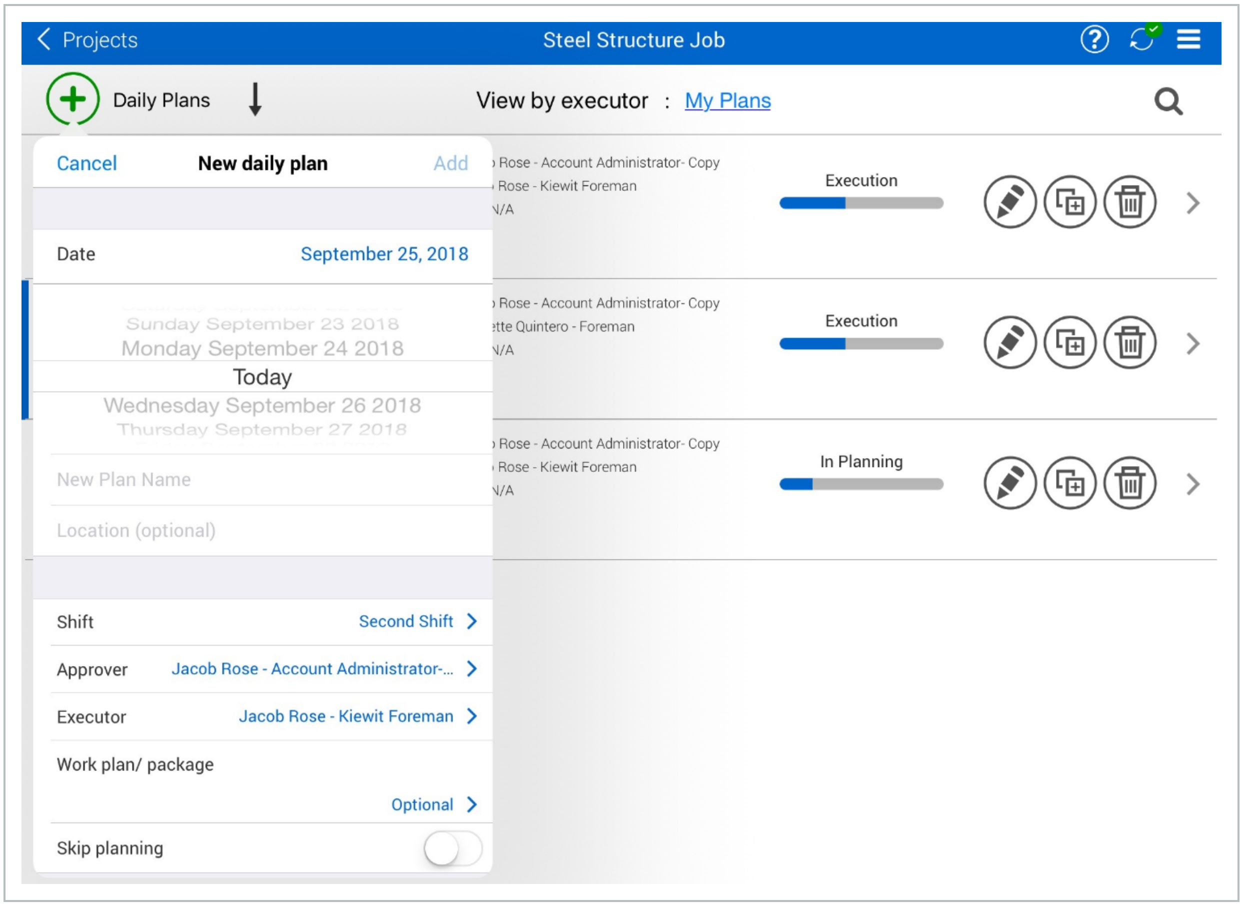


3.2.8 Create a Plan from Scratch Walk Through

The following steps will walk you through creating a daily plan from scratch.

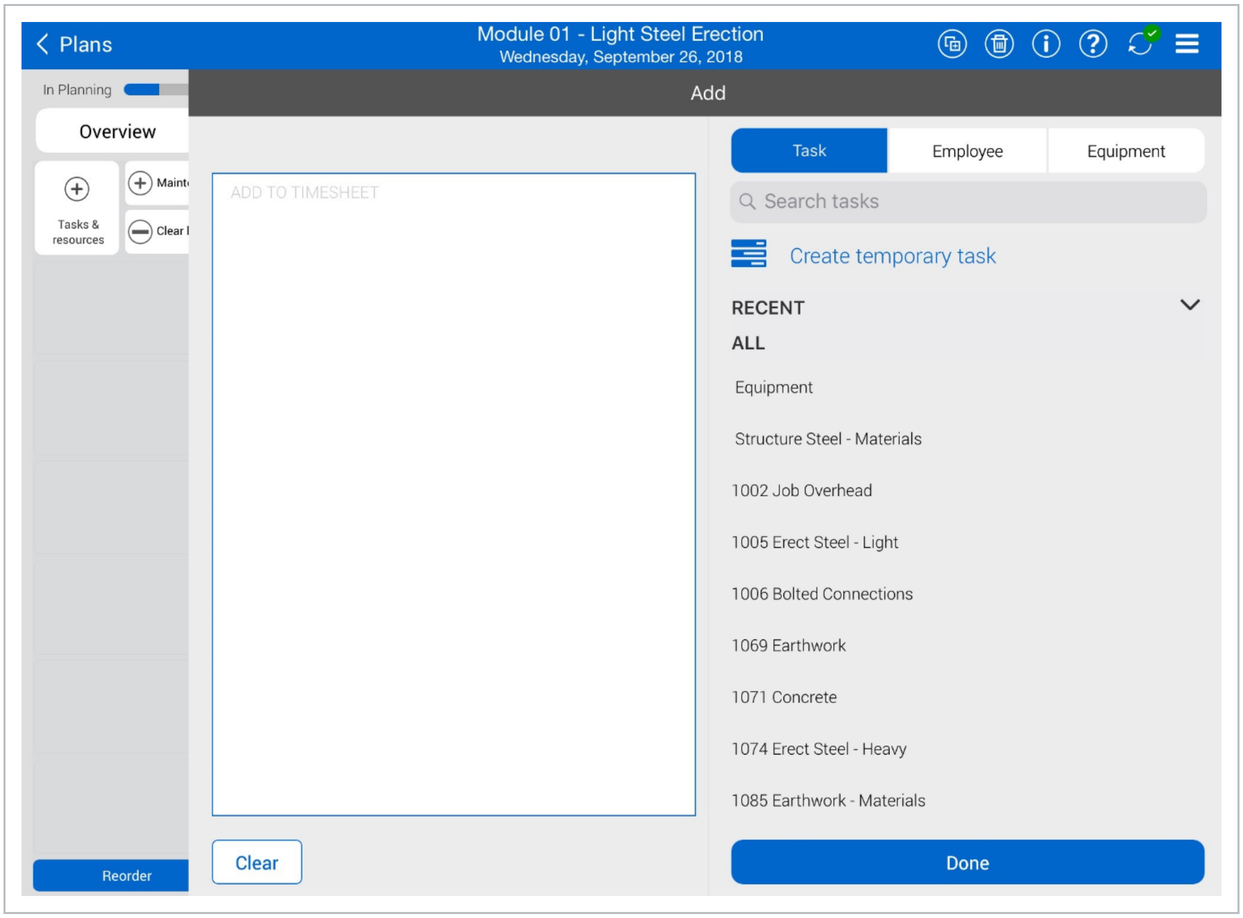
3.2 Step by Step 1 — Create a Daily Plan from Scratch

1. Log into the **InEight Progress** mobile application.
2. Select a project from the Projects home page.
3. Tap on the **Add**  **button** to create a plan from scratch.

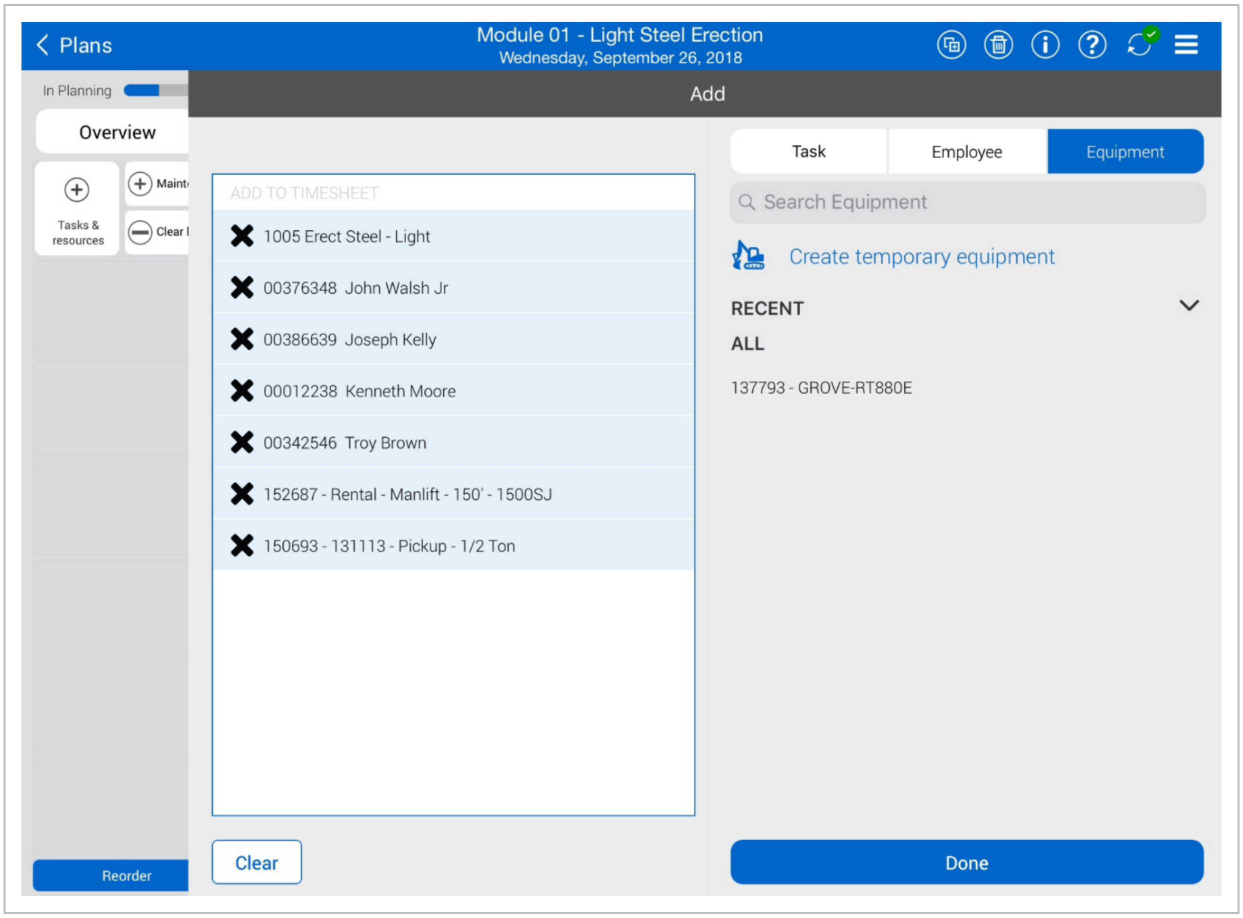


4. Choose a date for the daily plan.
5. Give a description in the Enter Plan Description field.
6. Enter a location in the Enter Location field.
7. Select a **shift** from the Job Shift menu.
8. Select an **Approver**.
   - Maximum of 2 selections. Usually an engineer and superintendent

9. Select an **Executer.**
   - Only one selection. Usually a foreman
10. Select **Work Plan/Package**.
11. Select a work plan or package for the daily plan and tap **Back**.
12. Tap **Add** to create a plan.
13. Tap the **Addbutton** in the Safety section of Tool box talks to add project safety concerns and mitigation.
14. Tap the **Quality tab** and add a quality concern and mitigation.
15. Tap **Done** to add the Tool Box Talk items to the Overview screen.
16. Tap on the **Time sheet tab**.
17. Tap on the **Add button**.
18. If not already selected, tap the **Task button** at the top.
19. Select a task (i.e. 1005 – Erect Steel Light).
   - You can perform a search to find the task or scroll through the list



20. Tap on the **Employee tab**, then tap select the employees you want to add.
21. Tap on the **Equipment tab**, then select the equipment you want to add.



22. Tap **Done**.
    - You will see the task, employee, and equipment appear on the Time sheet tab
23. Add employee time by tapping on the empty box next to an employee name.

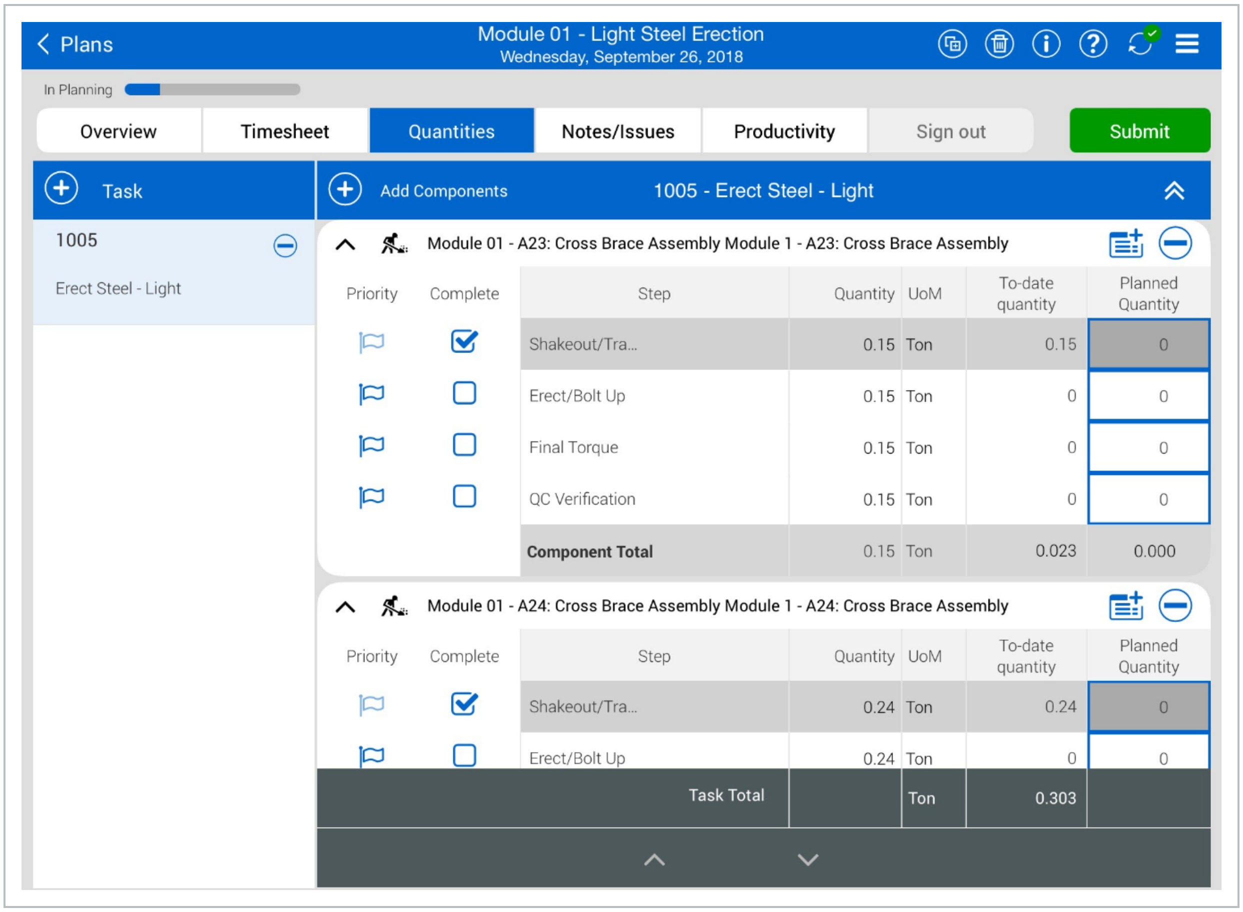
TIP	Check the box for **"Apply hours to all employees for the task"** and then select **Done** to apply these hours to all of the employees selected for this daily plan.

NOTE	You can choose between straight time (ST), over time (OT), and double time (DT). Other premiums can be set within the project settings from the Progress web application.

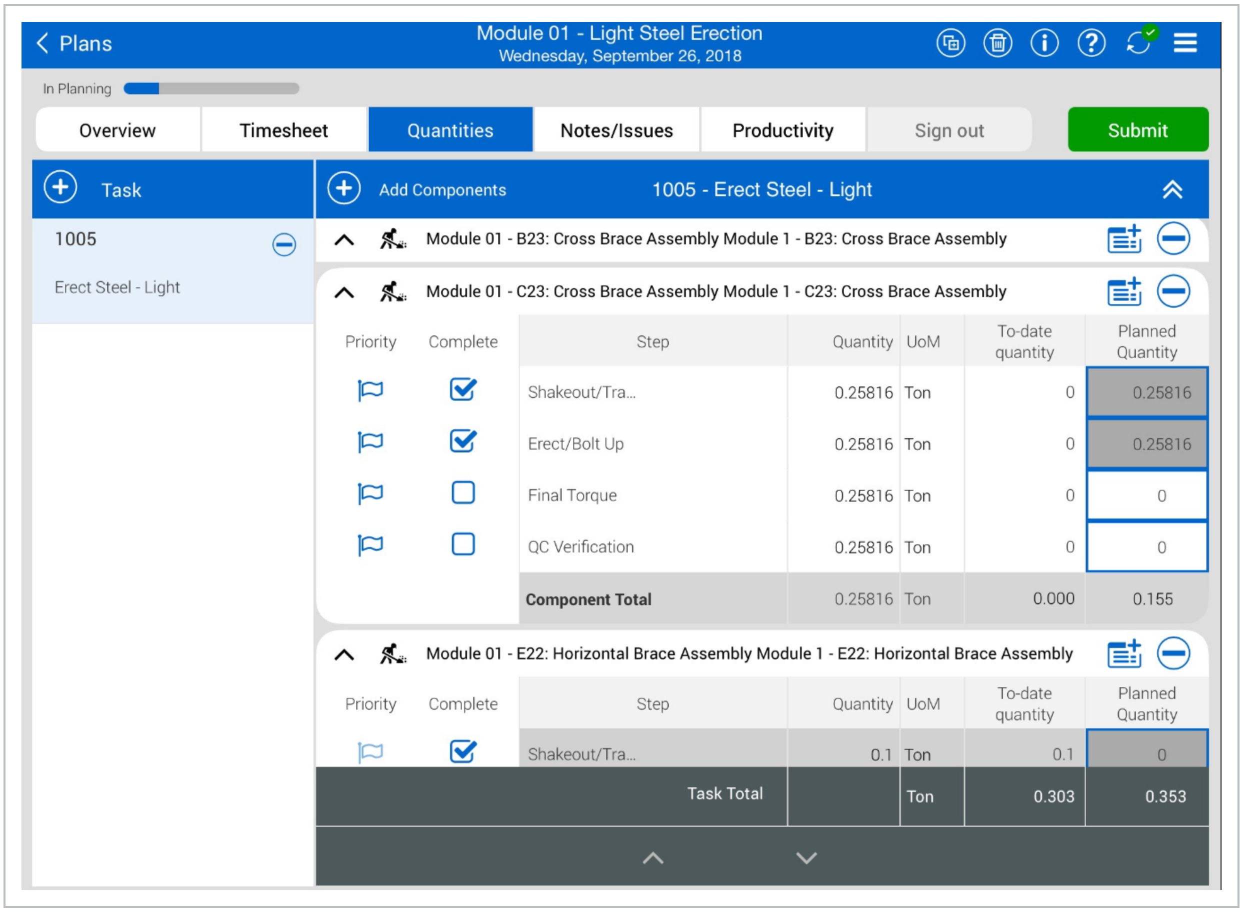
24. Add equipment time by tapping on the empty box next to a piece of equipment.

TIP	Check the box for **"Apply hours to all equipment for the task"** and then select **Done** to apply these hours to all of the equipment chosen for your daily plan.

25. Tap on the **Quantities tab**.
    - This opens the components section of each task
    - You can also input the planned quantity

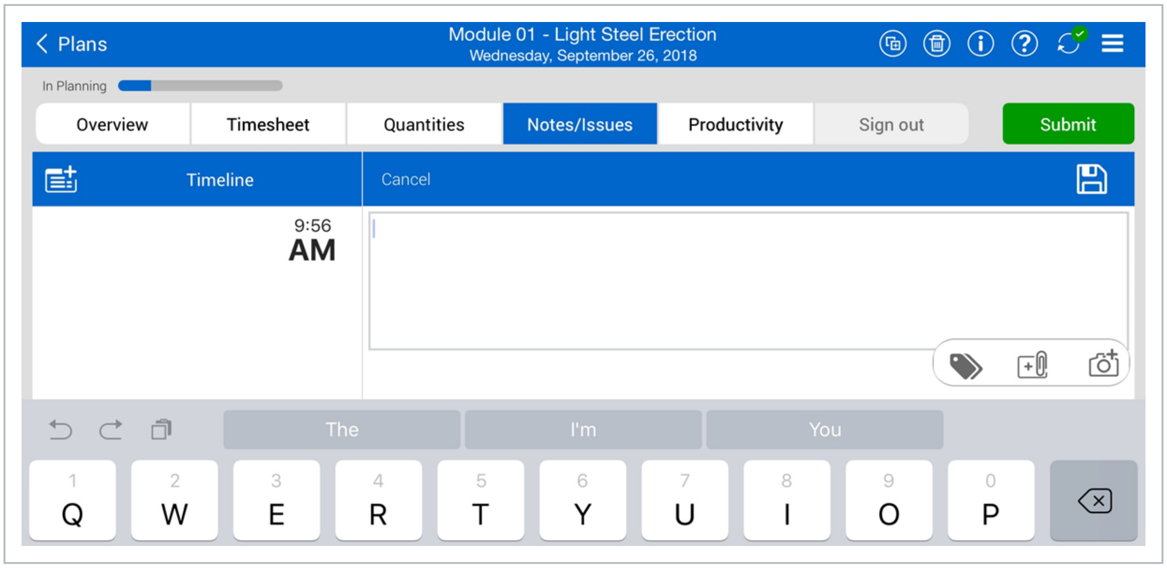


26. Select your task (i.e. 1005 – Erect Steel Light).
27. Tap the **Add Components button** .
28. Then, tap on the **Search All tab**.
29. In the search bar, type in a keyword and select your components.
30. Tap **Done** to add the component to the quantities.
31. Check the check boxes in the Complete column as needed for your components or their broken down steps.
    - By checking these boxes you are communicating to your crew that you expect these steps or components to be completed in the daily plan.

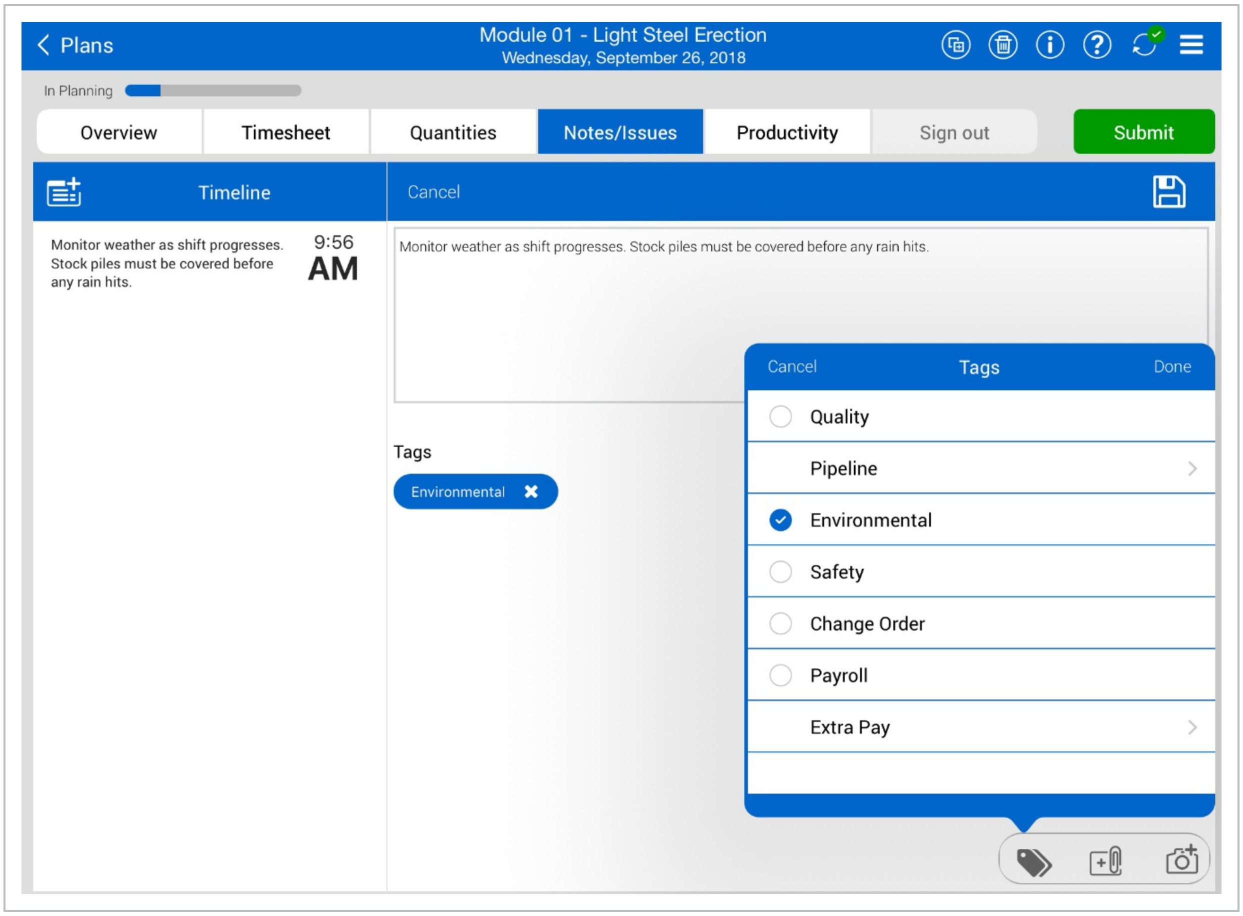


32. Tap on the **Notes/Issues tab**.
33. Tap on the **Add button** and select **Note** to add any project notes.

- Tap on the **textbox field** to bring up the keyboard on the iPad



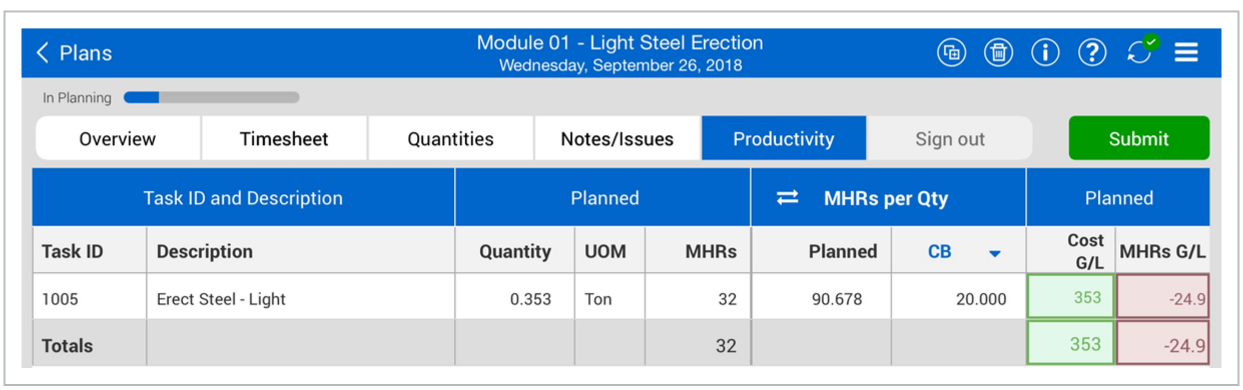
34. Tap on the **Tag**  **icon** to add any tags.



35. Tap on the **Camera** icon to take a photo, make markups, or add text.

36. Select **Done**.

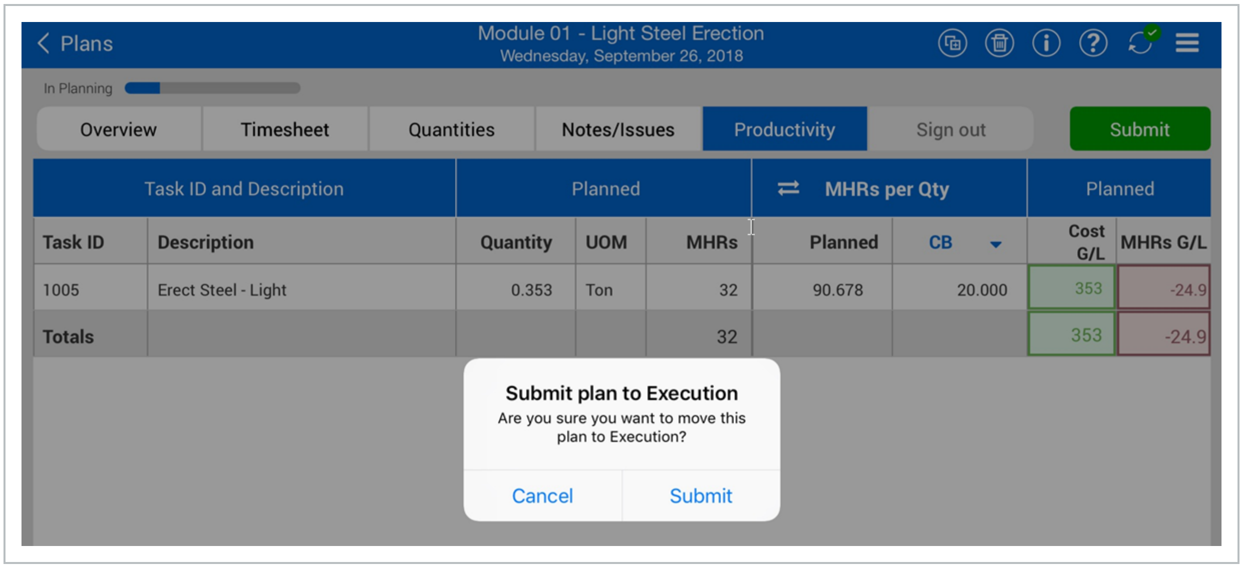
37. Tap on the **Productivity tab** and review your daily plan.



38. Review the **Planned Quantity**, **Planned MHRs**, and **Gain/Loss**.

- Tap the double arrows to flip between MHRs per Qty and Qty per MHRs

39. Tap on the **Submit button**.
    - Once you tap Submit, a window appears asking if you are sure that you want to move the plan into execution
40. Tap **Submit** again.
    - The application will automatically sync after submitting a plan to execution



NOTE Once you click submit, you will no longer be able to edit your plan. The only way to edit is to communicate with the engineer or superintendent to reject the plan or have them edit for you.

3.3 DAILY PLAN FROM COPY

Within Progress, you can create a daily plan by copying an existing plan. This will help you expedite the process in developing a plan if you have already performed the work.

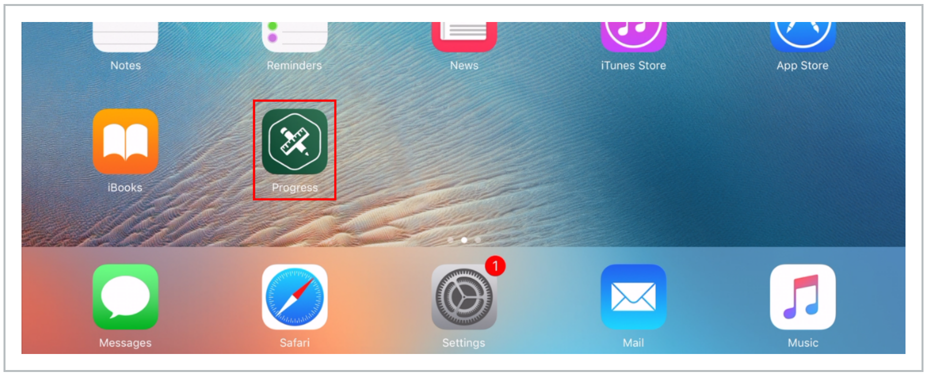
The copy of the Daily plan will be a mirror of the existing plan and you can edit the plan to tailor it to how you want it. For instance, if you have more crew members then when you last performed the work, you can add the new crew members to the Daily plan.

3.3.1 Create a Plan from Copy

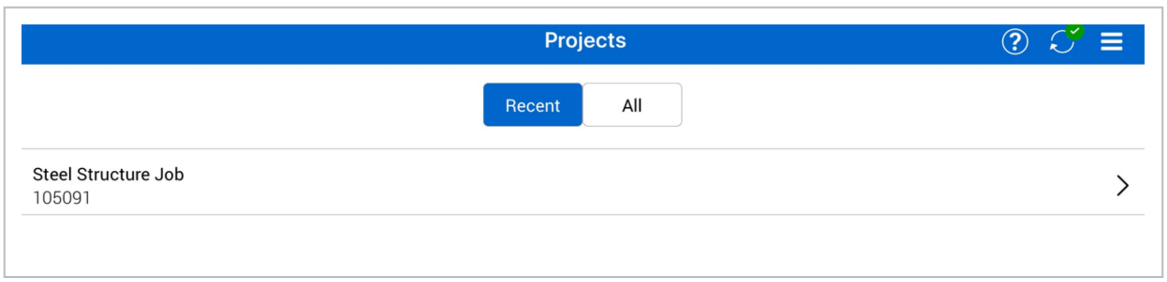
The following steps walk you through creating a daily plan from copy.

3.3 Step by Step 1 — Create a Daily Plan from Copy

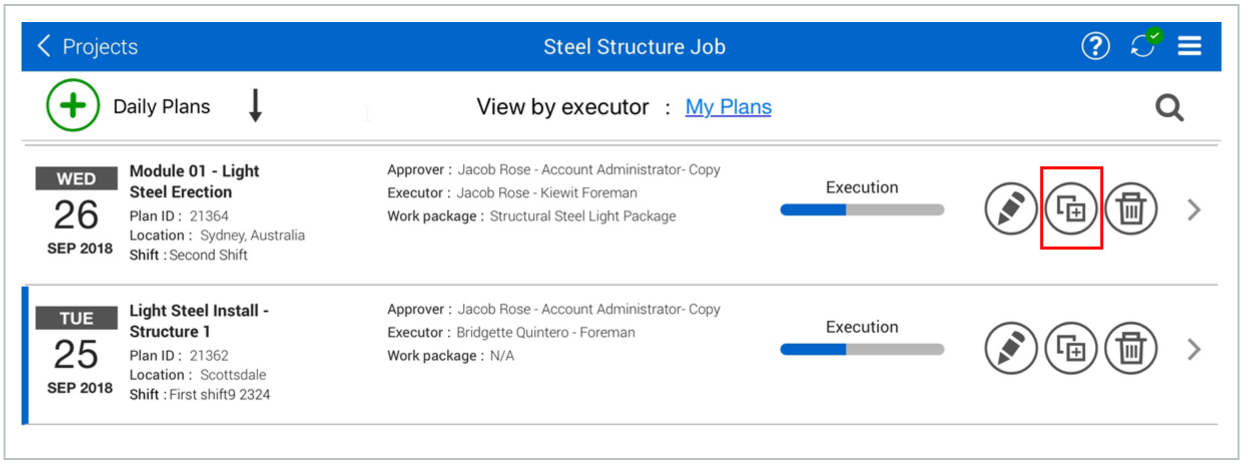
1. To access the InEight Progress mobile application, tap on the **Progress** app icon.



- Once you tap on the icon and sign in, the Projects page opens
- You will see a list of your assigned projects

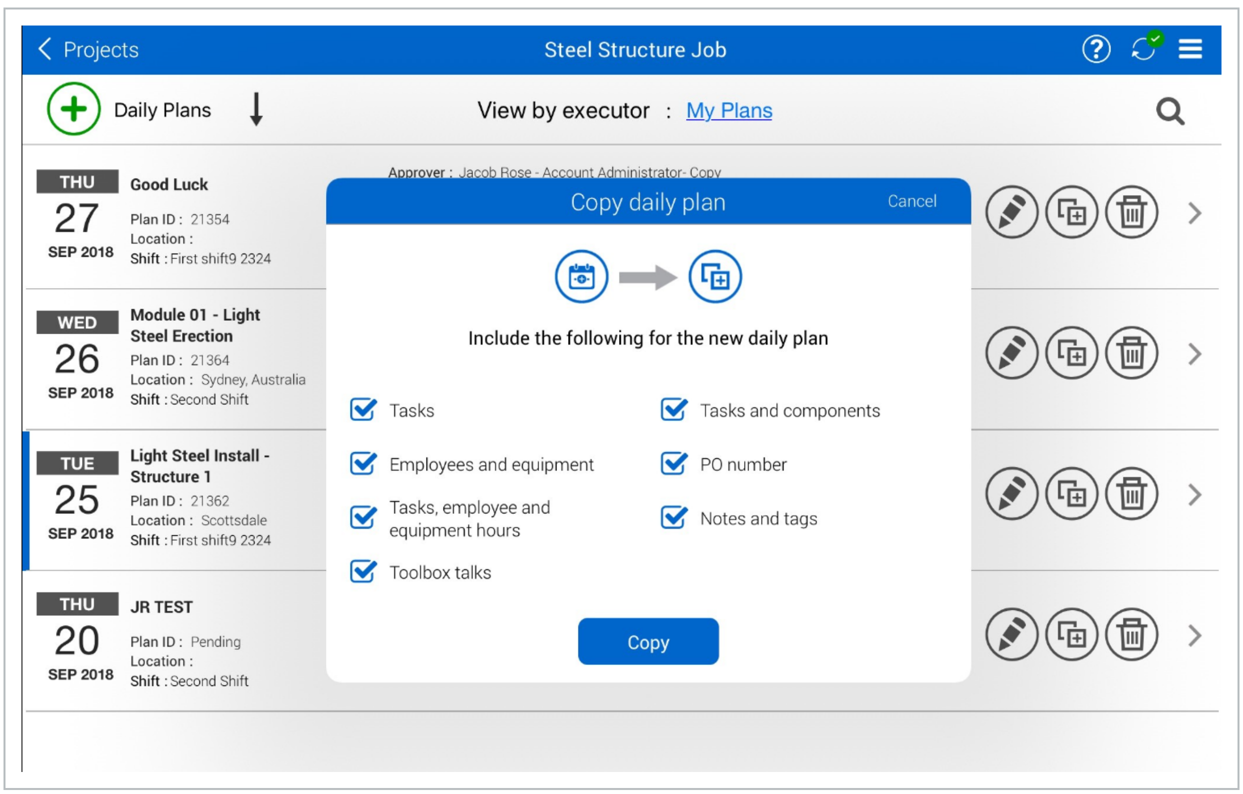


2. Tap on the job that you would like to view daily plans for.
   - The Daily plans page opens
3. Tap on the **Copy**  **icon** to make a copy of an existing plan.



- Once you tap on the Copy daily plan icon, the Copy daily plan window pops up
- Within the Daily plan window, you will be able to select items you want to copy over to the new daily plan
- The Copy daily plan window appears with all items automatically checked

4. Uncheck any items that you do not want to copy over to the new plan.



5. Tap on the **Copy button**.

- The Copy daily plan window appears

6. Edit the fields to reflect the new date.
7. Tap **Copy**.
8. Tap through each tab along the navigation bar and review that your content has been correctly copied over from the previous plan.

Exercise 3.1 — Create a Daily Plan from Scratch

Now that you have learned some basic functions of how to create a plan from scratch, put your skills to the test and see if you can complete some basic functions on your own.

1. Open the Steel Structure Training Job project.
2. Create a Plan from Scratch.
   - Use your experience in creating a daily plan
   - Come up with your own daily plan
   - What operations could you think of that you have created one for?
3. Fill out the Plan Details including approver, executer and work plan.
4. Add Toolbox Talk items and Planner Notes.
5. Add tasks, employees and equipment to the daily plan.
6. Add components to the daily plan.
7. Add Notes or an Issue to your daily plan.
8. Review your daily plan in the Productivity tab.
9. Submit your daily Plan to the Execution Phase.

Congratulations, you have completed this exercise!

Lesson 3 Review

1. In which tab in InEight Progress can you assign components to a task?
   a. Timesheet tab
   b. Productivity tab
   c. Quantities tab
   d. Overview tab

---

2. What are the required fields to create a daily plan from scratch?
   a. Date, Approver, Executer, Plan Description
   b. Date, Plan Description, Approver
   c. Plan Description, Approver, Executer
   d. Location, Date, and Executer

---

3. In which tab can you view your Planned versus Budget results?
   a. Productivity tab
   b. Timesheet tab
   c. Quantities tab
   d. Sign out tab

Lesson 3 Summary

As a result of this lesson, you can:

- Create a daily plan from scratch
- Create a daily plan from copy

InEight® COMPLIANCE

LESSON 4 – DAILY PLAN EXECUTION

Lesson Duration: 30 minutes

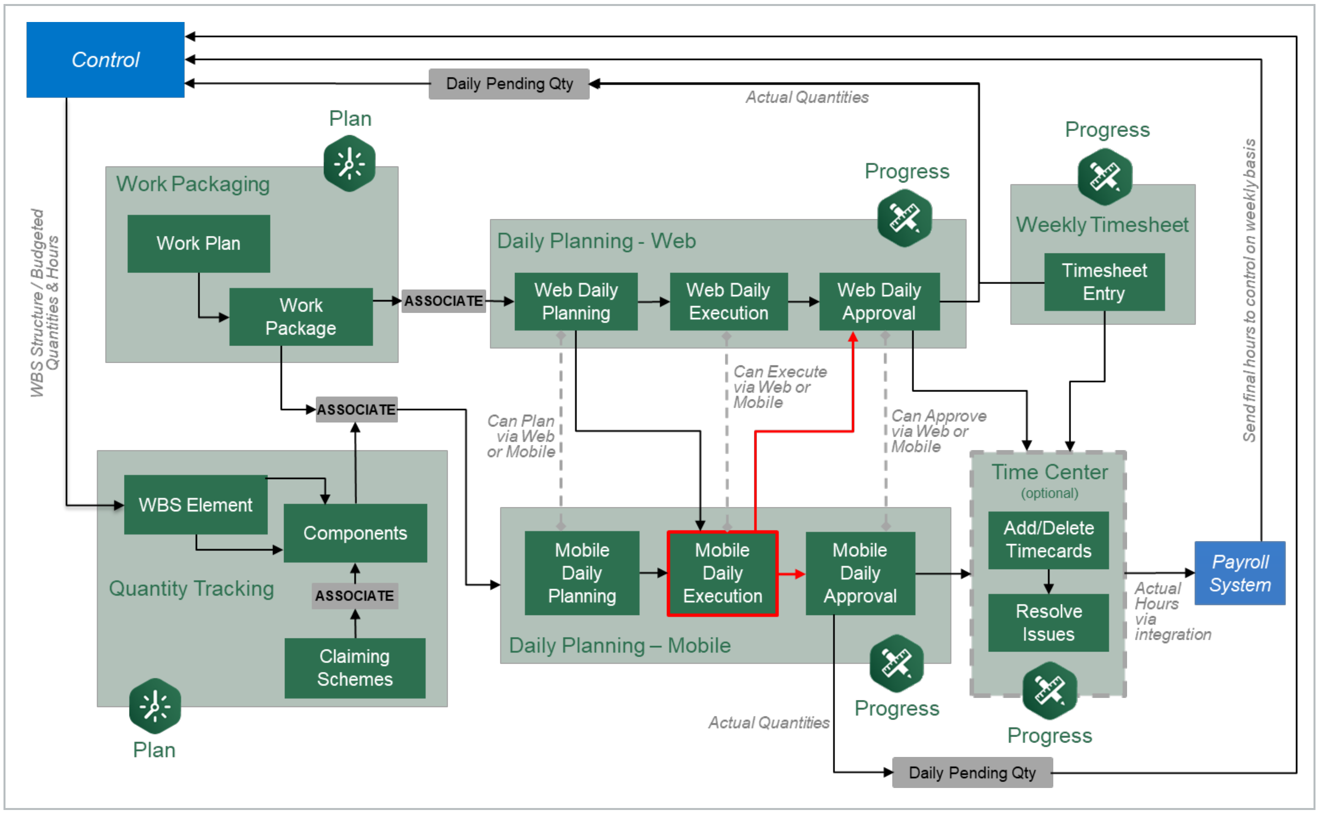
Lesson Objectives

After completing this lesson, you will be able to:

- Review the daily plan
- Input actuals into the daily plan
- Sign out

Lesson Topics

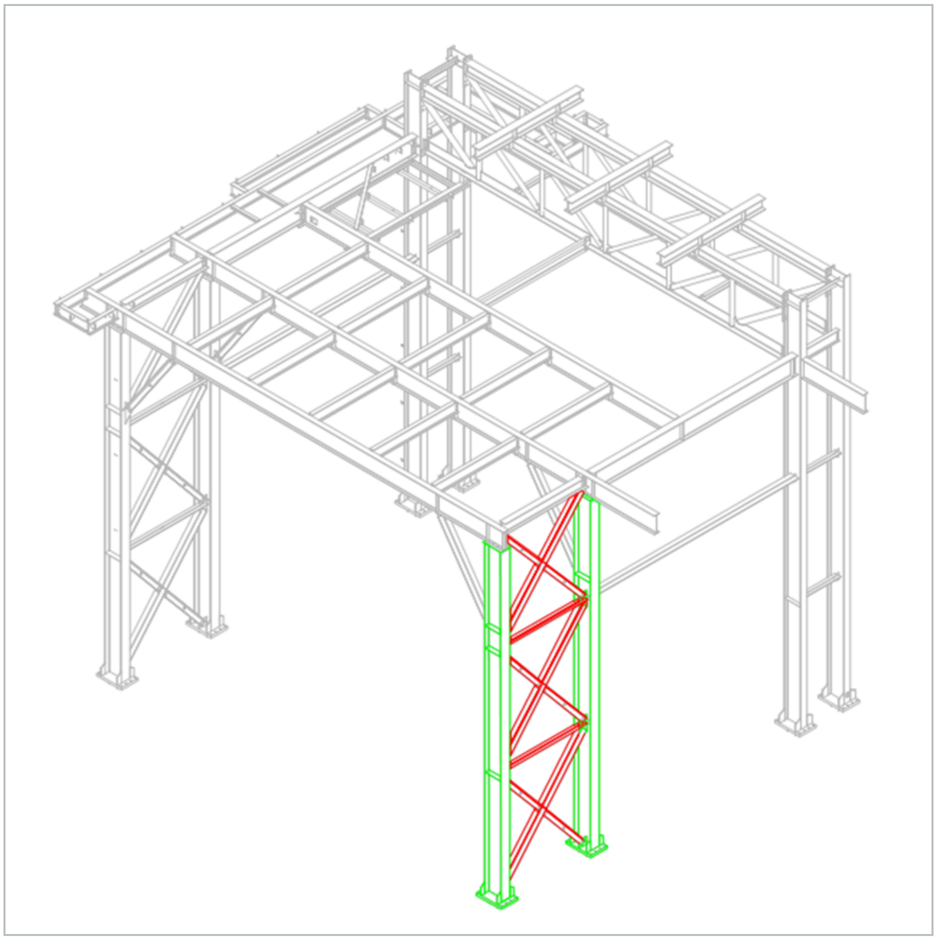
4.1 INEIGHT PROGRESS WORKFLOW - DAILY PLAN EXECUTION MOBILE



4.2 PLAN REVIEW

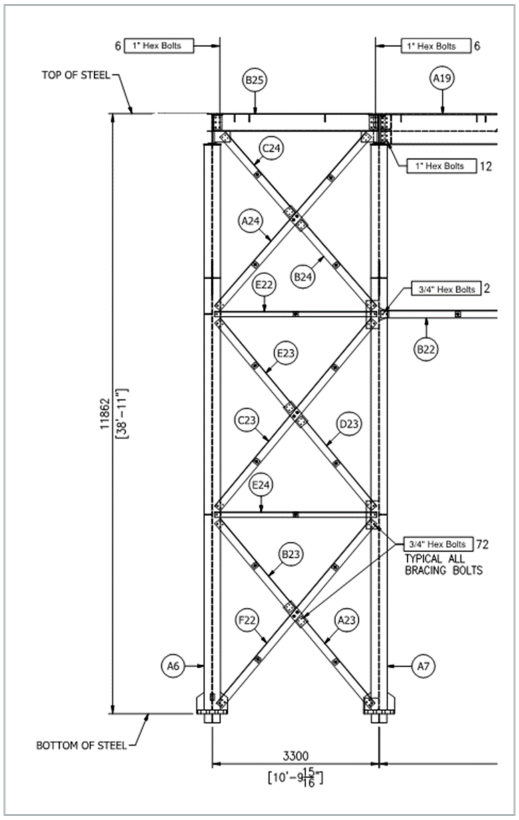
Scenario

> Your plan to install the horizontal and cross member assemblies (red columns) has been finalized and sent to the field for execution.



As a reminder, the steel members you will be installing are:

- *A23*
- *A24*
- *B23*
- *B24*
- *C23*
- *C24*
- *D23*
- *E22*
- *E23*
- *E24*
- *F22*



The plan will be to shakeout and transport the steel members by 1/2 ton pickup truck to the work area. You also plan to erect and bolt up members C23, D23, E23, and E24. You will use a JLG to help with erection.

After verifying the steel members with their respective drawings, it was noted that members E23 and E24 had dimensions that did not match the drawings. The foreman needs to create a note to communicate this discrepancy back to the approver. Instead of installing E23 and E24, the crew went ahead and installed B23, A23, and F22.

One of the crew did not show up for work today. He did not call in with a reason, therefore his absence will be unexcused and unpaid.

4.2.1 Overview

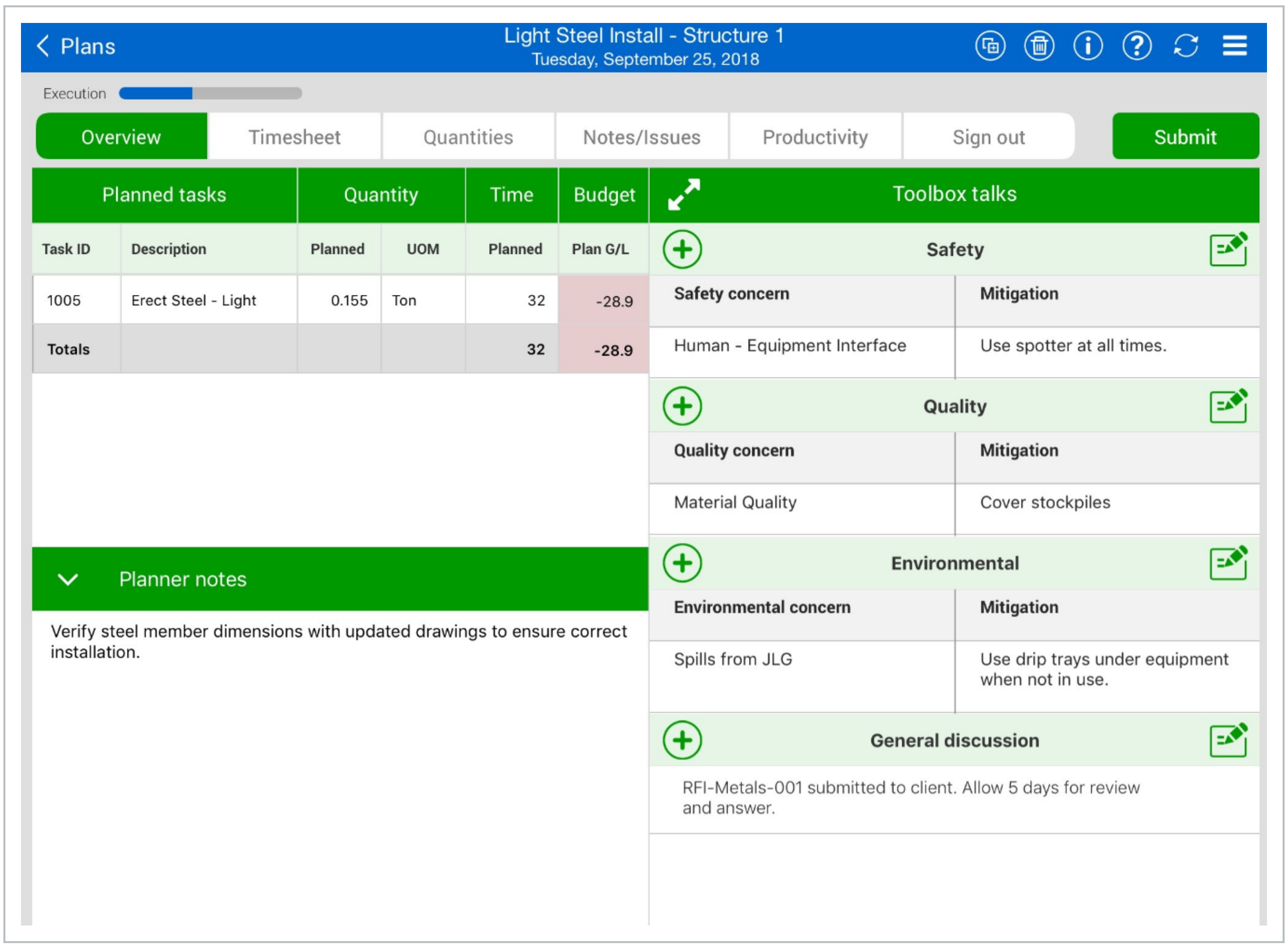
After the Daily Plan has been approved and synchronized, the plan is ready for review and execution in the field. During the morning meetings, the foreman can access the Daily Plan and review it with his crew before starting the operation.

When you access the Daily Plan for review, you first open to the Overview tab. You will notice that the plan color has now changed from blue to green. You can also tell what phase you are in by the bar in the upper left hand corner of your screen. Within the Overview tab, you can review the Tool Box Talks, Planner Notes, and Planned Tasks.

Moving to the Timesheet tab, you can note employees who are absent. You can also tell a crewmember what their task is for the day, how many hours they must complete the task, and what equipment they have for their task.

You may also want to tell your crew what the planned quantities are. The Quantities tab provides you with planned quantities for your crew to accomplish. There is also a breakdown of steps to complete each planned task.

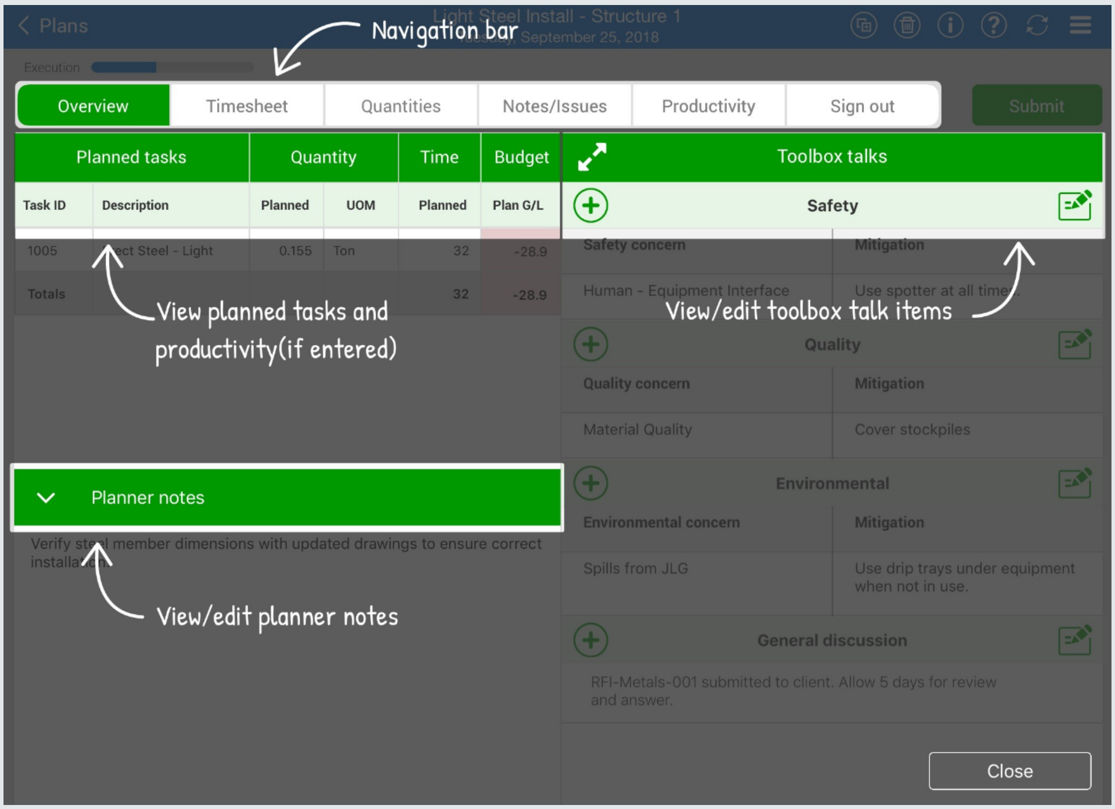
You can also review any additional information related to your tasks in the Notes/Issues tab.



TIP

In InEight Progress, from any screen, you can access the help screen by pressing the button. This is located in the upper right hand side of the application.

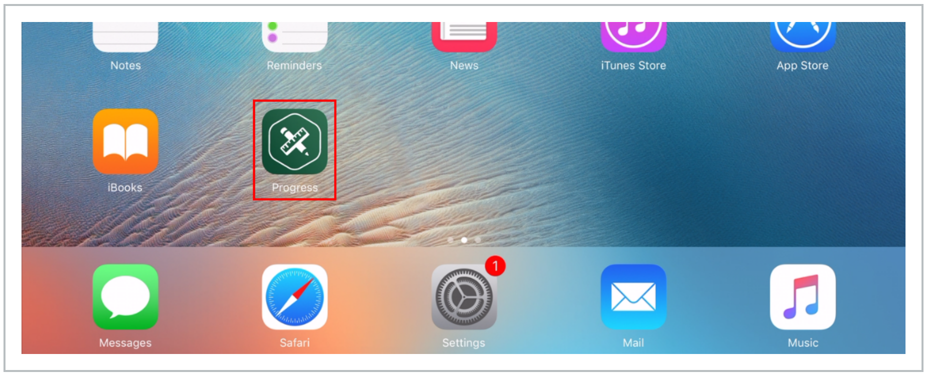
Once selected, the help screen will look like the following:



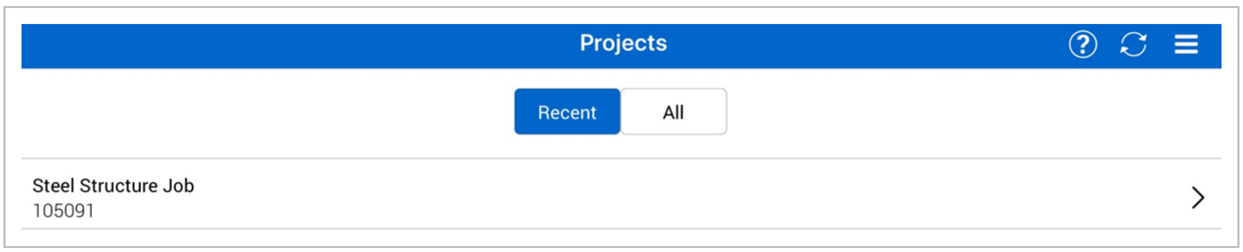
Simply select the close button at the bottom of your screen to close the help screen.

4.2 Step by Step 1 — Review Daily Plan Overview Tab

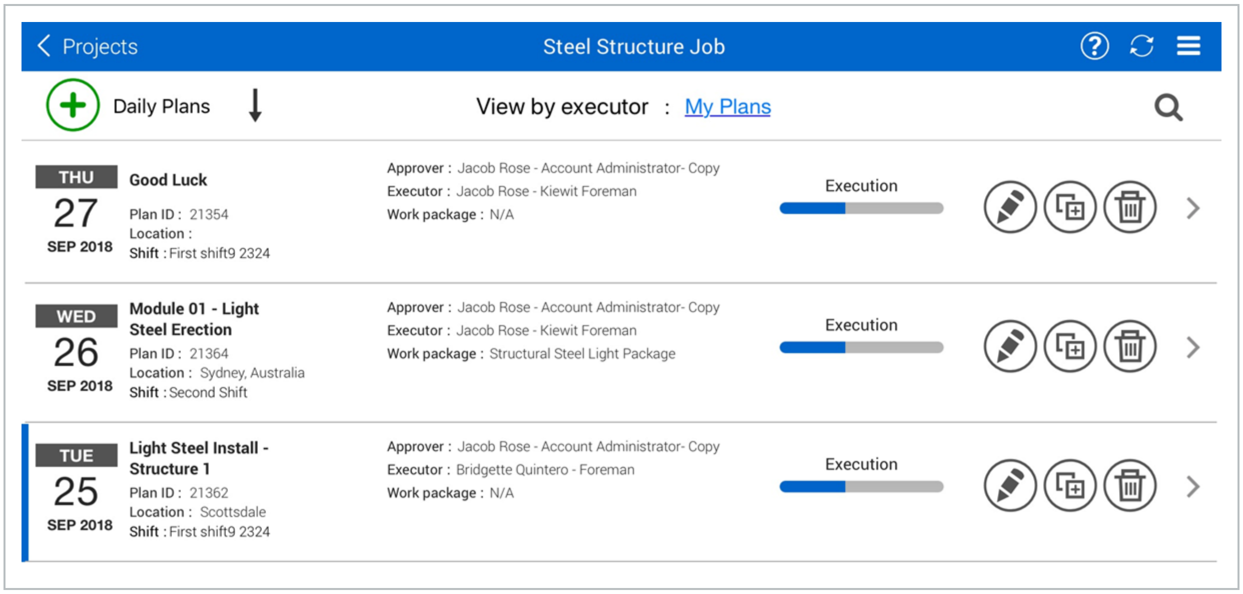
1. Select the **InEight Progress application** through your mobile device.



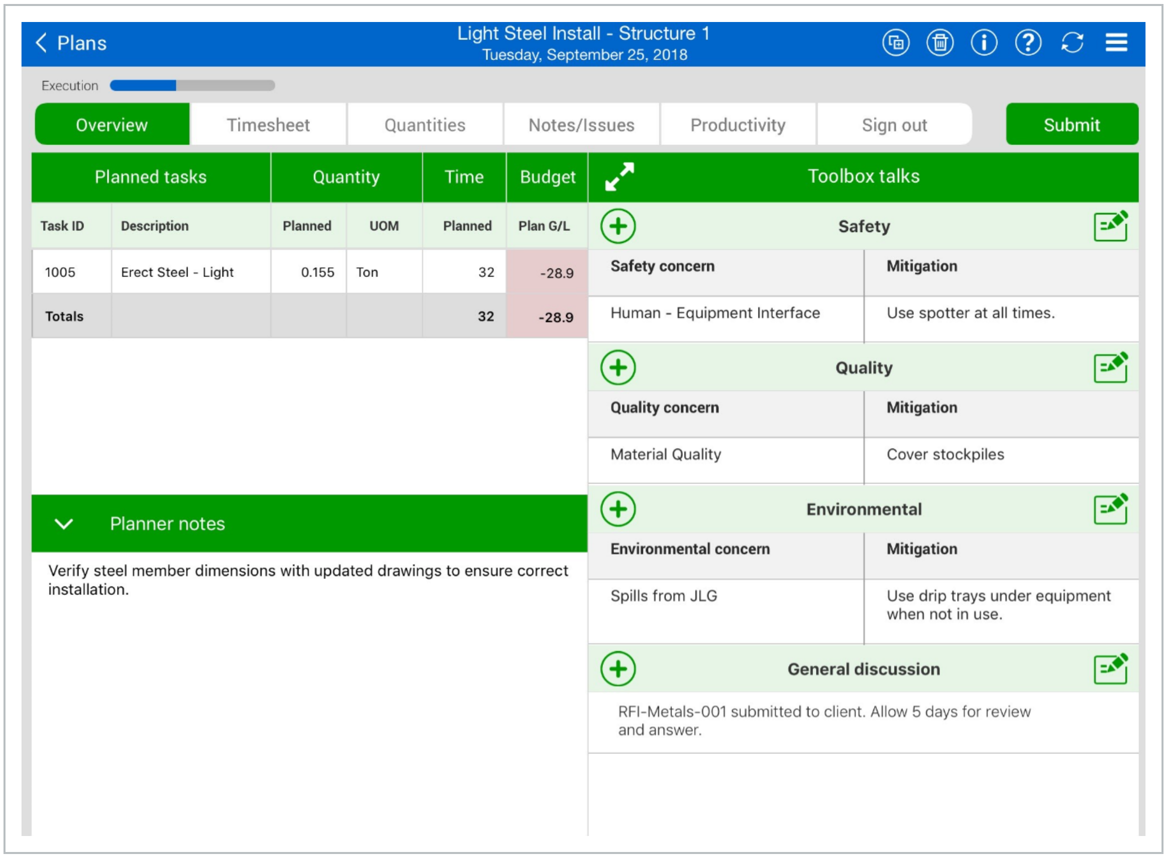
2. Log into **Progress** using your credentials.
    - This depends on your company and how they set up your log in information for you
    - After you log in, you will open to the Projects page where you will see all the projects that you have access to



3. Select **Steel Structure Job**.
    - Depending on how many projects you have access to, you may have more than one project to select from
    - The Daily Plans page of the project opens, where you will see all the daily plans created for the project
4. Select the daily plan: **Module [your user number] – Light Steel Erection**.



- This opens the plan Overview tab where you can review the daily plan with your crew and the superintendent



4.3 INPUT ACTUALS

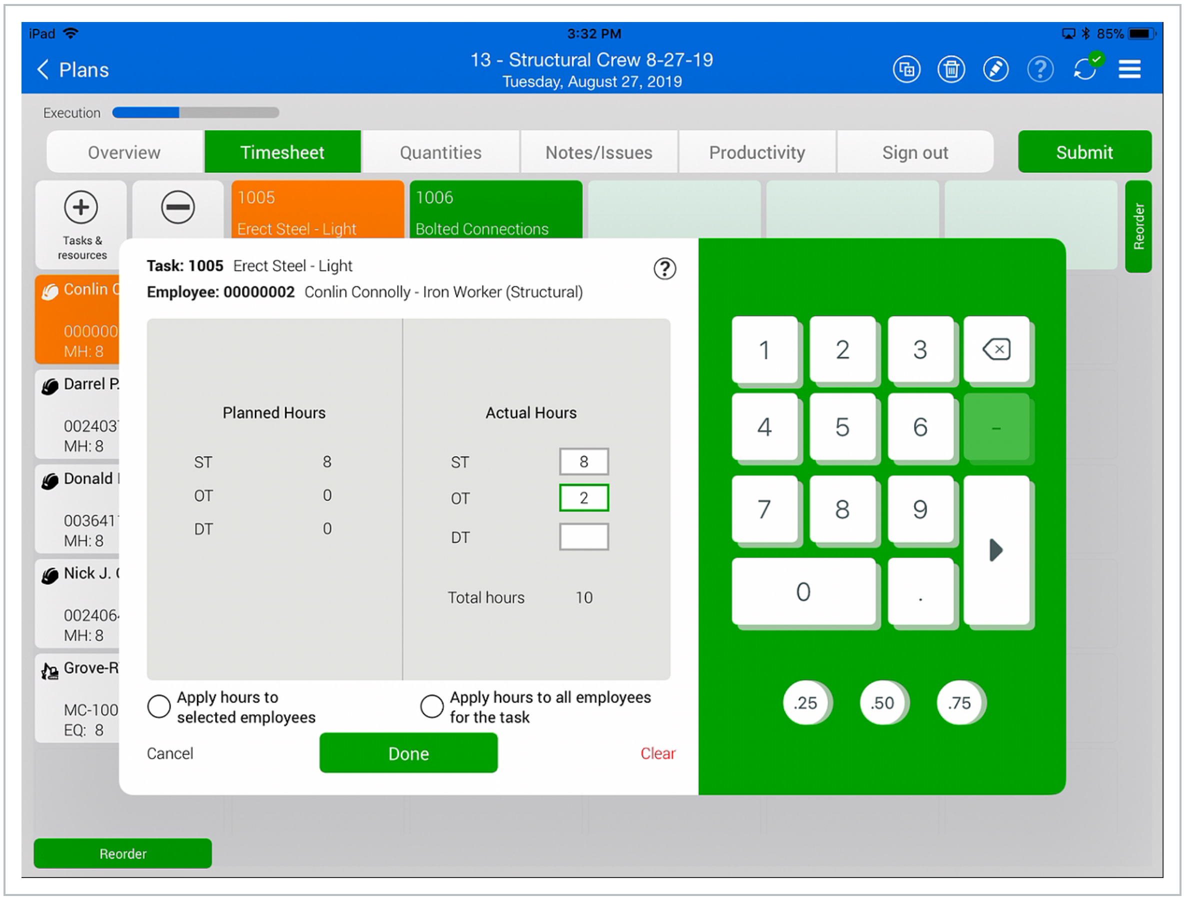
After completing work at the end of the day, within Progress you can input the hours each crewmember worked on a task, and the amount of quantity installed or completed. Inputting actuals for the Daily Plan takes place in the Timesheet and Quantities tabs.

4.3.1 Timesheet Tab

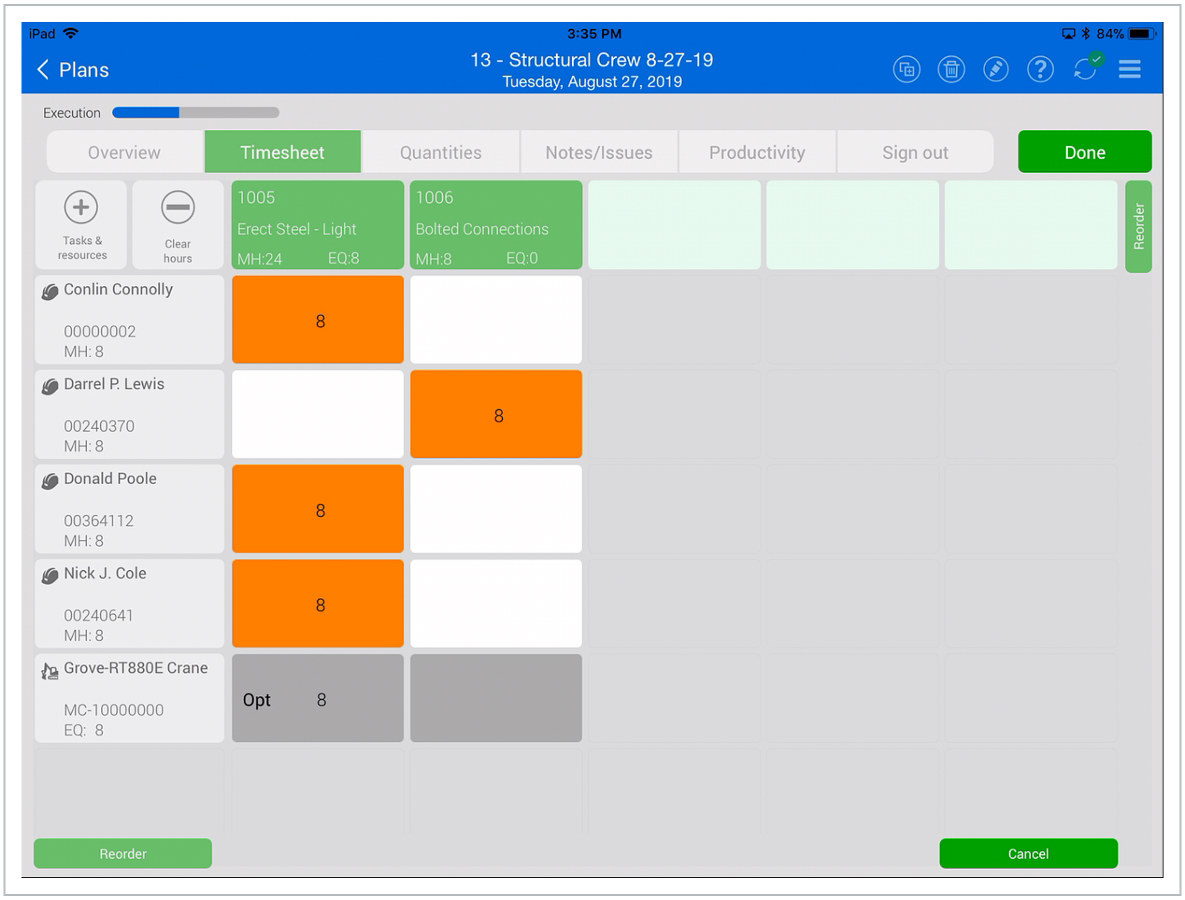
Within the Timesheet tab, you can enter the exact hours each crewmember worked and the amount of hours the equipment was used.

You may need to track that a crewmember has shown up late or missed a day of work. You can also add notes to an employee if there was an injury, tardiness, or extra work hours.

If you have crewmembers that must work overtime or double time to meet the schedule deadline, on the Timesheet tab you can enter straight time, overtime, and double time. In addition, to account for fractions of an hour, there are buttons below the keypad (e.g., by 0.25, 0.50, or 0.75). If you enter overtime or double time, you will see the updated hours in the hour box.

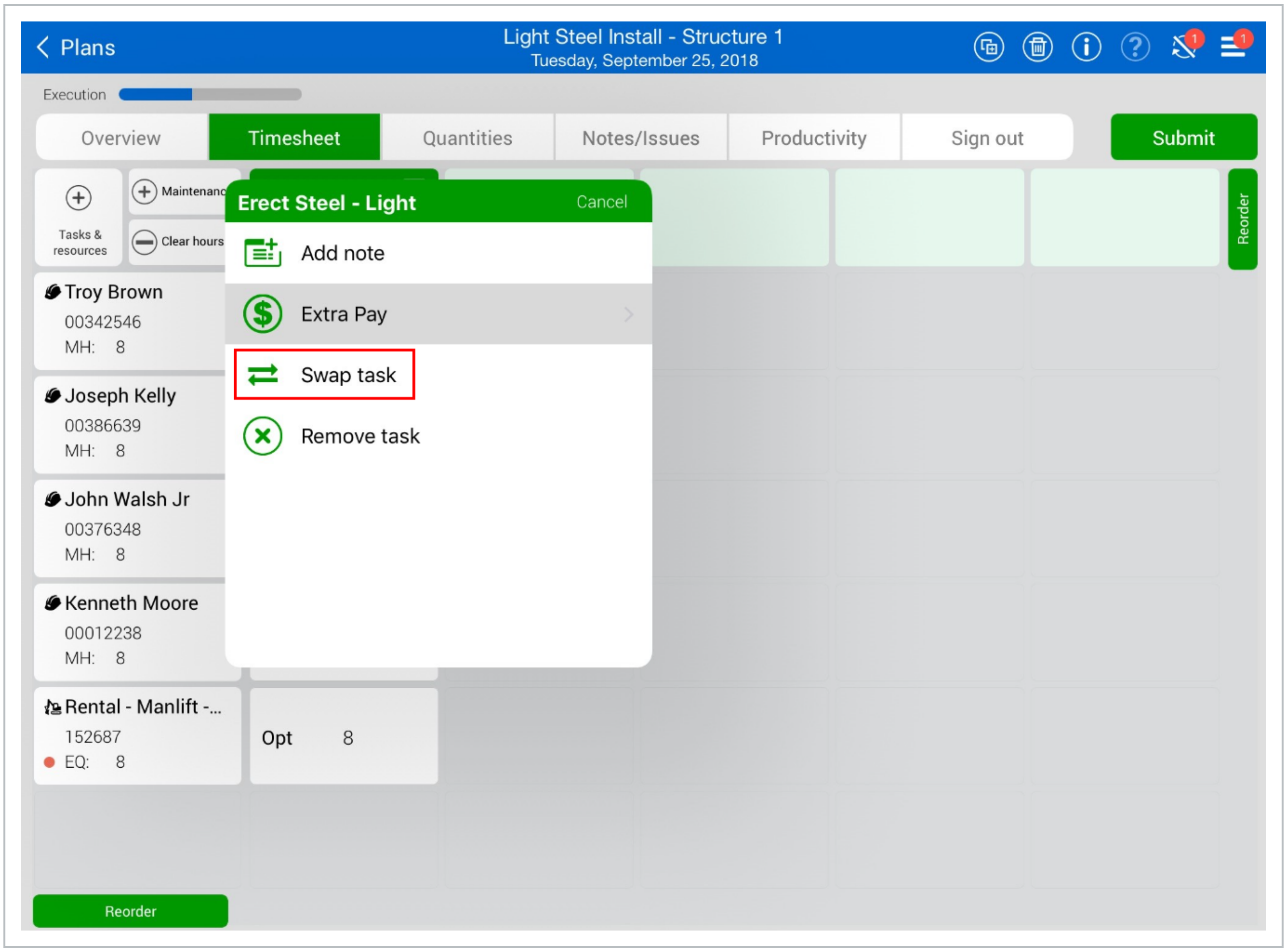


If everyone in your crew has worked the same hours, you can select the **Apply hours to all employees for the task** box. If you want to apply the same hours to some of the employees on the daily plan, you can select **Apply hours to selected employees** and select the hours boxes for all the employees you wish to allocate the hours to.



If your plan for the day has changed and you need to replace the task for the day, you can do so by tapping on the task box and selecting “Swap task”. This allows you to leave any hours you have already entered and not have to start from scratch.

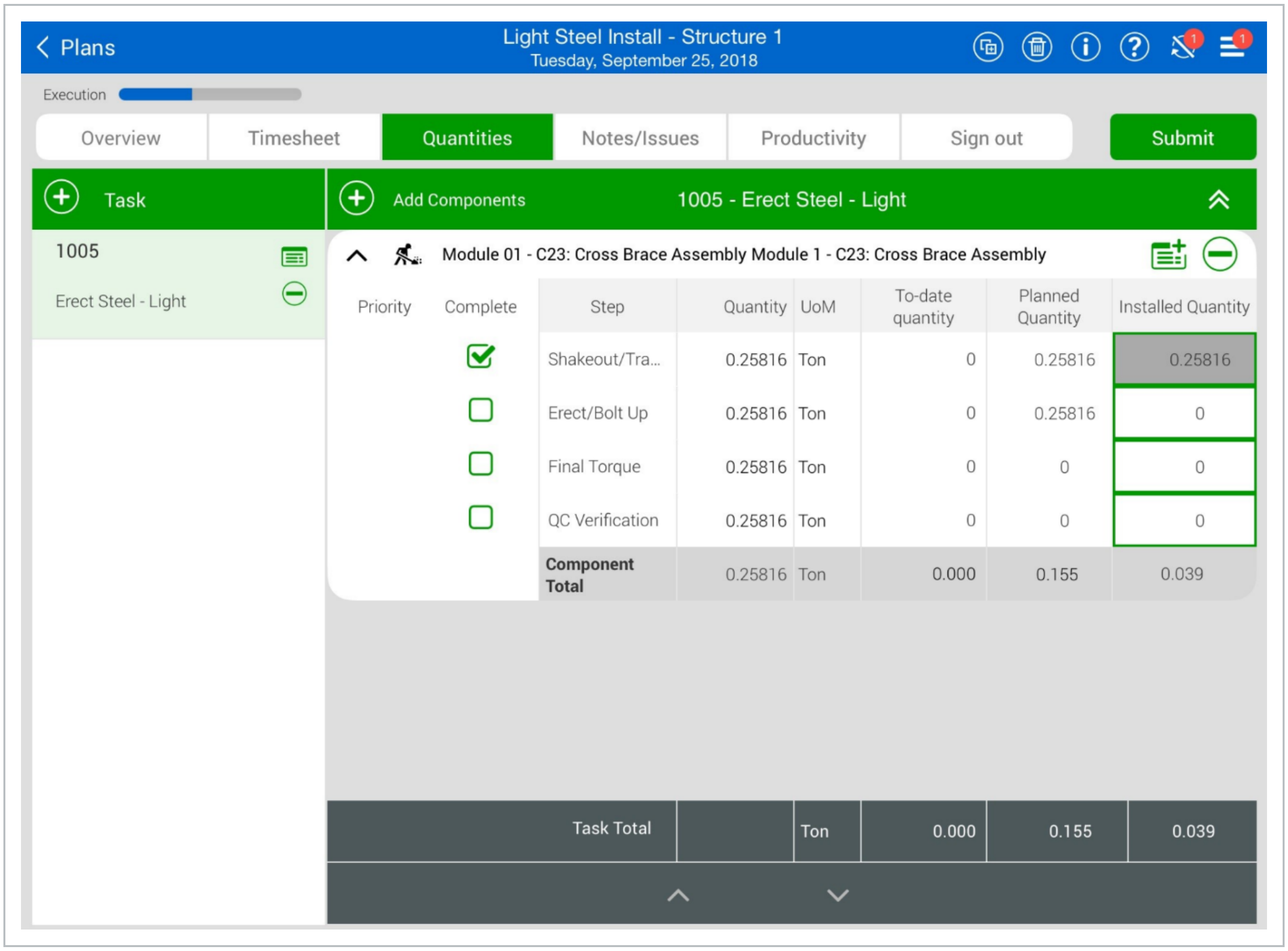
You can also add a note or define any extra pay from this screen.



TIP	You can change the order of the employees and equipment in the Timesheet tab by selecting one of the two Reorder buttons. Each button is located at the end of the task row and resource column.

4.3.2 Quantities Tab

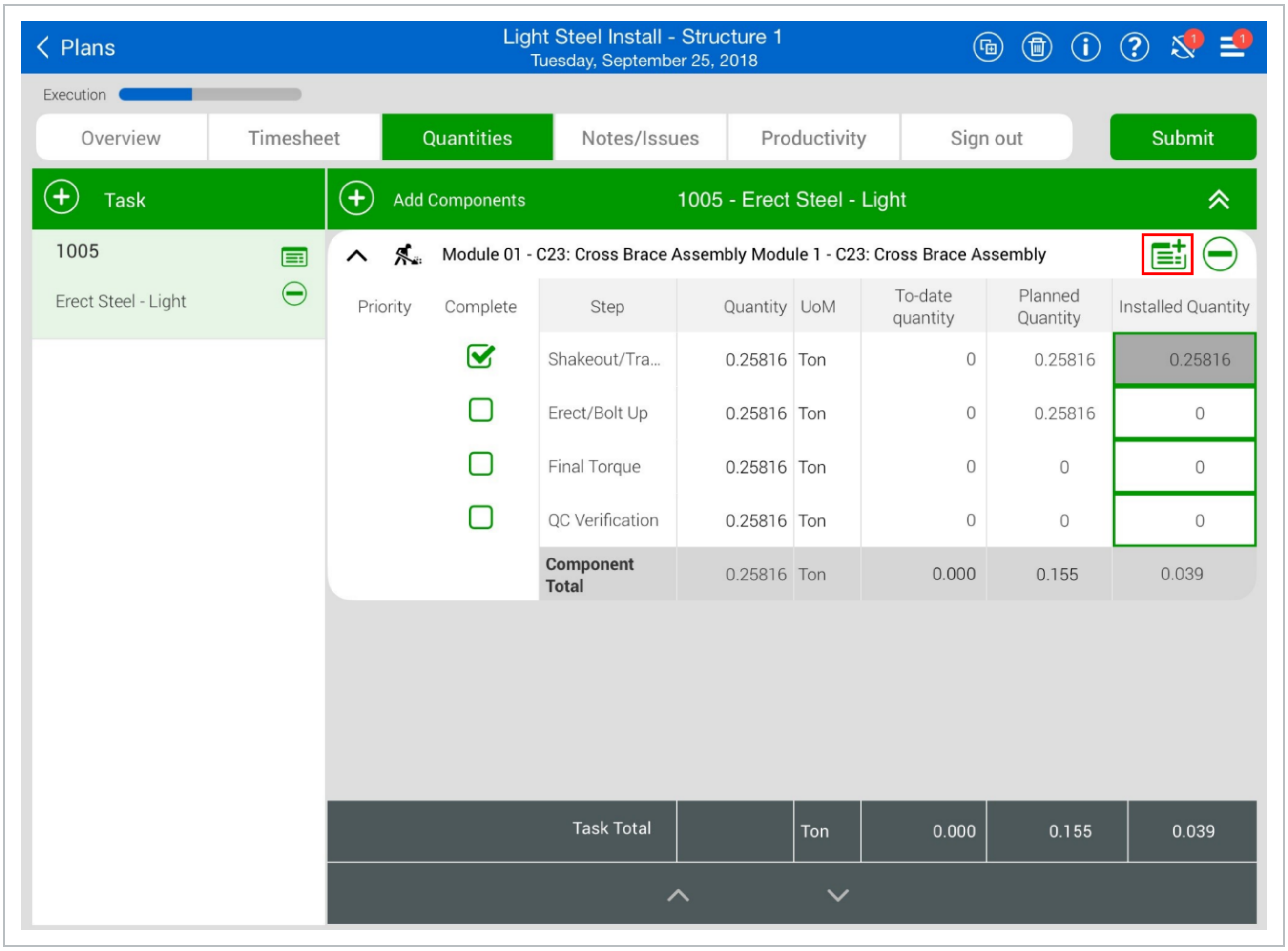
In the Quantities tab, you can check off a task as complete, where you input the actual quantities completed for the day.



4.3.3 Notes/Issues Tab

After entering the quantities, you may notice you need to add a note to identify a hold point (e.g., issue, missing material, QC inspection, etc.) for the component.

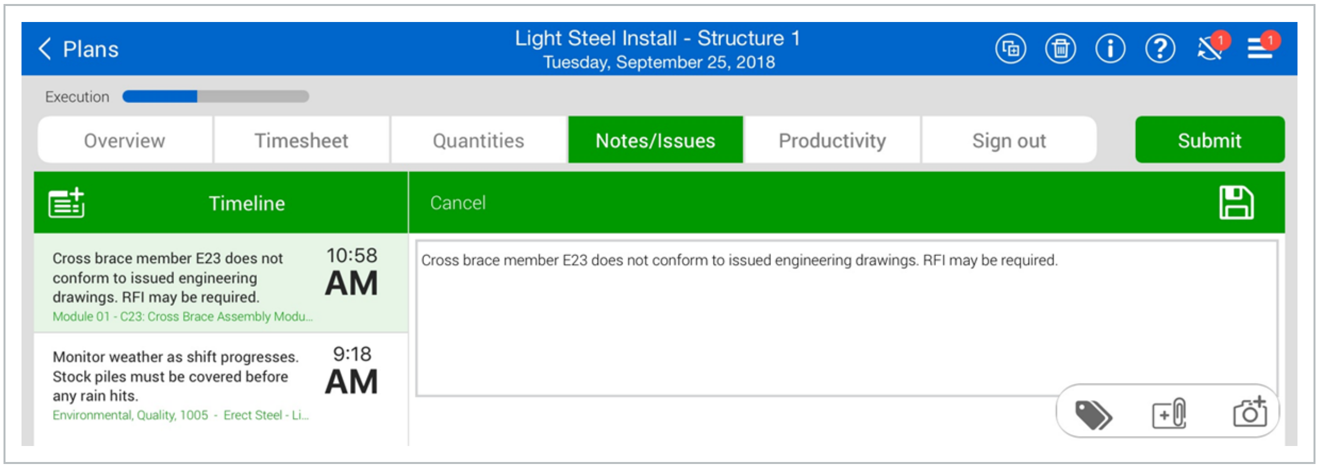
To add a note for each component, you can tap on the Note button.



Once you open the Notes field, you can add tags to the notes and associate the notes to the categories available. You can also add photos to your notes. Examples for using notes include:

- Additional information regarding the operation you performed for the day
- Performance results
- Quality issues
- Environmental compliance

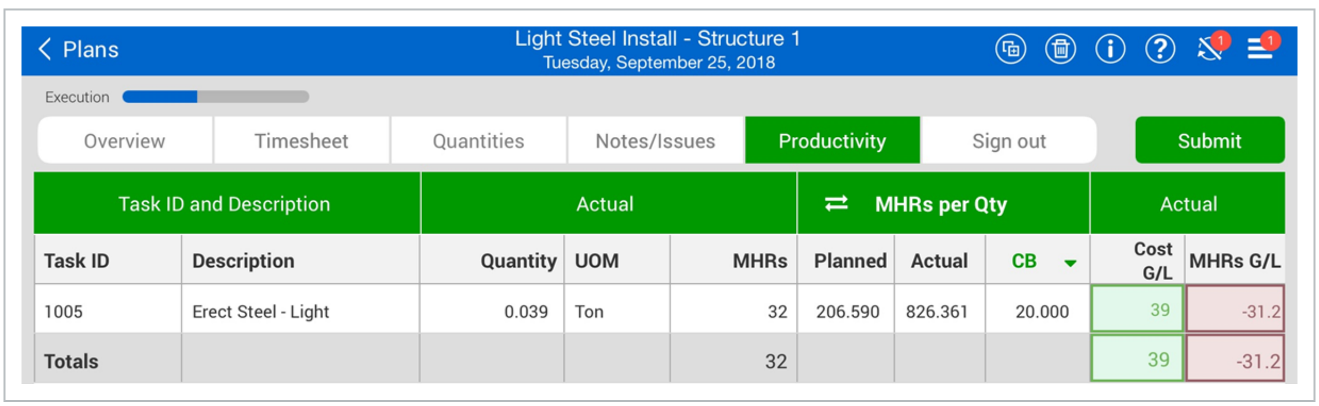
You can also add pictures, using the iPad’s camera or upload from the iPad’s Camera Roll.



4.3.4 Productivity Tab

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

MHR G/L and ($) G/L are two productivity metrics used to determine performance against budget. By default, MHR G/L is always shown. ($) G/L will be shown if the appropriate setting is selected in the project settings. The setting is called “Display currency in daily plan productivity during execution phase?” and is in the Daily Planning section of the project settings.



NOTE The Actual G/L compares the actual cost and man-hours recorded on your executed daily plan to the planned costs and man-hours using the following equations:

Actual Cost G/L = (Sum of (Total actual quantity for the WBS * CE final unit cost) - (Actual total cost of labor + Actual total cost of equipment))

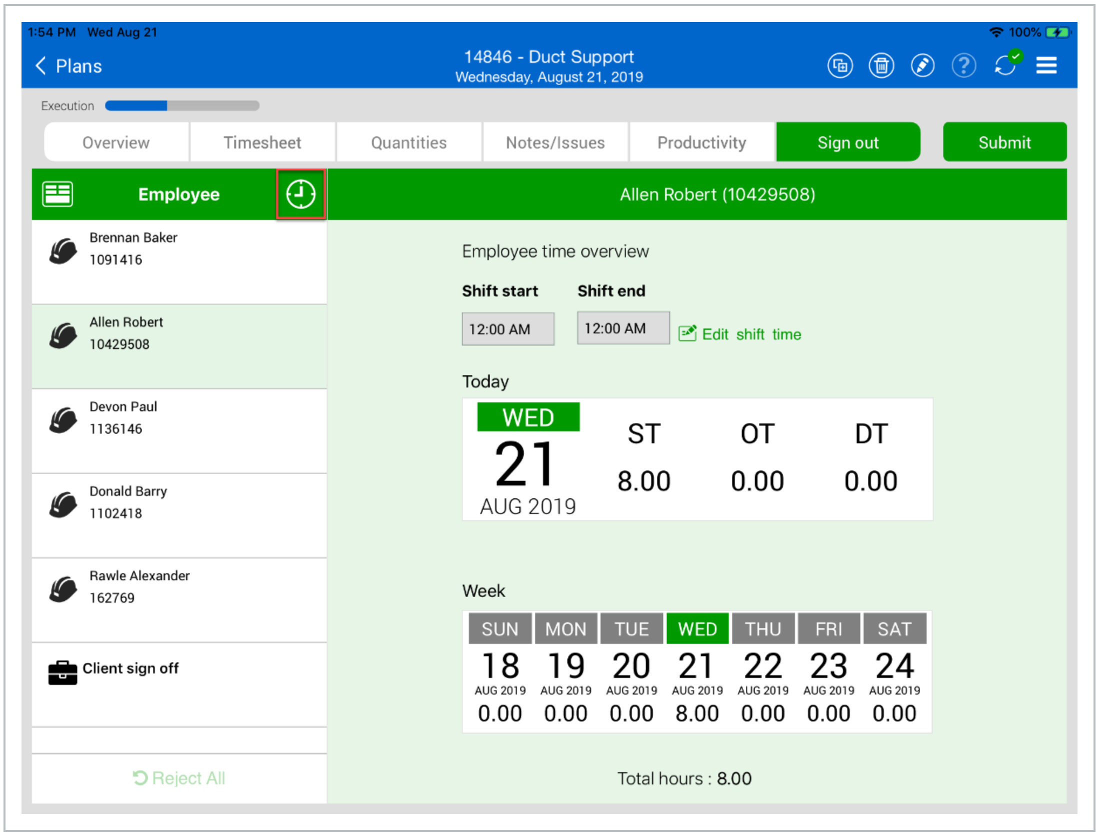
- Actual total cost of labor = Sum of Total number of hours worked by the employee * Hourly rate of the employee
- Actual total cost of equipment = Sum of (Total number of equipment hours operated * Hourly Unit rate of the equipment)

4.3.5 Sign Out Tab

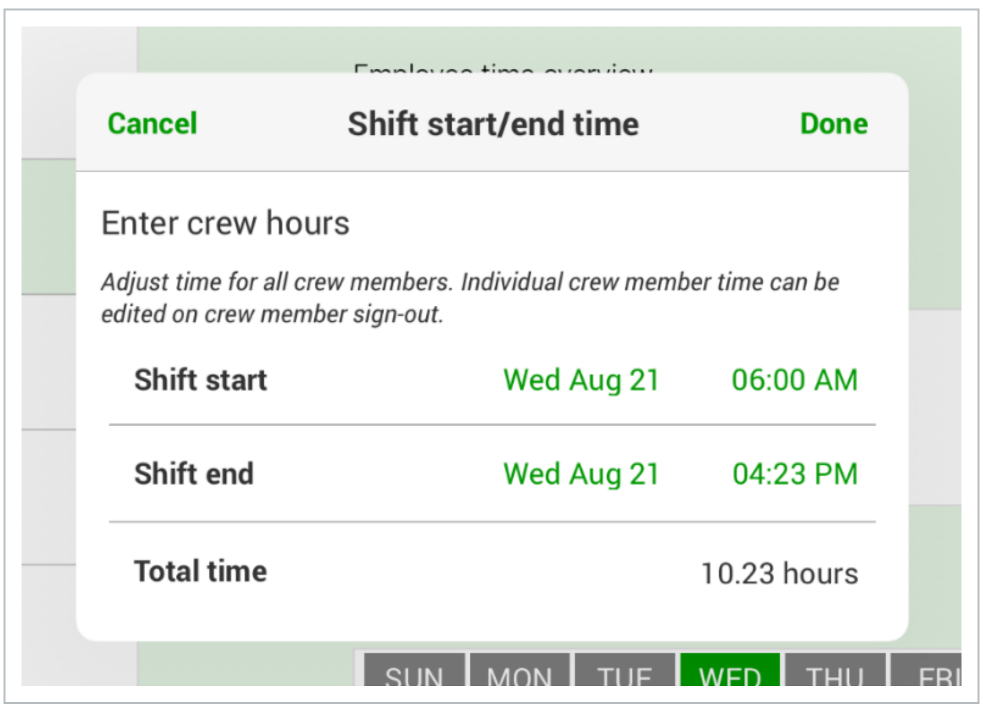
At the end of the day, as your crew is cleaning up and getting ready to head out for the day, you have gone through the tasks and input the actuals for man-hours and quantities. You are now ready to sign out your crew.

4.3.5.1 Shift Start/End Time

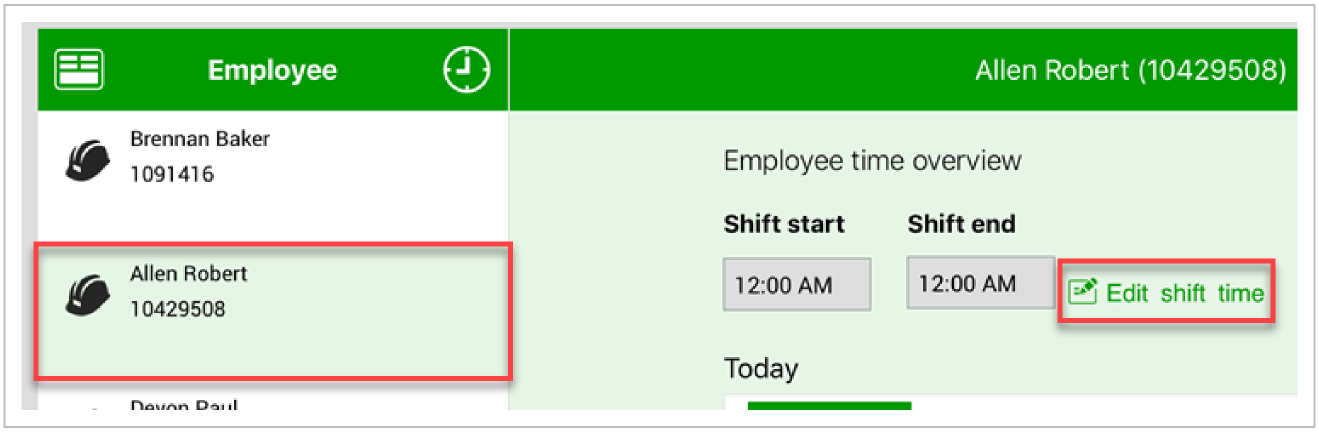
You can enter shift hours for an entire crew or for an individual (exception from crew) from the Sign out tab. To enter the hours worked for an entire crew, select the clock icon at the top of the list of crew members on the left side of the screen.



To enter hours worked on an individual level, select the crew member from the list on the left window and then select Edit shift time on the right window to adjust the hours worked for that individual.

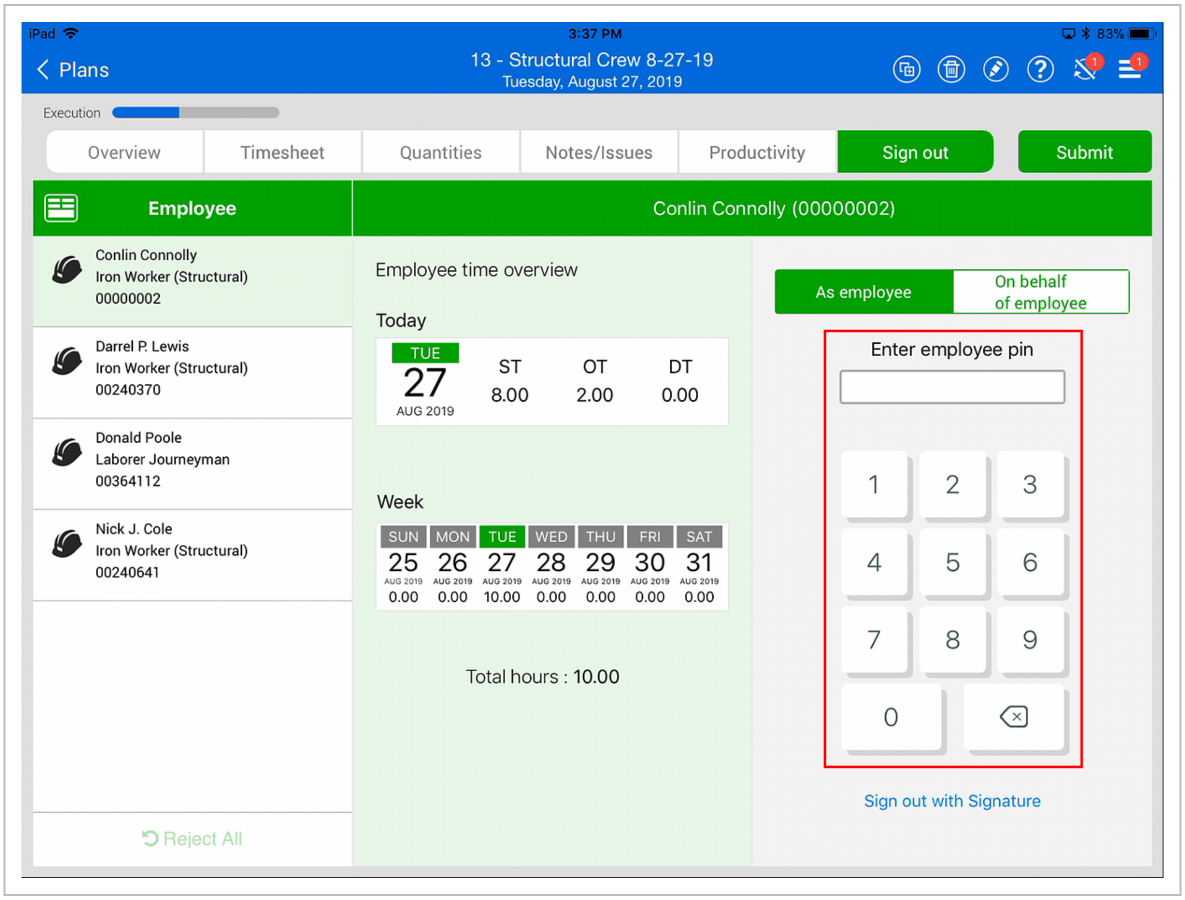


On the pop-up window, you can adjust the Shift start and Shift end values to reflect the hours worked by the crew. You can either save these changes once you've finished or cancel the operation.



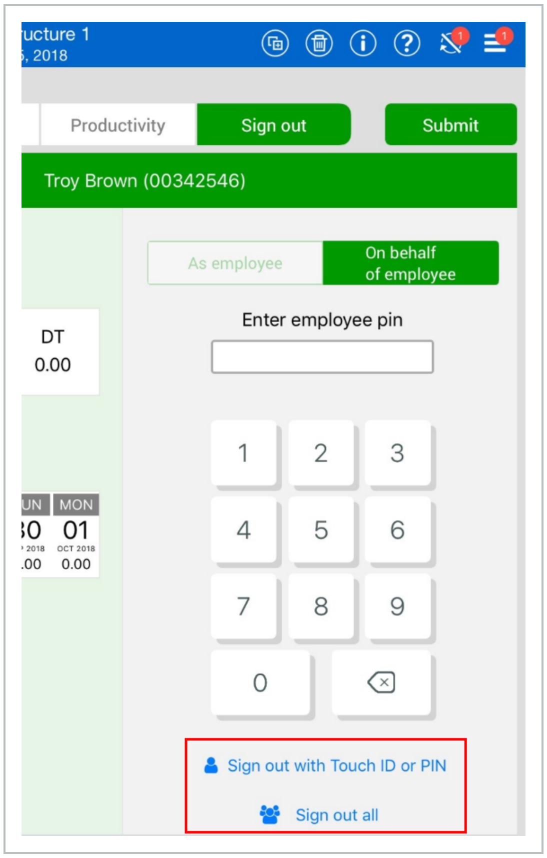
4.3.5.2 Employee Signout

For employees to sign out, they need to tap on their name. They review the hours input by the foreman before signing the card and, at that point, they can agree or disagree with the hours and negotiate them before signing out. Each employee must enter a PIN (personal information number) to sign out, which can be the birthdate of the employee or a number that the IT personnel has assigned. With the proper project settings enabled, there is also an option for them to sign out with signature.



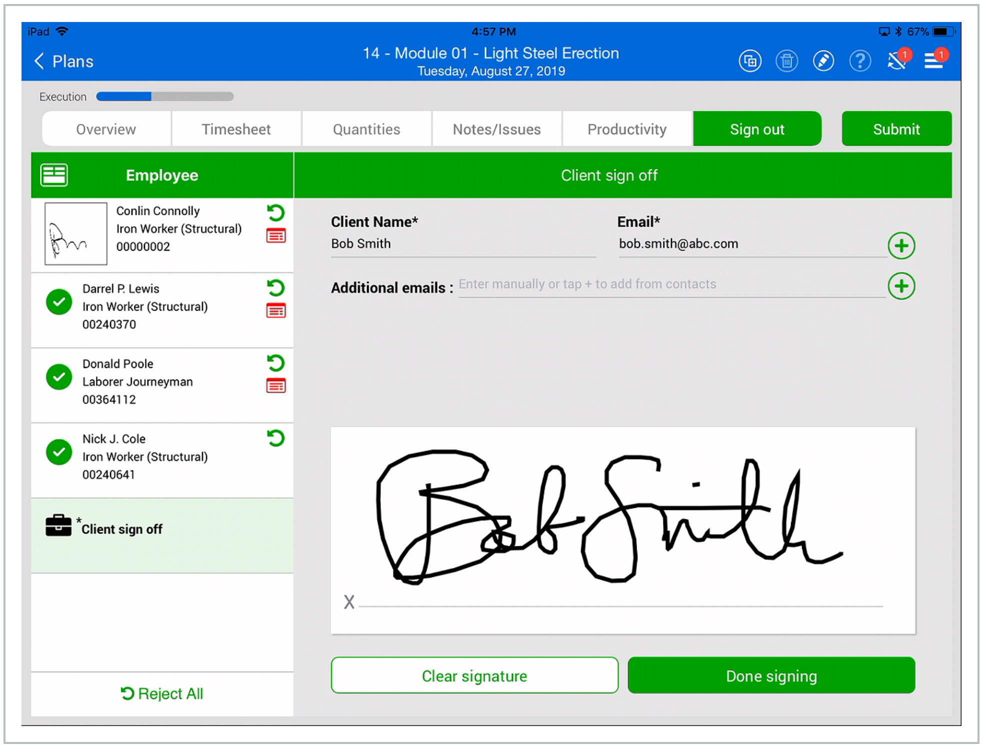
4.3.5.3 Signout on Behalf of Employee

You also have the option to sign out on behalf of employees by using Touch ID or PIN. In site work, this option makes the most sense. At the end of the shift, your crewmembers may be scattered throughout the job site. By signing out on their behalf, you are not taking them away from their work. As a field engineer, foreman, or other heavy user of the Progress mobile application, notice you can sign out for all employees at one time and use the electronic signature on the sign-out tab. engineer, foreman, or other heavy user of the Progress mobile



4.3.5.4 Client Signout

With the proper project settings enabled, you can include client signout on the Sign out tab, either as an optional or required field, so the client can sign off for the work completed that day.



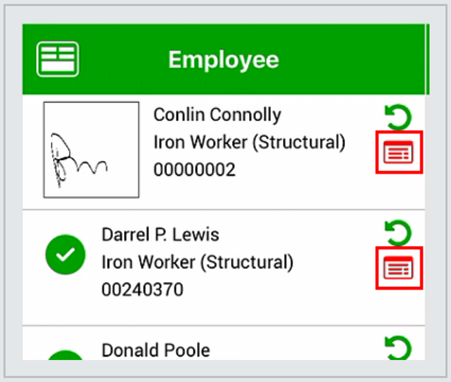
NOTE	The Client sign off will not become available (it will be greyed out) until all employees are signed out.

4.3.5.5 Compliance Questions

Upon sign out, you or your crewmember will be asked a set of compliance questions related to the work done that day. These questions are determined by management and set up for the job in the project settings by an administrator.

- For each question, you can answer “Yes” or “No”
- If you answer “No”, a screen appears with an area where you can put a note as to why you chose “No”
- You can select “No exceptions” if all answers are in the positive

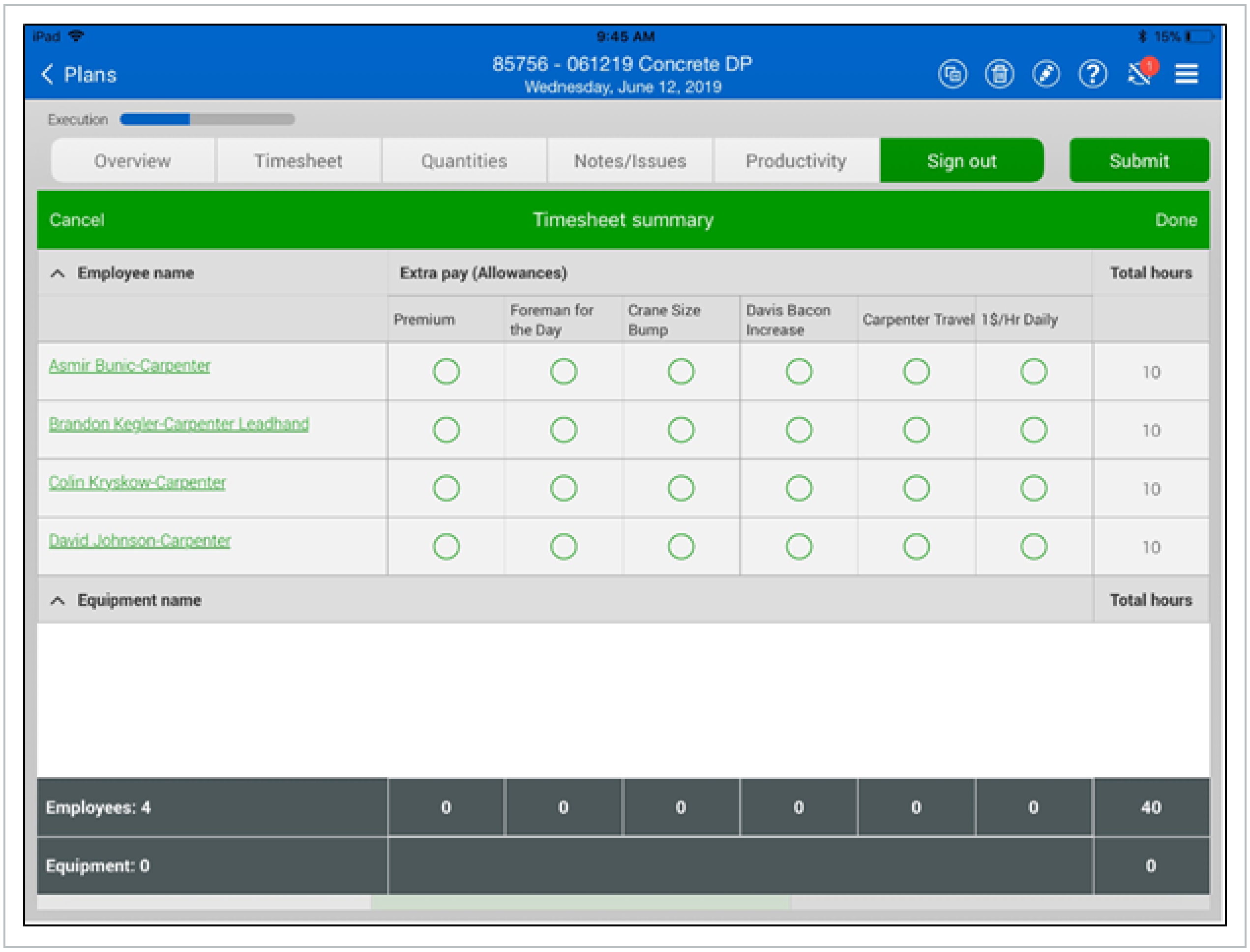
NOTE Employees that provide an answer that is out of compliance must provide a note, and a red Note indicator will display with the employee on the sign out tab.



After all employees complete the sign out, you must submit and synchronize the plan for the information from Progress to upload to Plan.

4.3.5.6 Timesheet Summary

As a foreman, you can review the Extra pay (allowances) allocated to each employee by selecting the **Timesheet summary** icon. This opens a Timesheet summary page that lists each employee and which of the available allowances they have for their timesheet.

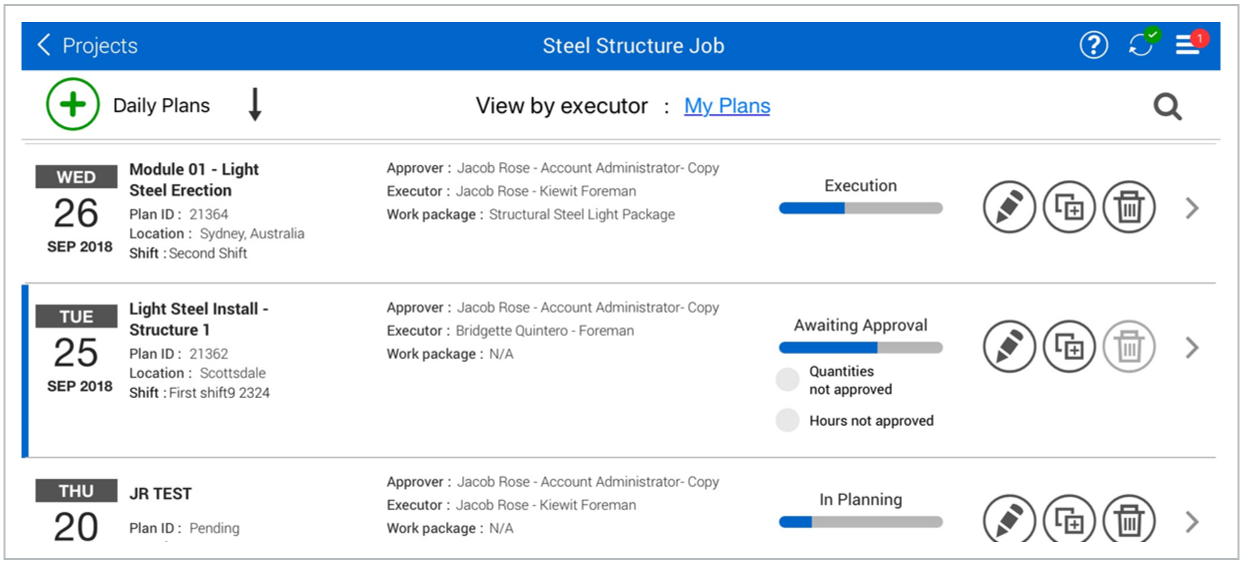


From this page, you can view, add and edit allowance allocations for each employee. As you do so, these changes will update automatically for each employee on the Timesheet and Notes/Issues tabs of the daily plan.

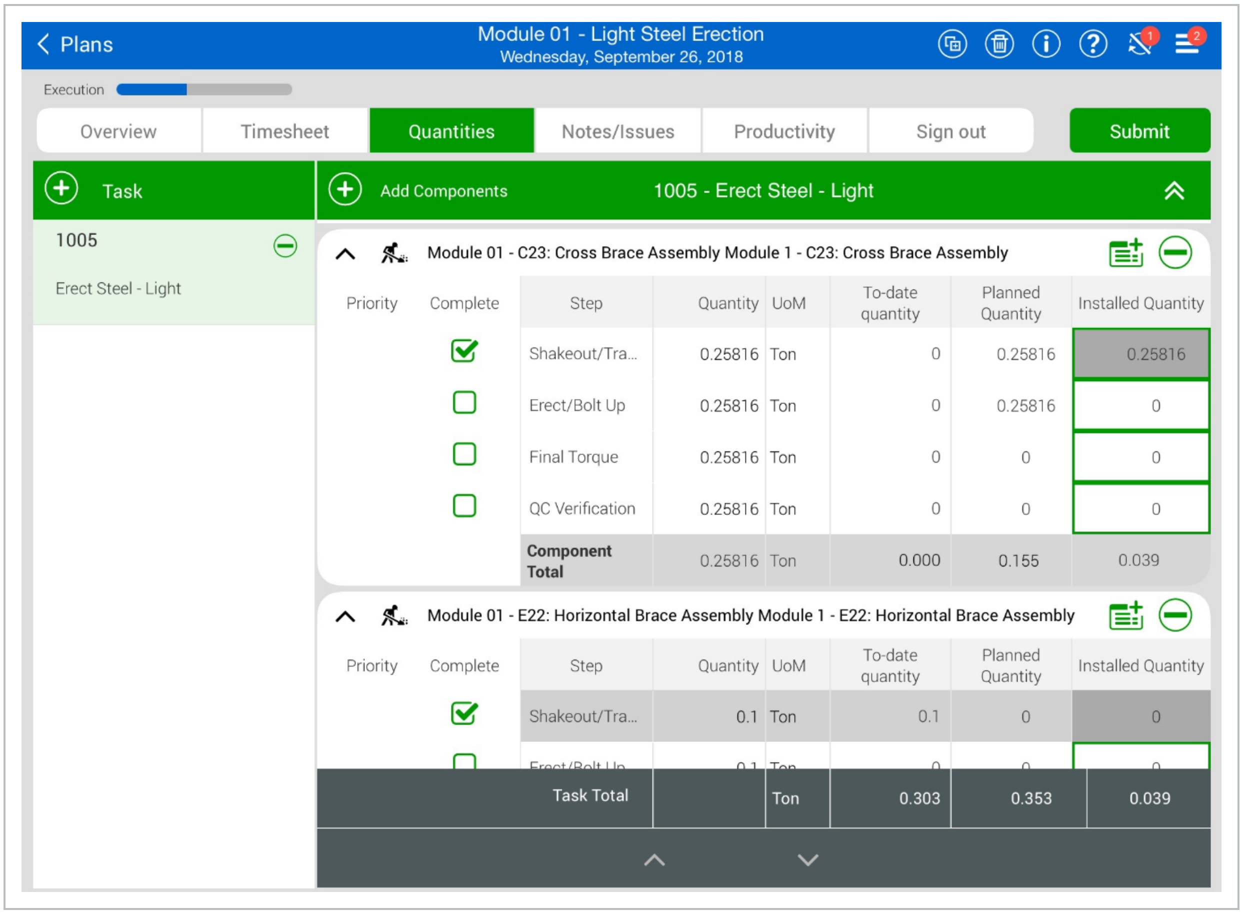
The following steps walk you through entering actuals into your daily plan in Progress.

4.3 Step by Step 1 — Input Actuals

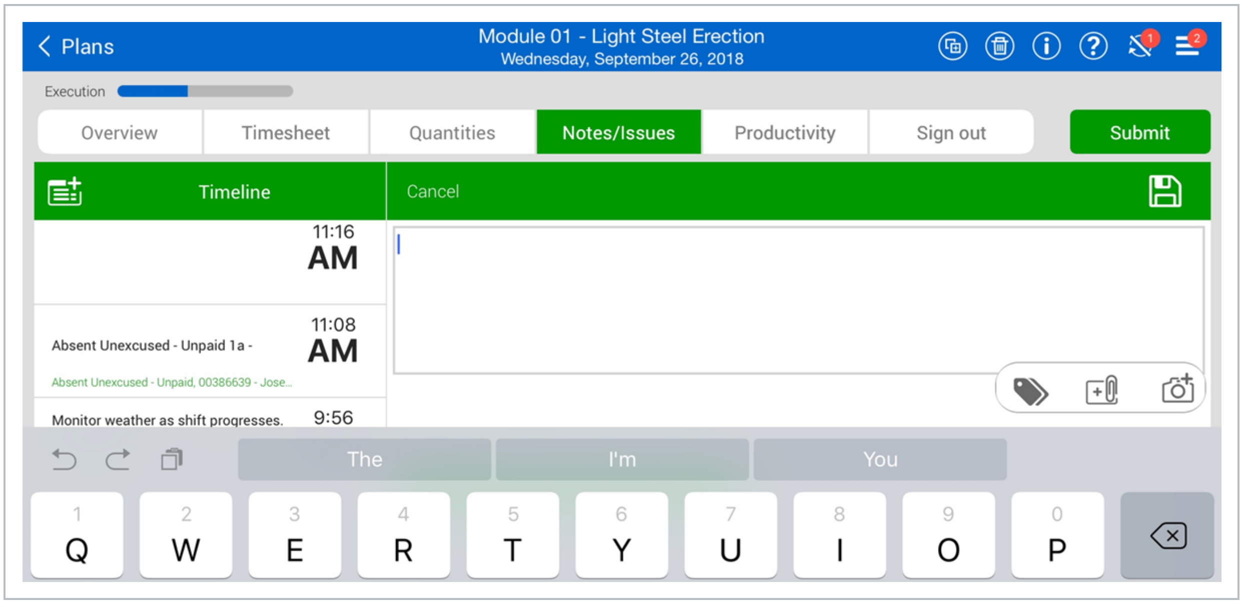
1. Open the Daily Plan you created in *Lesson 3*: **Module [your user number] – Light Steel Erection**.



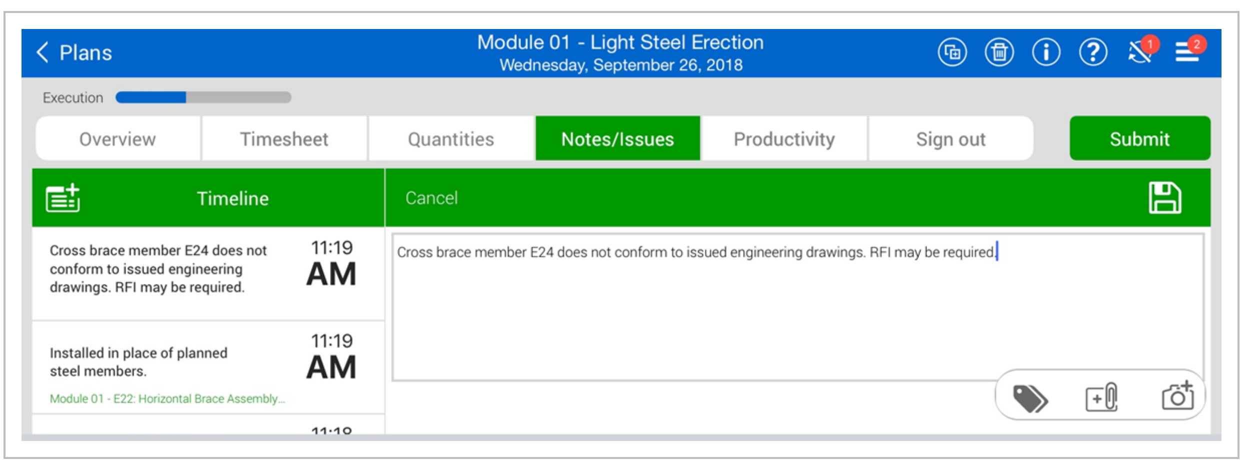
2. Tap on the **Timesheet** tab.
3. Input hours for all your employees and equipment.
4. Tap on the **Quantities** tab.
    - You will see the component assigned to the task from the planning phase
5. Select component **Module [your user number] – C23: Cross Brace Assembly Module [your number] – C23: Cross Brace Assembly**, check the following:
    - Shakeout/ Transport



6. Repeat for all components.
7. Tap the Complete box for Erect/Bolt up for the following steel members:
   - C23
   - D23
   - B23
   - A23
   - E22
8. Tap the Note  icon for component **Module [your user number] – B23: Cross Brace Assembly Module [your number] – B23: Cross Brace Assembly**.

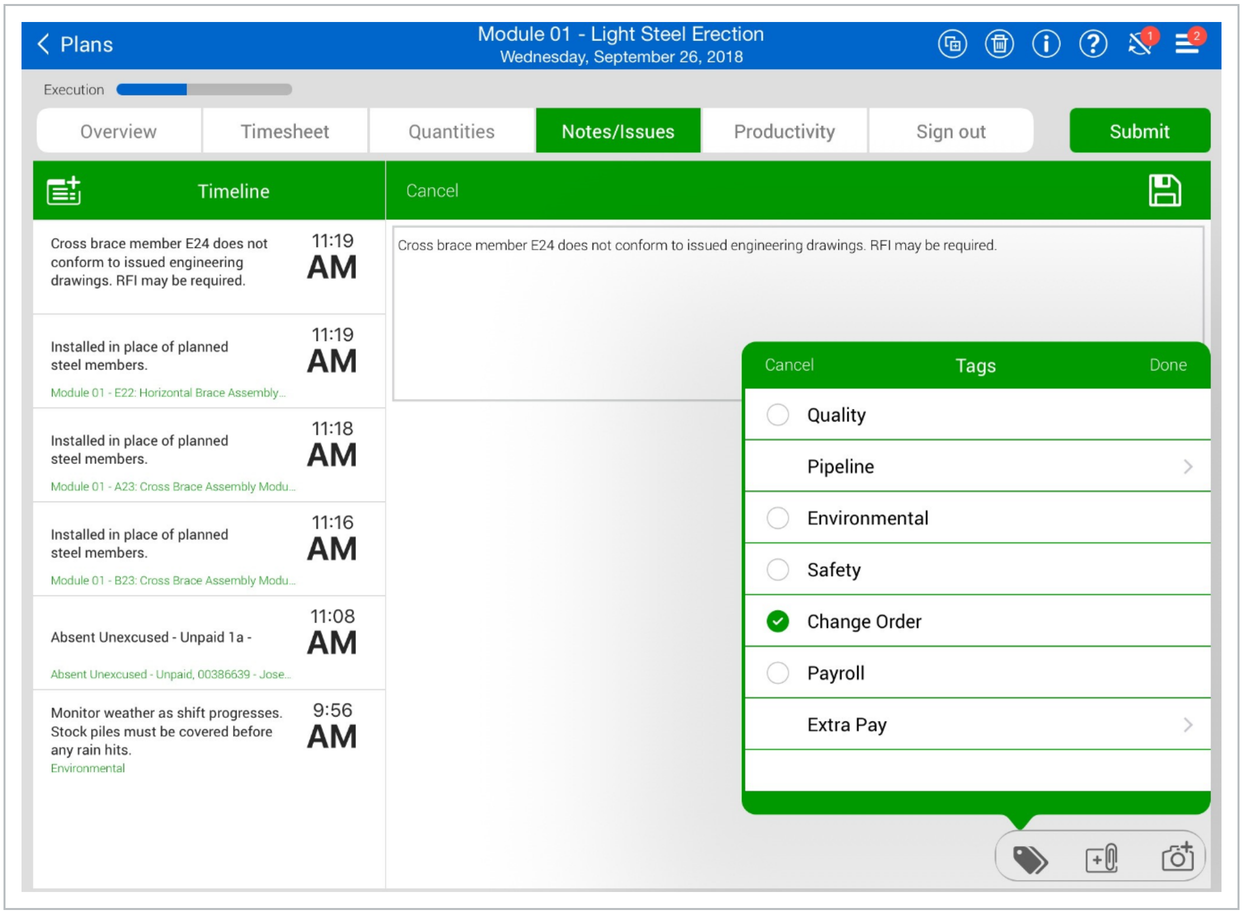


9. In the text field type **Installed in place of planned steel members**.
10. Tap the Save icon to return to the Quantities tab.
11. Repeat for steel members A23 & E22.
12. Tap on the **Notes/Issues** tab.
13. Tap on the  icon to add a new note
14. In the text field type: **Cross brace member, E24, does not conform to issued engineering drawings. RFI may be required.**



15. Tap the icon and tag the Note: **Change Order**.

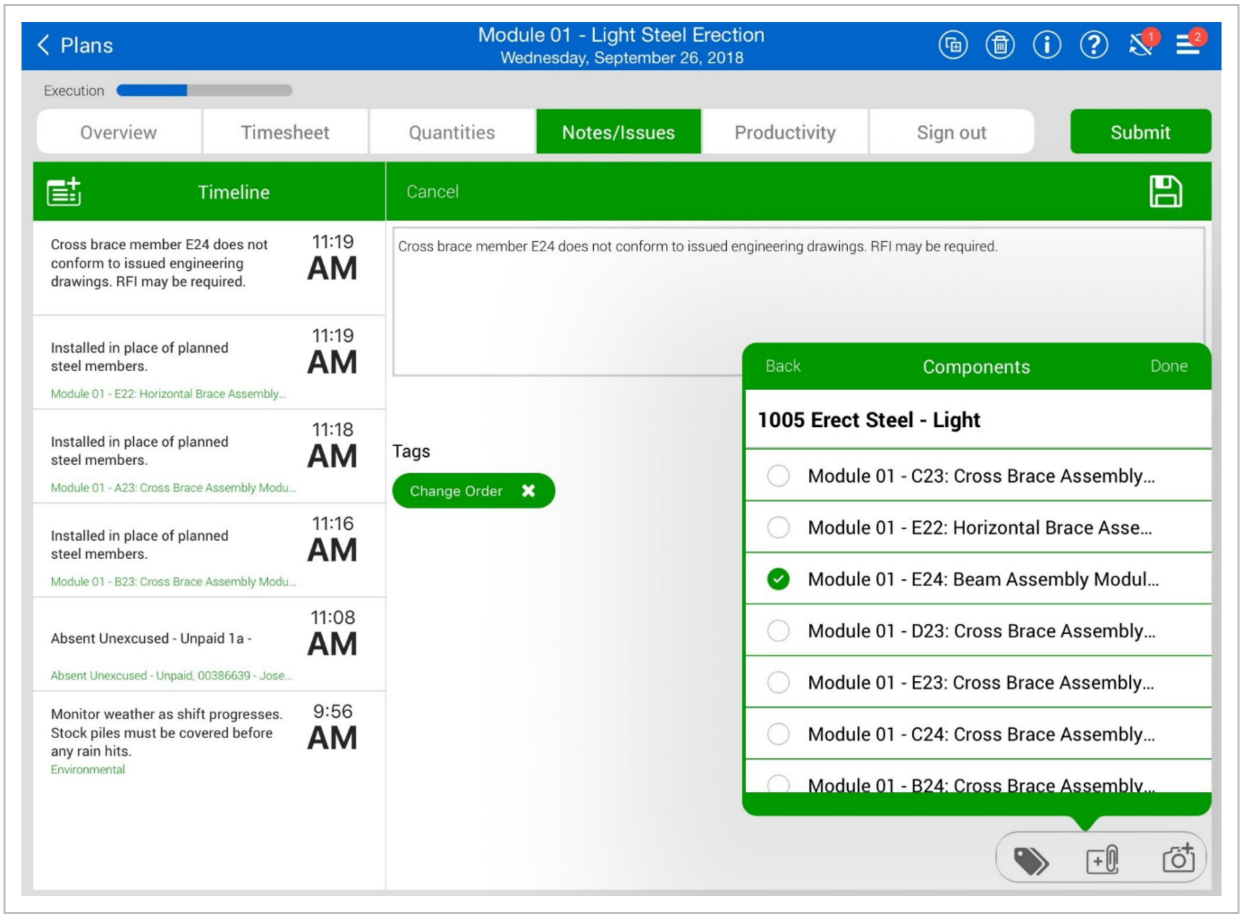
16. Select **Done**.



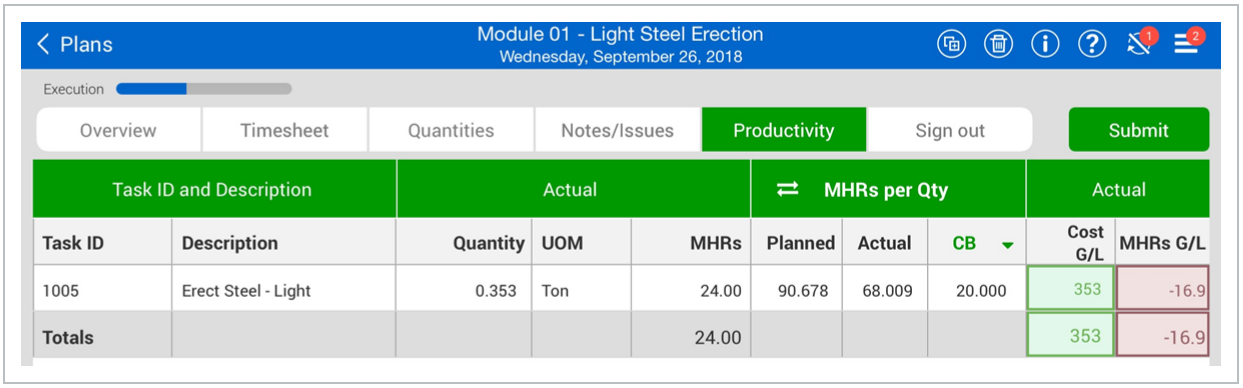
17. To associate the note with the E24 component, tap the  icon, then select **Components**.

18. Select **Module [your user number] – E24: Beam Assembly Module [your number] – E24: Beam Assembly**.

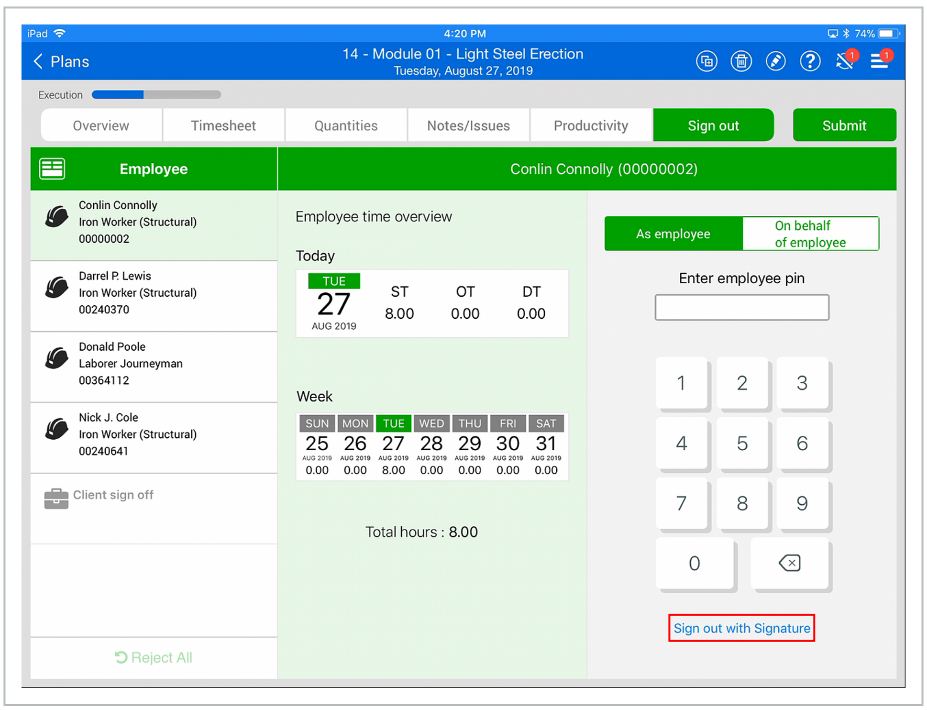
19. Select **Done**.



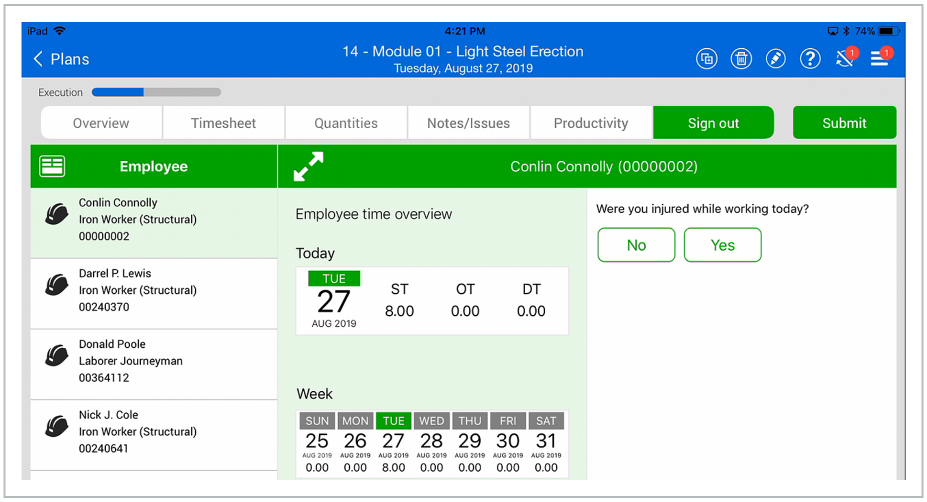
20. Tap the icon to add a photo to the note.
21. Tap **Use Camera** and take a picture using the iPad camera.
22. Make markups and add text.
23. Tap **Done** to add the picture to the Note.
24. Repeat for steel member E23.
25. Review the Productivity tab.
    - Check to see if you are gaining or losing man hours and what your actuals are compared to the planned and budget columns



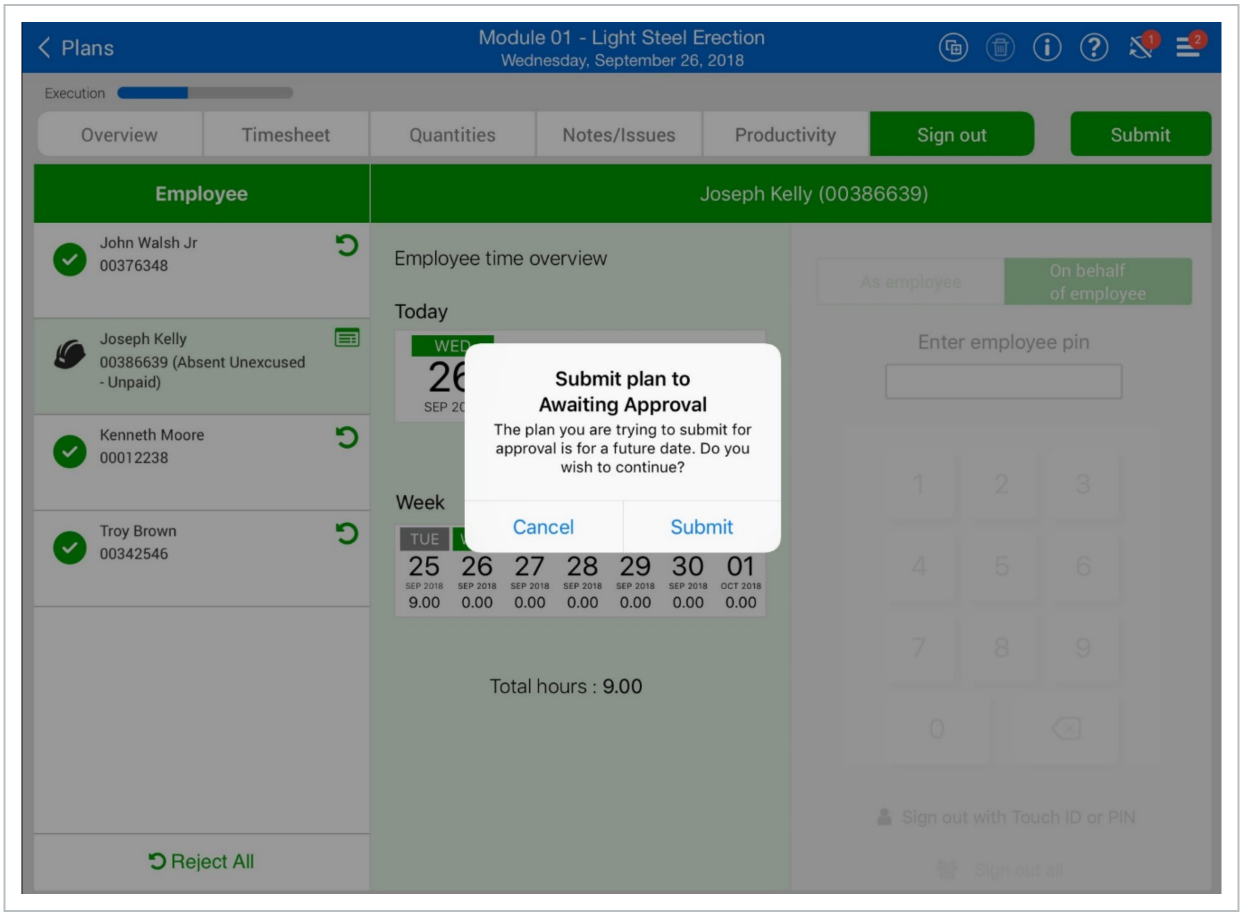
26. Tap on the **Sign out** tab.
27. Sign out each employee by selecting **On Behalf of Employee**.
28. Tap on **Sign out with Touch ID or PIN**.



29. Enter the ID number for your iPad.
    - The first name in the employee list is automatically highlighted and the list of compliance questions is shown
    - These compliance questions are usually set by management. They are set up in the project settings
30. Tap **No** to answer that you were not injured while working today.



31. Tap **Done**.
32. Repeat Steps 33-34 for all employees.
33. Tap **Submit** to submit the plan to the approval phase.
    - Progress will automatically sync when the plan is submitted. This sync must be successful for it to show up in the InEight Progress web application


Plans
Module 01 - Light Steel Erection
Wednesday, September 26, 2018
Execution
Overview
Timesheet
Quantities
Notes/Issues
Productivity
Sign out
Submit
Employee
Joseph Kelly (00386639)
John Walsh Jr
00376348
Joseph Kelly
00386639 (Absent Unexcused - Unpaid)
Kenneth Moore
00012238
Troy Brown
00342546
Reject All
Employee time overview
Today
Week
Total hours : 9.00
Submit plan to Awaiting Approval
The plan you are trying to submit for approval is for a future date. Do you wish to continue?
Cancel
Submit
Enter employee pin

Exercise 4.1 — Input Actuals

Now that you have learned some basic functions of daily plan execution, put your skills to the test and see if you can complete some basic functions on your own.

1. Open the daily plan you created in the previous lesson (Exercise 3.1)
2. Review and edit the hours for the employees and equipment.
3. Review and add or remove tasks and components as necessary.
4. Review the Notes/Issues tab and add a note or issue.
5. Tag and associate the note to a category.
6. Review the Productivity tab.
7. Check the Planned, Actuals, and Budgeted quantities and man-hours
8. Sign out for your employees.

Congratulations, you have completed this exercise!

Lesson 4 Review

1. In the Quantities tab, aside from adding tasks, what can you do?
    a. Add components and temporary components
    b. Add notes
    c. Add claiming steps to components
    d. Both a and b

---

2. In which tab can you add tags, associations, and pictures?
    a. Overview tab
    b. Timesheet tab
    c. Quantities tab
    d. Notes/Issues tab

---

3. In the Productivity tab, which metrics can you compare against Actual MHRs per Qty?
    a. Current Estimate MHRs per Quantity
    b. Current Budget MHRs per Quantity
    c. Planned MHRs per Quantity
    d. All of the above

Lesson 4 Summary

As a result of this lesson, you can:

- Review the daily plan
- Input actuals into the daily plan
- Sign out

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LESSON 5 – DAILY PLAN APPROVAL

Lesson Duration: 30 minutes

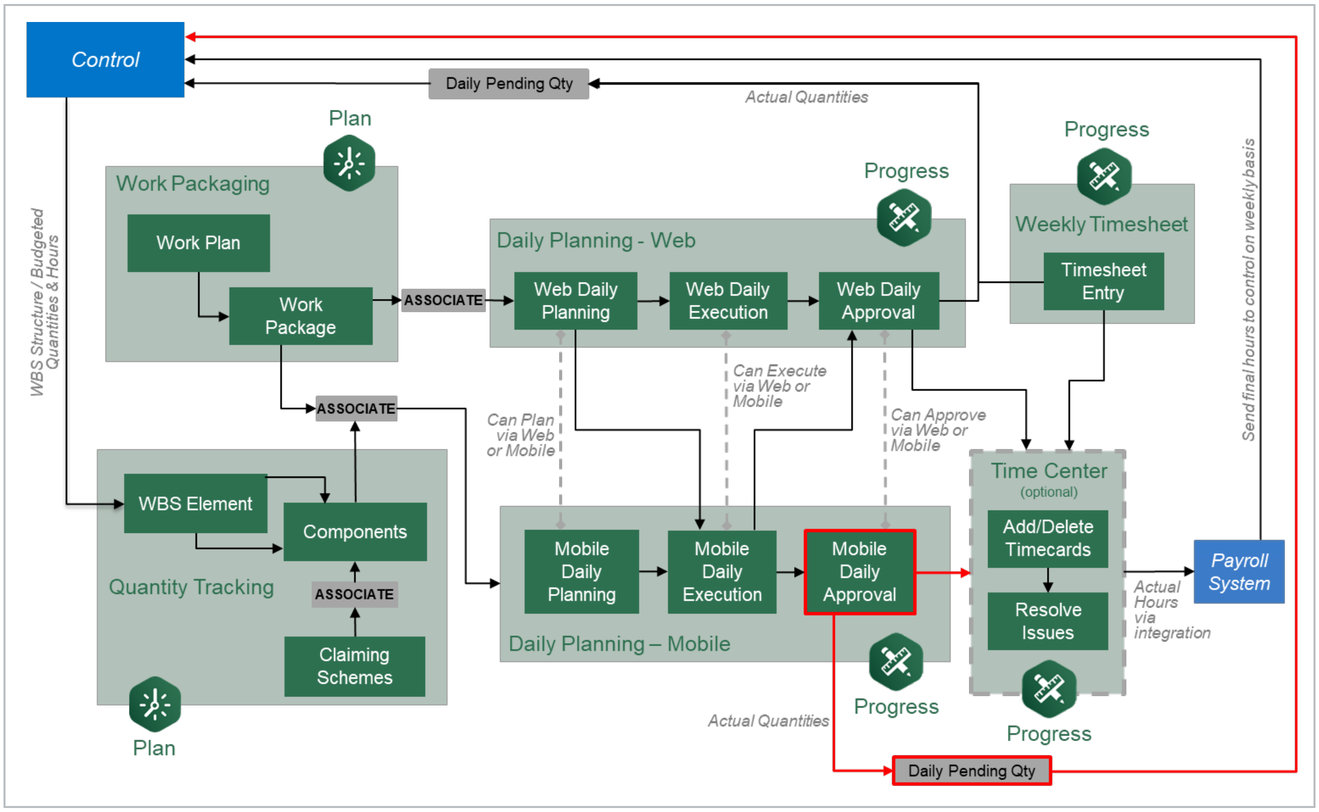
Lesson Objectives

After completing this lesson, you will be able to:

- Review actuals
- Approve daily plans

Lesson Topics

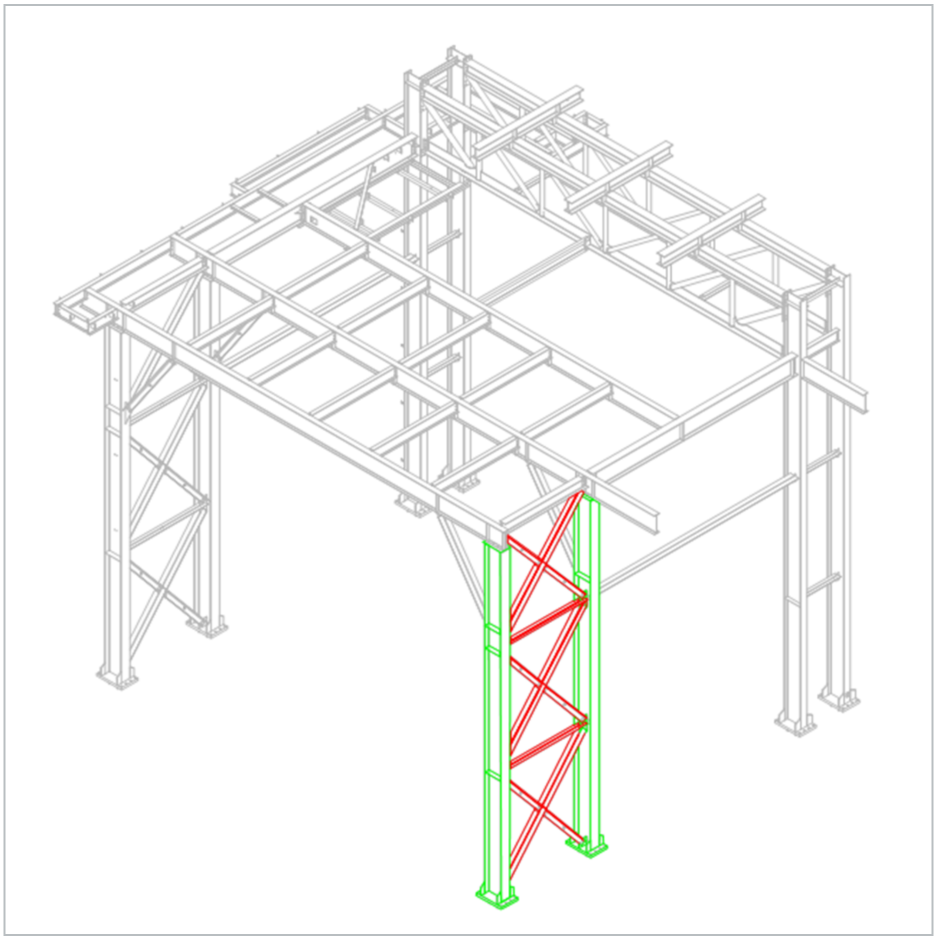
5.1 INEIGHT PROGRESS WORKFLOW - DAILY PLAN APPROVAL MOBILE



5.2 REVIEW ACTUALS

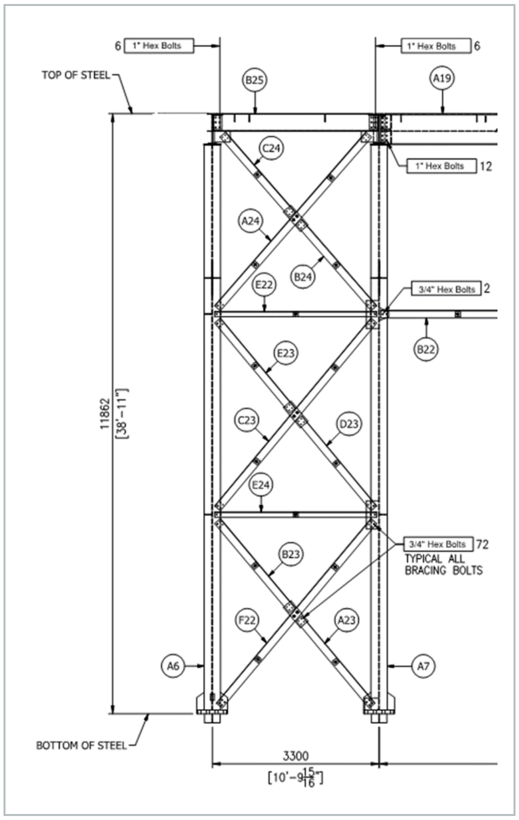
Scenario

> Your plan to install the horizontal and cross member assemblies (red columns) has been executed and sent for approval.



As a reminder, the steel members you will be installing are:

- *A23*
- *A24*
- *B23*
- *B24*
- *C23*
- *C24*
- *D23*
- *E22*
- *E23*
- *E24*
- *F22*



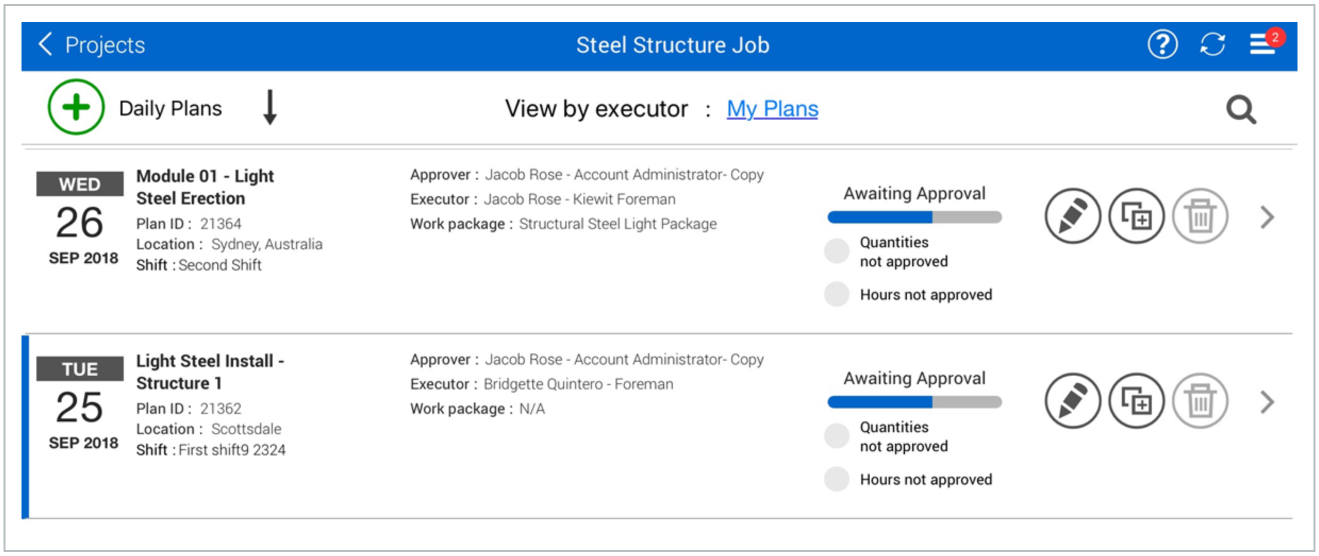
The plan was to shakeout and transport the steel members by 1/2 ton pickup truck to the work area. You also planned to erect and bolt up members C23, D23, E23, and E24.

After verifying the steel members with their respective drawings, it was noted that members E23 and E24 had dimensions that did not match the drawings. The foreman created a note to communicate this discrepancy back to the approver. Instead of installing E23 and E24, the crew went ahead and installed B23, A23, and F22.

One of your employees was asked to be Foreman for the day when the original foreman did not show up for work. The new Foreman also worked 2 extra hours to help the field engineer develop the RFI. The plan will have to be revised to reflect these changes.

Once a daily plan has been executed and synchronized, the final step before the daily plan is approved is reviewing the actuals. This last review is extremely important; it is the last chance to verify all actual values input during the Execution Phase are correct, and if there are any mistakes this is the last opportunity to correct them.

TIP In Progress, the daily plan's status in the plan list will change from Execution to Awaiting Approval once submitted for approval. The plan color will then revert to blue.

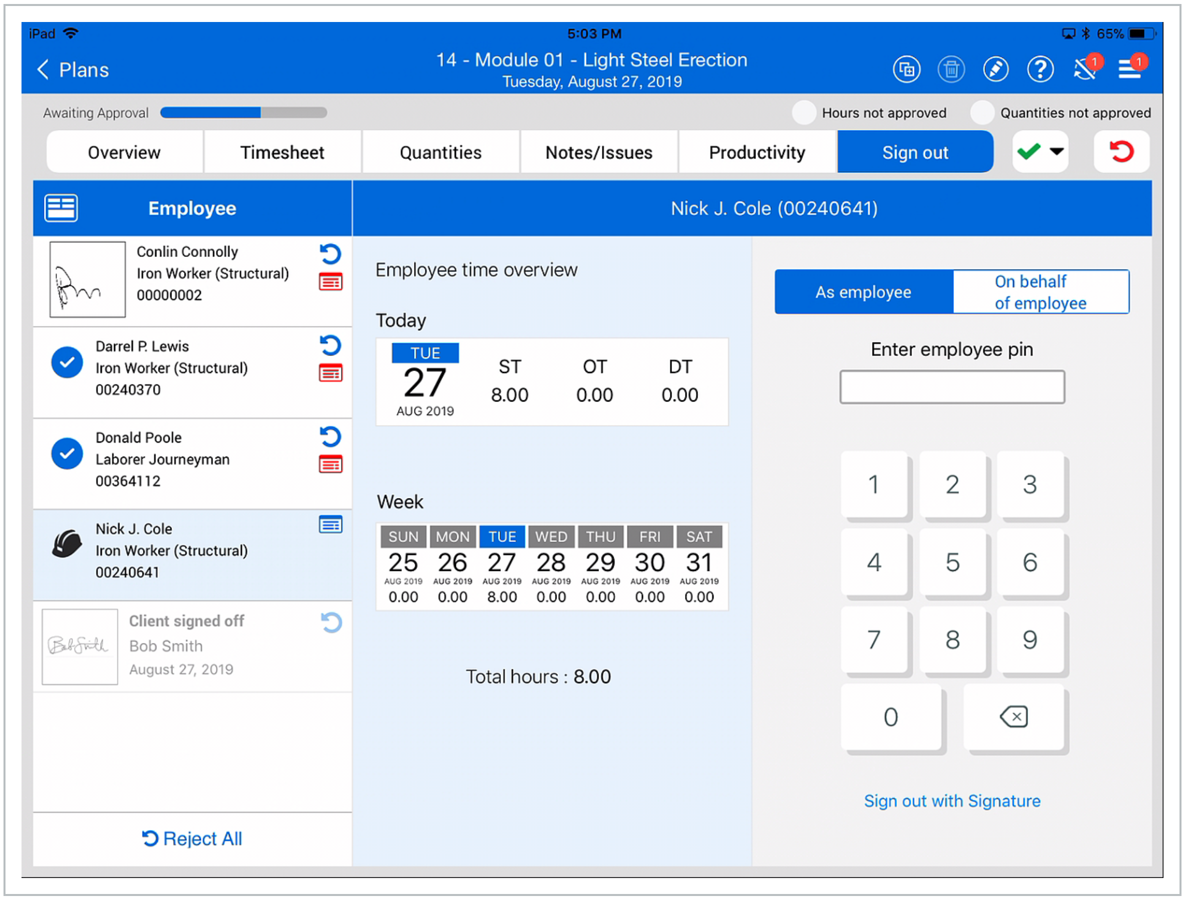


In the Awaiting Approval Phase, a daily plan will have six tabs (same as the Execution Phase) :

- Overview
- Timesheet
- Quantities
- Notes/Issues
- Productivity
- Sign Out

The first five tabs, (Overview, Timesheet, Quantities, Notes/Issues, and Productivity), in the Awaiting Approval Phase are identical to their respective tabs in the Execution Phase. All information entered, edited, or removed in the Execution Phase will be reflected in the Awaiting Approval Phase. Furthermore, the Awaiting Approval Phase has the same level of editing on the previously discussed tabs as the Execution Phase does.

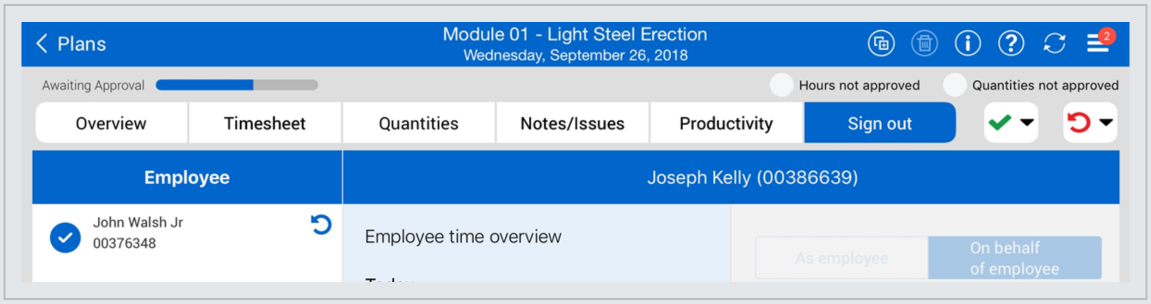
On the Sign Out tab, you will now be able to review the submitted time for each employee on the crew, as well as previously approved hours for the week, and the answered compliance questions. At this point, you are also able to make changes to an employee's hours by rejecting an employee's sign out. If you are completely unsatisfied with the plan, you have the option to reject the plan and send it back to execution for editing.



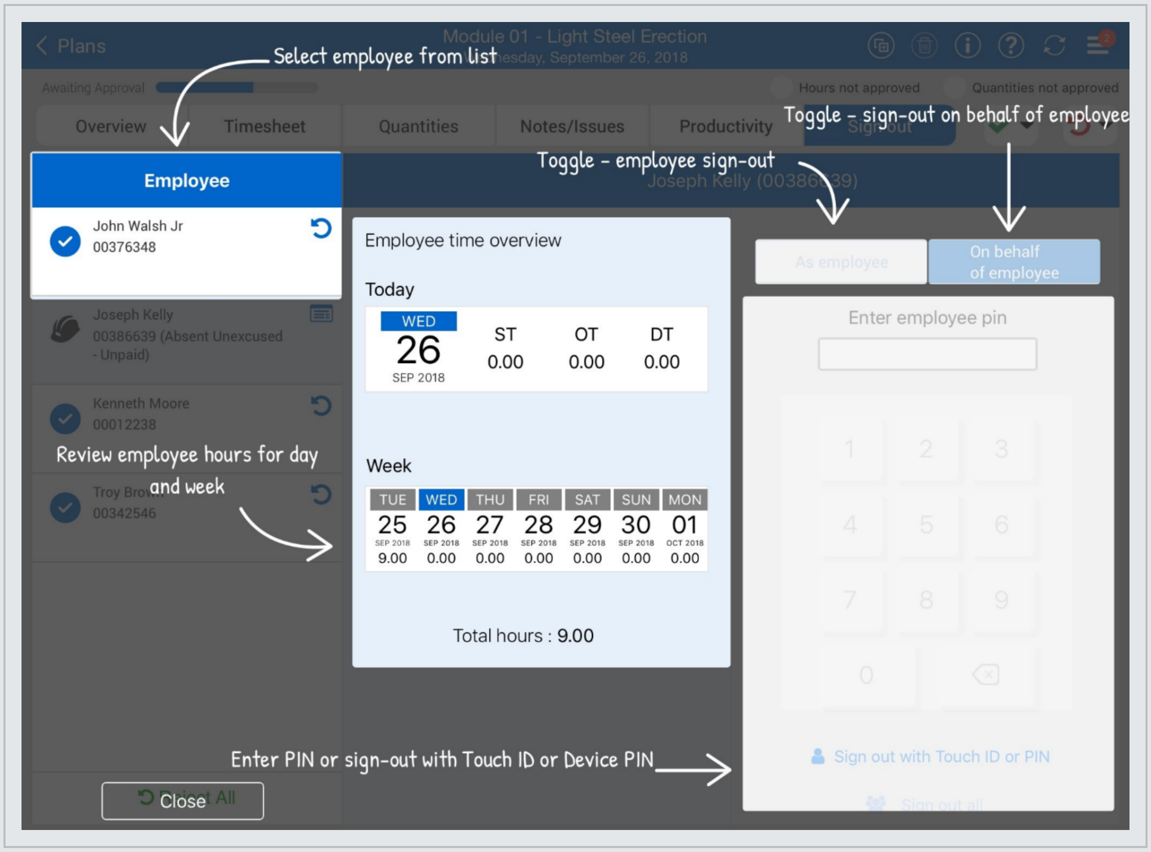
14 - Module 01 - Light Steel Erection
Tuesday, August 27, 2019
Plans
Awaiting Approval
Hours not approved
Quantities not approved
Overview
Timesheet
Quantities
Notes/Issues
Productivity
Sign out
Employee
Nick J. Cole (00240641)
Conlin Connolly
Iron Worker (Structural)
00000002
Darrel P. Lewis
Iron Worker (Structural)
00240370
Donald Poole
Laborer Journeyman
00364112
Nick J. Cole
Iron Worker (Structural)
00240641
Client signed off
Bob Smith
August 27, 2019
Reject All
Employee time overview
Today
TUE 27 AUG 2019
ST 8.00
OT 0.00
DT 0.00
Week
SUN 25 0.00
MON 26 0.00
TUE 27 8.00
WED 28 0.00
THU 29 0.00
FRI 30 0.00
SAT 31 0.00
Total hours : 8.00
As employee
On behalf of employee
Enter employee pin
Sign out with Signature

TIP

In Progress, from any screen, you can access the help screen by pressing the button. This is located in the upper right hand side of the application.



Once selected, the help screen will look like the following:



Select the close button at the bottom of your screen to close the help screen.

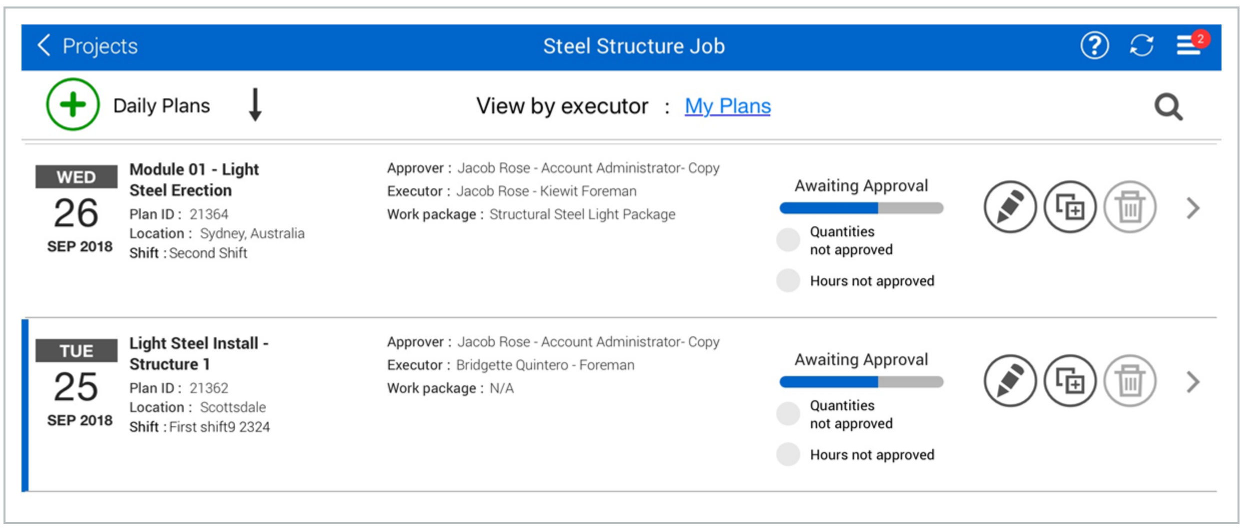
5.2.1 Edit Submitted Daily Plan

Reviewing a plan once executed is an integral step in the approval process. You can make changes to the plan, such as rejecting an employee's hours, modifying them, and then signing the employee back out.

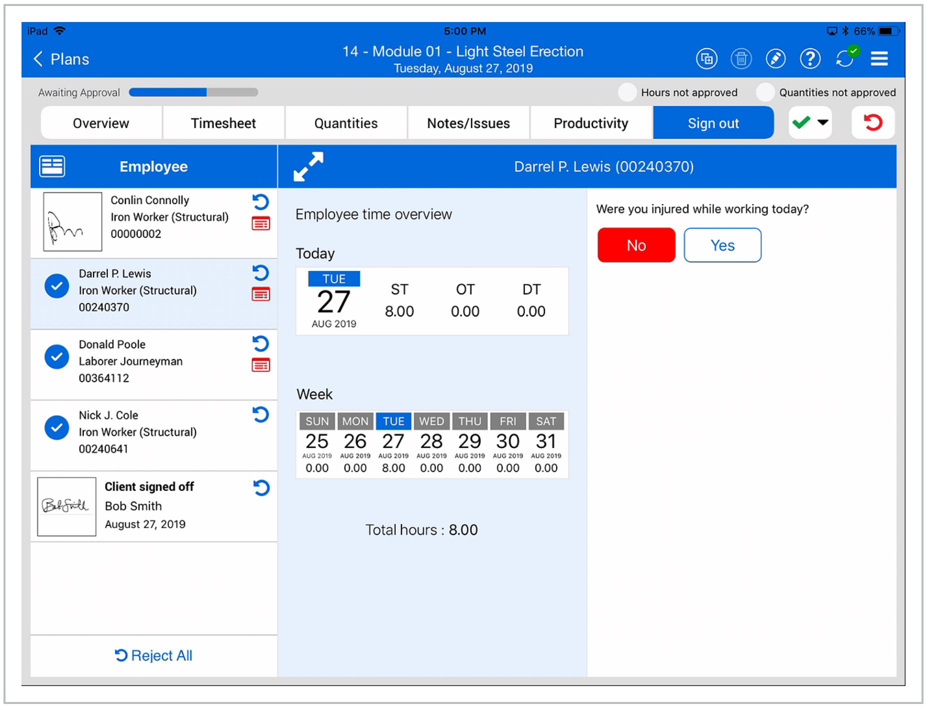
The following Step by Step walks you through how to reject an employee's sign out, modify their actual hours and re-sign them out on their behalf.

5.2 Step by Step 1 — Adjust the Hours of a Signed Out Employee

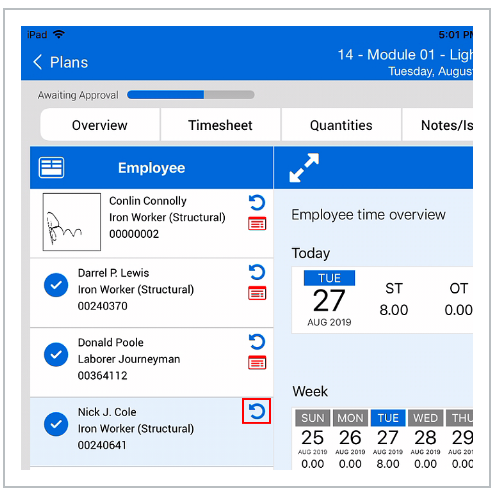
1. From the Daily Plans page, open the Daily Plan you created in Lesson 3: **Module [your user number] – Light Steel Erection**.



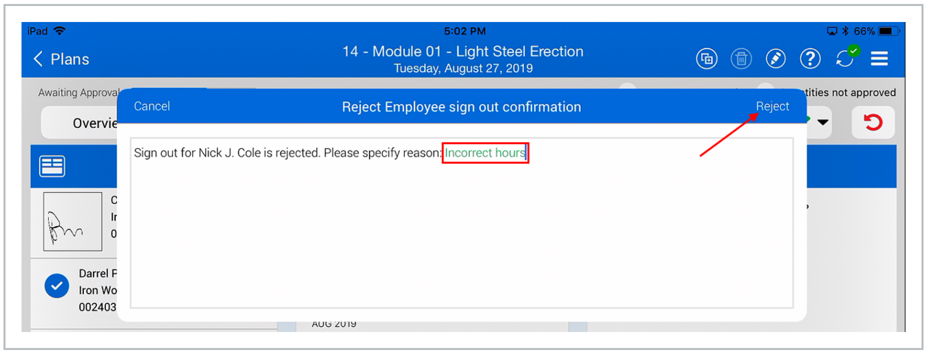
2. Tap on the **Sign Out** tab.



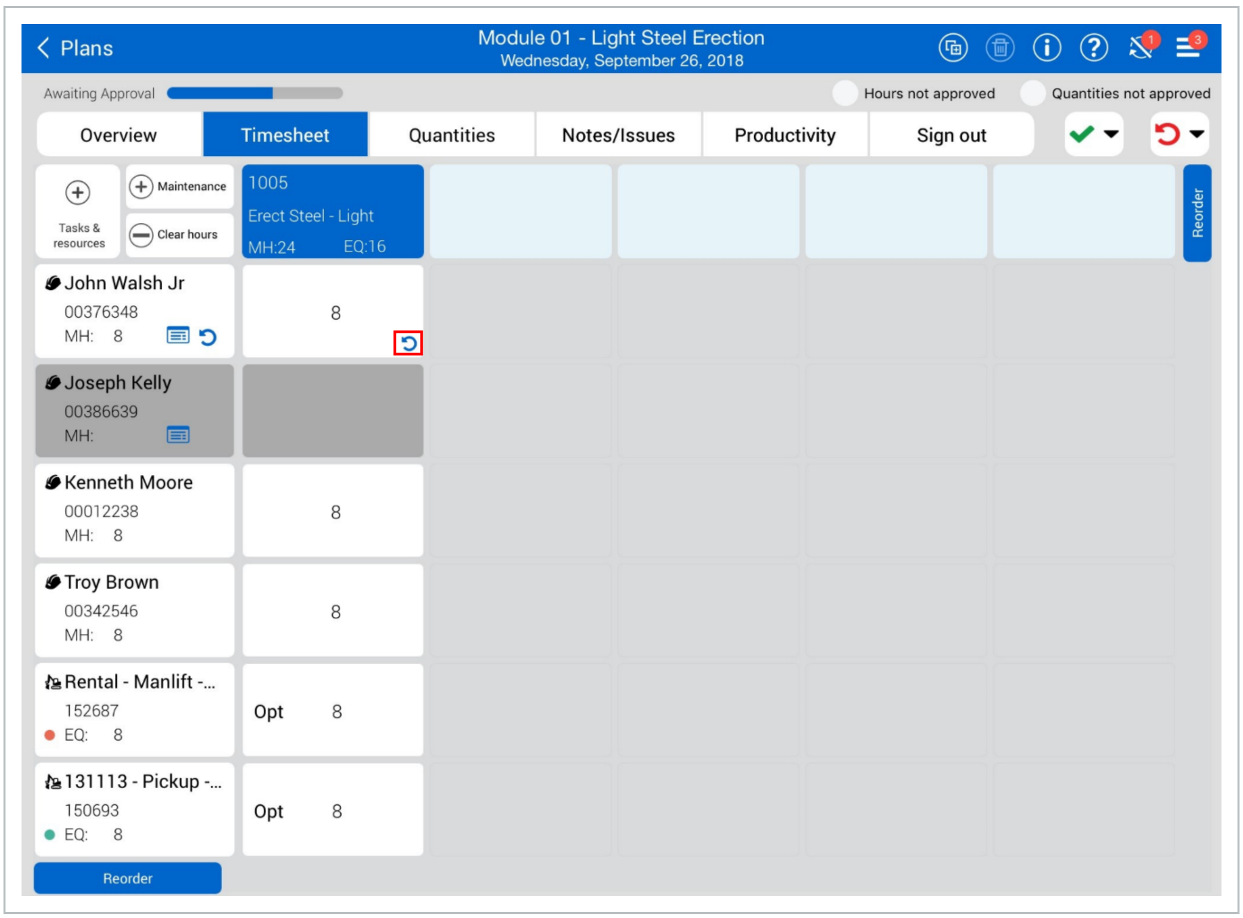
3. Tap the **Reject**  button for one of your employees.



4. Type a reason for rejection and then tap **Reject**.

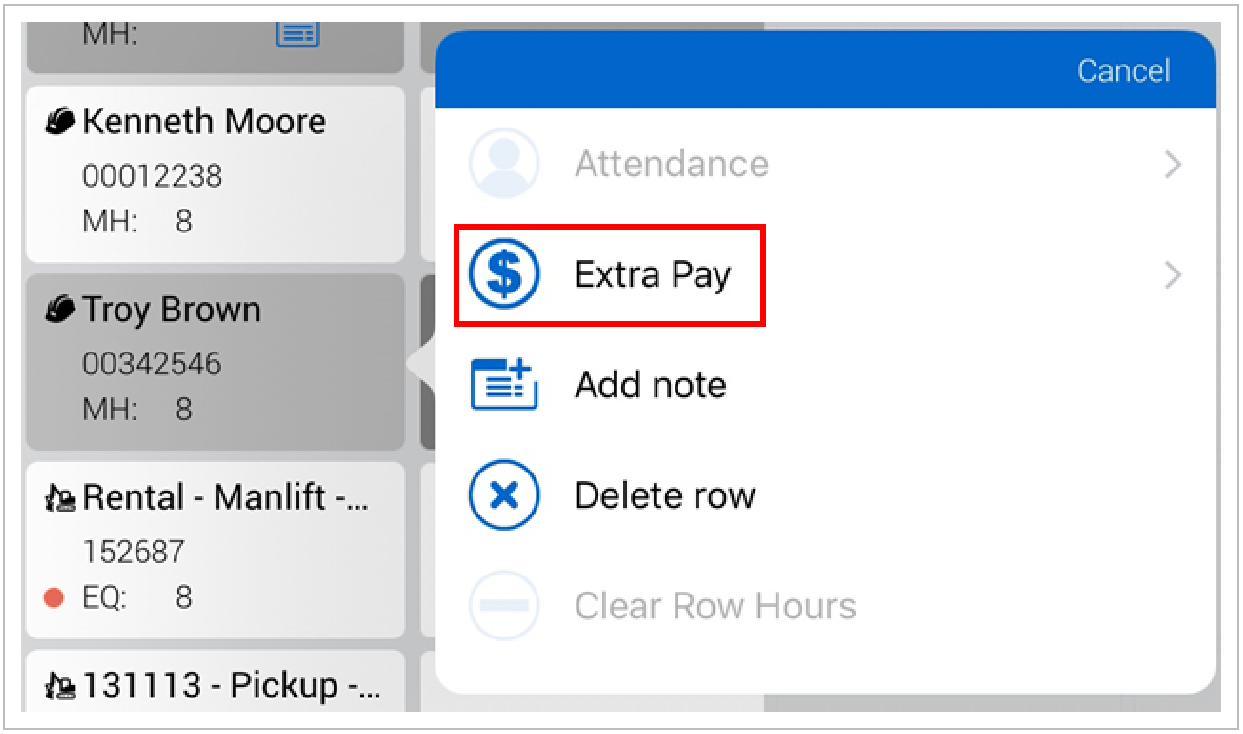


5. Tap on the **Timesheet** tab
6. Tap in the hours entry area for task 1005 Erect Steel - Light and the employee of which you rejected his hours.
   - You can tell which hours have been rejected by the **Reject** icon 

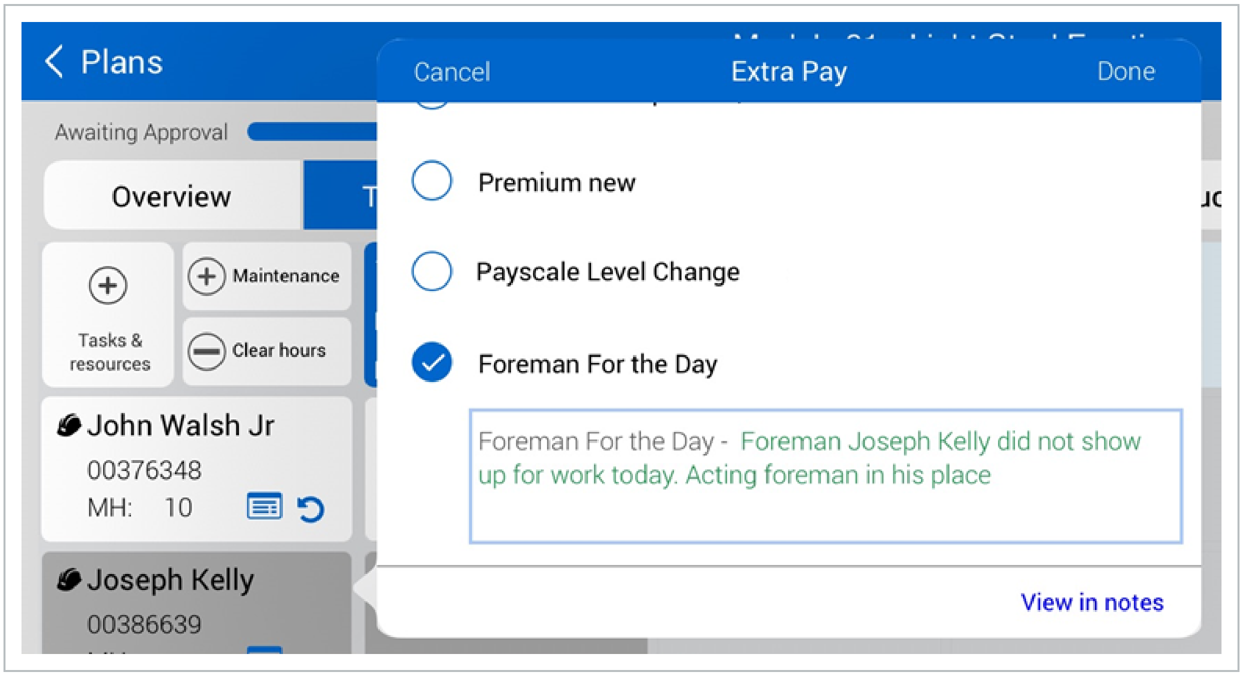


7. Enter **10** hours in the OT box.

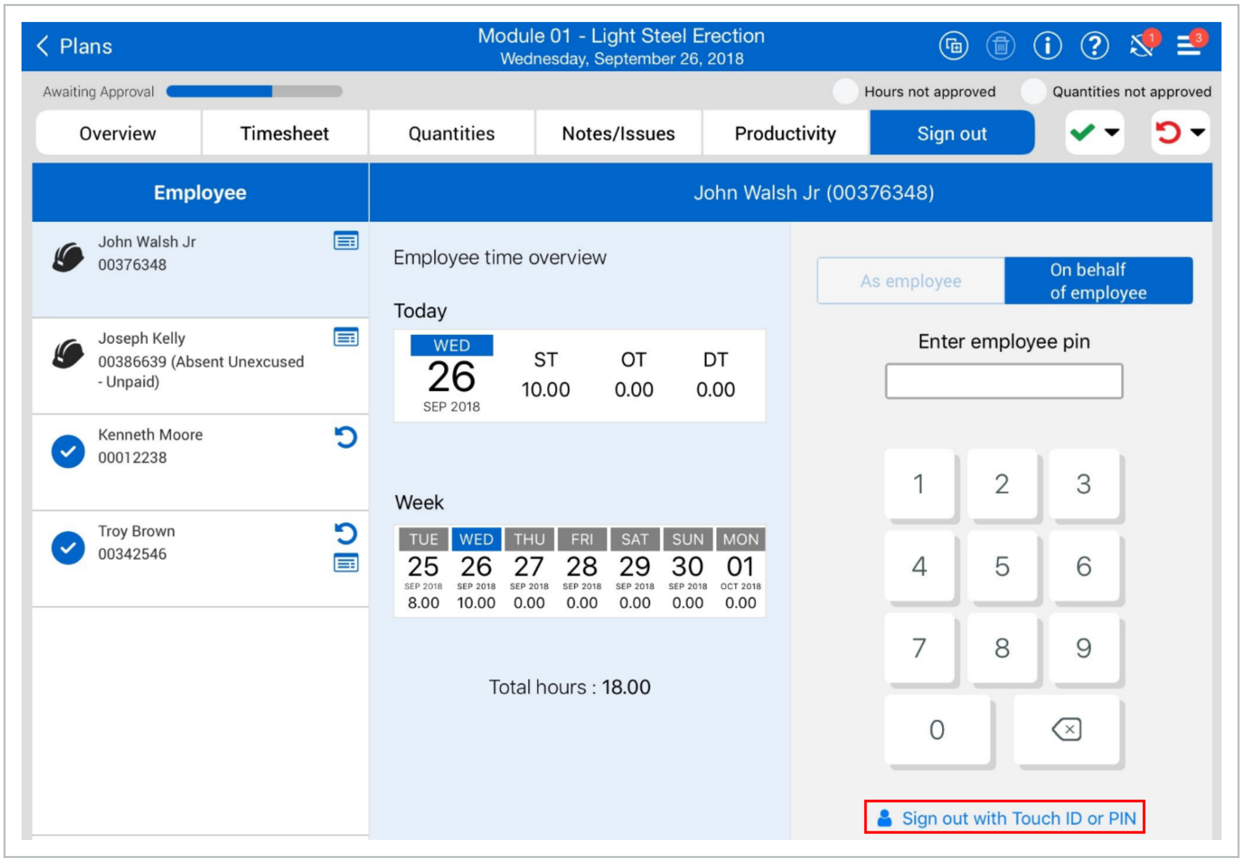
8. Tap **Done**.
9. Tap on one of your employees and select **Extra Pay**.



10. Select **Foreman for the Day** and type in the following note: **Foreman did not show up for work today. Acting foreman in his place.**



11. Select **Done**.
12. Tap on the **Sign out** tab.
13. Select the top employee from the employee list on the left
14. Select **On behalf of Employee** and then **Sign out with Touch ID or PIN**.



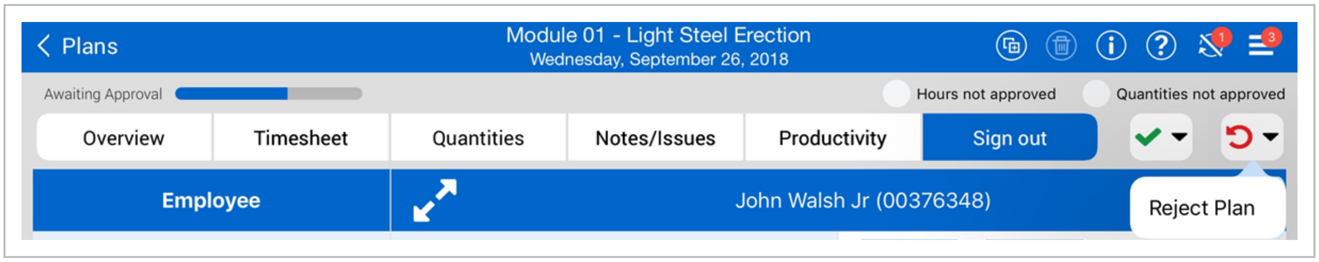
15. Enter the passcode for your iPad.

16. Answer the compliance question with **No**.
17. Tap **Done**.

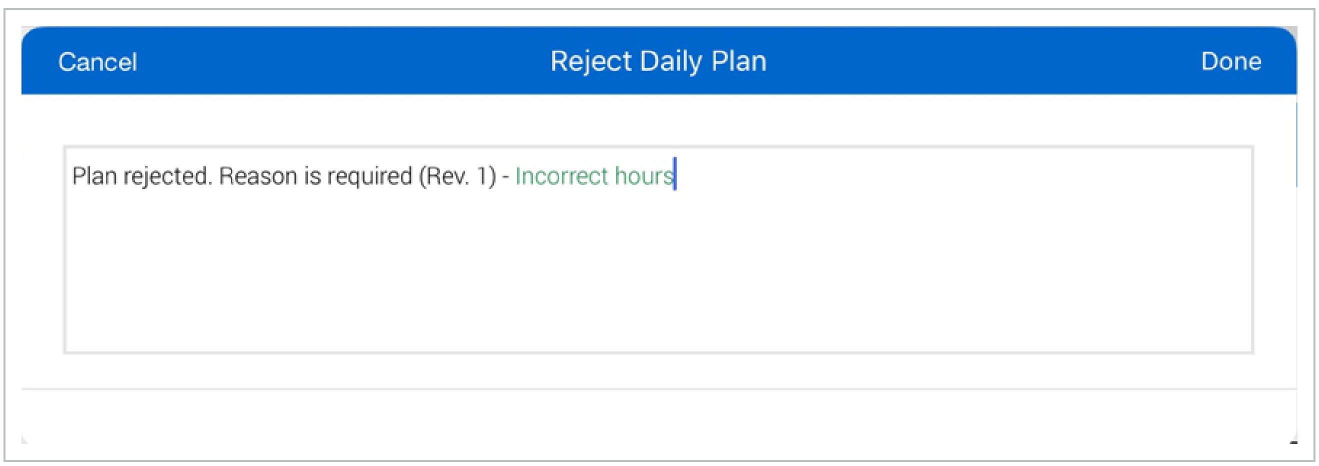
5.2.2 Reject a Daily Plan

While reviewing a daily plan, you may notice that there has been mistake with all the employees' hours. You can go through and fix the mistake individually as per the previous Step by Step, or you have the option to reject the whole plan. Rejecting the plan will put the plan back into the Execution Phase. The foreman will then be responsible to make any changes.

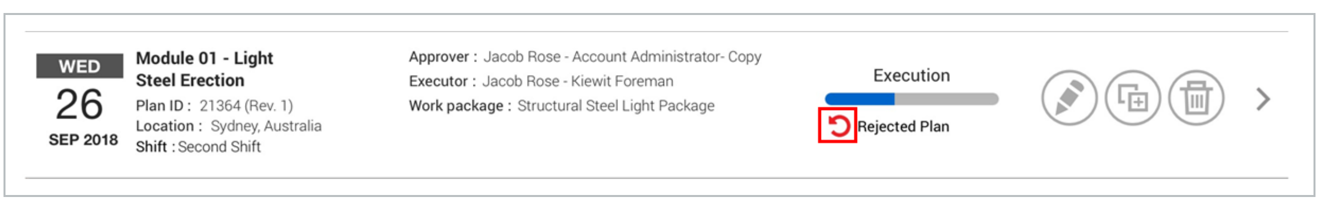
On any of the six tabs, to reject a plan select the  icon and then Reject Plan.



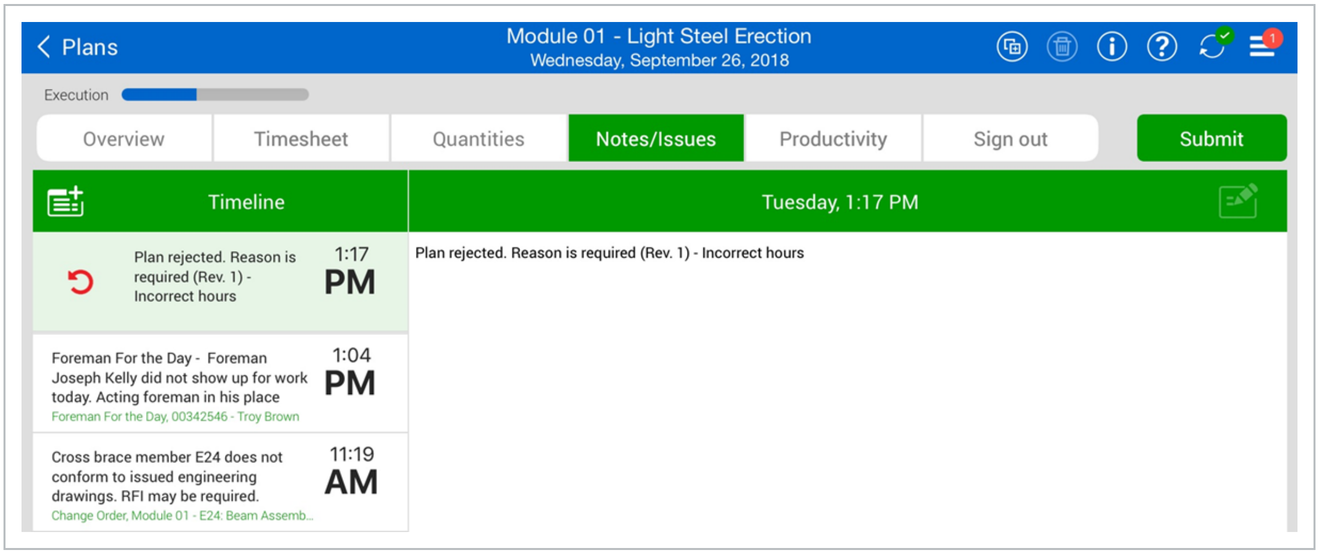
A pop-up window appears, and you will be required to give a reason for why the plan has been rejected; you will not be able to submit until you have entered a reason.



Once rejected, the plan will revert to the Execution Phase. The red arrow icon will now also appear on your plan.

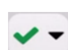


You can now go through the whole Execution Phase again, making the changes that have been requested by the approver. You can view the reason for rejection in the Notes/Issues tab. Once all information has been fixed, you can submit the plan back to approval.



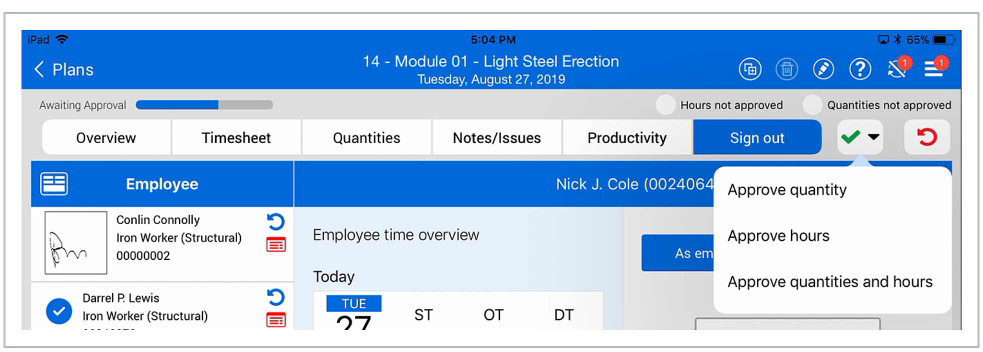
5.3 APPROVE A DAILY PLAN

In this topic, you will approve a daily plan using the Progress mobile application.

Once a daily plan has been fully executed and actuals reviewed, the plan is ready for approval. On any of the six tabs, to approve a daily plan, tap on the  icon.

When approving daily plans, there are three options:

- Quantity
- Hours
- Quantity and Hours



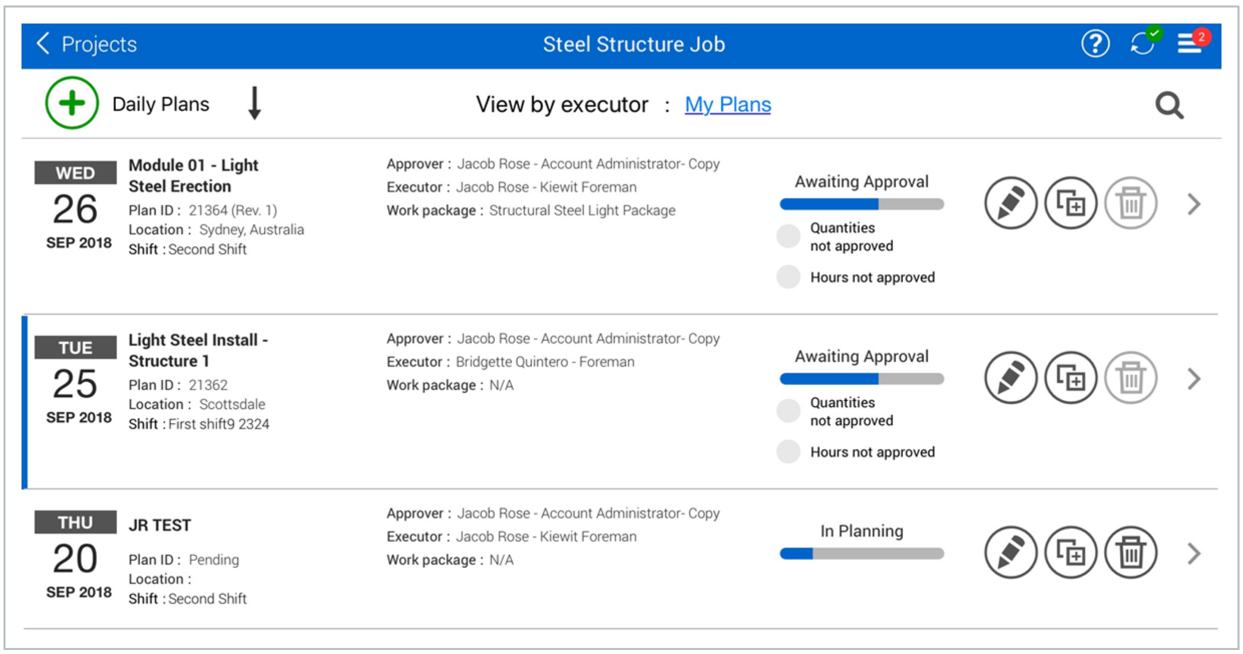
If you select “Approve Quantity”, only the quantities for the daily plan will be approved and the hours will still need to be approved separately.

If you select “Approve Hours”, the hours for the daily plan will be approved and the quantities will still need to be approved separately.

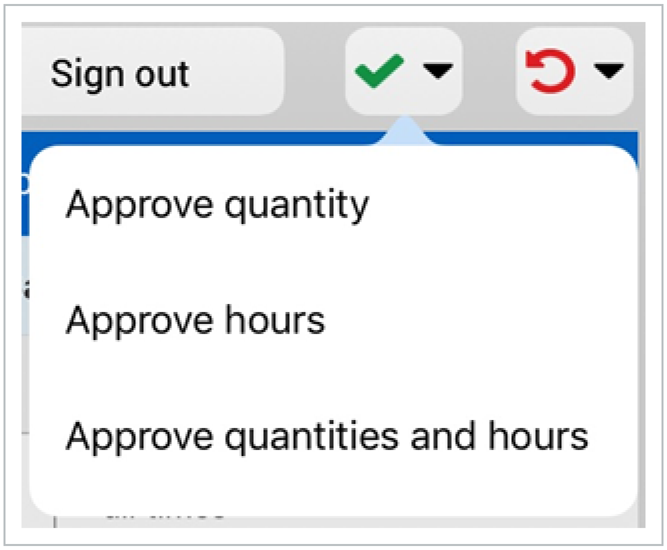
If you select “Approve Quantity and Hours”, you will approve both.

5.3 Step by Step 1 — Approve a Daily Plan

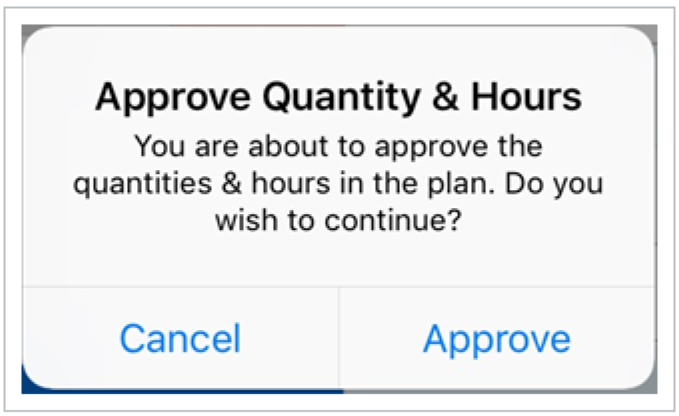
1. From the Daily Plans home page, open the **Module [your user number] – Light Steel Erection** daily plan.

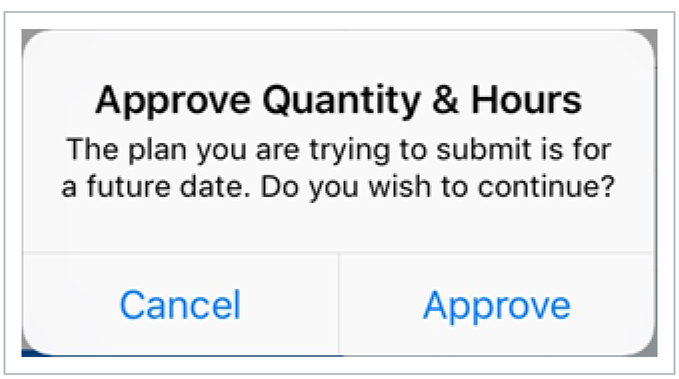


2. Select the  icon.
3. From the drop-down list, select **Approve Quantity and Hours**.



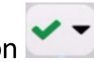
4. You will get a pop-up window asking if you are sure you want to submit. Select **Approve**. You may get a pop-up window saying your plan is for a future date. Still select **Approve.**





TIP	In Progress, the daily plan's status in the plan list will change from Awaiting Approval to Approved – Awaiting Payroll.

Lesson 5 Review

1. When approving a daily plan, what selection(s) do you get when you tap on ?
    a. Approve Quantity
    b. Approve Hours
    c. Approve Quantity and Hours
    d. All of the above

2. What is required when rejecting a plan?
    a. Foreman signature
    b. Picture
    c. Reason for rejection
    d. You cannot reject a plan

3. What color does the planning screen become in Approval mode?
    a. Red
    b. Green
    c. Blue
    d. Yellow

Lesson 5 Summary

As a result of this lesson, you can:

- Review actuals
- Approve daily plans