
**PROGRESS USER
GUIDE**

Daily Plan Mobile

FIELD EXECUTION MANAGEMENT

INEIGHT 

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LESSON 1 – INEIGHT PROGRESS OVERVIEW

Lesson Duration: 30 minutes

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the purpose of InEight Progress
- Explain the general workflow for InEight Progress

Lesson Topics

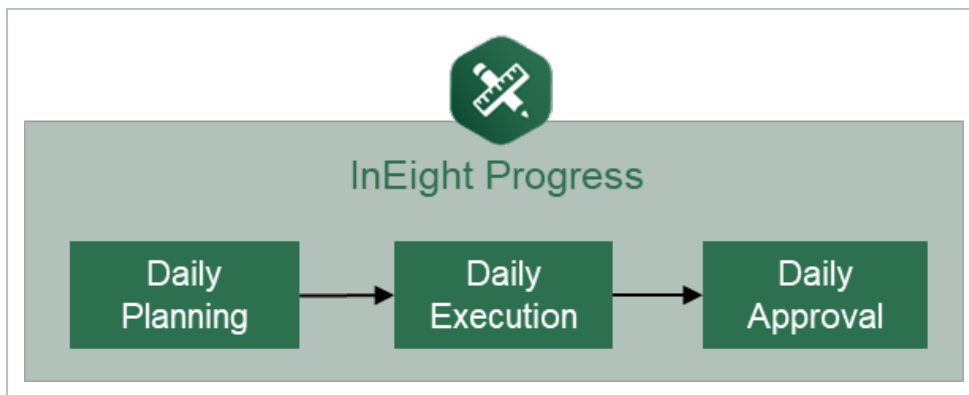
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1.1 INEIGHT PROGRESS OVERVIEW

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

1.1.1 InEight Progress Daily Planning Phases

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



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

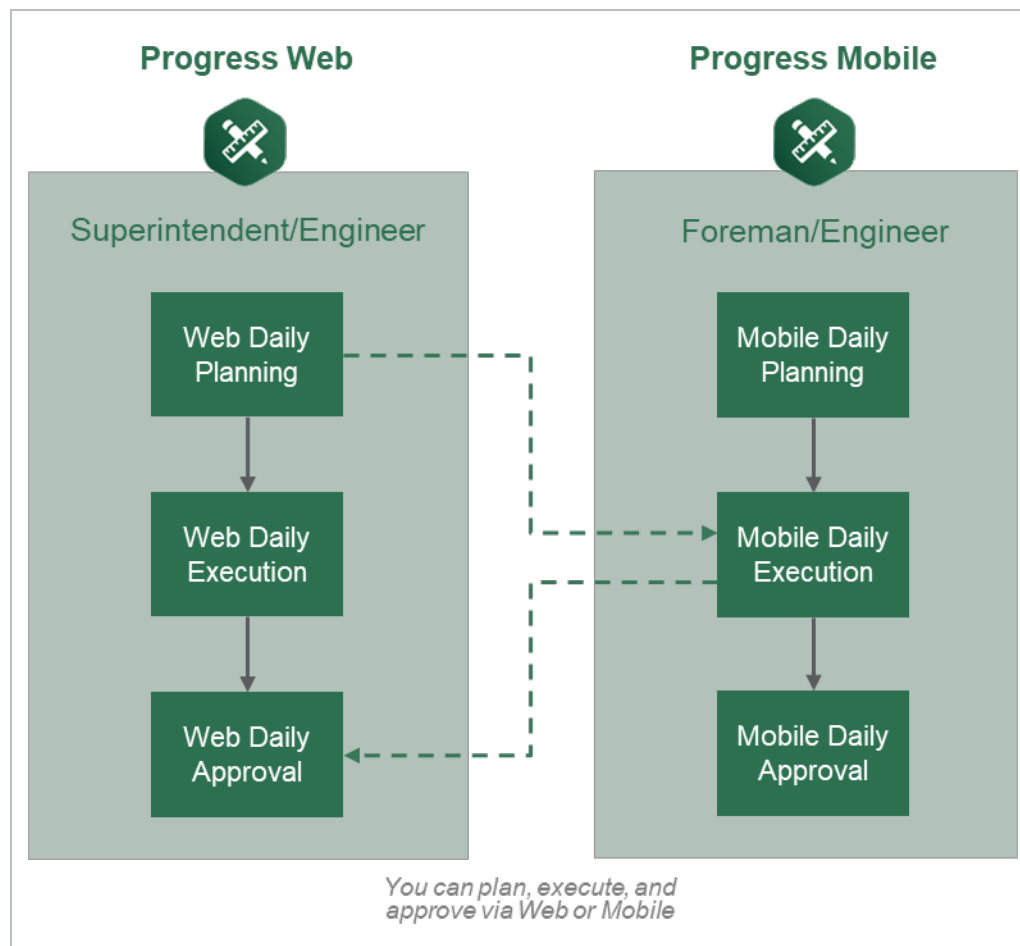
In the Execution Phase, a project member takes the daily plan out in the field and references it throughout the day. As work is completed, the project member enters actual hours worked for employees and equipment. He or she also enters installed quantities, notes/issues and/or pictures to document issues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

In the Approval Phase, a project member reviews the actual tasks, employees, equipment, hours, quantities and productivity for the plan. In this phase, the hours and/or quantities can be approved as

is, or if the approver would like something changed, the plan can be edited or sent back to the Execution Phase. The approver can approve the hours submitted, the quantities submitted or both. Approving the hours will send them to payroll for processing and approving the quantities will send them to the quantity tracking module of InEight Plan which syncs directly with InEight Control.

1.1.2 Daily Plan Work Flow

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



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

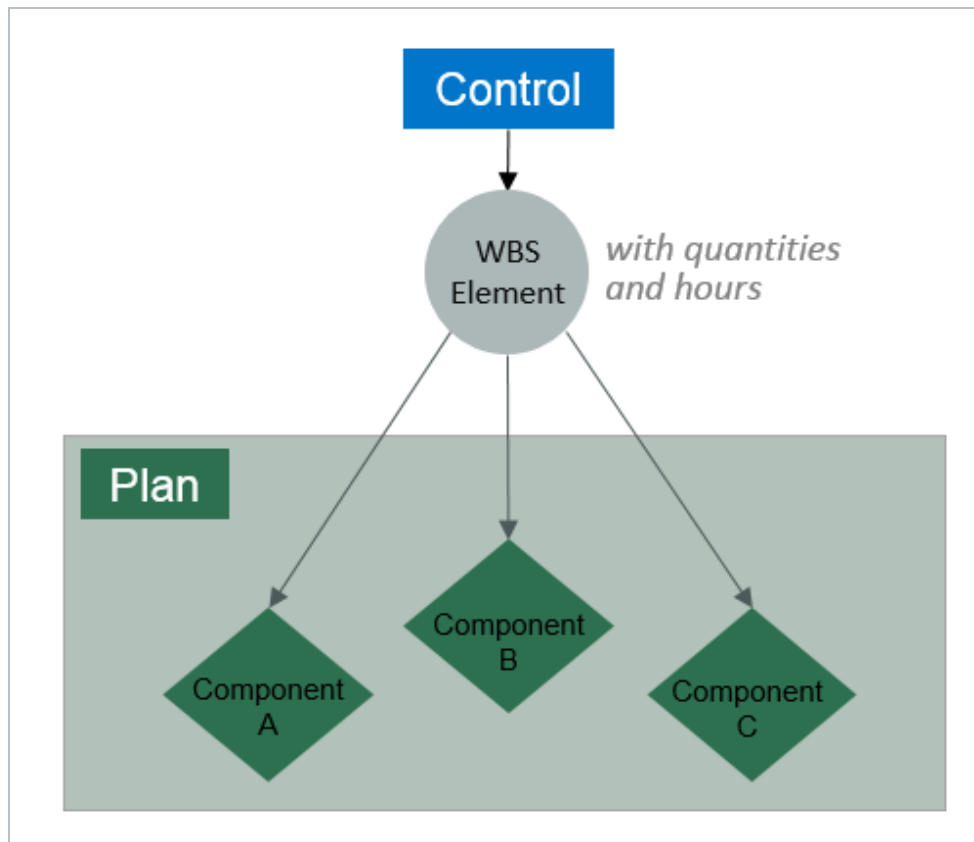
a computer. In this case the Execution Phase is completed in the InEight Progress mobile application. Finally, the superintendent or engineer may also be responsible for approval of the daily plan which would again be completed in the InEight Progress Web application from their office computer.

TIP

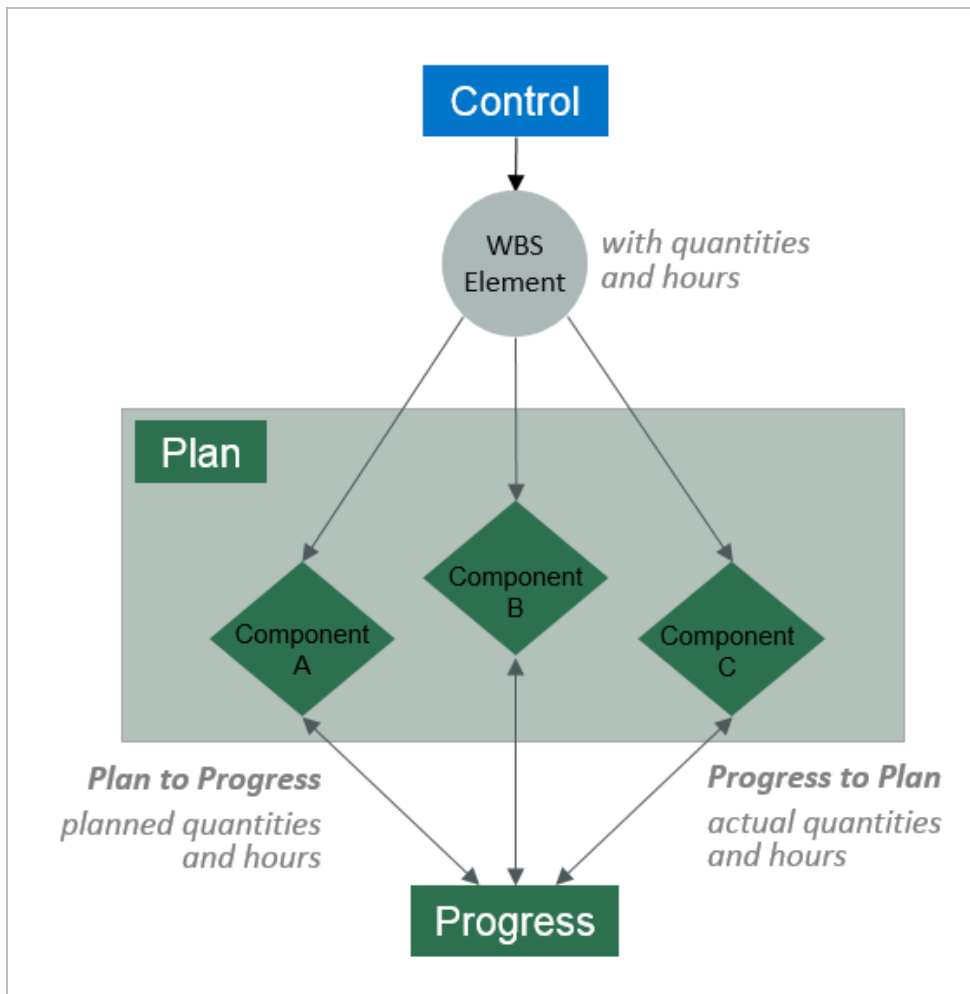
Mobile Daily Planning has all the same functionality as Web Daily Planning for InEight Progress, but is available as a mobile-only application.

1.1.3 InEight Control Integration

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



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



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

1.1.4 Daily Planning

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

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

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

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

NOTE

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

1.1.5 Daily Execution

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

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

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

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

1.1.6 Daily Approval

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

There are 3 options in the Approval Phase:

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

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

1.1.7 Work Flow Beyond InEight Progress

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

1.1.7.1 Hours

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

1.1.7.2 Quantities and Costs

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

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



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:

- Describe the purpose of InEight Progress
- Explain the general workflow for InEight Progress

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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.

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2.1 MOBILE OVERVIEW

2.1.1 Login

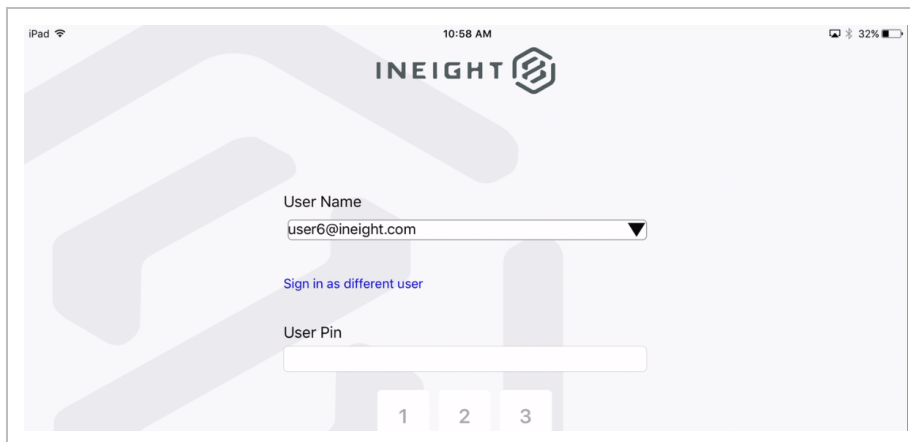
InEight Progress Mobile is a mobile application only and must be installed on an Apple iPad to be used. Once installed, you take the following steps to log in to the application:

Log into InEight Progress

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



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



3. In the **User Pin** field, enter the password provided by your manager.

- InEight Progress automatically syncs during the initial sign in. 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.

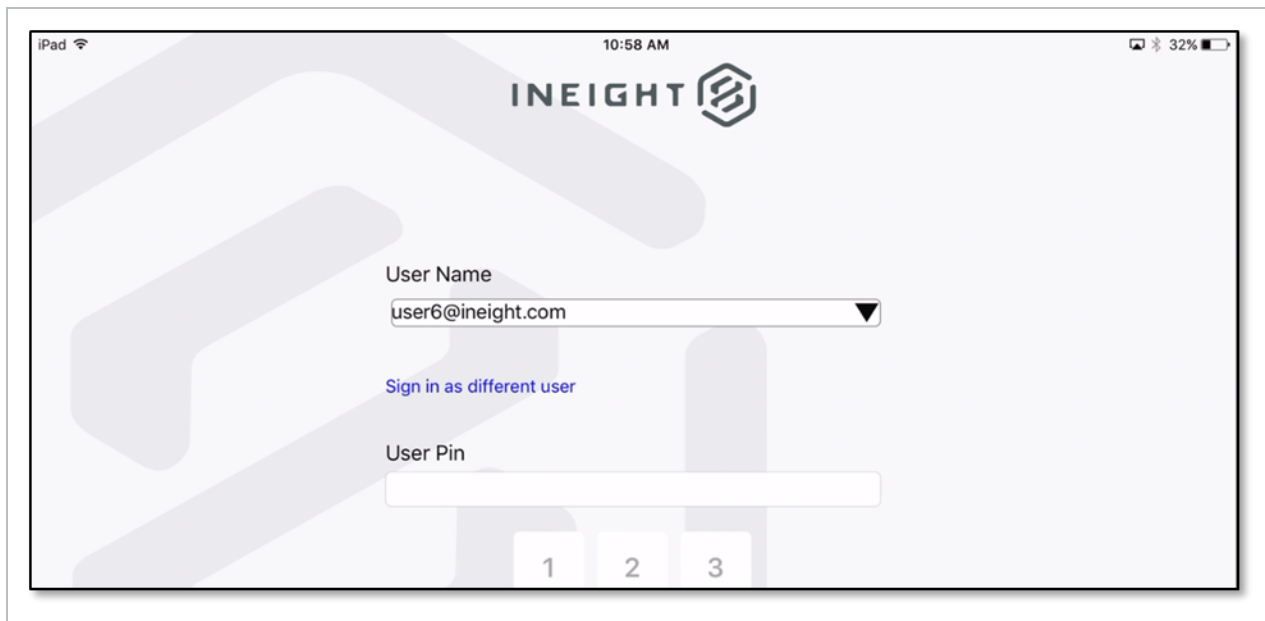
- Users can log in whether they have the same or differing roles
- When a different user logs in, it does not affect the existing logged in user
- The user logged in at the time will only see their own data

When you are using Kiosk Mode, a sync occurs automatically when you sign out.

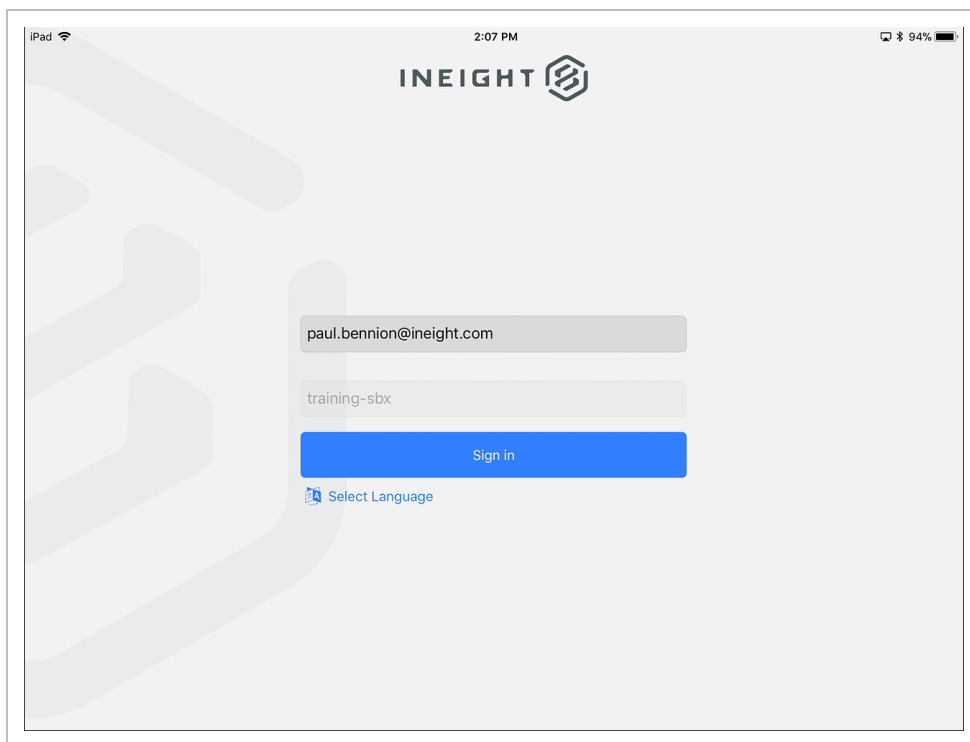
You can also sync in the background while using the application. To sync in the background, open Settings, and then tap **Enable background sync**.

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.

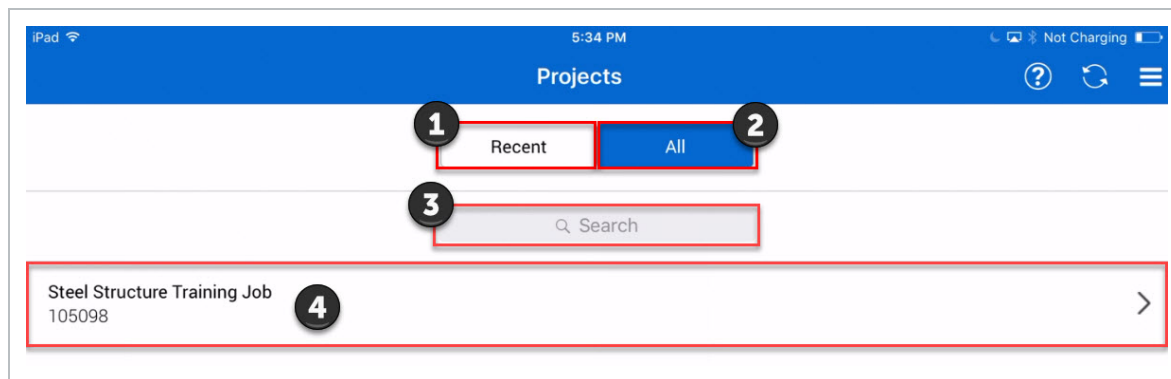
The project list shows all projects available for you. You must have the role of Superintendent, Engineer or Foreman assigned in the InEight cloud platform under Suite Administration > User Management, for a project to appear in the project list.

Overview – Project List

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

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

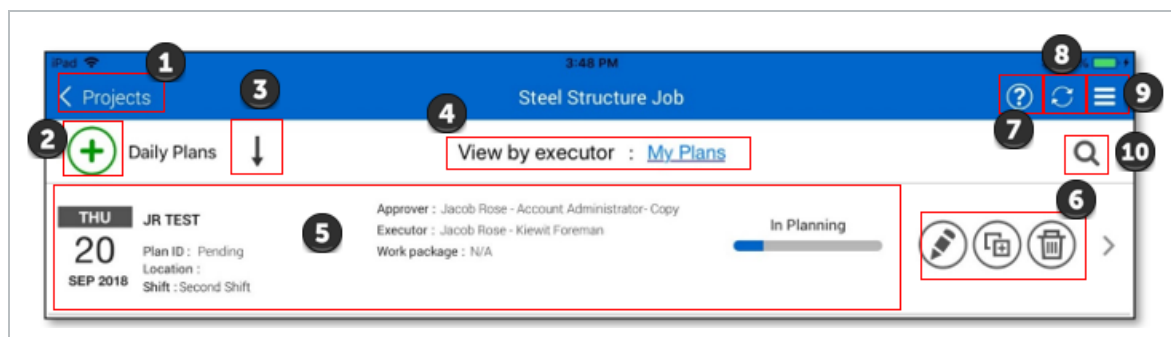
The plan list shows all the daily plans already created and assigned to you within a specified date range. You can configure the date range in the project settings, but the default is ten days in the past and five days in the future. Tapping on an existing plan opens that plan.

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.

Overview – Plan List (continued)

	Title	Description
4	View by Executor	Allows you to view plans assigned to a specific foreman.
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 Cloud Platform and pushes any changes from InEight Progress Mobile back to InEight Progress Web. This is used often when working in offline mode when you return to a location with access to internet.
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.

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.

Overview	Timesheet	Quantities	Notes/Issues	Productivity	Sign out
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TIP

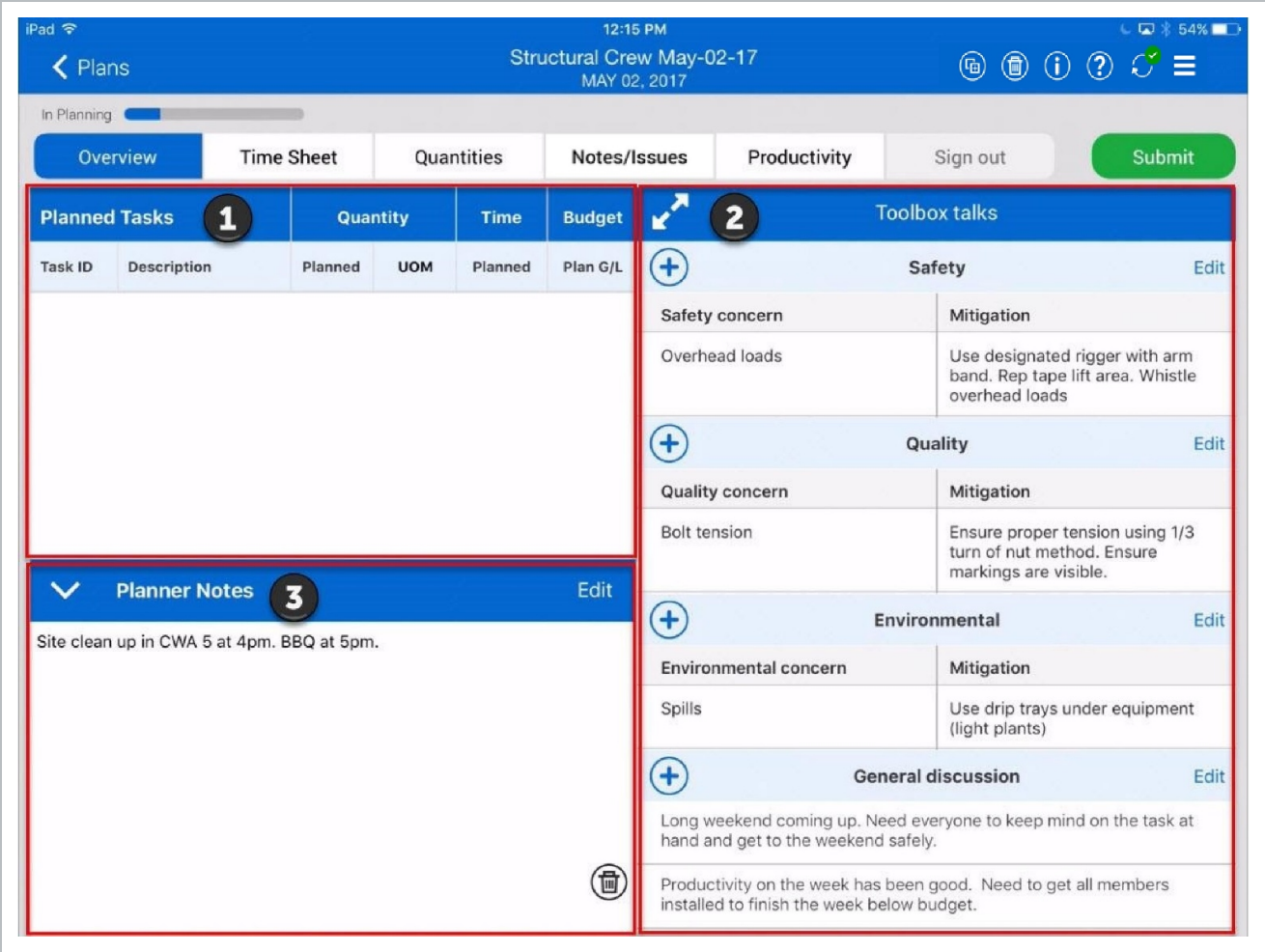
While in the Planning Phase, the screen is highlighted with a blue accent. When in the Execution Phase, this changes to green. This helps to remind yourself which phase of the process you are in.

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:

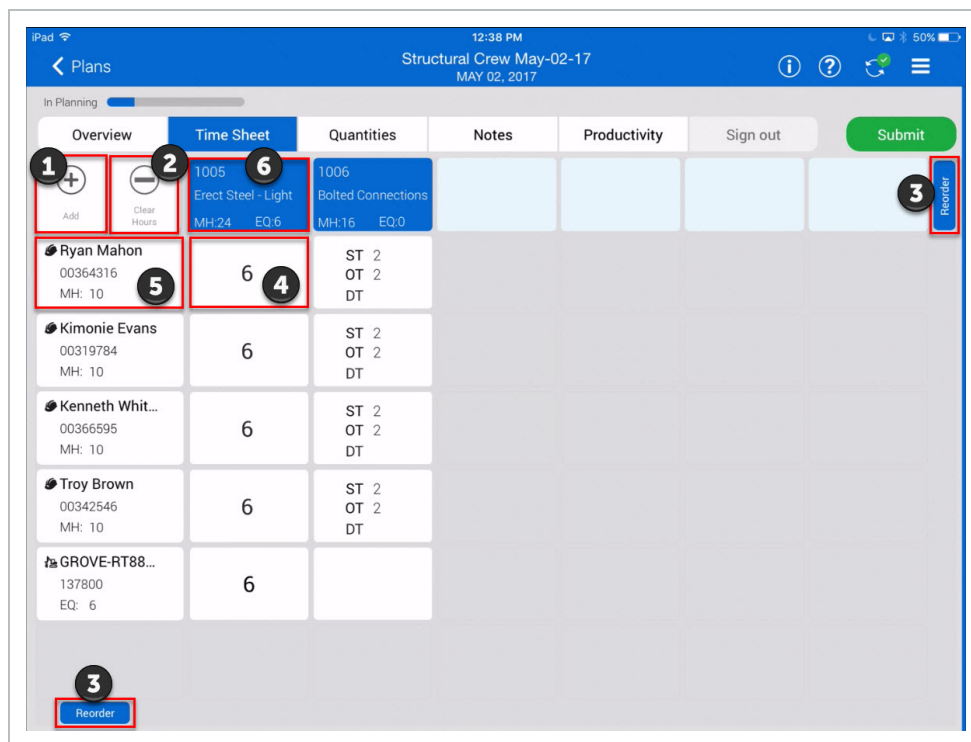
- Add tool box talk items by tapping the  icon
- Tap the  icon to expand to a larger view
- Minimize planner notes by tapping the  icon

2.2.2 Time Sheet

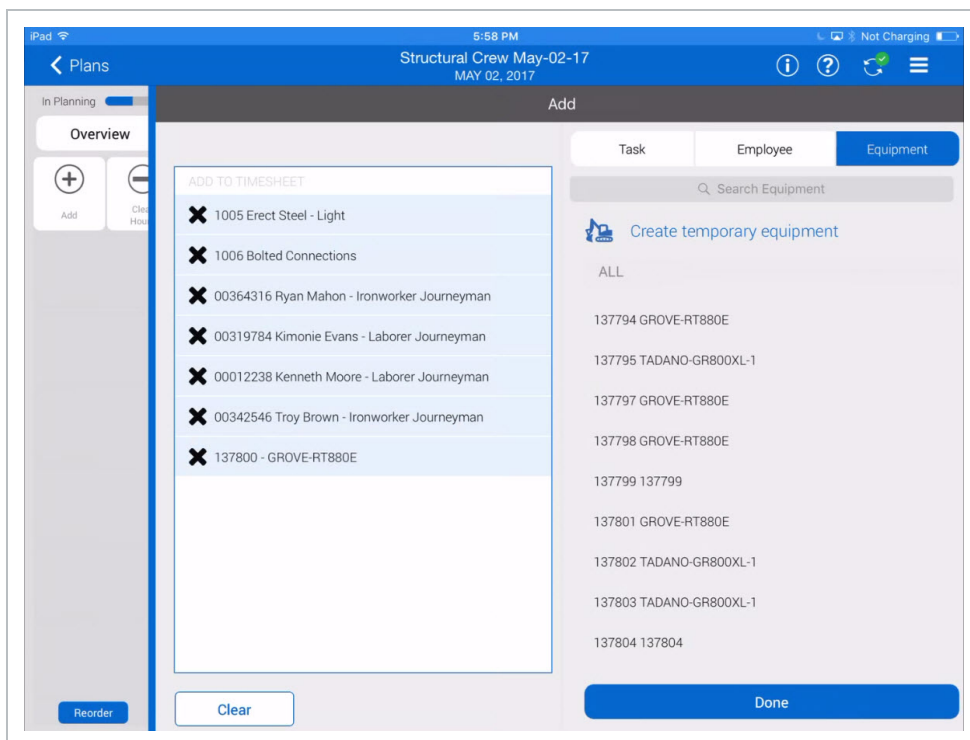
On the Time Sheet tab, you can enter all your tasks, employees and equipment and assign hours to each. The table below explains key navigation points.

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, temporarily change billing class, 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.



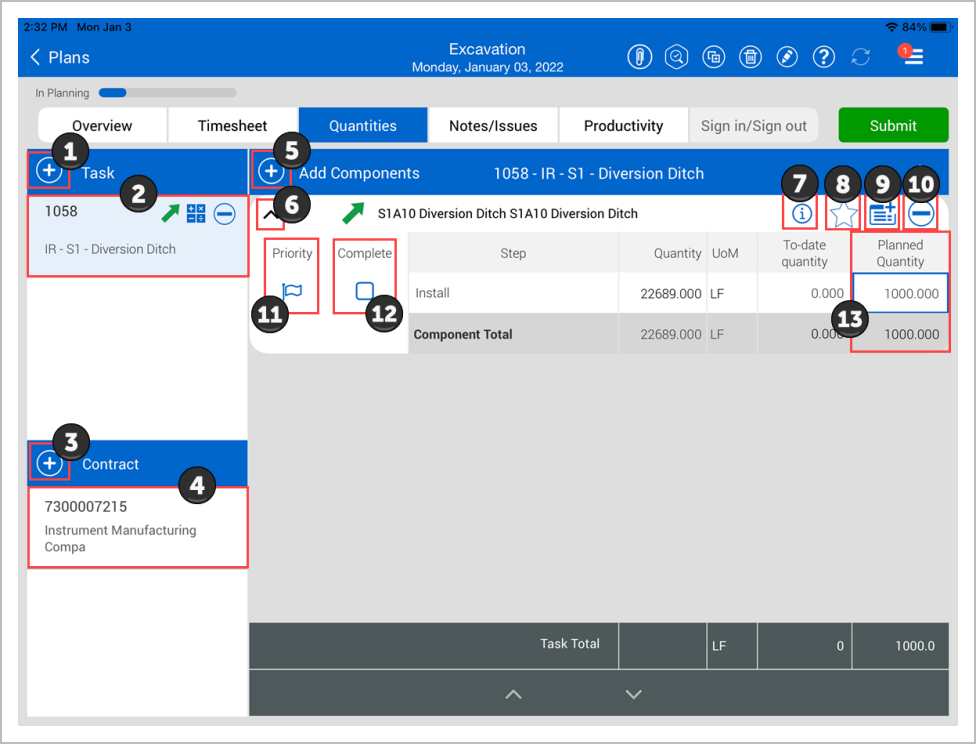
- View your lists of all available tasks, employees and equipment by tapping on the appropriate tab at the top of the window
- Once selected from a list, items appear on the left-hand side of the window under Add To Time Sheet as shown above
- Tapping on the **X** next to an item removes it from the 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 show or add components for the selected task.
3	Add contract	Tap here to add contracts.
4	Select contract	Tap here to show or add components for the selected contract.
5	Add Components	Tap here to add components for the selected task or contract by selecting from a list.
6	Expand / Collapse	Tap here to expand and collapse individual component details.
7	Information	Tap here to show a description of the component.
8	Favorite	Tap here to add the component to your favorites.
9	Add note	Tap here to add a note or issue associated with an individual component.
10	Delete component	Tap here to delete a component.
11	Priority	Tap here to mark a component step as a priority.
12	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.
13	Planned Quantity	Tap here to enter the planned quantity for a component step, providing the planned quantity does not exceed the component quantity.
14	View Planning slide-out panel	(Not pictured. See 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

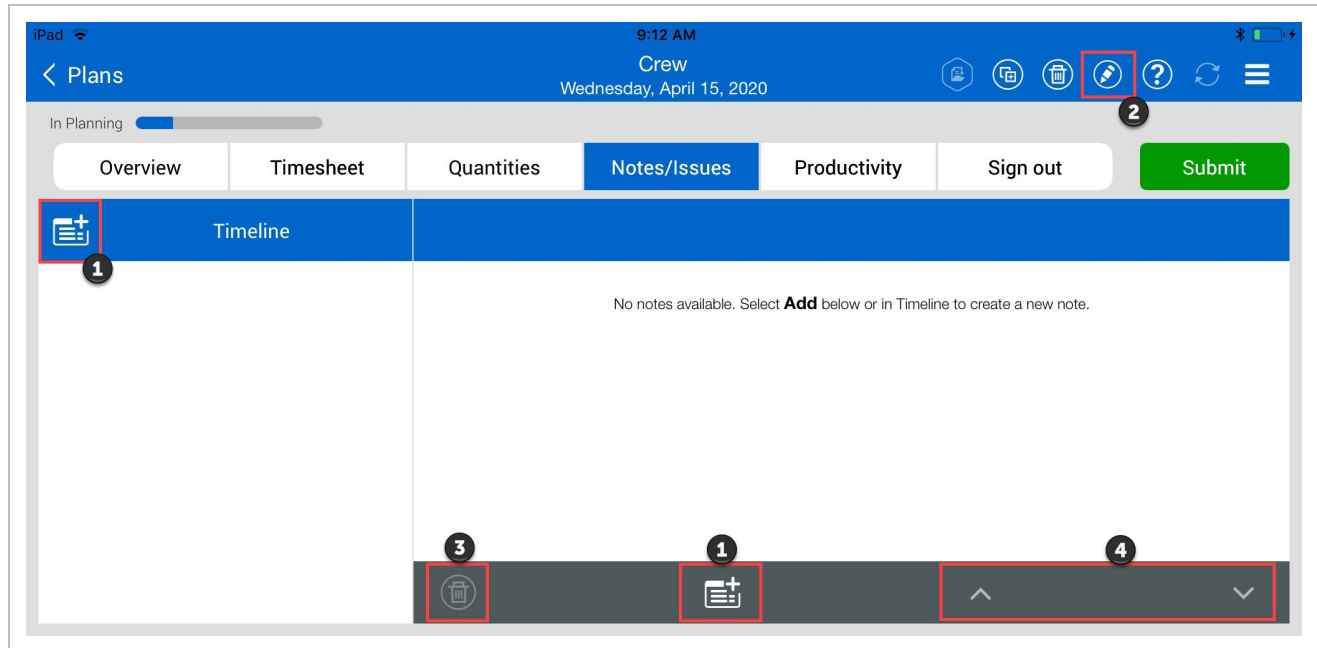
The Notes/Issues tab is where you can enter additional information regarding a task or component for the crew to be aware of when they execute the plan. You can add safety, quality control, environmental, subcontract, and other information. If an issue is added it will automatically show up on the issue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

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.

Overview – Notes/Issue Tab (continued)

	Title	Icon	Description
4	Arrow Up Arrow Down	 	The Arrow button allows you to navigate through the list of notes up or down.



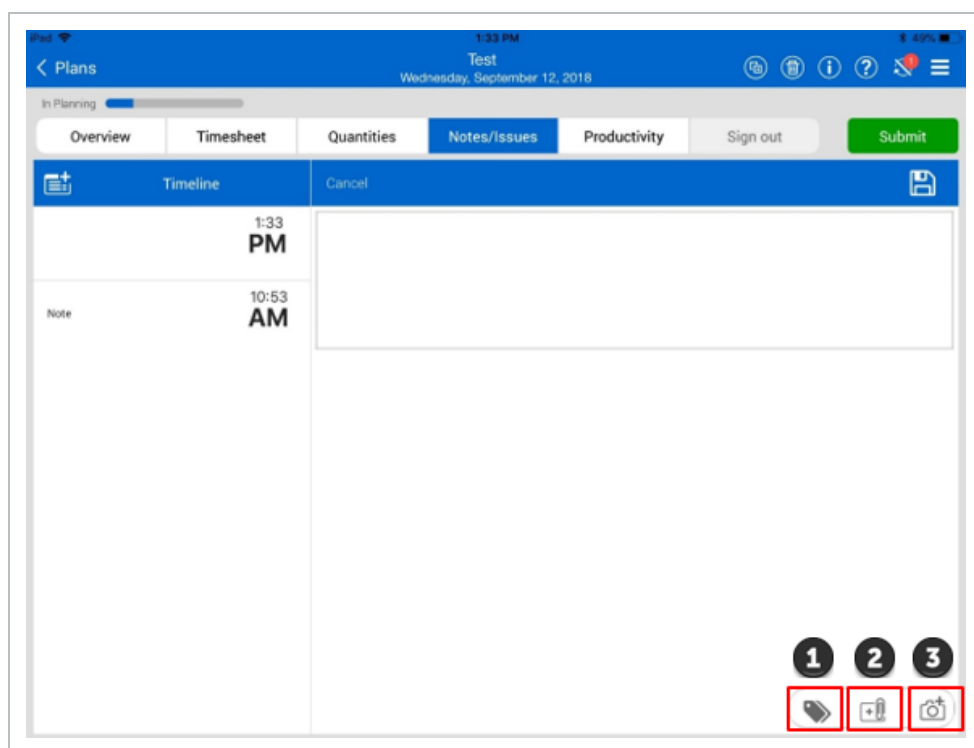
When you add a new note or issue, three icons will appear at the bottom. The following overview explains these icons.

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

Overview – Tags & Associations (continued)

Title	Icon	Description
2 Associations		The Associations button allows you to associate the note with a specific task, employee, equipment, components, or vendors.
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 in comparison to current budget, current estimate, and forecasted or goal unit rates which shows your planned gain/loss.

Overview – Productivity Tab

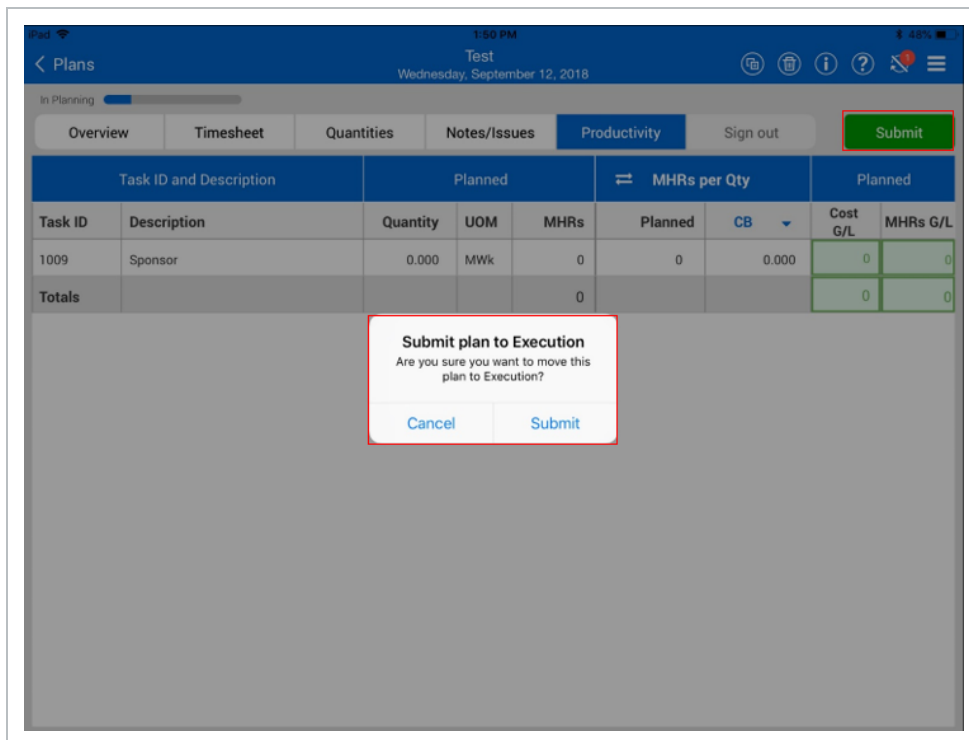
Title		Description
1	Task ID and Description	Indicates the tasks planned for the crew to perform that day.
2	Planned	Displays the plan information you entered in the Quantity tab (quantity, unit of measure, and man-hours).
3	MHRs per Qty	Compares the planned values to the current budget values.
4	Planned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

Task ID and Description		Planned			MHRs per Qty		Planned	
Task ID	Description	Quantity	UOM	MHRs	Planned	CB	Cost G/L	MHRs G/L
1511	Erect Steel (Light/Med./Hvy)	1.050	Ton	20	19.048	18.863	28	-0.2
1477	SNCR Common Steel Demo	0.175	PLS	20	114.286	151.000	351	6.4
Totals				40			379	6.0

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 warning pop-up 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 can review the daily plan by navigating through each tab in the navigation bar and reviewing the data in each tab.

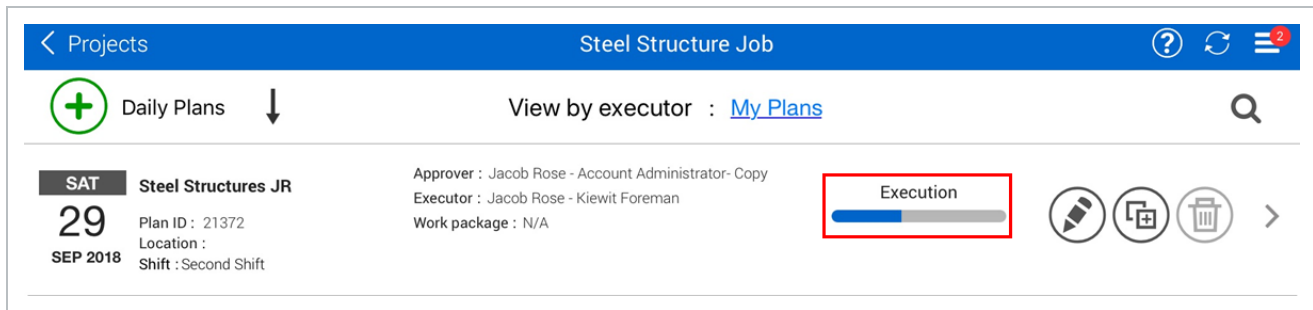
2.3 DAILY EXECUTION

Scenario

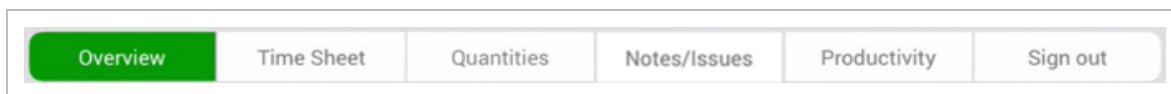
Steve is an electrical foreman on a project. Yesterday he created a daily plan that was reviewed by his superintendent, Paul. He is now preparing for the morning meeting and getting ready to execute the daily plan.

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 through 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

Overview – Overview Tab (continued)

Title	Description
	Planned Quantity comes from information entered during the planning phase.
3	Time Displays the planned hours for the task.
4	Budget Displays the planned gain or loss in manhours by comparing the planned hours and planned install quantities to the budget unit rates.
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 while working in any of the daily plans.
7	Planner Notes Shows general notes input during the planning phase. During execution phase this block is not editable.

iPad 3:37 PM Structural Crew May-02-17 MAY 02, 2017

Execution Overview Time Sheet Quantities Notes Productivity Sign out Submit

Task ID	Description	Planned	UOM	Time	Budget
1005	Erect Steel - Light	1.3249...	Ton	24	1.8
1006	Bolted Connections	17.1	Ea	16	1.1
Totals				40	2.9

Toolbox talks

Safety Edit

Safety concern	Mitigation
Overhead loads	Use designated rigger with arm band. Rep tape lift area. Whistle overhead loads

Quality Edit

Quality concern	Mitigation
Bolt tension	Ensure proper tension using 1/3 turn of nut method. Ensure markings are visible.

Environmental Edit

Environmental concern	Mitigation
Spills	Use drip trays under equipment (light plants)

General discussion Edit

Long weekend coming up. Need everyone to keep mind on the task at hand and get to the weekend safely.

Productivity on the week has been good. Need to get all members installed to finish the week below budget.

Planner Notes

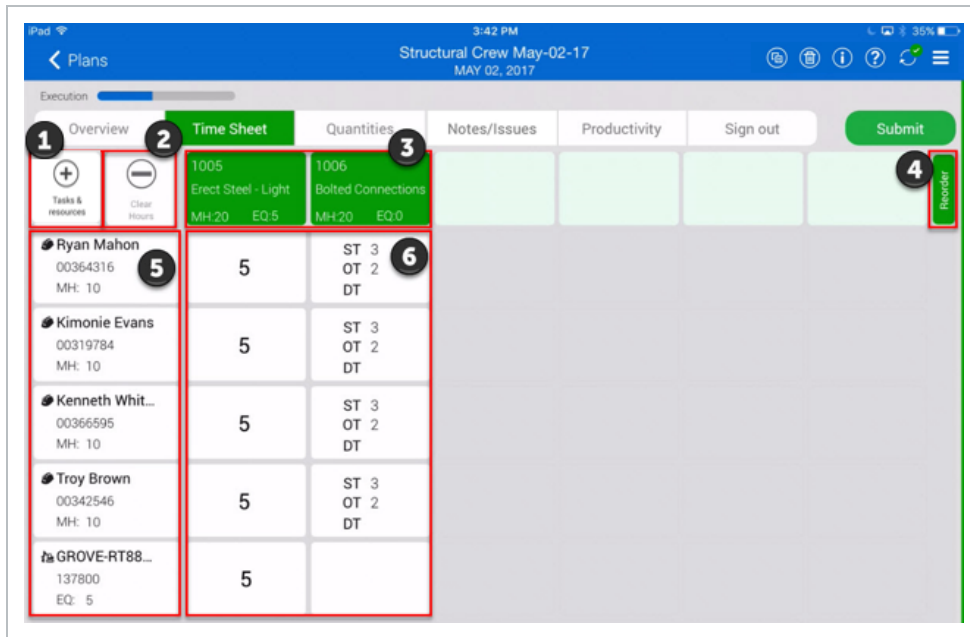
Site clean up in CWA 5 at 4pm. BBQ at 5pm.

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 work operations to be completed. These are also the cost codes you are charging employee time to.
4	Reorder	Allows you to reorder the list of items in the time sheet any way you want, by tapping and dragging the item.
5	Employees & Equipment	Displays the employees and equipment assigned to the Time Sheet.
6	Hours	Displays the actual hours each employee worked. These fields should be edited to reflect what employees actually work on and for how long.



- 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)

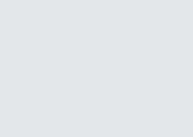
2.3.4 Quantities

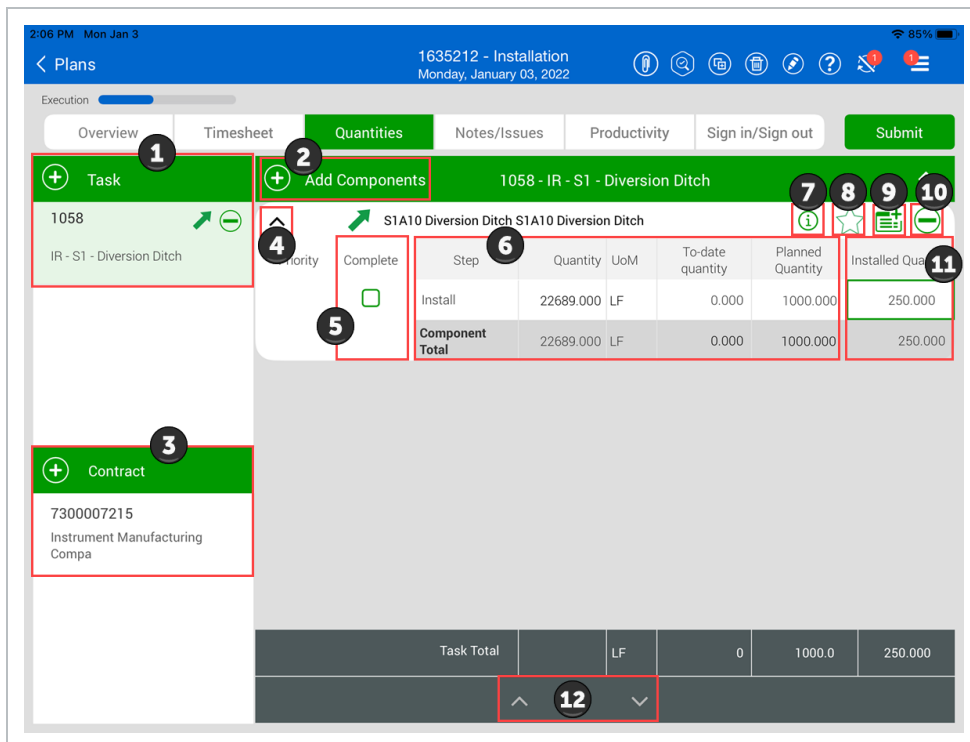
In the Quantities tab, all the components that were included in the planning process for each task are shown. Actual quantities are claimed by entering the quantity or tapping the Complete check box. You can add or delete components at this point if required.

Overview – Quantities Tab

	Title	Icon	Description
1	Add task		Lets you add tasks. You can also add temporary tasks.
2	Add Component		Lets you add components for the task or contract selected in the left side panels. You can also add temporary components.
3	Add contract		Lets you add contracts.
4	Expand / Collapse Icon		Selecting these icons will either expand or collapse the component details.

Overview – Quantities Tab (continued)

Title	Icon	Description
		
5	Complete check box	 Check this box when the component of the task is complete.
6	Component breakdown	Displays the Planned Quantity and what is claimed to date. Displays the claiming steps or rules of credit for that specific component. This area is greyed out because it is not an editable field.
7	Information	 Shows a description of the component.
8	Favorite	 Adds the component to your favorites.
9	Notes	 Allows you to add notes and issues to the components.
10	Delete	 Tap this icon to remove the component.
11	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.
12	Up and down arrows	 Allows you to navigate through the different tasks.



2.3.5 Notes/Issues

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.

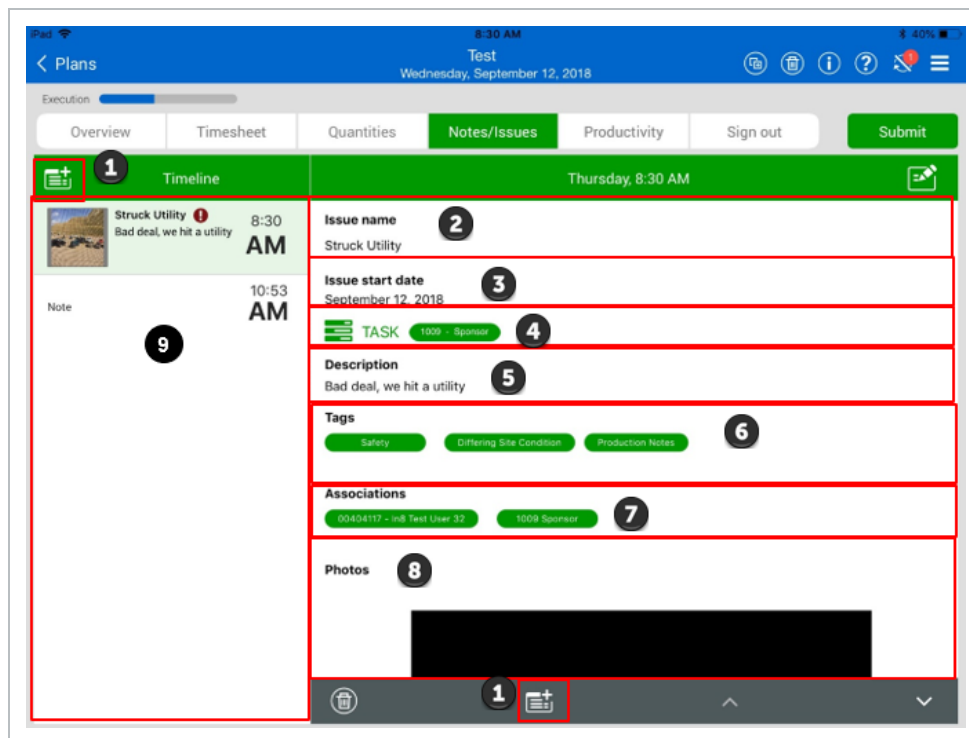
Along with the note/issue, you can add tags to associate the notes/issues with a pre-defined category. You also can add photos with your notes/issues.

Overview – Notes/Issues Tab

Title			Description
1	Add	 	Click either icon to add a note/issues to this daily plan.
2	Name		Displays the name of the note or issue.
3	Date		The start date of the note or issue

Overview – Notes/Issues Tab (continued)

Title		Description
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, components, and vendors. 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

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 as well as view your actual gain/losses.

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) or Forecast or Goals.
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.

Task ID and Description		Actual			MHRs per Qty			Actual	
Task ID	Description	Quantity	UOM	MHRs	Planned	Actual	CB	Cost G/L	MHRs G/L
1511	Erect Steel (Light/Med./...	1.070	Ton	20.00	19.048	18.692	18.863	45	0.2
1477	SNCR Common Steel De...	0.160	PLS	20.00	114.286	125.000	151.000	250	4.2
Totals				40.00				295	4.0

2.3.7 Sign Out

Before submitting a completed daily plan for approval, 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.

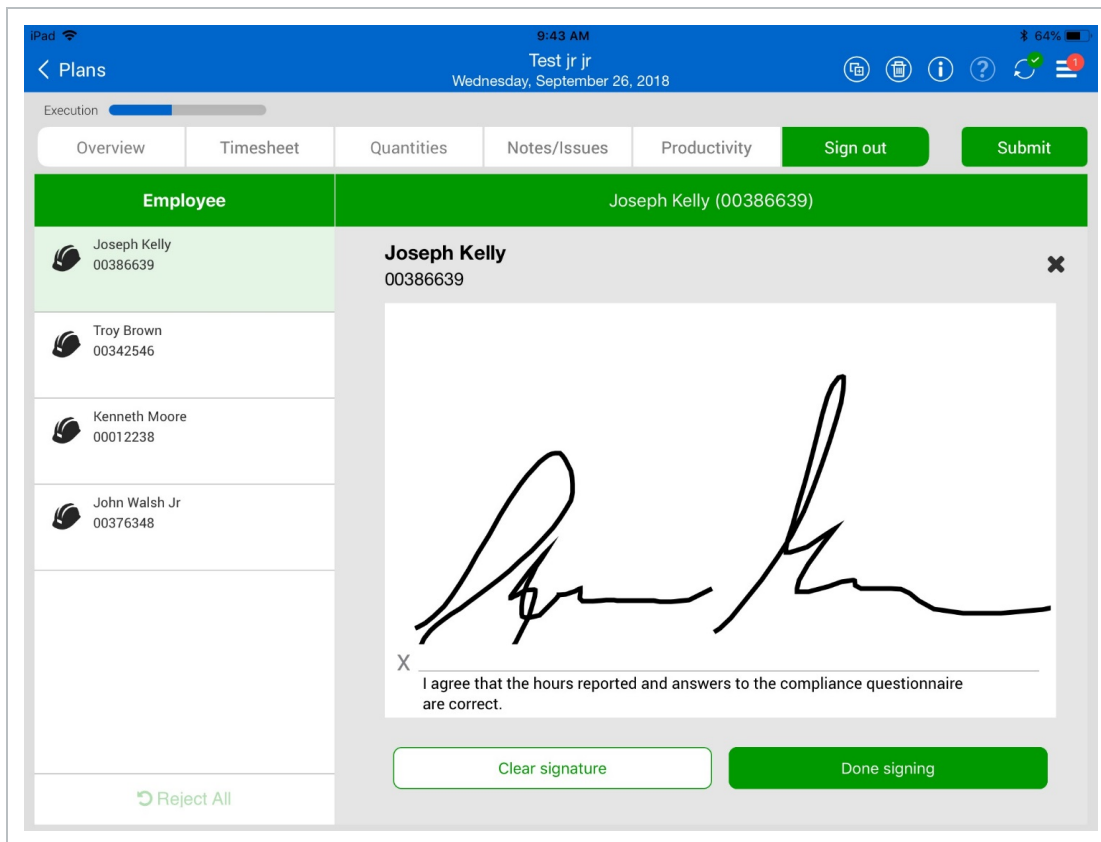
Overview – Sign out Tab

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 employees enter their pin numbers.
6 Touch ID Signout	User can use iPad thumb-print to sign out rather than entering pin.
7 Sign out all	Allows a foreman or executor to sign out all employees by signing out only once.

The screenshot shows the 'Sign out' tab in the Progress Daily Plan mobile app. The interface is divided into several sections:

- Employee List (1):** A list of employees including Joseph Kelly (00386639), Troy Brown (00342546), Kenneth Moore (00012238), and John Walsh Jr (00376348).
- Employee Name (2):** The name of the selected employee, Joseph Kelly (00386639), is displayed.
- Employee Time Overview (3):** A section showing the employee's time overview for the day and week. It includes a table for the day's hours (Today) and a table for the week's hours (Week).
- Sign out Options (4):** Two buttons are visible: 'As employee' and 'On behalf of employee'.
- Enter employee pin (5):** A numeric keypad for entering the employee's pin number.
- Sign out with Touch ID or PIN (6):** A button for signing out using Touch ID or PIN.
- Sign out all (7):** A button for signing out all employees.

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 the planning phase, 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 to the InEight Cloud Platform.

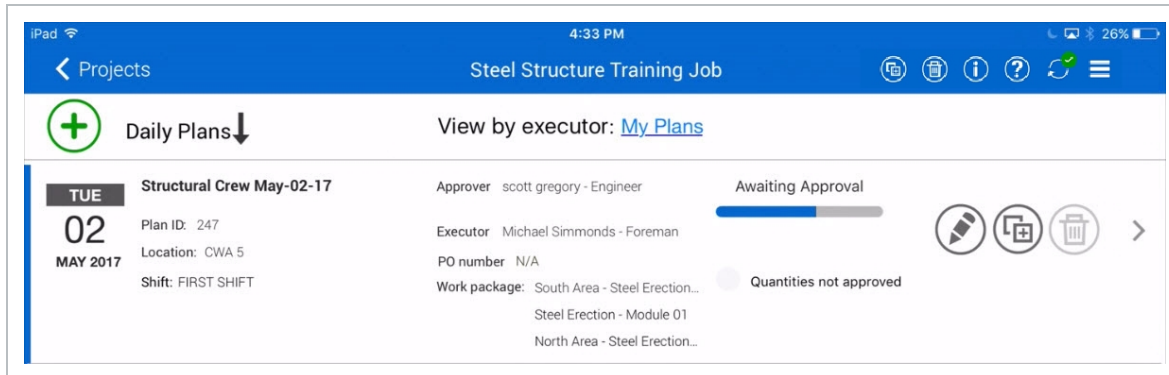
Scenario Recap

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

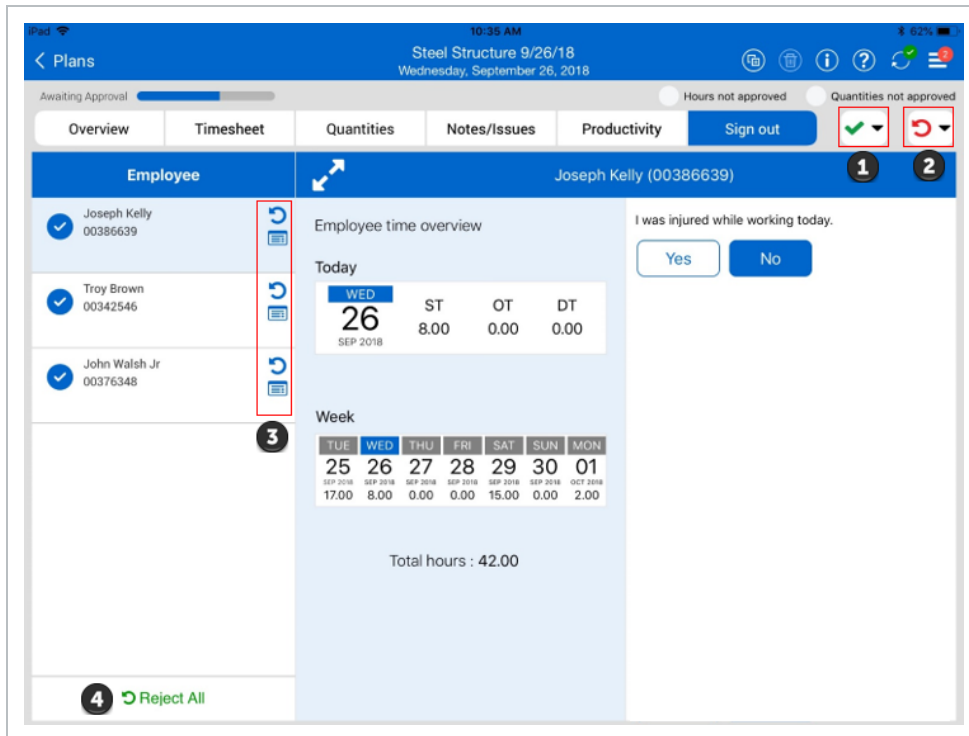
You access a daily plan from the list of daily plans. Note that the current status is now Awaiting Approval. There is also a note indicating that the quantities have not been approved.



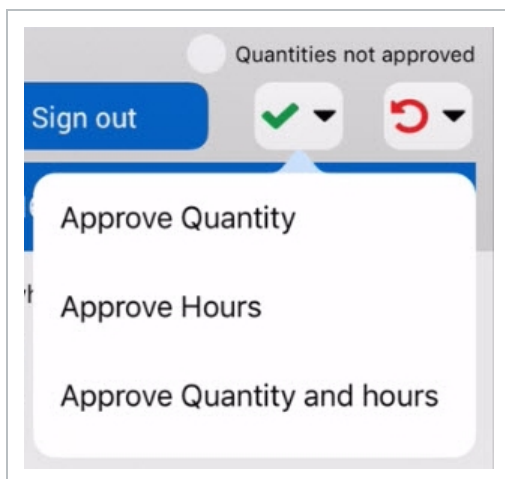
Navigating through the Approval Phase is very similar to the Planning and Execution Phases. The same navigation bar appears at the top of the screen. You can review the information in each tab to ensure everything has been entered correctly. The Submit button is now gone and is replaced by two new buttons.

Overview – Sign out Tab

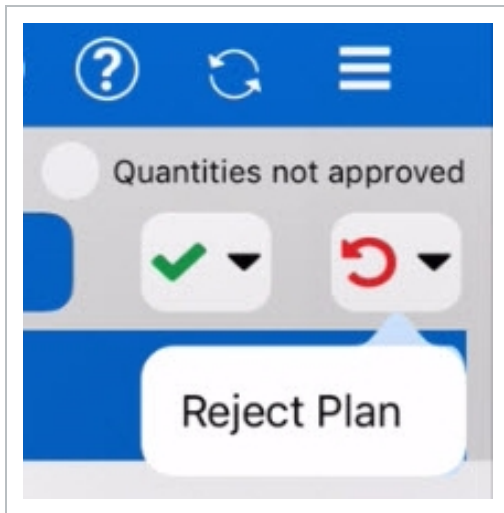
Title	Description
1 Approval	Approves actual quantities, hours or both.
2 Reject	Rejects the plan and sends it back to the Execution Phase.
3 Reject Sign out	Rejects the sign out for an individual employee. This must be done before editing any hours on the timesheet. The employee must sign out again after changes have been made or the supervisor approving the timecard can sign out on behalf of the employee.
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 significant changes are required, or if the Executor is the member required to make changes, it is recommended 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 receive updates from other InEight Cloud modules 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.

2.6 ATTACHMENTS ON MOBILE

In the mobile application, you can attach files to a daily plan and view existing attachments.

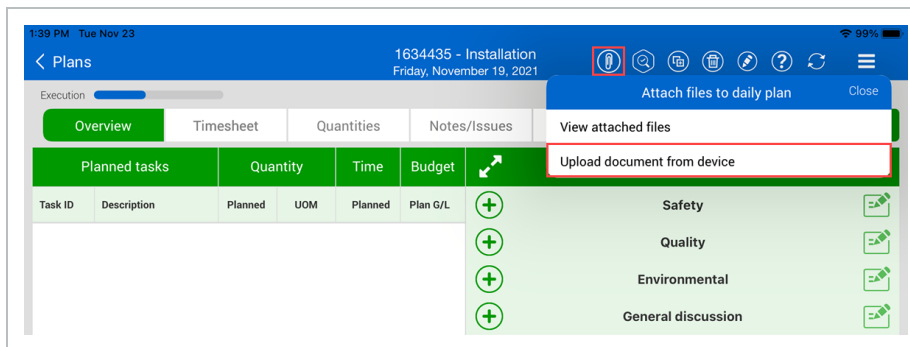
NOTE

You can only attach files from your device. To attach files from InEight Document to a daily plan, you must use the web application.

The following steps show you how to add an attachment from your device during any phase of daily planning.

2.6 Step by Step 1 — Add an attachment on mobile

1. In a daily plan, tap the **Attach File** icon in the upper right of the page.
2. Select **Upload document from device** from the drop-down menu.



3. In the Upload Documents dialog box, tap the **Add** icon.
4. Select the file from your device, and then tap **Upload**.

NOTE

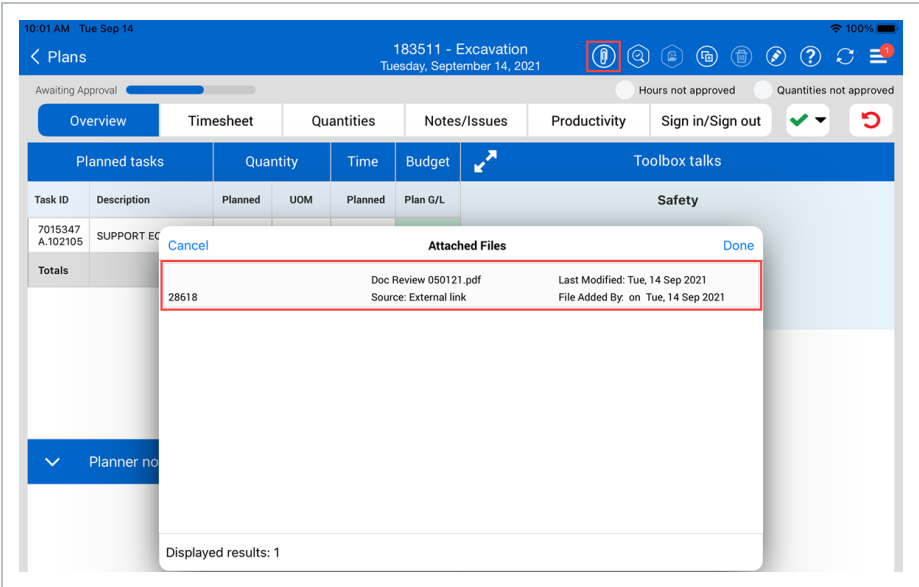
An attachment must be 10 MB or less.

The following steps show you how to view an attachment during any phase of daily planning.

2.6 Step by Step 2 — View an attachment on mobile

To view an attachment during any phase of daily planning, tap the **Attach File** icon in the upper right of the page, and then select **View attached files** from the drop-down menu.

- 1. Tap the **Attach File** icon in the upper right of the page.
- 2. Select **View attached files** from the drop-down menu.
- 3. In the Attached Files dialog box, tap a file to view it in a new window.



NOTE You can only view attachments whose source is InEight Document in the Document mobile app if you have the app downloaded and have access to the same project in Document.

Exercise 2.1 — Navigate InEight Progress

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

1. Open InEight Progress (mobile or web) and log in if necessary.

2. Open your project.

3. Open any daily plan in the Plan List and navigate through each of the daily plan tabs to review the plan information.

Congratulations, you have completed this exercise!

Lesson 2 Review

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

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

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

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

Lesson 2 Summary

As a result of this lesson, you can:

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

- Explain what each sync symbol represents



LESSON 3 – 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

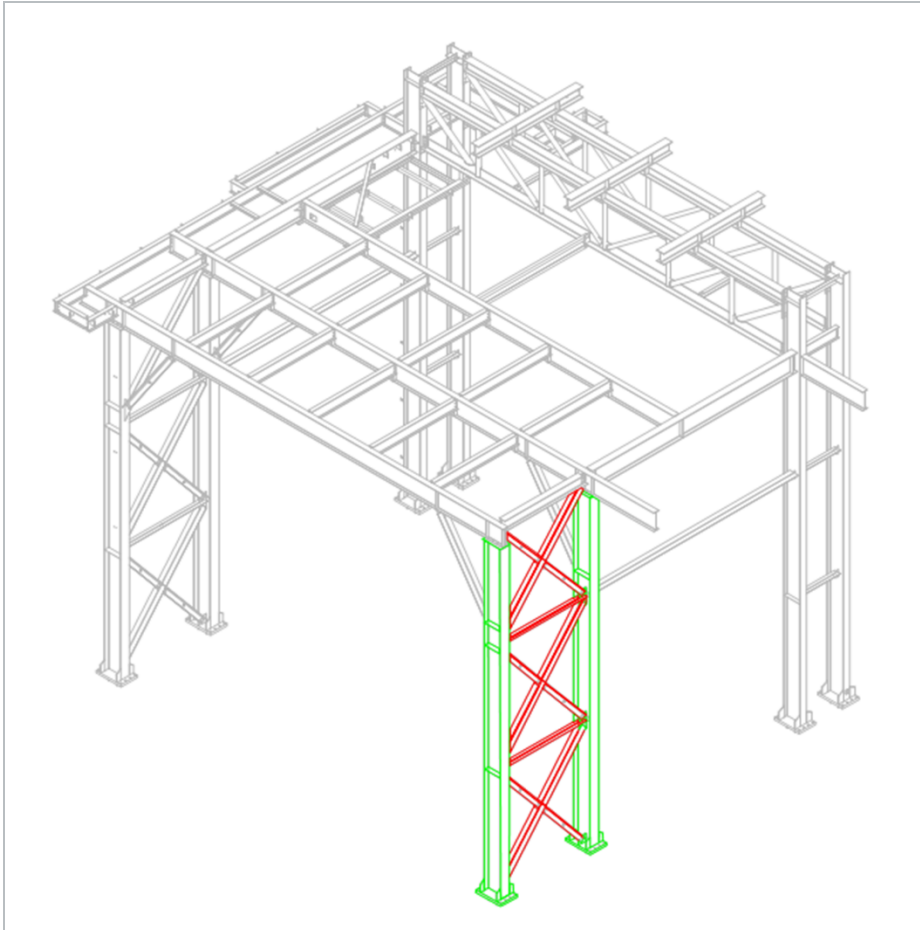
3.1 InEight Progress Workflow - Daily Plan Creation Mobile	56
3.2 Daily Plan from Scratch	56
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3.2.2 Timesheet Tab	62
3.2.3 Quantities Tab	70
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The flowchart illustrates the 'Daily Planning' process, which is divided into several key functional areas and stages:

- Control:** The central hub at the top, managing the overall process. It receives 'Actual Quantities' and sends 'Daily Pending Qty' back to the Plan and Progress areas.
- Plan (Plan icon):**
 - Work Packaging:** Contains a 'Work Plan' which leads to a 'Work Package'.
 - Quantity Tracking:** Contains a 'WBS Element' which leads to 'Components'.
 - Claiming Schemes:** An input to 'Components'.
 - Associations:** 'Work Package' is associated with 'Web Daily Planning'. 'Components' are associated with 'Mobile Daily Planning'.
- Daily Planning - Web (Web icon):**
 - Flow: Web Daily Planning → Web Daily Execution → Web Daily Approval.
 - Input: 'Can Plan via Web or Mobile' feeds into 'Web Daily Planning'.
 - Output: 'Can Execute via Web or Mobile' feeds into 'Web Daily Execution'.
 - Output: 'Can Approve via Web or Mobile' feeds into 'Web Daily Approval'.
- Daily Planning - Mobile (Mobile icon):**
 - Flow: Mobile Daily Planning → Mobile Daily Execution → Mobile Daily Approval.
 - Input: 'Can Plan via Web or Mobile' feeds into 'Mobile Daily Planning'.
 - Output: 'Can Execute via Web or Mobile' feeds into 'Mobile Daily Execution'.
 - Output: 'Can Approve via Web or Mobile' feeds into 'Mobile Daily Approval'.
- Progress (Progress icon):**
 - Weekly Timesheet:** Receives input from 'Web Daily Approval' and 'Mobile Daily Approval', leading to a 'Timesheet Entry'.
 - Time Center (optional):** Receives input from 'Mobile Daily Approval', leading to 'Add/Delete Timecards' and 'Resolve Issues'.
 - Integration:** 'Resolve Issues' leads to 'Actual Hours via integration'.
- Payroll System:** Receives 'Actual Hours via integration' and sends data back to the 'Control' block.
- Output:** 'Actual Quantities' are sent from the 'Mobile Daily Approval' stage back to the 'Control' block.

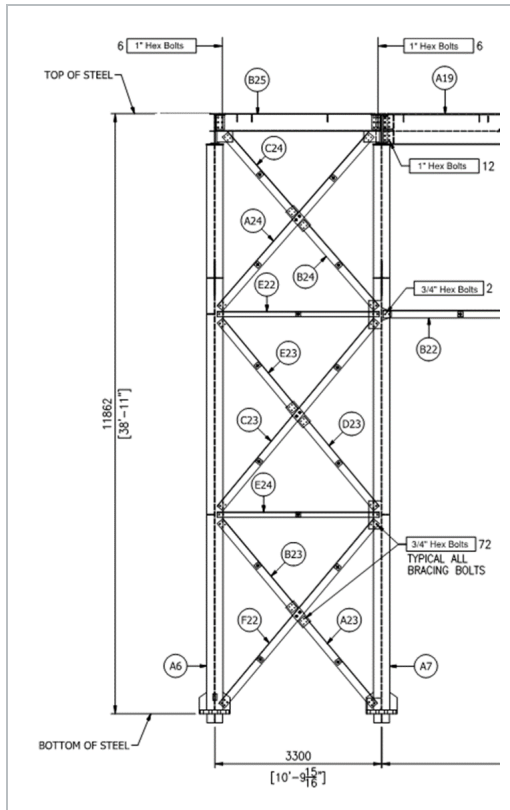
Scenario

InEight Inc. | Release 22.6



The steel members you will be installing are:

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



The plan for our crew tomorrow will be to shake out 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 (labor and equipment) that is used to achieve a goal or objective.

In 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)

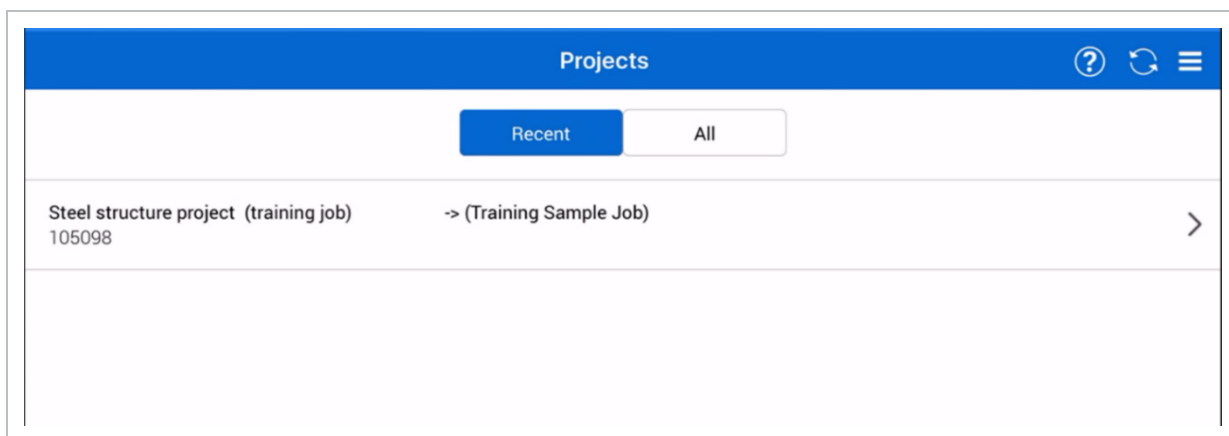
NOTE

You must provide a date of when the plan will be executed, select an approver, and select an executor 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.

Some projects or organizations may choose to not require an executor which is a setting that can be changed in the project settings. Refer to the Progress Admin User Guide for more information on settings.

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



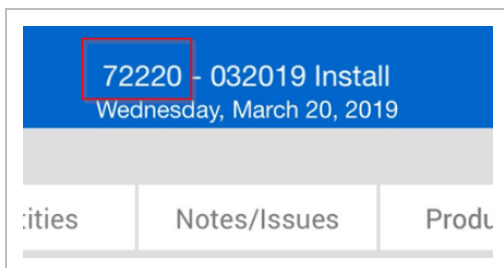
When you select the project you want to create a daily plan for, you will open the Daily plans page, where you will see the **Add**  button.

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, executor, Work plan/package ID, and associated vendor. When you have completed the plan information, you create the plan by selecting **Add** in the top right corner.

The screenshot shows the 'New daily plan' form. At the top, there's a header with a green plus icon, 'Daily Plans', a dropdown arrow, and a 'View' link. Below the header, there are 'Cancel' and 'Add' buttons. The form fields are: 'Date' (June 02, 2022), 'New Plan Name', 'Location (optional)', 'Shift' (FIRST SHIFT), 'Approver' (with a dropdown arrow), 'Executor' (with a dropdown arrow), 'Work plan/ package' (Optional), 'Associated vendor' (Optional), and 'Skip planning' (toggle switch).

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.

Light Steel Install - Structure 1	
Tuesday, September 25, 2018	
Notes	Light Steel Install - Structure 1
Time	Tuesday, September 25, 2018
Budget	Scottsdale
Planned	Shift
Plan G/L	First shift9 2324
	Approver
	Jacob Rose - Account Administrator- Copy
	Executor
	Bridgette Quintero - Foreman
	PO number
	N/A
	Work plan/ package
	None

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 required hold points
- 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 requires a response from the engineer in order to perform a section of work due to a design conflict
- A reminder of material requisition that you need to complete for upcoming work

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

Plans Light Steel Install - Structure 1
Tuesday, September 25, 2018

In Planning

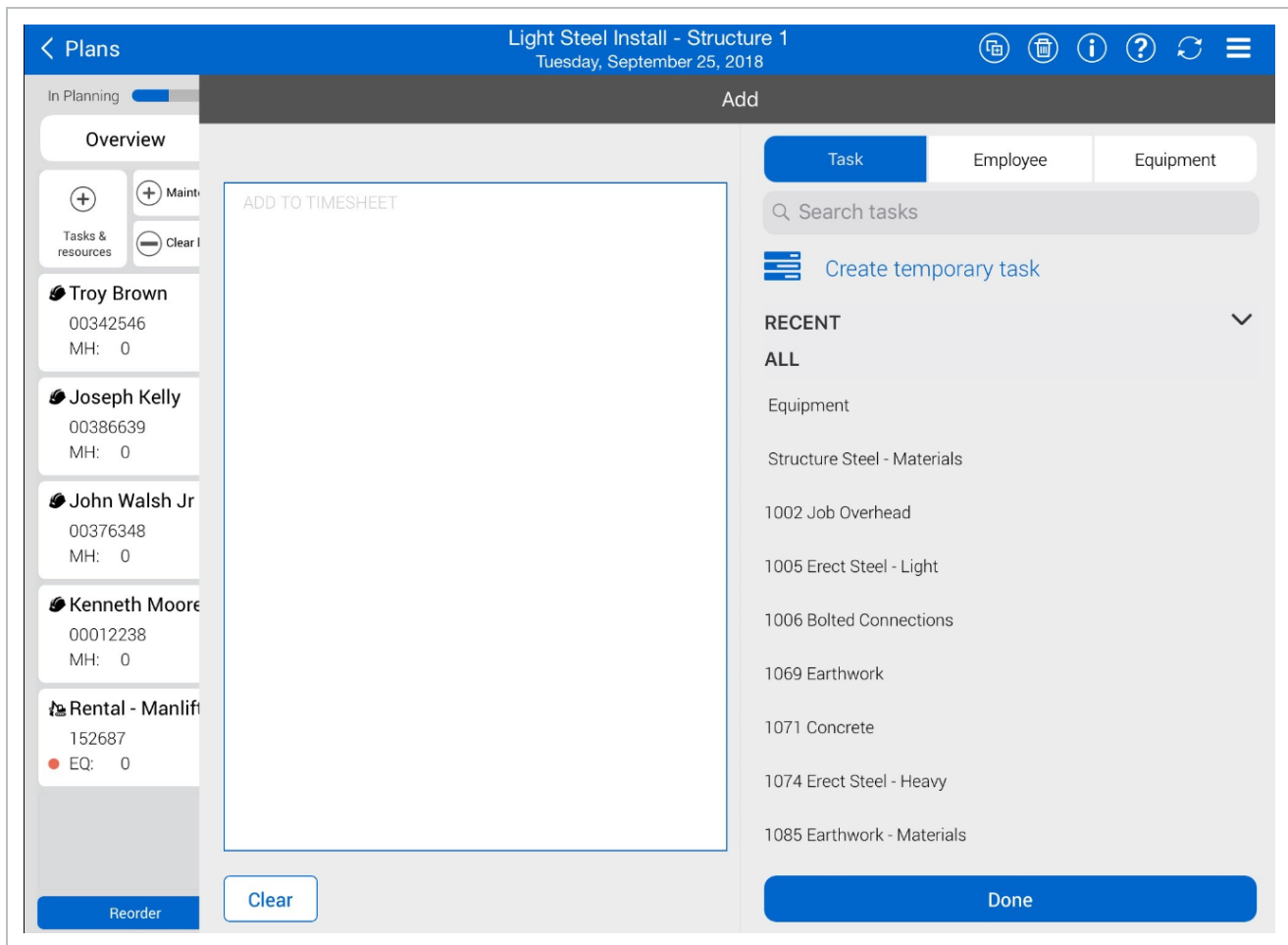
Overview Timesheet Quantities Notes/Issues Productivity Sign out **Submit**

Planned tasks		Quantity		Time	Budget	Toolbox talks	
Task ID	Description	Planned	UOM	Planned	Plan G/L		
Planner notes Verify steel member dimensions with updated drawings to ensure correct installation.						+ Safety Safety concern Human - Equipment Interface Mitigation Use spotter at all times.	
						+ Quality Quality concern Material Quality Mitigation Cover stockpiles	
						+ Environmental Environmental concern Spills from JLG Mitigation Use drip trays under equipment when not in use.	
						+ General discussion RFI-Metals-001 submitted to client. Allow 5 days for review and answer.	

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 scopes of work that equal one cost item or line in the overall project budget. They are the charge codes you will charge employee and equipment hours to. Tasks are designated by a unique WBS number which is established in InEight Control and can vary greatly from company to company based on how you standardize cost coding structures..



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.

Plans

Light Steel Install - Structure 1
Tuesday, September 25, 2018

In Planning

Overview

Timesheet

Quantities

Notes/Issues

Productivity

Sign out

Submit

+

Tasks & resources

+

Maintenance

←

Clear hours

1005

Erect Steel - Light

MH:24 EQ:0

Reorder

Troy Brown

00342546

MH: 8

8

Joseph Kelly

00386639

MH: 8

8

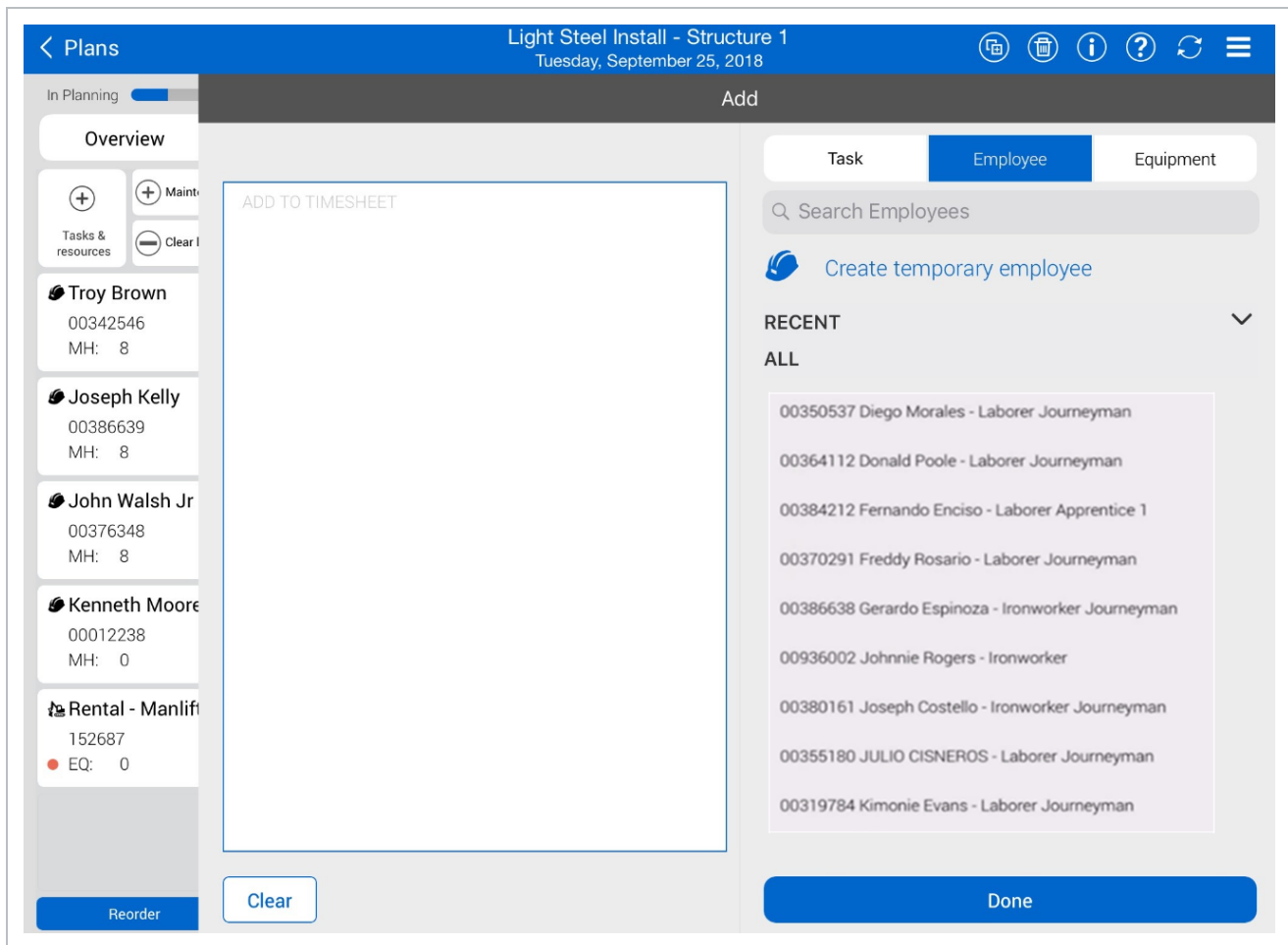
John Walsh Jr

00376348

MH: 8

8

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



You can add employees and equipment only if the plan date is within the resources' project start and end dates. These dates are managed in your project's Assigned operational resources page.

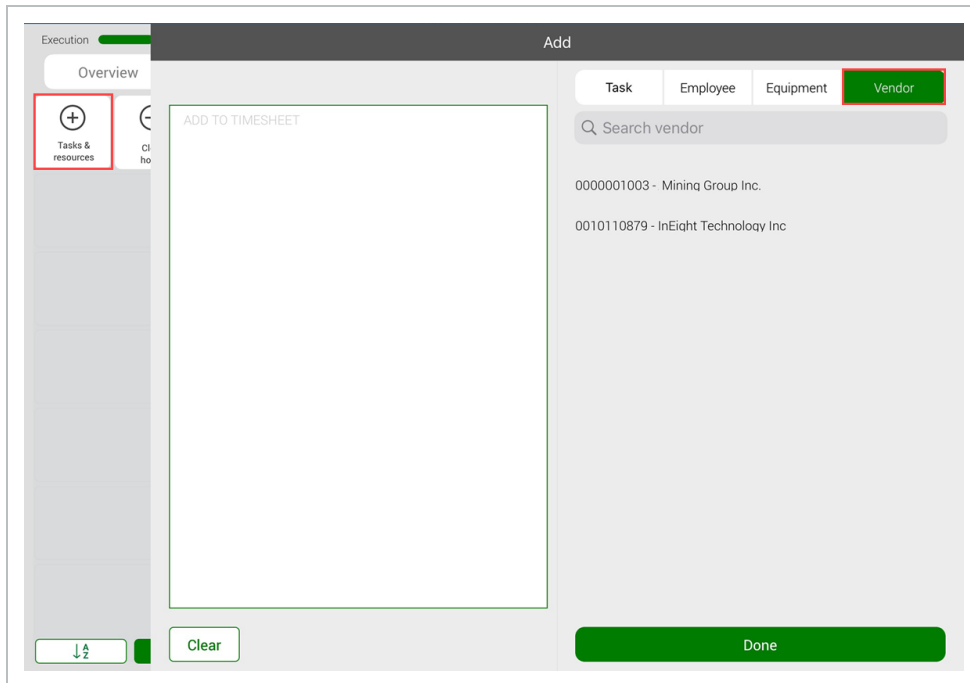
NOTE

If you change project employee or equipment dates after they are already added, and the plan date is outside the new project employee or equipment dates, an inactive employee or equipment icon is shown.

3.2.2.5 Add vendors

If your project has vendors who are completing work, you can add the vendors to a timesheet to assign labor hours directly to the vendor and enter the number of vendor employees who worked. Vendor data comes from InEight Control, where you assign vendors to individual cost items to indicate that a certain scope of work will be completed by a third-party vendor.

To add a vendor to the timesheet, tap **Tasks and resources**, and then tap **Vendors** in the slide-out panel. Select vendors from the left side of the panel, and then tap **Done**.



3.2.2.6 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.

3.2.2.7 Add Hours

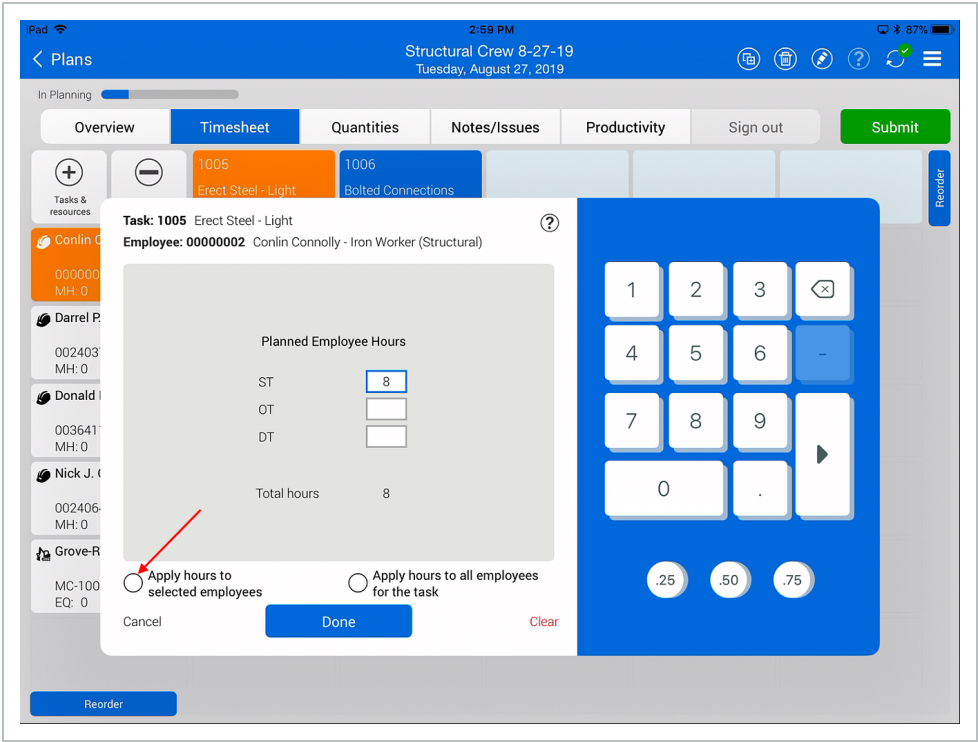
After you add tasks, labor, equipment, and vendor resources to the project, you can add time to the tasks and resources.

- 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
- If you are adding hours to a vendor resource, there is an additional Number of employees field.

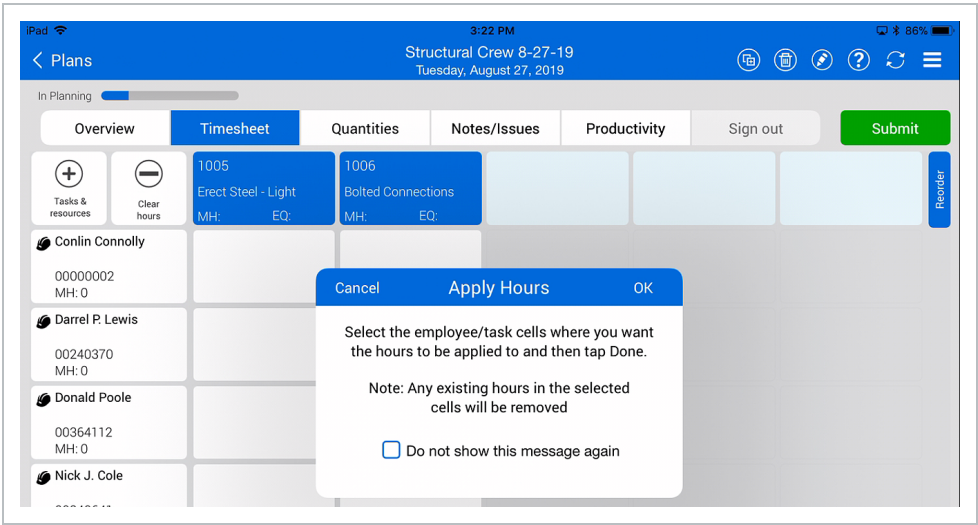
The screenshot shows the 'Plans' screen for 'Structural Crew 8-27-19' on Tuesday, August 27, 2019. The 'Timesheet' tab is active. A modal dialog titled 'Task: 1005 Erect Steel - Light' is open, showing 'Employee: 00000002 Conlin Connolly - Iron Worker (Structural)'. The dialog has a 'Planned Employee Hours' section with input fields for 'ST' (8), 'OT', and 'DT'. The 'Total hours' is displayed as 8. At the bottom, there are two radio buttons: 'Apply hours to selected employees' (selected) and 'Apply hours to all employees for the task'. The dialog also includes 'Cancel', 'Done', and 'Clear' buttons. A numeric keypad is visible on the right side of the dialog.

3.2.2.8 Apply Hours to Selected Employees

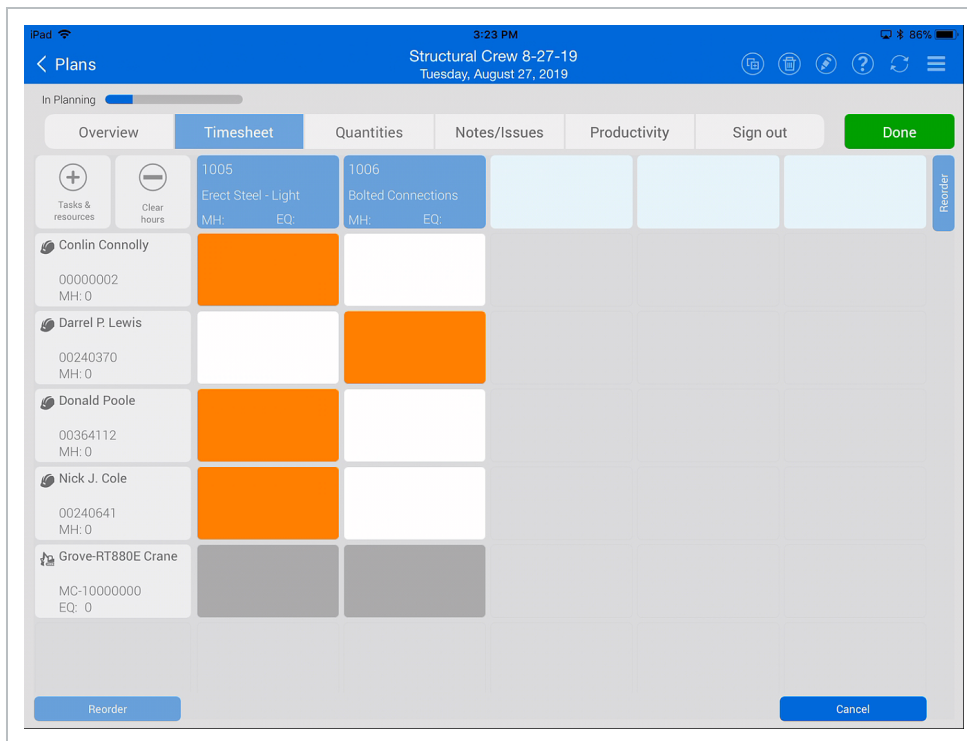
To save time, you can add hours to multiple employees at once. To do so, you would tap on the hours box for an employee and enter the number of hours you plan for them to work. You can then select **Apply hours to selected employees**.



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.

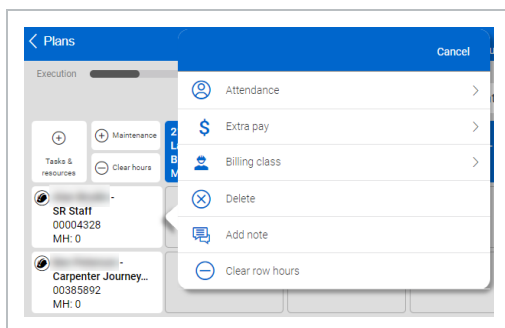


When you tap OK to close the dialogue, you can then select the hours boxes for all the employees you want to assign the same number of hours to, then tap Done.



3.2.2.9 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 **Extra pay**, you have the choice from none, premium, Foreman for the day, pay scale level change, and additional lump sum amount
- When you select **Billing class**, you can override the employee's default billing class with a different billing class.

NOTE

This change is only temporary. The employee's default billing class is not changed.

- Add a note
- Delete row
- Clear row hours

3.2.3 Quantities Tab

Progress pulls in quantity components associated to cost items from InEight Plan to the Quantities tab, where you can select the planned quantities to be completed.

Plans

Light Steel Install - Structure 1
Tuesday, September 25, 2018

In Planning

Overview

Timesheet

Quantities

Notes/Issues

Productivity

Sign out

Submit

+

Task

1005
Erect Steel - Light

+

Add Components

1005 - Erect Steel - Light

Module 01 - C23: Cross Brace Assembly

Module 1 - C23: Cross Brace Assembly

Priority	Complete	Step	Quantity	UoM	To-date quantity	Planned Quantity
	☐	Shakeout/Tra...	0.25816	Ton	0	0
	☐	Erect/Bolt Up	0.25816	Ton	0	0
	☐	Final Torque	0.25816	Ton	0	0
	☐	QC Verification	0.25816	Ton	0	0
Component Total			0.25816	Ton	0.000	0.000

Task Total

Ton

0.000

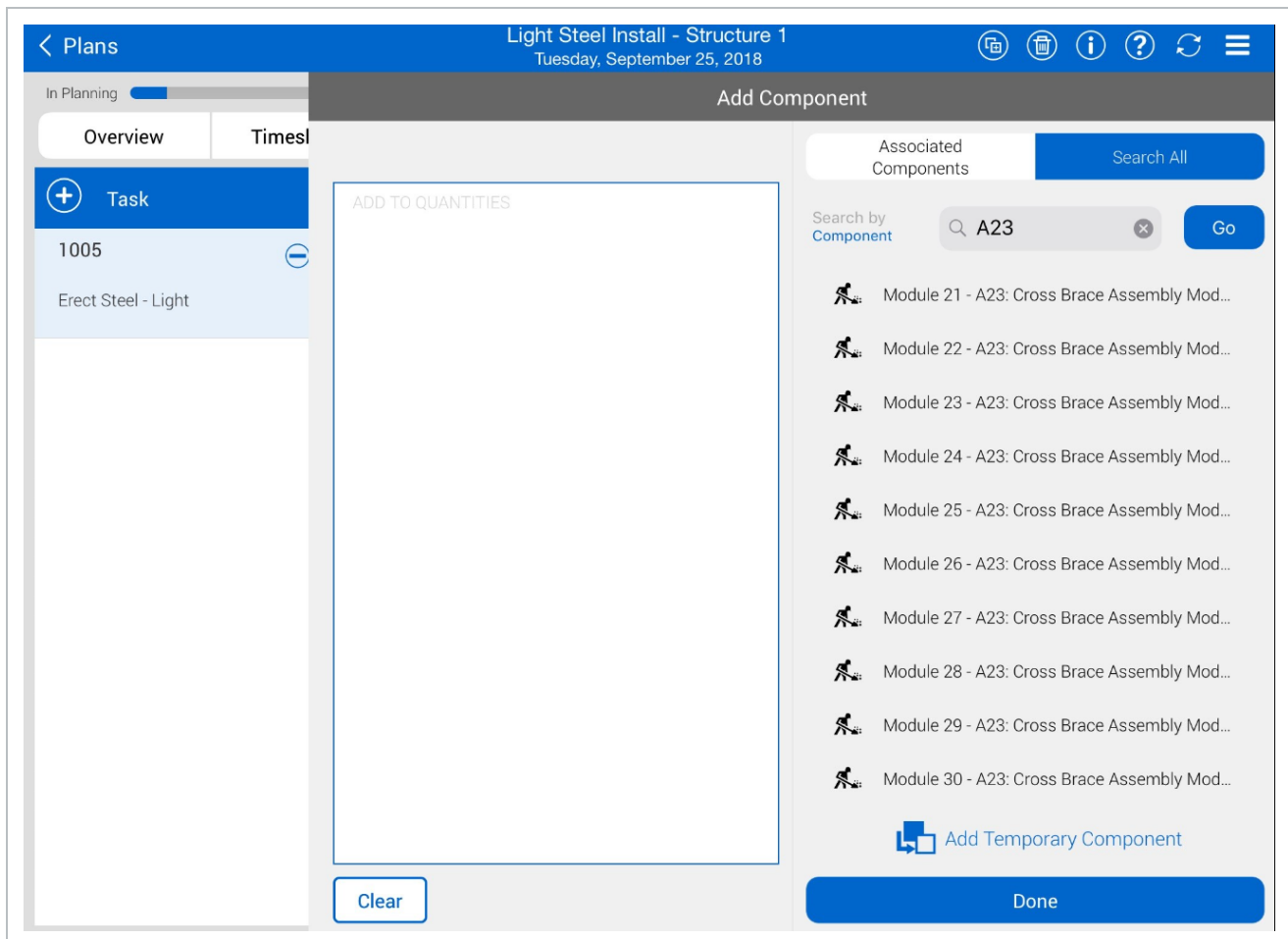
3.2.3.10 Components

Components are portions of a cost item created to divide cost item quantities into manageable and identifiable tasks, 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 several types of components:

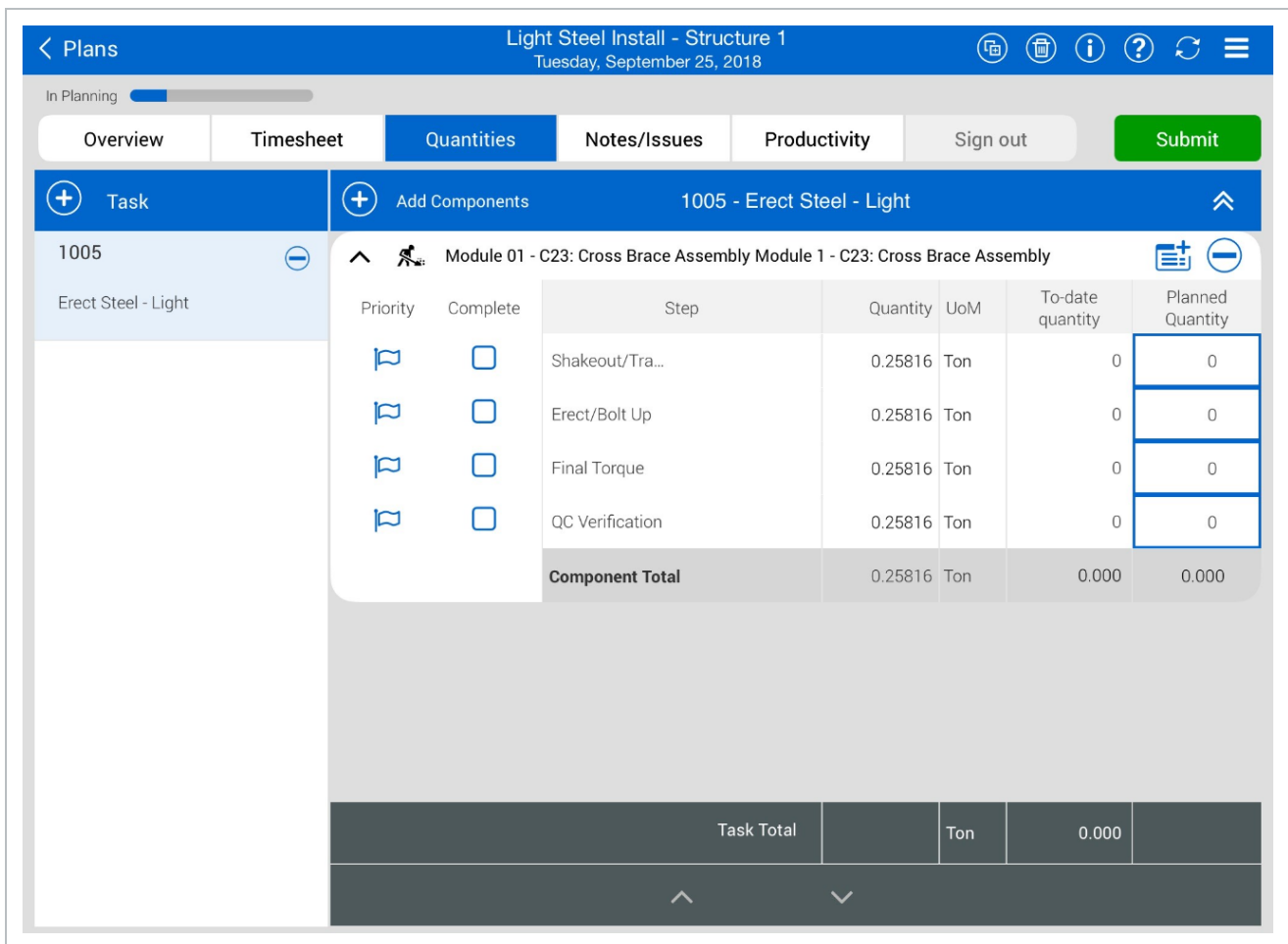
- Activity – Disciplines that show claiming schemes for physical work such as electrical

- Denoted by 

- Material – Commodities that show claiming schemes for materials such as anchor bolts
 - Denoted by 
- Contract – Linked to Schedule of Value items in InEight Contract for billing validation.

3.2.3.11 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.



The screenshot displays the 'Planned Quantity' section of the InEight mobile app. The top bar shows 'Plans' and 'Light Steel Install - Structure 1' with the date 'Tuesday, September 25, 2018'. Below the top bar, there are tabs for 'Overview', 'Timesheet', 'Quantities', 'Notes/Issues', 'Productivity', 'Sign out', and a green 'Submit' button. The 'Quantities' tab is selected, showing a task list on the left and a detailed view of the selected task on the right.

The task list on the left shows a task named '1005 - Erect Steel - Light' with a minus icon. The detailed view on the right shows the task name '1005 - Erect Steel - Light' and a sub-header 'Module 01 - C23: Cross Brace Assembly Module 1 - C23: Cross Brace Assembly'. Below this, there is a table with columns: Priority, Complete, Step, Quantity, UoM, To-date quantity, and Planned Quantity.

Priority	Complete	Step	Quantity	UoM	To-date quantity	Planned Quantity
	☐	Shakeout/Tra...	0.25816	Ton	0	0
	☐	Erect/Bolt Up	0.25816	Ton	0	0
	☐	Final Torque	0.25816	Ton	0	0
	☐	QC Verification	0.25816	Ton	0	0
Component Total			0.25816	Ton	0.000	0.000

At the bottom of the screen, there is a 'Task Total' section showing 'Task Total' with a 'Ton' unit and a value of '0.000'.

3.2.3.12 Contracts

Contracts can be added to a daily plan so that you can add associated contract components to track for billing validation.

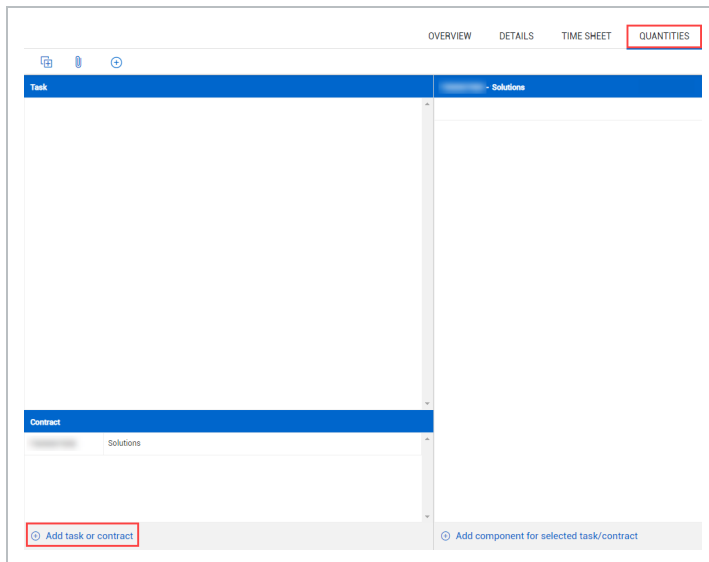
NOTE

A contract must be associated with the same project and have schedule of value items to be available in a daily plan.

The following steps show you how to add a contract.

3.2 Step by Step 1 — Add a contract to a daily plan

1. On the Quantities tab of a daily plan, click **Add task or contract** in the lower left of the page.



2. In the slide-out panel, open the **Contract** tab, and then select one or more contracts from the list. Selected contracts are moved to the Add to daily plan list.
3. Click **Done**.

After you add a contract, you can add any associated contract components in the Quantities tab.

3.2.3.13 Contract components

Contract components are used to track quantities for billing validation.

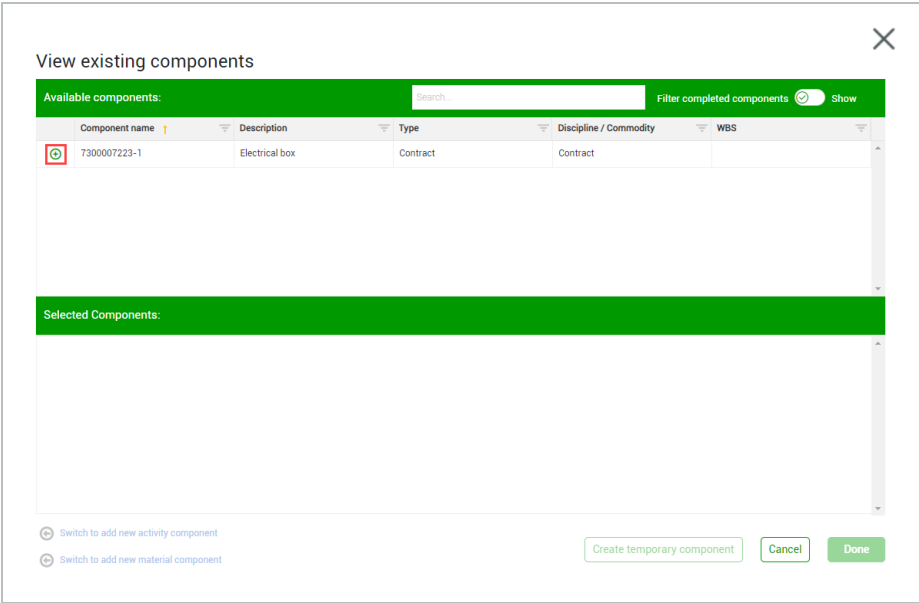
NOTE

A contract component is automatically created from Contract when a schedule of values item for a contract is not set to hide in Plan and Progress.

The following steps show you how to add a contract component to a daily plan. You must add a contract to the daily plan before adding a contract component.

3.2 Step by Step 2 — Add a contract component to a daily plan

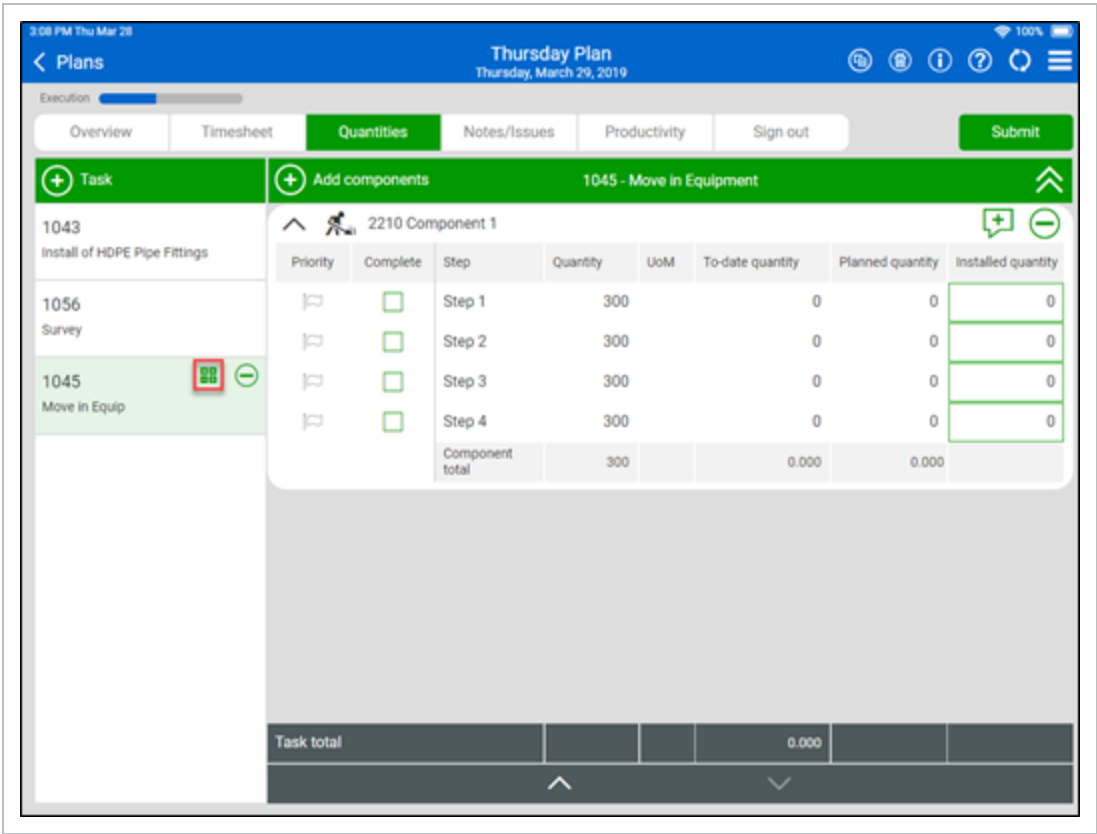
- 1. Select a contract from the Contract list in the lower left of the Quantities tab.
- 2. Click **Add component for select task/contract**.



- 3. Select a contract component from the View existing components slide-out panel, and then click **Done**.

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.

The screenshot displays the 'Calculate costs' screen within the 'Thursday Plan' for Thursday, March 29, 2019. The screen has tabs for Overview, Timesheet, Quantities (selected), Notes/Issues, Productivity, and Sign out, along with a Submit button. A 'Cost summary' table lists Labor at \$3,600.00 and Equipment at \$940.00, with a total cost of \$4,540.00. Below the table, the 'Break even' section shows a quantity of 454 LF. The 'Calculate G/L' section prompts the user to enter a quantity to calculate Gain/Loss, with a 'Calculate' button. A numeric keypad is overlaid on the right side of the screen.

Task	Qty	UoM	Cost
1043 Install			
Labor			\$ 3,600.00
Equipment			\$ 940.00
1056 Survey			
Task total cost			\$ 4,540.00

1045 Break even ⓘ
Quantity needed to break even for this task.

Qty	UoM
454	LF

Calculate G/L ⓘ
Enter quantity to calculate Gain/Loss for this task, given the current Labor and Equipment hours.

Qty	UoM
	LF

Calculate

Earned	Cost	G/L
\$	\$ 4,540.00	\$

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

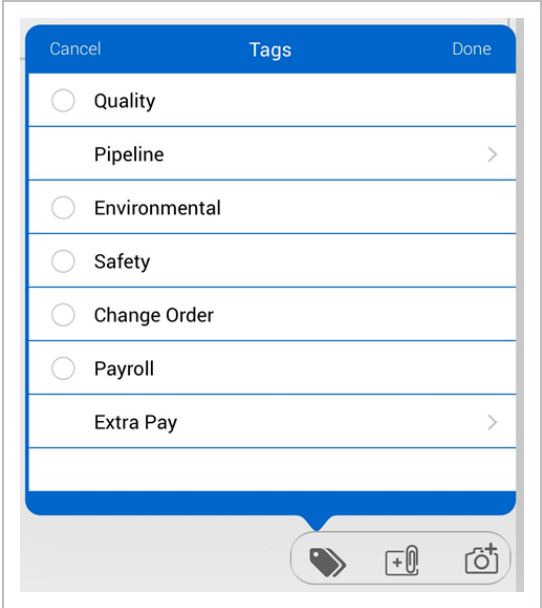
The screenshot displays the 'Plans' mobile application interface. At the top, a blue header bar contains a back arrow, the title 'Plans', the project name 'Light Steel Install - Structure 1', the date 'Tuesday, September 25, 2018', and several utility icons. Below the header, a progress bar indicates 'In Planning' status. A horizontal menu bar includes tabs for 'Overview', 'Timesheet', 'Quantities', 'Notes/Issues' (which is selected), 'Productivity', 'Sign out', and a green 'Submit' button. The main content area is divided into two panels. The left panel, titled 'Timeline', shows a note: 'Monitor weather as shift progresses. Stock piles must be covered before any rain hits.' with a timestamp of '9:18 AM'. The right panel, titled 'Cancel', contains the same note text. Below the note, there are sections for 'Tags' and 'Associations'. The 'Tags' section shows two selected tags: 'Quality' and 'Environmental'. The 'Associations' section shows one selected association: '1005 - Erect Steel - Light'. At the bottom right of the right panel, there are three icons: a tag, a document with a plus sign, and a camera.

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

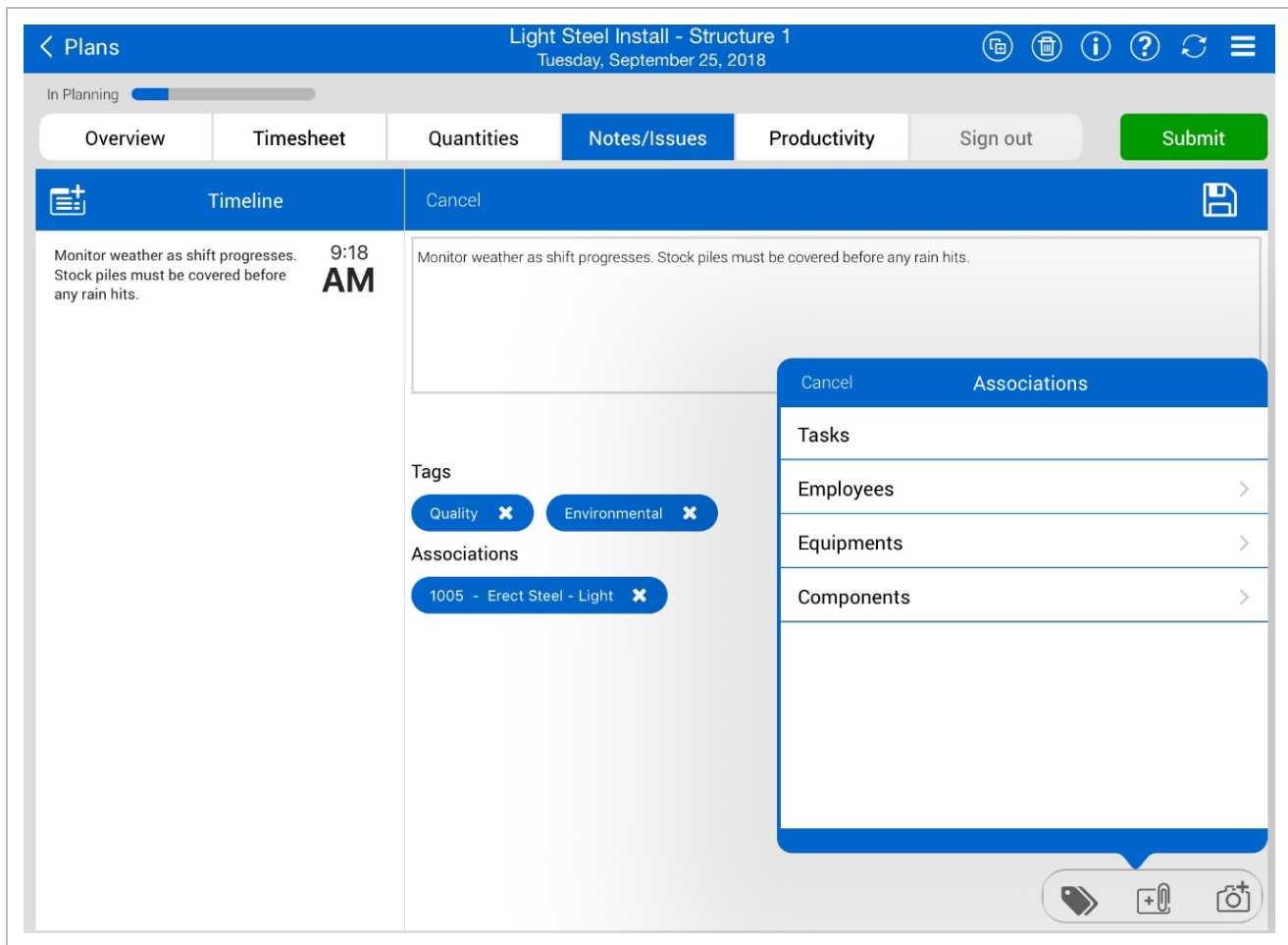
3.2.5.14 Tags and Associations

You can tag your notes to the following selections:

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

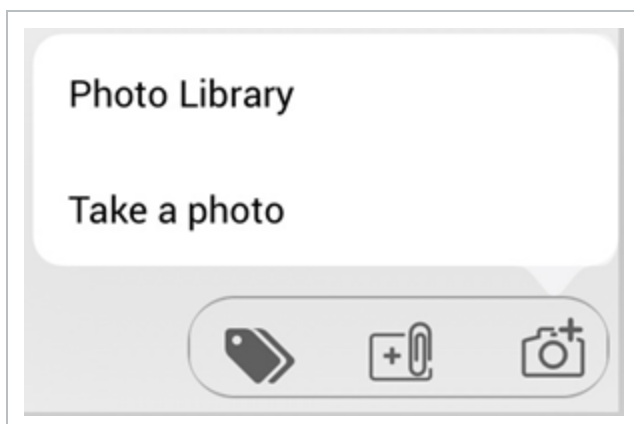


Aside from tagging your notes/issues, you also can associate your notes to any of the following categories: Task, Employee, Equipment, Component, and Vendor. After you tap a category name, you can select an association.

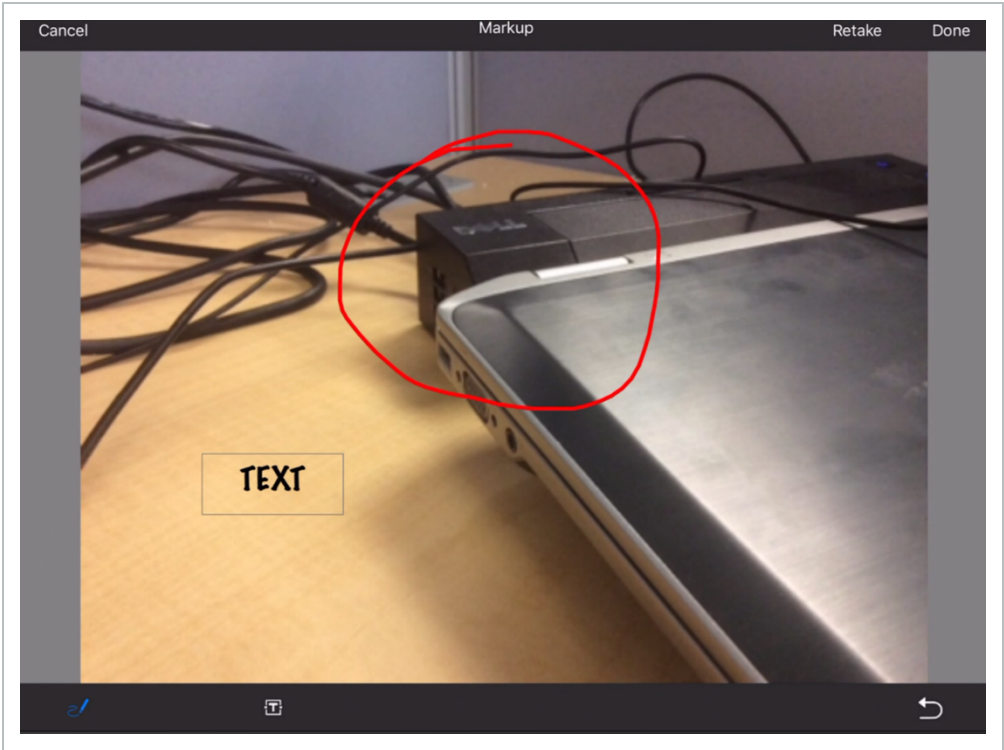


3.2.5.15 Adding and Editing a Picture

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.

Plans								
Light Steel Install - Structure 1								
Tuesday, September 25, 2018								
In Planning								
Overview		Timesheet		Quantities		Notes/Issues		Productivity
								Sign out
								Submit
Task ID and Description		Planned			MHRs per Qty		Planned	
Task ID	Description	Quantity	UOM	MHRs	Planned	CB	Cost G/L	MHRs G/L
1005	Erect Steel - Light	0.155	Ton	32	206.590	20.000	155	-28.9
Totals				32			155	-28.9

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 other applications and users in InEight. The engineer or superintendent that oversees your daily plans will then review and either approve or reject the Daily plan.

NOTE

Once you tap Submit, you can no longer edit the Daily plan in the planning phase. It will be moved into the Execution phase.

The screenshot shows the 'Plans' screen in the InEight mobile app. The title bar indicates 'Light Steel Install - Structure 1' and 'Tuesday, September 25, 2018'. Below the title bar, there's a progress bar labeled 'In Planning'. The main content area has a tabbed interface with 'Overview', 'Timesheet', 'Quantities', 'Notes/Issues', 'Productivity', and 'Sign out'. The 'Productivity' tab is active, showing a table with task details. A modal dialog is open in the center, asking 'Submit plan to Execution' with the question 'Are you sure you want to move this plan to Execution?' and two buttons: 'Cancel' and 'Submit'.

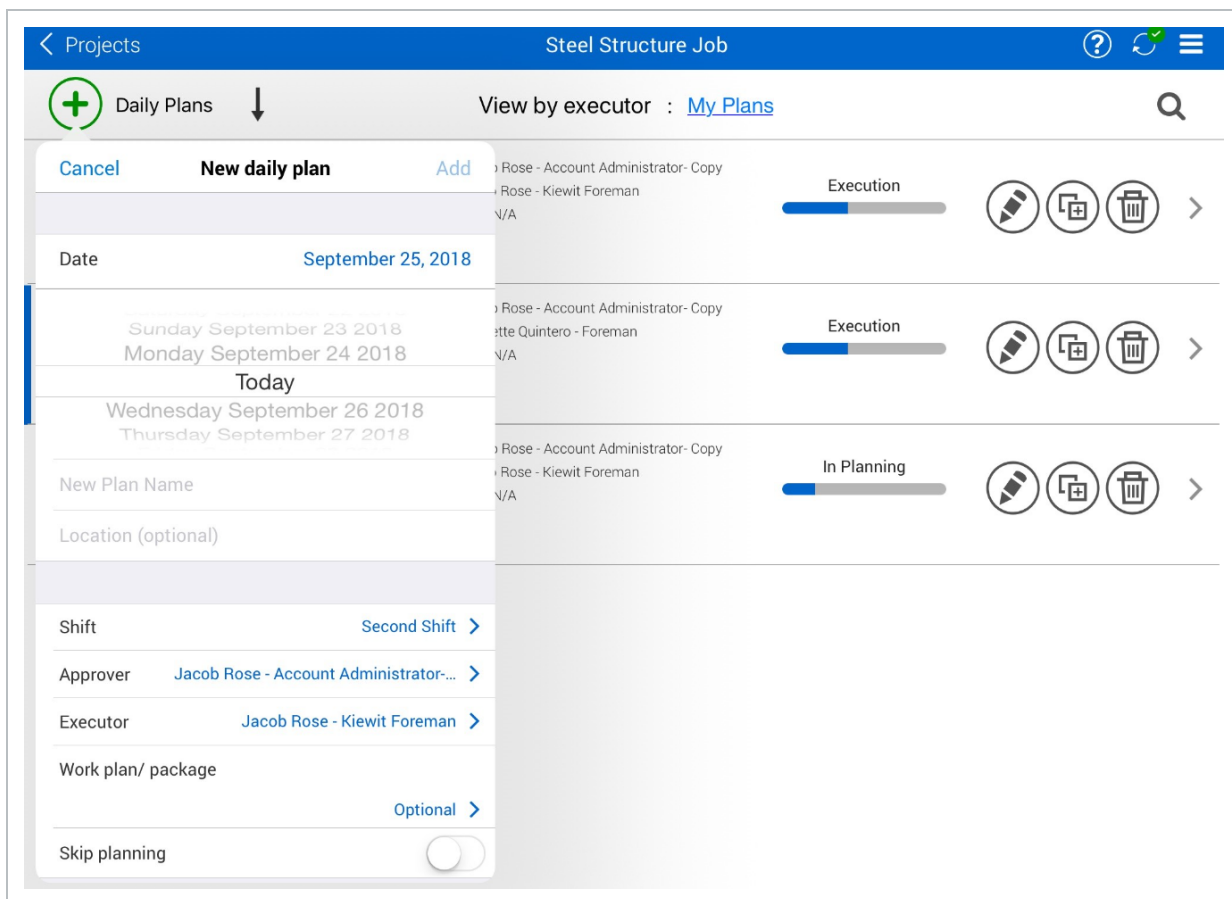
Task ID and Description		Planned			MHRs per Qty		Planned	
Task ID	Description	Quantity	UOM	MHRs	Planned	CB	Cost G/L	MHRs G/L
1005	Erect Steel - Light	0.155	Ton	32	206.590	20.000	155	-28.9
Totals				32			155	-28.9

3.2.8 Create a Plan from Scratch Walk Through

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

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.



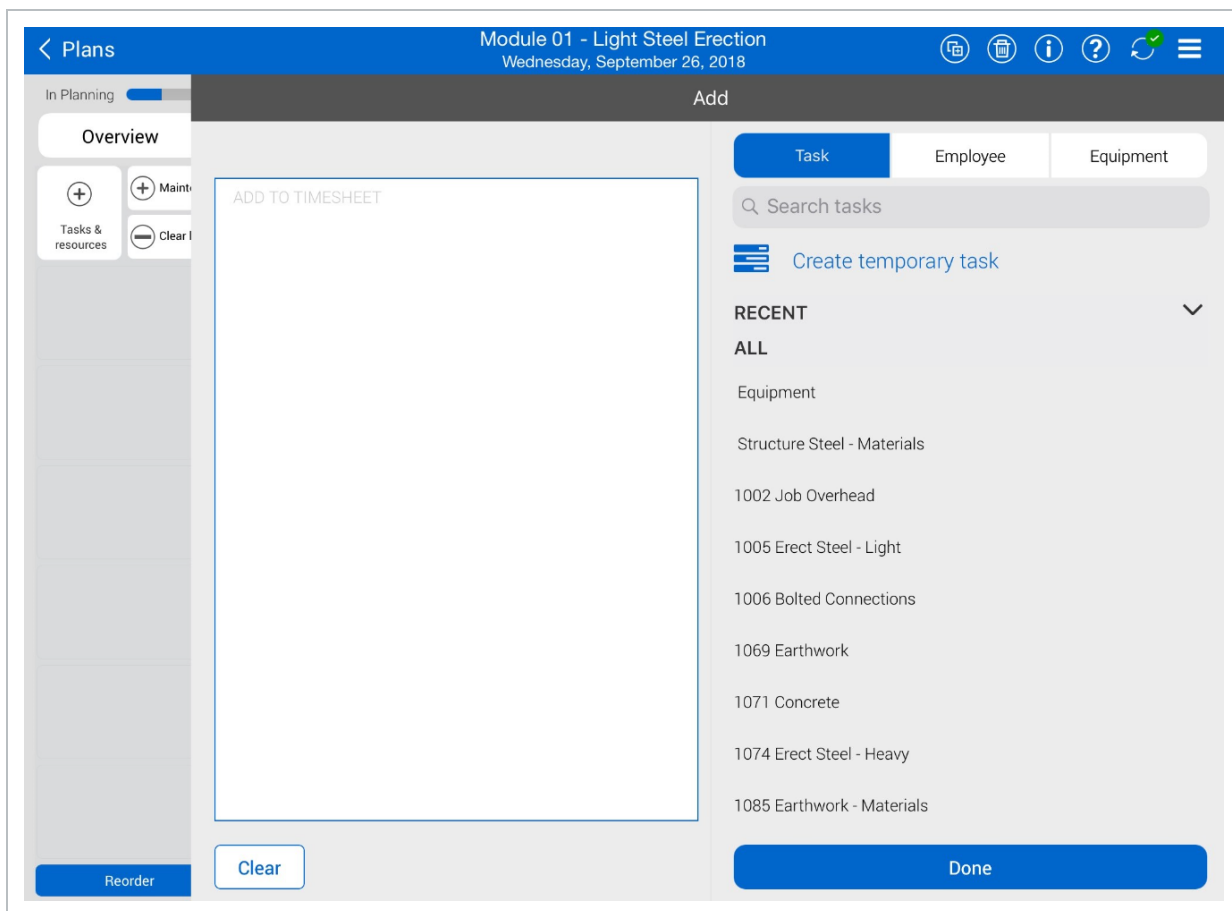
The screenshot displays the 'New daily plan' form in the InEight Progress mobile application. The form is overlaid on a list of existing plans. The form fields are as follows:

- Date:** September 25, 2018
- New Plan Name:** (empty field)
- Location (optional):** (empty field)
- Shift:** Second Shift
- Approver:** Jacob Rose - Account Administrator-...
- Executor:** Jacob Rose - Kiewit Foreman
- Work plan/ package:** Optional
- Skip planning:** (toggle switch)

The background shows a list of plans with status bars (Execution or In Planning) and action icons (edit, share, delete).

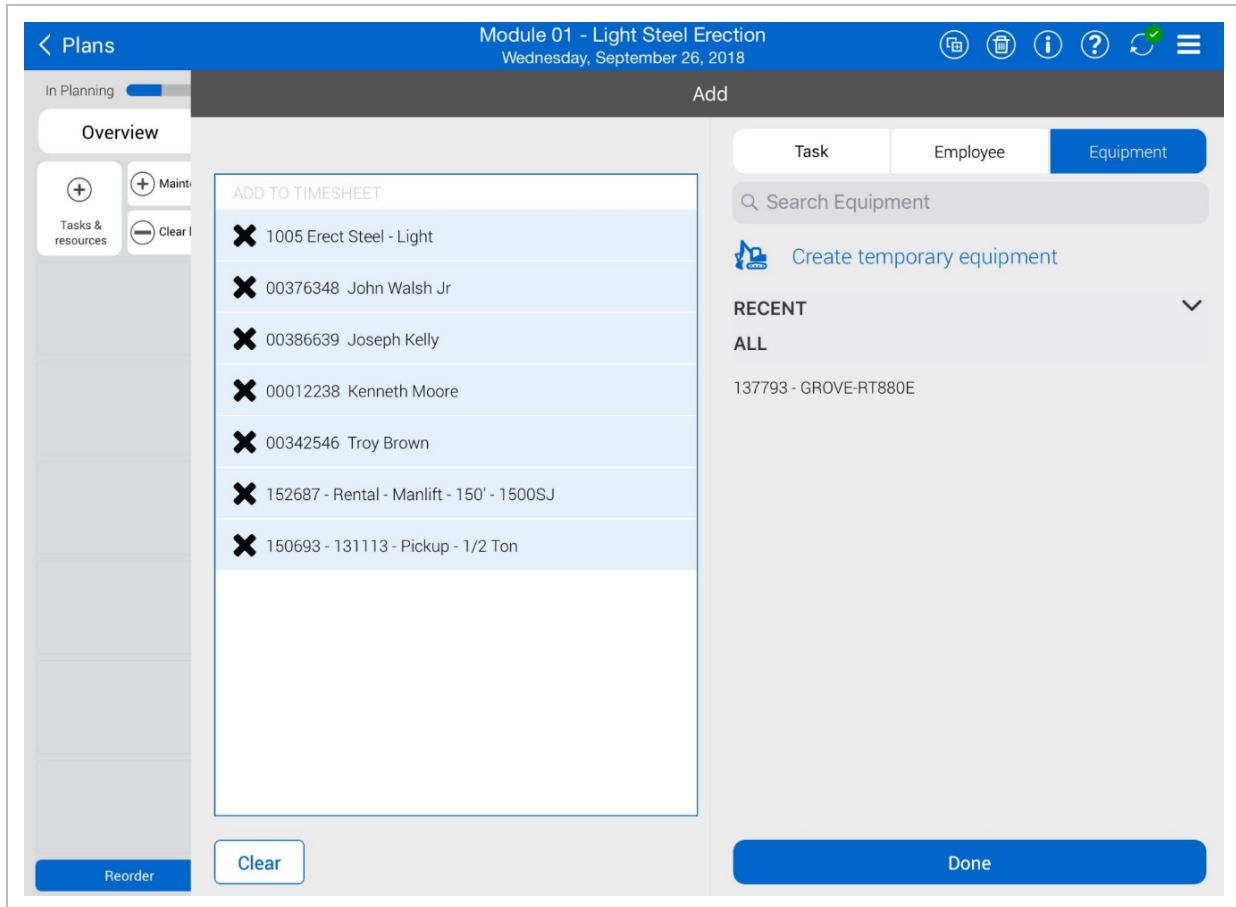
4. Choose a date for the daily plan.
5. Give a description in the Enter Plan Description field.
6. Enter a location in the Enter Location field.
7. Select a **shift** from the Job Shift menu.
8. Select an **Approver**.
 - Maximum of 2 selections. Usually an engineer and superintendent

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 **Add** button 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 Timesheet 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

Module 01 - A23: Cross Brace Assembly

Priority	Complete	Step	Quantity	UoM	To-date quantity	Planned Quantity
	☒	Shakeout/Tra...	0.15	Ton	0.15	0
	☐	Erect/Bolt Up	0.15	Ton	0	0
	☐	Final Torque	0.15	Ton	0	0
	☐	QC Verification	0.15	Ton	0	0
Component Total			0.15	Ton	0.023	0.000

Module 01 - A24: Cross Brace Assembly

Priority	Complete	Step	Quantity	UoM	To-date quantity	Planned Quantity
	☒	Shakeout/Tra...	0.24	Ton	0.24	0
	☐	Erect/Bolt Up	0.24	Ton	0	0
Task Total				Ton	0.303	

26. Select your task (i.e. 1005 – Erect Steel Light).

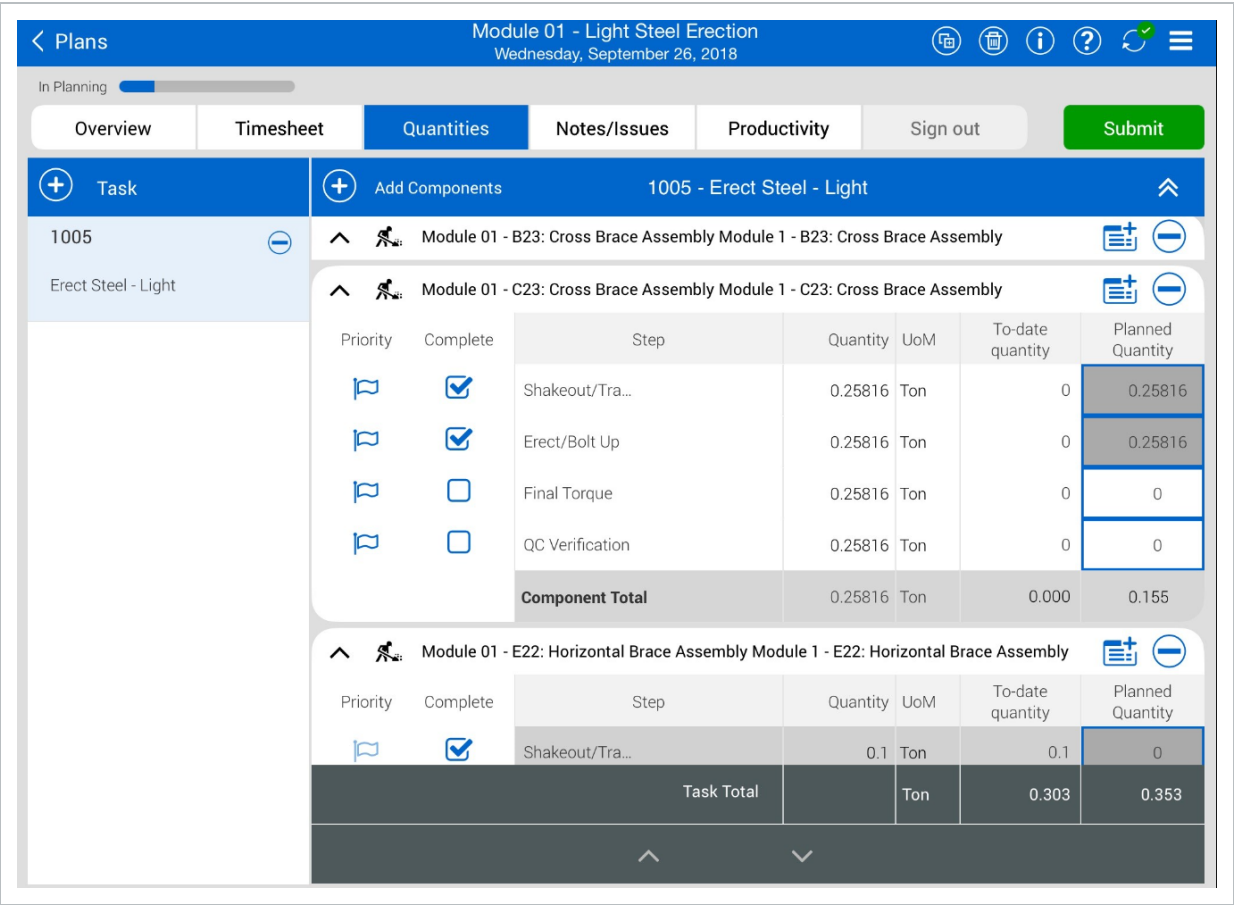
27. Tap the **Add Components** button.28. Then, tap on the **Search All** tab.

29. In the search bar, type in a keyword and select your components.

30. Tap **Done** to add the component to the quantities.

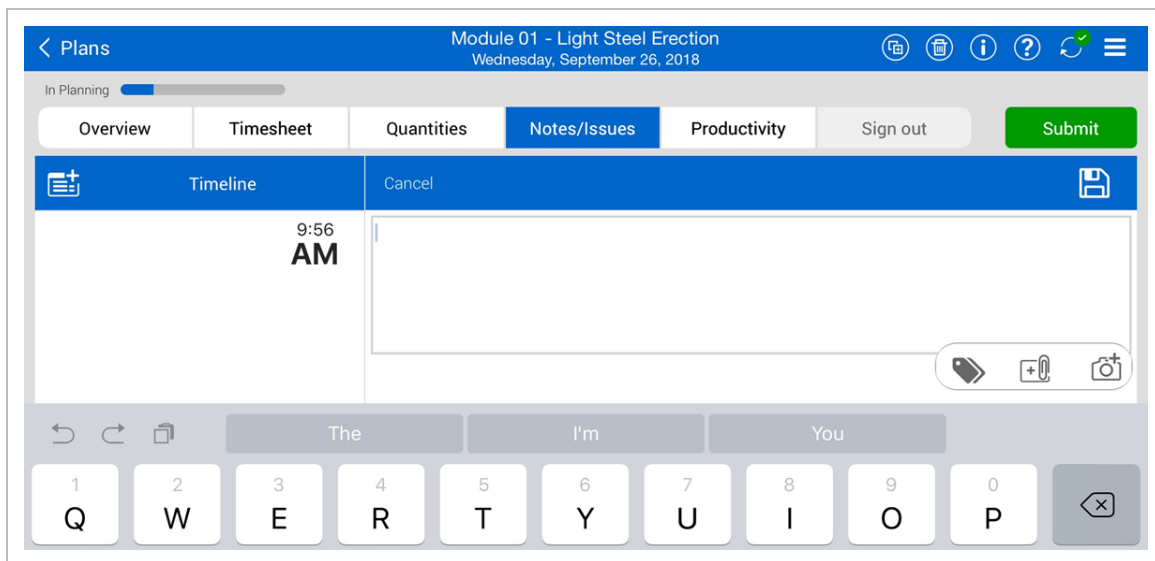
31. Check the check boxes in the Complete column as needed for your components or their broken down steps.

- By checking these boxes you are communicating to your crew that you expect these steps or components to be completed in the daily plan

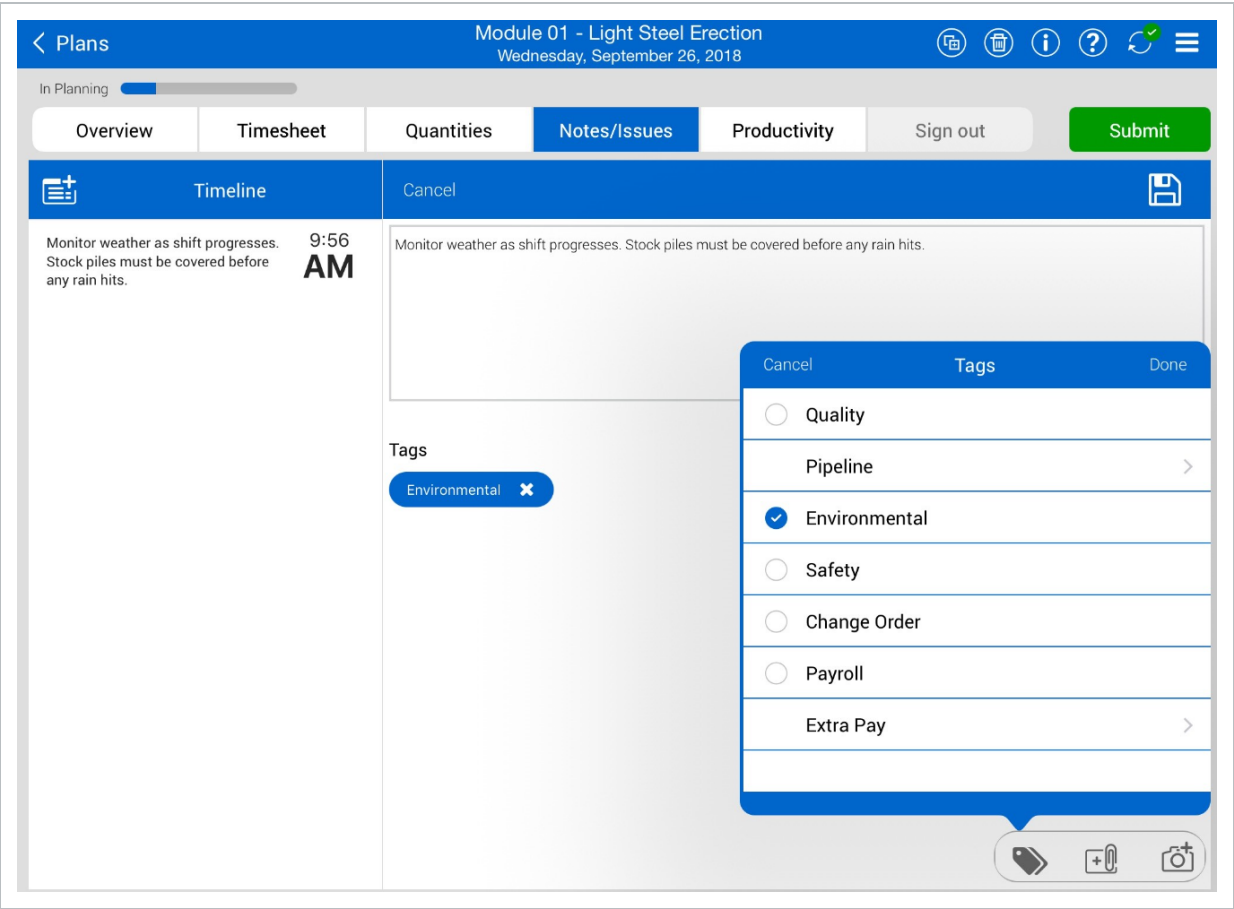


- 32. Tap on the **Notes/Issues** tab.
- 33. Tap on the **Add** button and select **Note** to add any project notes.

- 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.

Module 01 - Light Steel Erection								
Wednesday, September 26, 2018								
In Planning								
Overview Timesheet Quantities Notes/Issues Productivity Sign out Submit								
Task ID and Description		Planned			MHRs per Qty		Planned	
Task ID	Description	Quantity	UOM	MHRs	Planned	CB	Cost G/L	MHRs G/L
1005	Erect Steel - Light	0.353	Ton	32	90.678	20.000	353	-24.9
Totals				32			353	-24.9

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

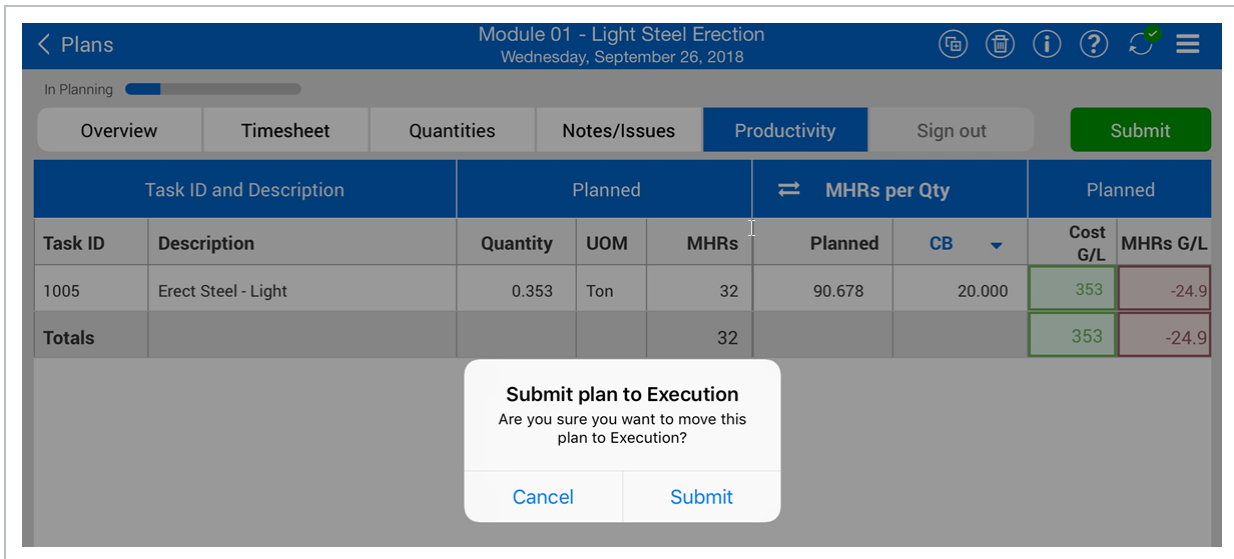
- Tap the double arrows to flip between MHRs per Qty and Qty per MHRs

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 similar work.

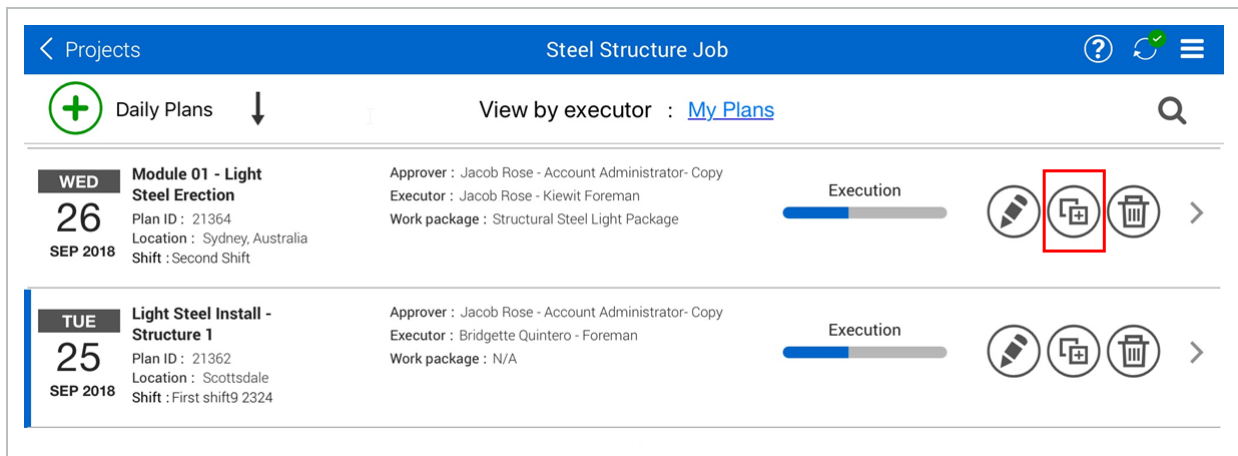
The copy of the Daily plan will be a mirror of the existing plan and you can edit the plan to tailor it to the new days objectives. For instance, if you have more crew members then when you last performed the work, you can add the new crew members to the Daily plan.

3.3.1 Create a Plan from Copy

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

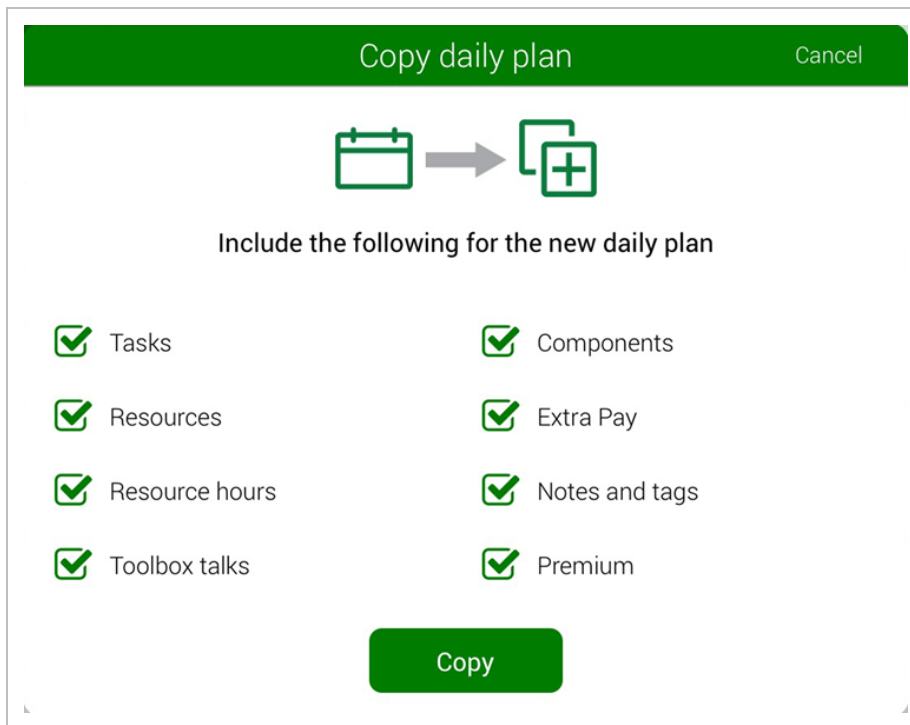
Create a Daily Plan from Copy

1. From the list of daily plans for your project, tap on the **Copy**  icon to make a copy of an existing plan. The Copy daily plan dialog box opens.



In the Copy daily plan dialog box, you can select items you want to copy to the new daily plan. All items are selected by default.

2. Deselect any items that you do not want to copy over to the new plan.



3. Tap **Copy**.
4. Edit the fields to reflect the new date.
5. Tap **Copy**.
6. 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



LESSON 4 – DAILY PLAN EXECUTION

Lesson Duration: 30 minutes

Lesson Objectives

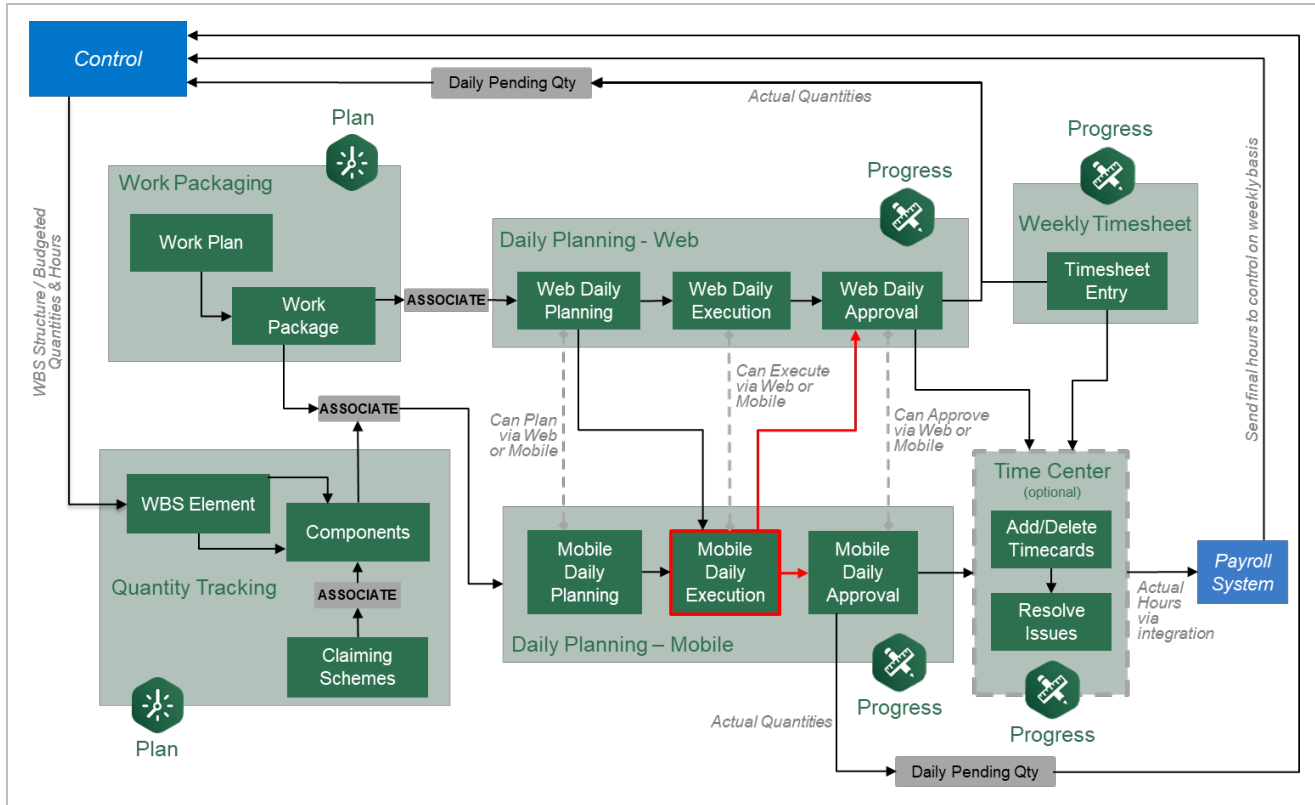
After completing this lesson, you will be able to:

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

Lesson Topics

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Lesson 4 Review	126
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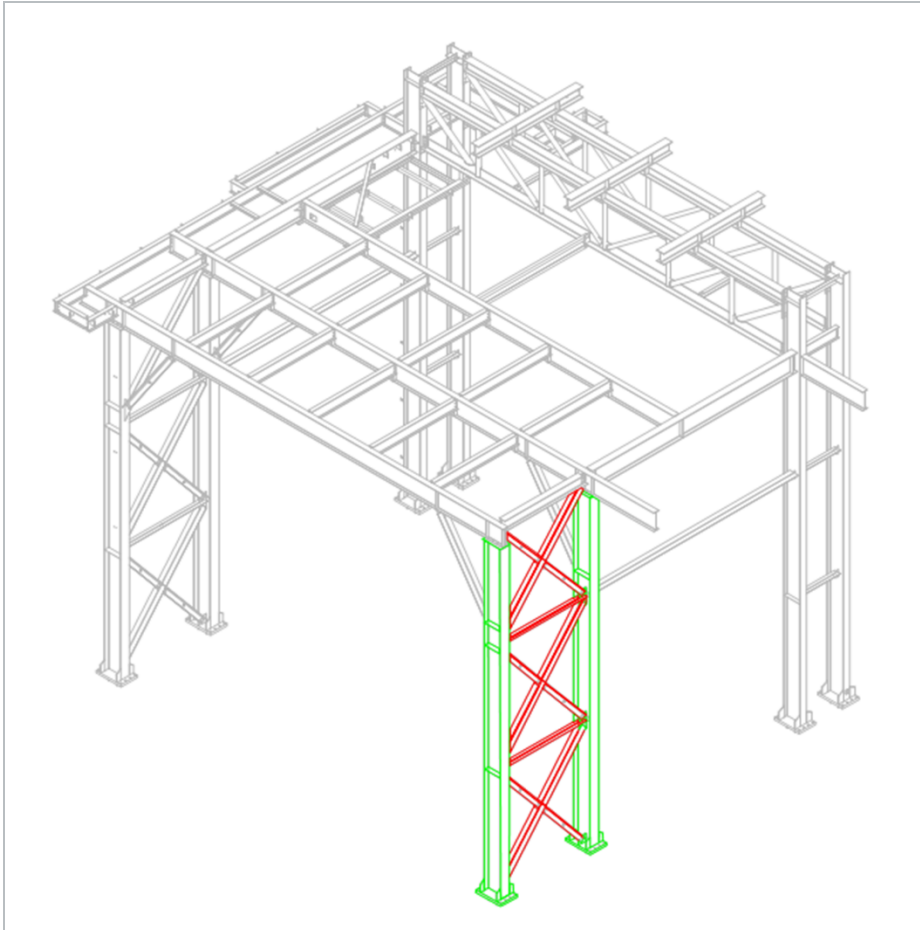
4.1 INEIGHT PROGRESS WORKFLOW - DAILY PLAN EXECUTION MOBILE



4.2 PLAN REVIEW

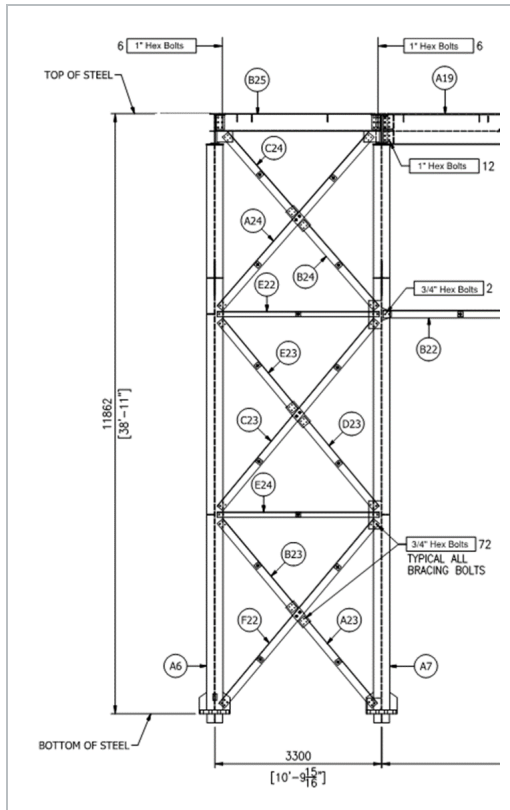
Scenario

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 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 crew member what their task is for the day, how many hours they must complete the task, and what equipment they have for their task.

You 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.

Plans
Light Steel Install - Structure 1
Tuesday, September 25, 2018

Execution

Overview

Timesheet

Quantities

Notes/Issues

Productivity

Sign out

Submit

Planned tasks		Quantity		Time	Budget	Toolbox talks	
Task ID	Description	Planned	UOM	Planned	Plan G/L		
1005	Erect Steel - Light	0.155	Ton	32	-28.9	+ Safety concern	+ Mitigation
Totals				32	-28.9	Human - Equipment Interface	Use spotter at all times.
						+ Quality	+ Mitigation
						Material Quality	Cover stockpiles
						+ Environmental	+ Mitigation
						Spills from JLG	Use drip trays under equipment when not in use.
						+ General discussion	+
						RFI-Metals-001 submitted to client. Allow 5 days for review and answer.	

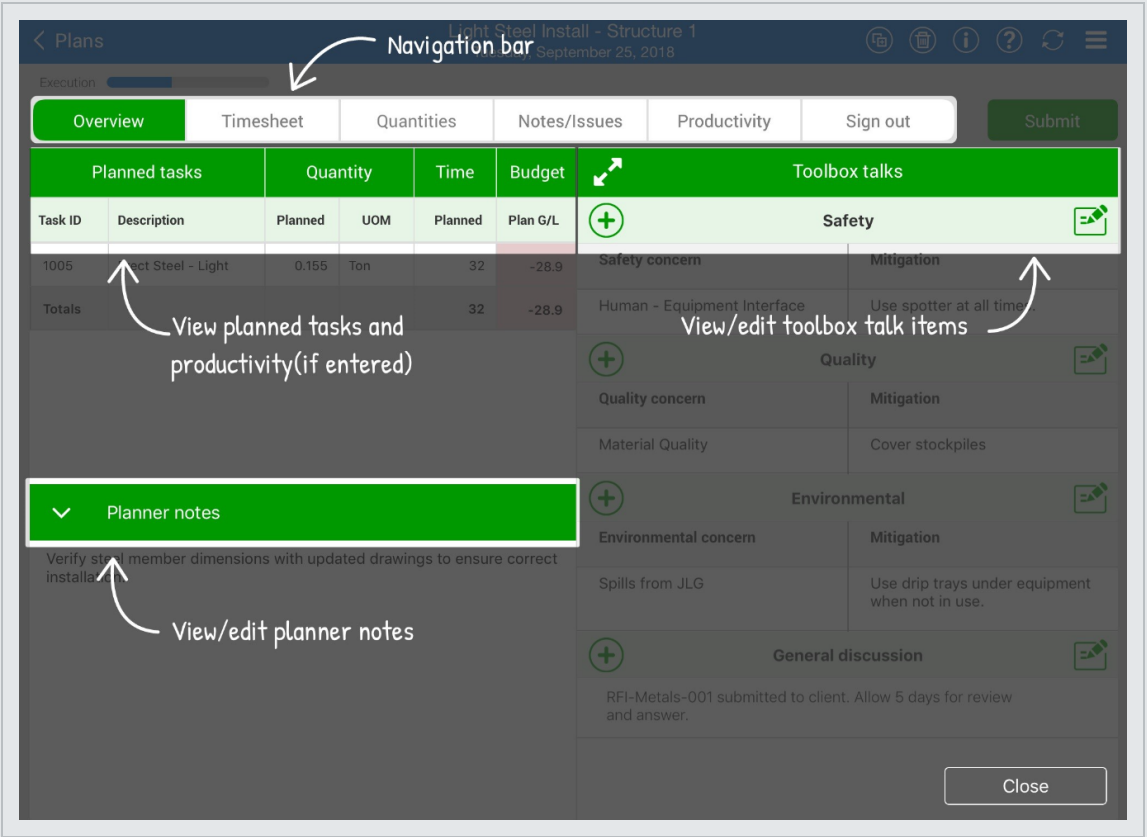
Planner notes

Verify steel member dimensions with updated drawings to ensure correct installation.

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.

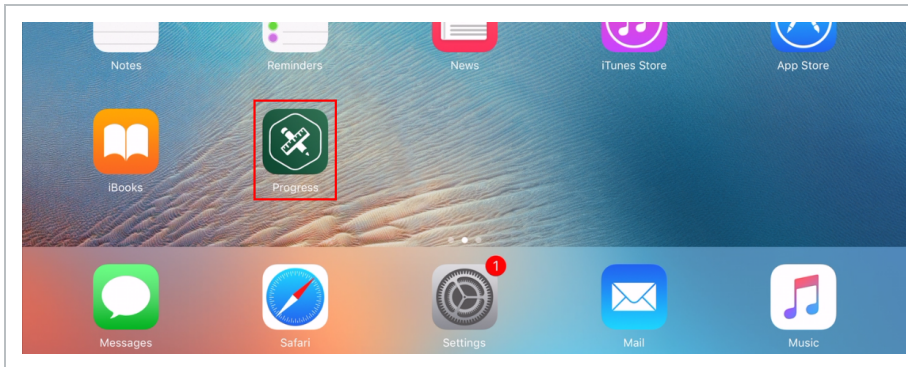
Once selected, the help screen will look like the following:



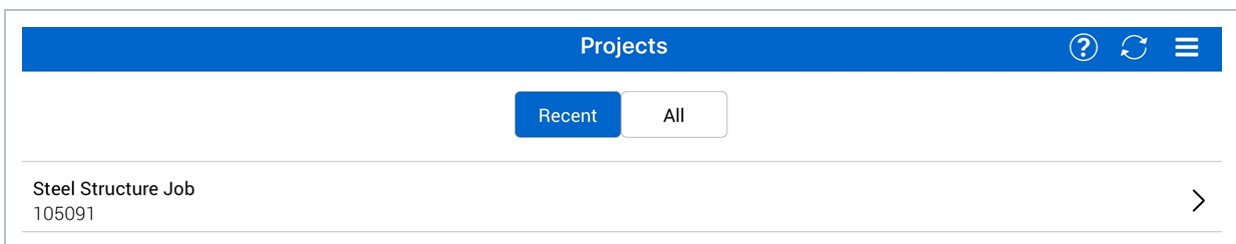
Simply select the close button at the bottom of your screen to close the help screen.

Review Daily Plan Overview Tab

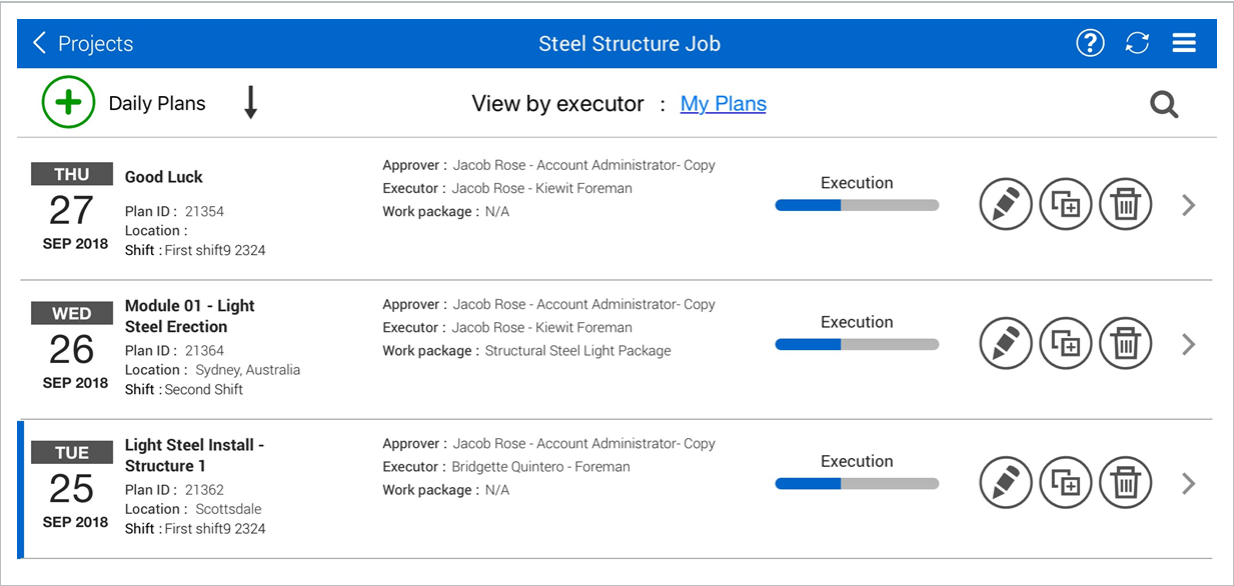
1. Launch the **InEight Progress** application through your mobile device.



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 a project.
 - 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 a daily plan.



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

Plans Light Steel Install - Structure 1
Tuesday, September 25, 2018

Execution

Overview Timesheet Quantities Notes/Issues Productivity Sign out Submit

Planned tasks		Quantity		Time	Budget	Toolbox talks	
Task ID	Description	Planned	UOM	Planned	Plan G/L		
1005	Erect Steel - Light	0.155	Ton	32	-28.9	Safety Safety concern Mitigation Human - Equipment Interface Use spotter at all times.	
Totals				32	-28.9	Quality Quality concern Mitigation Material Quality Cover stockpiles	
Planner notes Verify steel member dimensions with updated drawings to ensure correct installation.						Environmental Environmental concern Mitigation Spills from JLG Use drip trays under equipment when not in use.	
						General discussion RFI-Metals-001 submitted to client. Allow 5 days for review and answer.	

4.3 INPUT ACTUALS

As the workday progresses, within Progress you can input the hours each crew member 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.

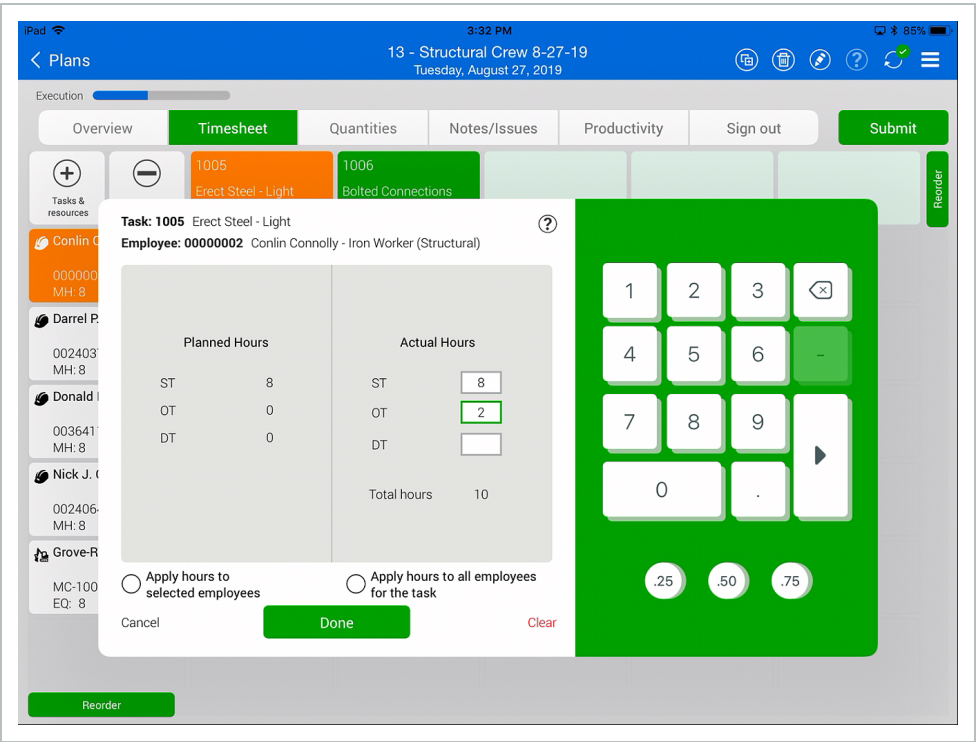
4.3.1 Timesheet Tab

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

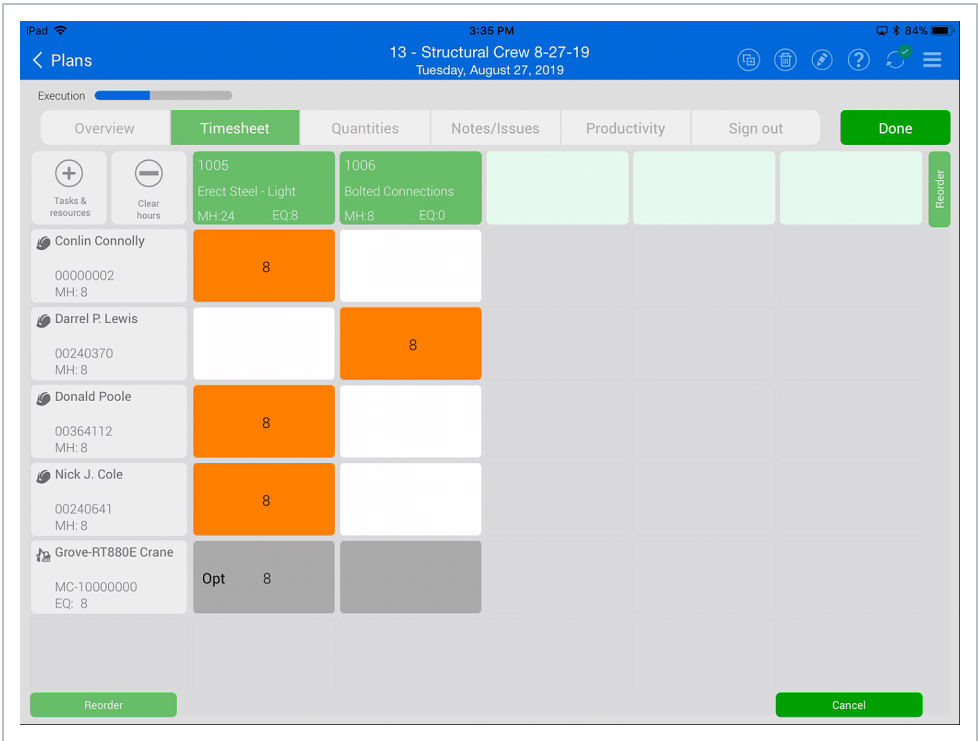
You may need to track that a crewmember has shown up late or missed a day of work. You can also add notes to an employee if there was an injury, tardiness, or extra work hours.

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.



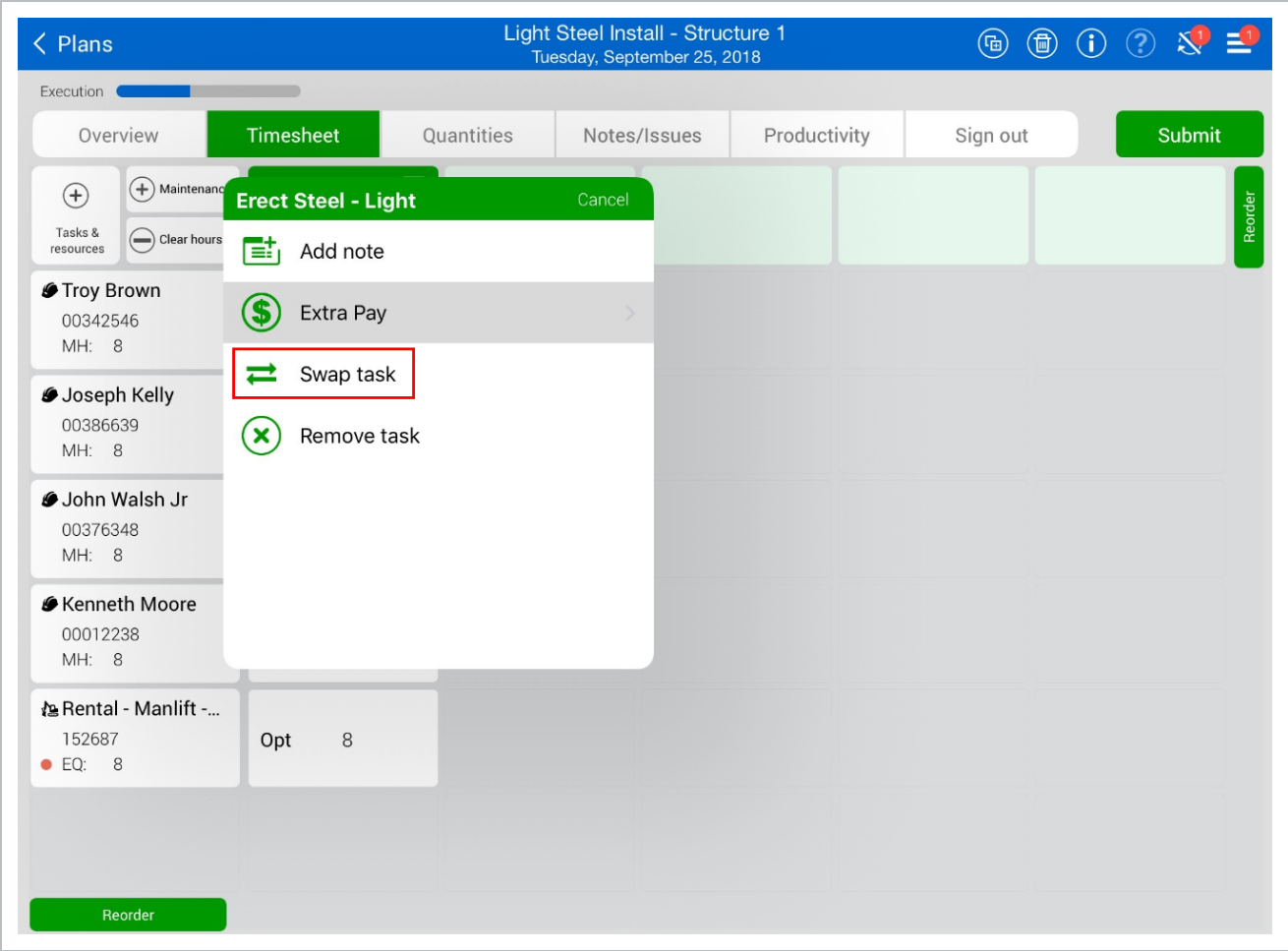
If everyone in your crew has worked the same hours, you can select the **Apply hours to all employees for the task** box. If you want to apply the same hours to some of the employees on the daily plan, you can select **Apply hours to selected employees** and select the hours boxes for all the employees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



If you are adding hours to a vendor resource, there is an additional Number of employees field.

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

On the Quantities tab, you can check off components and claiming steps as complete, or input the exact quantities completed for the day.

Plans

Light Steel Install - Structure 1
Tuesday, September 25, 2018

Execution

Overview

Timesheet

Quantities

Notes/Issues

Productivity

Sign out

Submit

+

Task

+

Add Components

1005 - Erect Steel - Light

⬆

1005

Erect Steel - Light

⬇

⬆

🔧

Module 01 - C23: Cross Brace Assembly

Module 1 - C23: Cross Brace Assembly

⬆

⬇

Priority

Complete

Step

Quantity

UoM

To-date quantity

Planned Quantity

Installed Quantity

☒

Shakeout/Tra...

0.25816

Ton

0

0.25816

0.25816

☐

Erect/Bolt Up

0.25816

Ton

0

0.25816

0

☐

Final Torque

0.25816

Ton

0

0

0

☐

QC Verification

0.25816

Ton

0

0

0

Component Total

0.25816

Ton

0.000

0.155

0.039

Task Total

Ton

0.000

0.155

0.039

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 a specific component, you can tap on the Note  button.

Light Steel Install - Structure 1
Tuesday, September 25, 2018

Execution

Overview Timesheet **Quantities** Notes/Issues Productivity Sign out Submit

Task **Add Components** 1005 - Erect Steel - Light

1005
Erect Steel - Light

Module 01 - C23: Cross Brace Assembly Module 1 - C23: Cross Brace Assembly

Priority	Complete	Step	Quantity	UoM	To-date quantity	Planned Quantity	Installed Quantity
	☒	Shakeout/Tra...	0.25816	Ton	0	0.25816	0.25816
	☐	Erect/Bolt Up	0.25816	Ton	0	0.25816	0
	☐	Final Torque	0.25816	Ton	0	0	0
	☐	QC Verification	0.25816	Ton	0	0	0
Component Total			0.25816	Ton	0.000	0.155	0.039
Task Total				Ton	0.000	0.155	0.039

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.

Plans Light Steel Install - Structure 1
Tuesday, September 25, 2018

Execution

Overview Timesheet Quantities **Notes/Issues** Productivity Sign out Submit

Timeline Cancel

Cross brace member E23 does not conform to issued engineering drawings. RFI may be required.
Module 01 - C23: Cross Brace Assembly Modu... **10:58 AM**

Monitor weather as shift progresses. Stock piles must be covered before any rain hits.
Environmental, Quality, 1005 - Erect Steel - Li... **9:18 AM**

Cross brace member E23 does not conform to issued engineering drawings. RFI may be required.

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 cost in daily plan productivity during execution phase?” and is in the Daily Planning section of the project settings.

Plans Light Steel Install - Structure 1
Tuesday, September 25, 2018

Execution

Overview Timesheet Quantities Notes/Issues **Productivity** Sign out Submit

Task ID and Description		Actual			MHRs per Qty			Actual	
Task ID	Description	Quantity	UOM	MHRs	Planned	Actual	CB	Cost G/L	MHRs G/L
1005	Erect Steel - Light	0.039	Ton	32	206.590	826.361	20.000	39	-31.2
Totals				32				39	-31.2

NOTE

The Actual G/L compares the actual cost and man-hours recorded on your executed daily plan to the budgeted, forecasted or current estimate costs and man-hours using the following equations:

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

The drop down arrow next to CB under the MHRs per QTY header allows you to select which unit cost to compare against: CE, CB or Forecast

- 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 In/Sign Out Tab

The Sign in/Sign out tab lets you sign in or out for the day, answer any questions associated with sign-in or sign-out, and enter any breaks you take.

4.3.5.1 Sign In Subtab

The Sign In subtab lets you sign in for the day and answer questions at the beginning of your shift.

11:08 AM Tue Mar 9

45660 - Excavate
Wednesday, February 24, 2021

Execution

Overview Timesheet Quantities Notes/Issues Productivity Sign in/Sign out Submit

Employee John Doe (00000000)

John Doe
00000000 (Temporary e...)

Sign out all eligible

* Client sign off

Reject All

Sign in Breaks Sign out

Shift start
06:00 AM Edit shift time

ST	OT	DT	Total
0.00	8.00	0.00	8.00
hours	hours	hours	hours

Planned Tasks

Task: 00000000	ST	OT	DT	Total
Removal	0	8	0	8
	hours	hours	hours	hours

Sign in questions

I have listened to today's tooltalks and understand my tasks for today.

Yes No

Clear

Sign in

Shift Start Time

You can enter shift start time. The Shift start field is synced with the Breaks and Sign Out subtabs. Changes made to the time in one subtab change the others.

NOTE

If you enter a Shift end value in the other subtabs, you cannot edit the Shift start field in the Sign In subtab.

Employee Sign-in

To sign in as an employee, tap on your name. Each employee must enter a PIN (personal information number) to sign in, which can be your birth date or a number that the IT personnel has assigned. With the proper project settings enabled, there is also an option to sign in with a signature.

Sign-in on Behalf of Employee

Depending on project settings you might also have the option to sign in on behalf of employees by using Touch ID or PIN. This project setting is recommended because crewmembers might forget to sign in when the crew iPad is not around, which prevents the daily plan from being submitted. As a field engineer, foreman, or other heavy user of the app, you can sign in for all employees at one time and use the electronic signature.

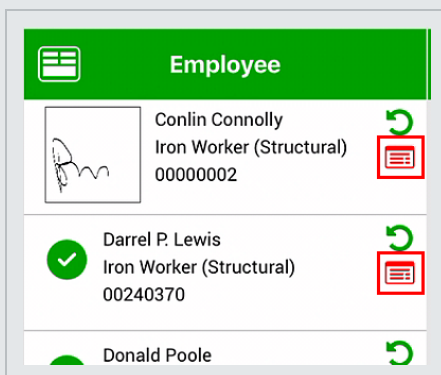
Questions

When you sign in, you or your crewmember might be asked a set of questions related to the work to be 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 give a non-compliant answer, a dialog box lets you put a note as to why you chose that answer
- You can tap **No Exceptions** if all answers are in compliance

NOTE

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



4.3.5.2 Breaks Subtab

In the Breaks subtab, you can enter up to three breaks per daily plan and per person. To enter a break, you must enter its start time and length.

11:08 AM Tue Mar 9

45660 - Excavate
Wednesday, February 24, 2021

< Plans

Execution

Overview Timesheet Quantities Notes/Issues Productivity Sign in/Sign out Submit

Employee John Doe (00000000)

John Doe
00000000 (Temporary e...)

Sign out all eligible

* Client sign off

Reject All

Sign in Breaks Sign out

Shift start	Shift end	ST	OT	DT	Total
06:00 AM	06:00 AM	0.00	8.00	0.00	8.00
		hours	hours	hours	hours

Edit shift time

Breaks

Break 1

Break 1 start time Break 1 length

Break 2

Break 2 start time Break 2 length

Break 3

Break 3 start time Break 3 length

Shift Start/End Time

You can also change your shift start and shift end times on the Breaks subtab.

NOTE If you change the shift start and end times, the Sign In and Sign Out subtabs change to match the new times.

4.3.5.3 Sign Out Subtab

The Sign Out subtab lets you sign out your hours and answer questions at the end of the day. Depending on settings and permissions, you can also sign out on behalf of eligible employees.

11:09 AM Tue Mar 9

45660 - Excavate
Wednesday, February 24, 2021

Plans

Execution

Overview Timesheet Quantities Notes/Issues Productivity Sign in/Sign out Submit

Employee John Doe (00000000)

John Doe
00000000 (Temporary e...)

Sign out all eligible

* Client sign off

Sign in Breaks Sign out

Shift start	Shift end	ST	OT	DT	Total
06:00 AM	06:00 AM	0.00	8.00	0.00	8.00
		hours	hours	hours	hours

Edit shift time

I have been authorized and permitted to take the time off for my rest periods in accordance with company policies and Wage Order 16

Yes No

I have not been hurt today.

Yes No

Clear No Exceptions

Sign out

Cancel Sign out

Reject All

Shift Start/End Time

You can enter shift hours for an entire crew or for an individual (exception from crew) from the Sign out subtab. 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 page.

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

In the dialog box, 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 have finished or cancel the operation.

4.3.5.4 Employee Sign-out

To sign out as an employee, tap on your name. You can review the hours input by the foreman before signing the card and, at that point, you 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 your birthdate or a number that the IT personnel has assigned. With the proper project settings enabled, there is also an option to sign out with a signature.

4.3.5.5 Sign-out on Behalf of Employee

Depending on project settings you might also have the option to sign out on behalf of employees by using Touch ID or PIN. This project setting is recommended because crewmembers might forget to sign out or leave early when the crew iPad is not around, which prevents the daily plan from being submitted. As a field engineer, foreman, or other heavy user of the app, you can sign out for all employees at one time and use the electronic signature on the sign-out subtab.

4.3.5.6 Client Sign-out

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

NOTE

The Client sign off is available until all employees are signed out.

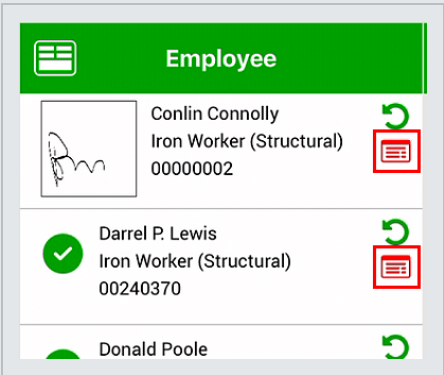
4.3.5.7 Questions

When you sign out, you or your crewmember might be asked a set of 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 give a non-compliant answer, a dialog box lets you put a note as to why you chose that answer
- You can tap **No Exceptions** if all answers are in compliance

NOTE

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



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

4.3.5.8 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.

Plans

93747 - Crew
Wednesday, April 15, 2020

Execution

Overview

Timesheet

Quantities

Notes/Issues

Productivity

Sign out

Submit

Cancel

Timesheet summary

Done

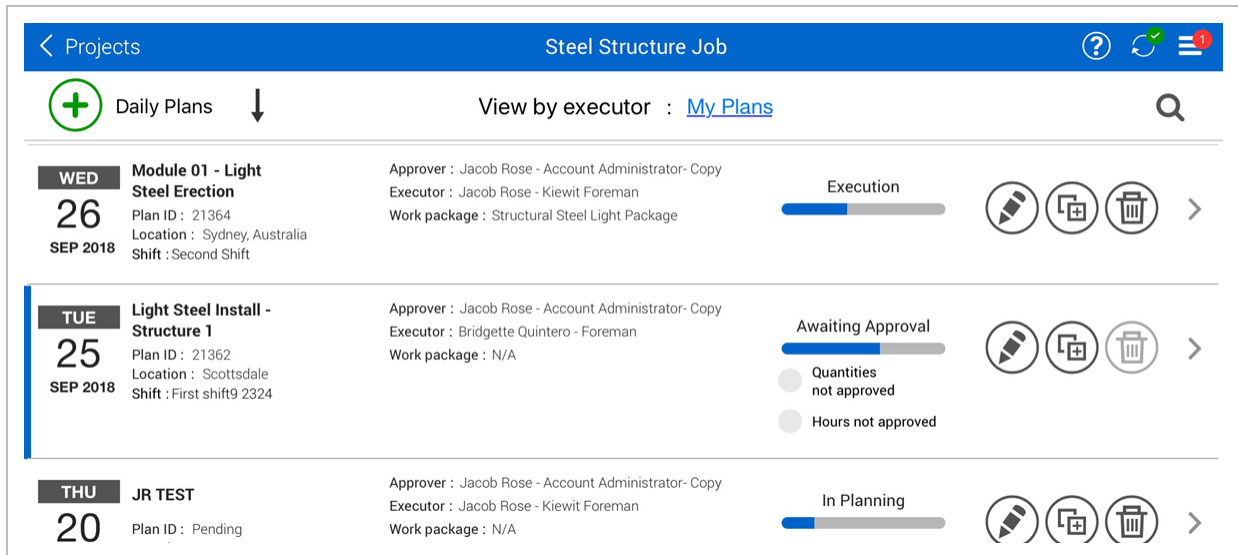
Employee name	Extra pay (Allowances)						Total hours
	New Crane Size Bump Edited1	789	98	565	dfgh	asdv	
Fred Farland	☐	☐	☐	☐	☐	☐	10.00
James Dowling	☐	☐	☐	☐	☐	☐	10.00
Jorje Zamarron	☐	☐	☐	☐	☐	☐	10.00
Michael Bench	☐	☐	☐	☐	☐	☐	10.00
Equipment name							Total hours
Employees: 4	0	0	0	0	0	0	40.00
Equipment: 0							0

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.

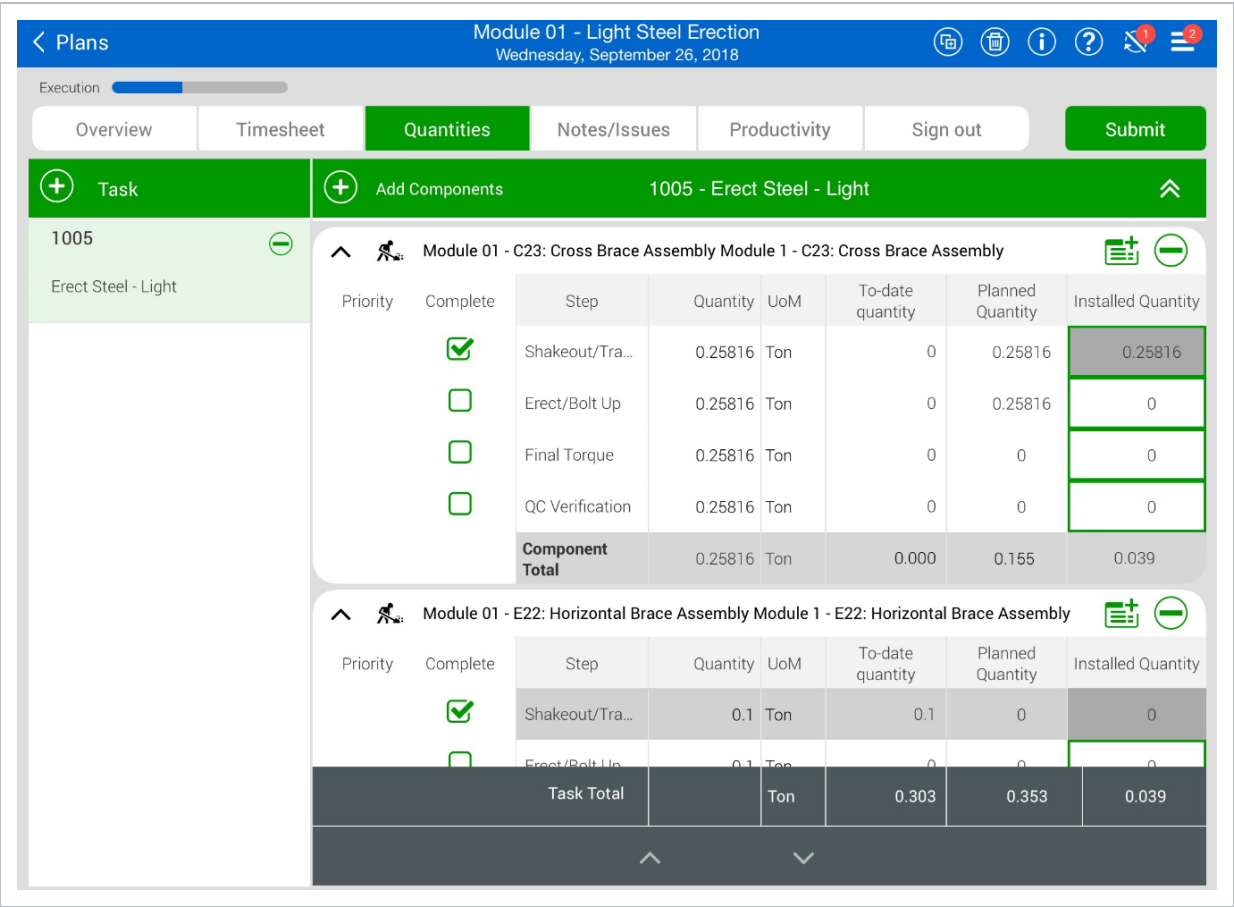
The following steps walk you through entering actuals into your daily plan in Progress.

Input Actuals

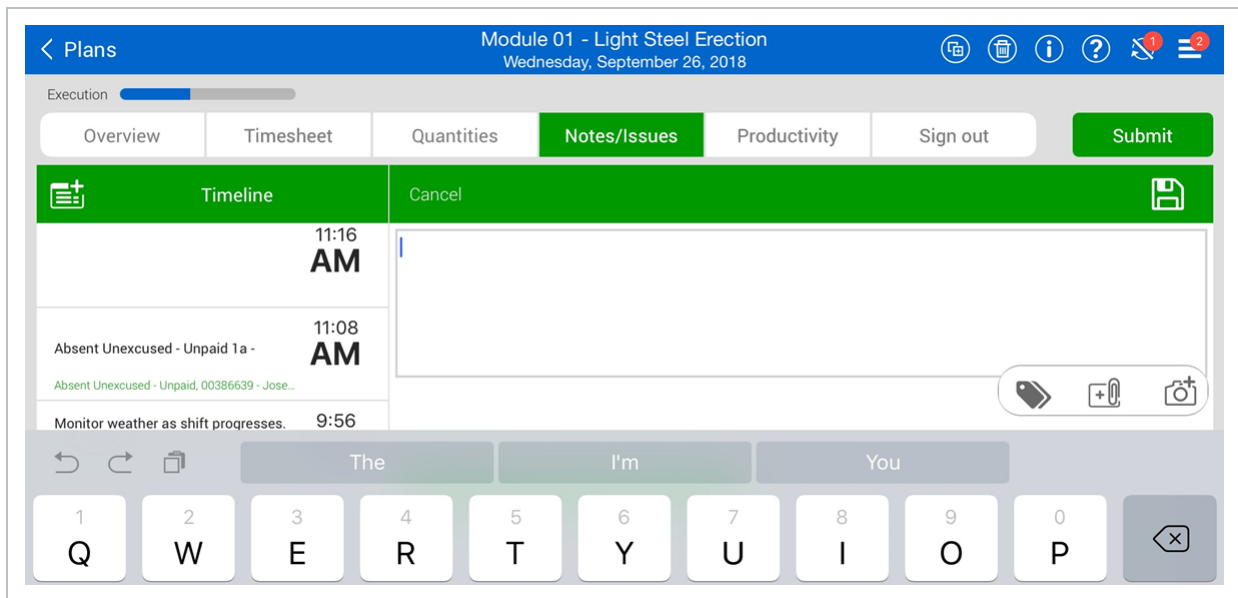
1. Open a daily plan from on of your projects.



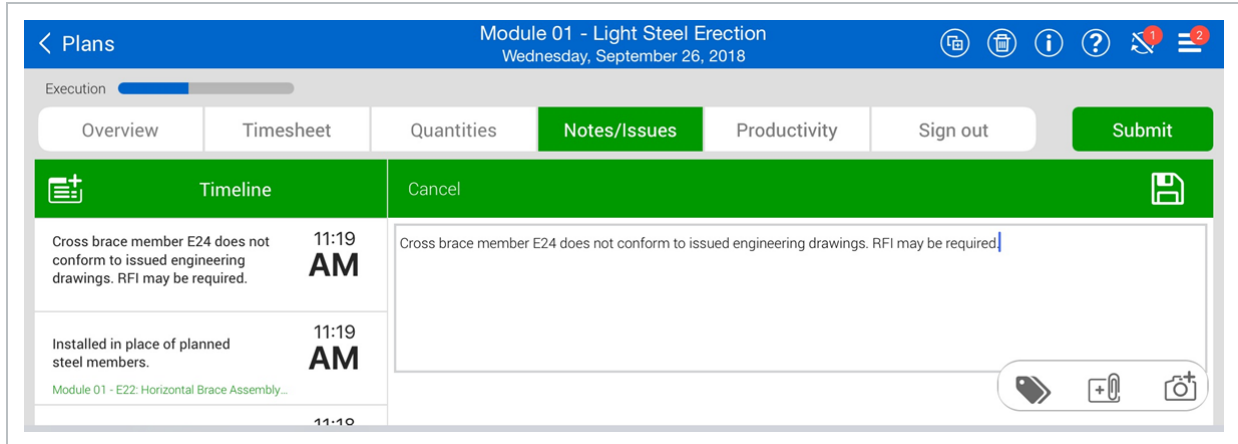
2. Tap on the **Timesheet** tab.
3. Input hours for all your employees and equipment.
4. Tap on the **Quantities** tab.
 - You will see the component assigned to the task from the planning phase
5. Check the check boxes in the "Complete" column wherever necessary for assigned components or their broken down steps.



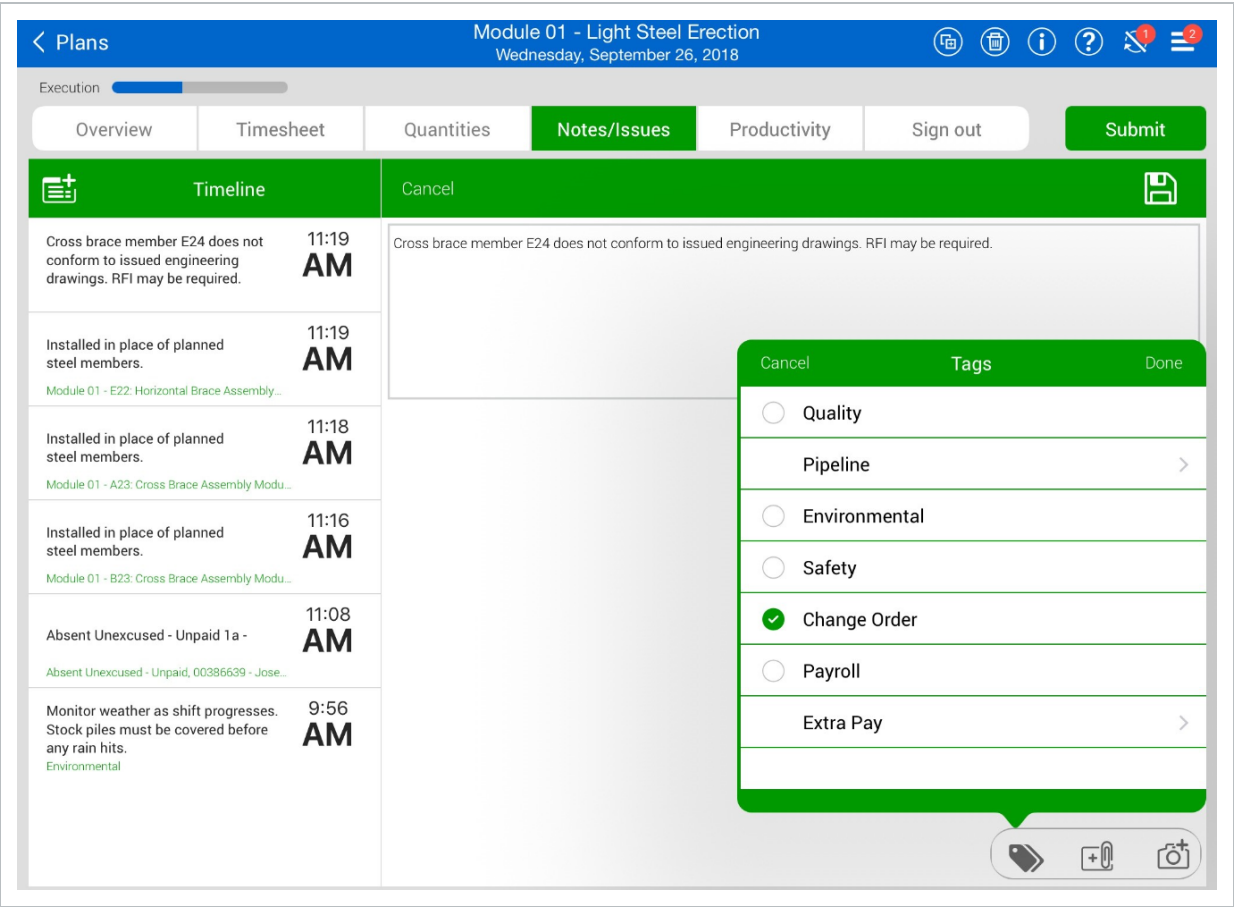
6. Tap the **Note**  icon to add a component note.
- Tap in the text entry field and your device keyboard will automatically appear



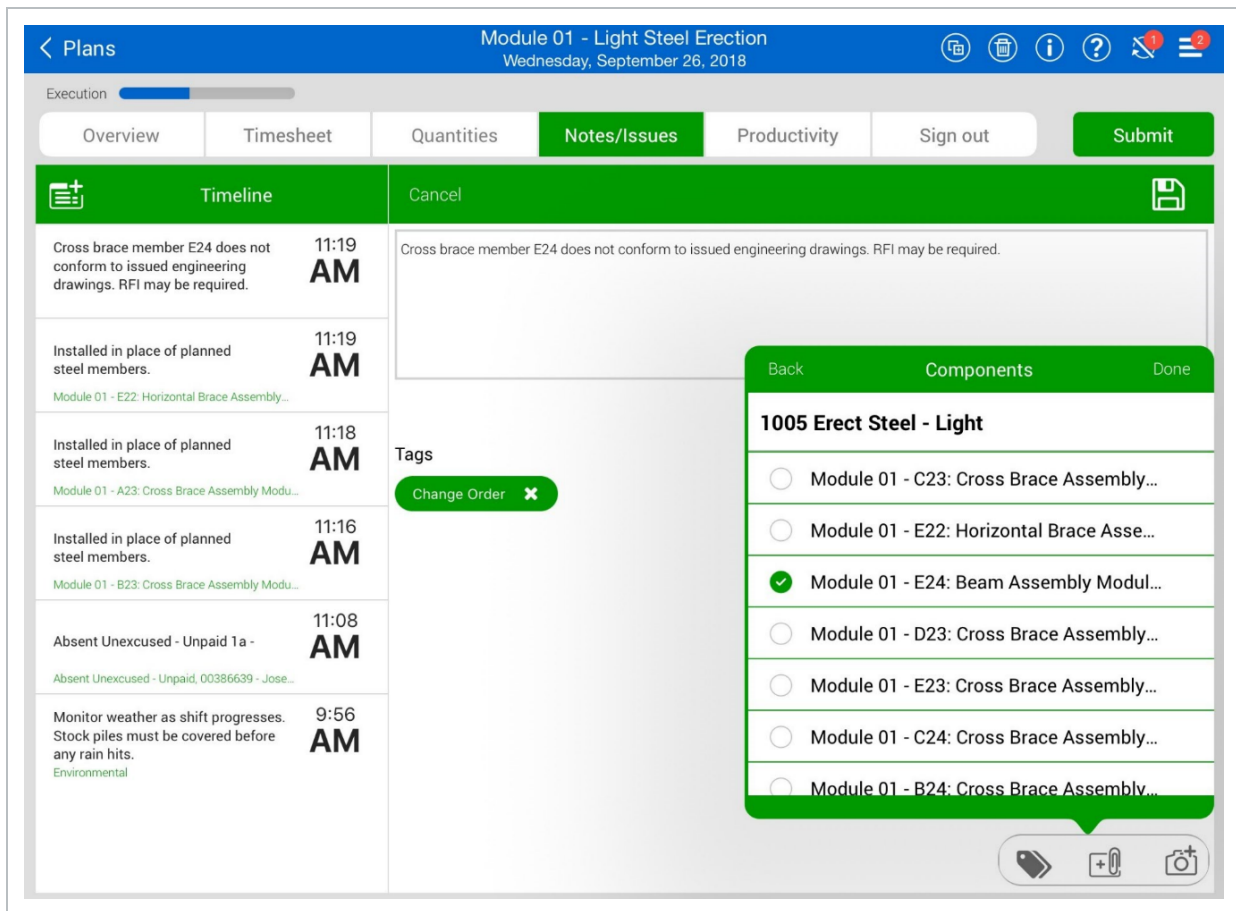
7. Tap **Save** to return to the Quantities tab.
8. Tap on the **Notes/Issues** tab.
9. Tap on the **Note**  icon to add a project note or concern.



10. Tap the **Tag**  icon and tag your note.
11. Select **Done**.



- 12. To associate the note with a component, tap the **Tag**  icon, then select **Components**.
- 13. Select a component.
- 14. Click **Done**.



15. Tap the **Camera**  icon to add a photo to the note.
16. Tap **Use Camera** and take a picture using the iPad camera.
17. Make markups and add text.
18. Tap **Done** to add the picture to the note.
19. 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

< Plans

Module 01 - Light Steel Erection

Wednesday, September 26, 2018

Execution

Overview

Timesheet

Quantities

Notes/Issues

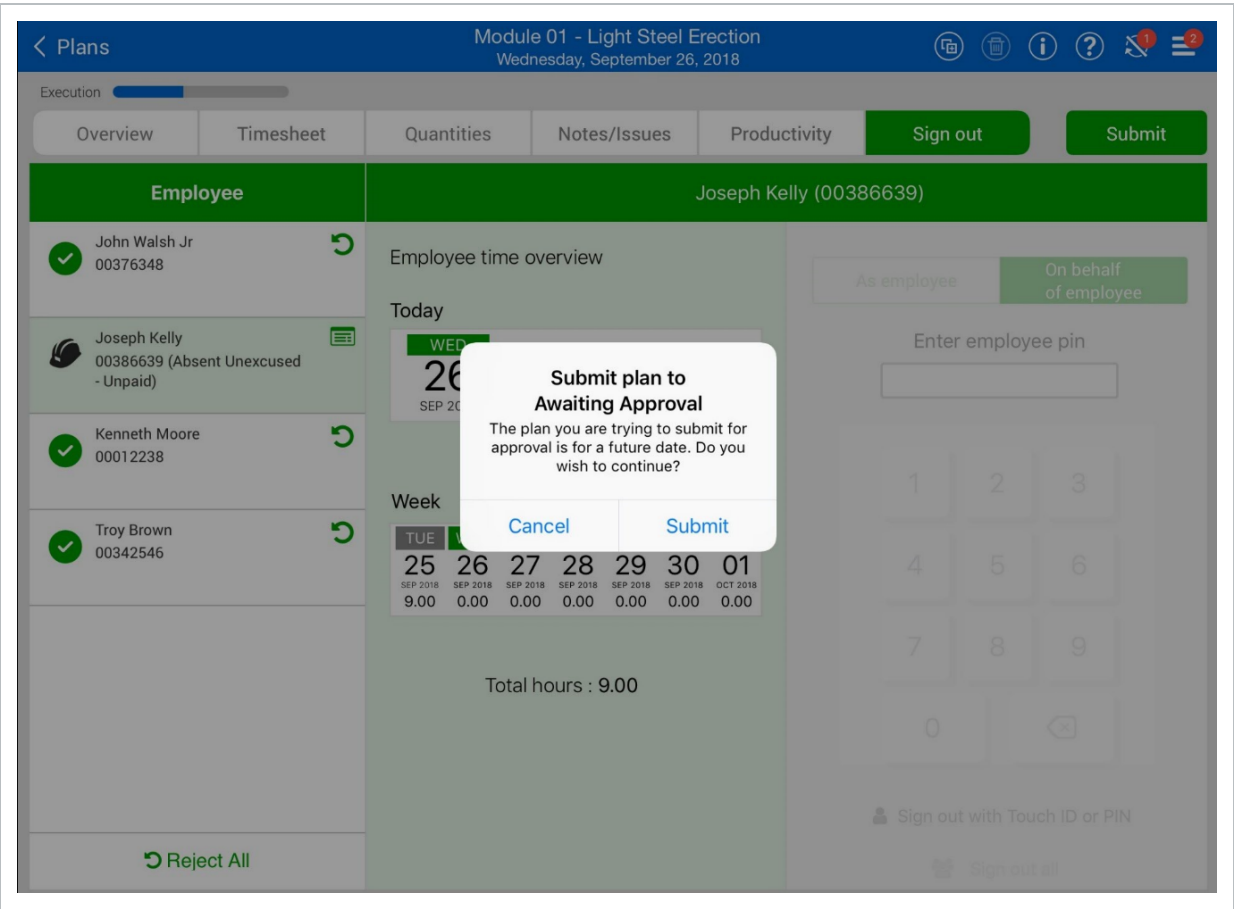
Productivity

Sign out

Submit

Task ID and Description		Actual			⇌ MHRs per Qty			Actual	
Task ID	Description	Quantity	UOM	MHRs	Planned	Actual	CB	Cost G/L	MHRs G/L
1005	Erect Steel - Light	0.353	Ton	24.00	90.678	68.009	20.000	353	-16.9
Totals				24.00				353	-16.9

20. Tap on the **Sign In/Sign Out** tab, and then tap the **Sign Out** subtab.
21. Sign out each employee by selecting **On Behalf of Employee**.
22. Tap on **Sign out with Touch ID or PIN**.
23. 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
24. Answer employee sign out questions.
25. Tap **Done**.
26. Repeat the sign out steps for all employees.
27. 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



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



LESSON 5 – DAILY PLAN APPROVAL

Lesson Duration: 30 minutes

Lesson Objectives

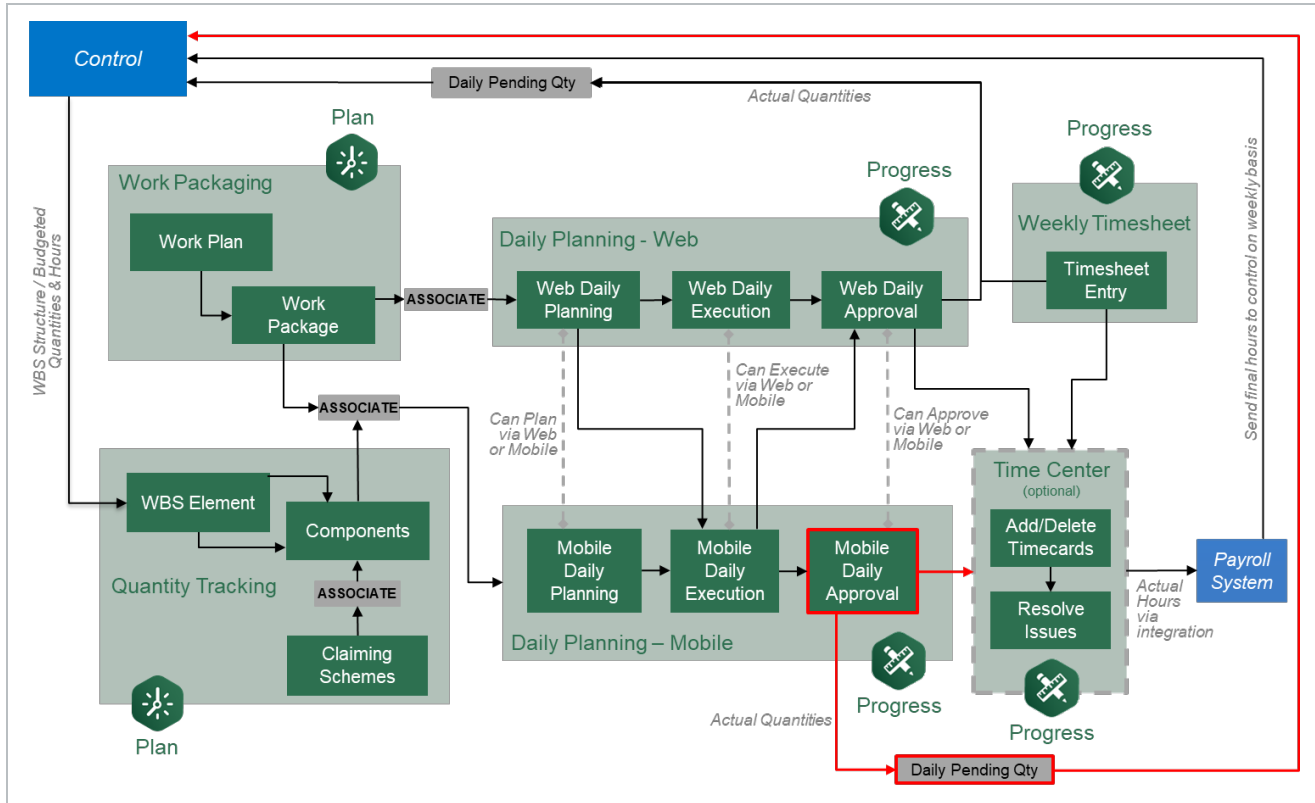
After completing this lesson, you will be able to:

- Review actuals
- Approve daily plans

Lesson Topics

5.1 InEight Progress Workflow - Daily Plan Approval Mobile	128
5.2 Review Actuals	128
5.2.1 Edit Submitted Daily Plan	134
5.2.2 Reject a Daily Plan	140
5.3 Approve a Daily Plan	141
Lesson 5 Review	145
Lesson 5 Summary	145

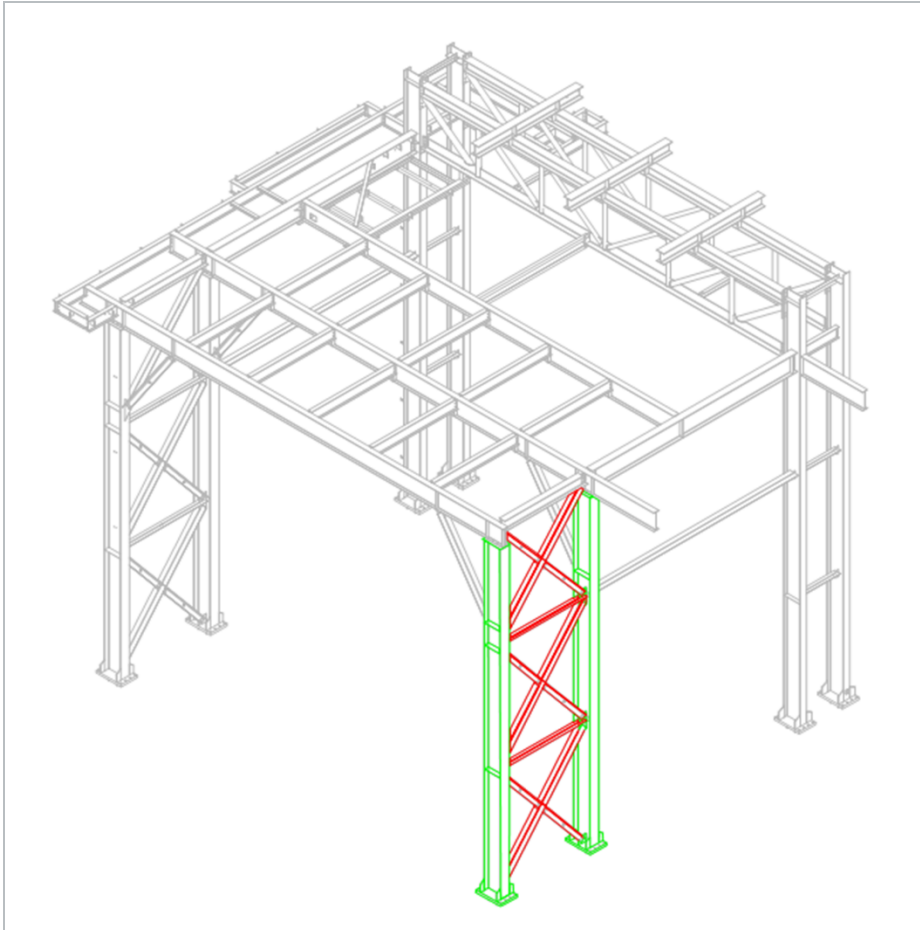
5.1 INEIGHT PROGRESS WORKFLOW - DAILY PLAN APPROVAL MOBILE



5.2 REVIEW ACTUALS

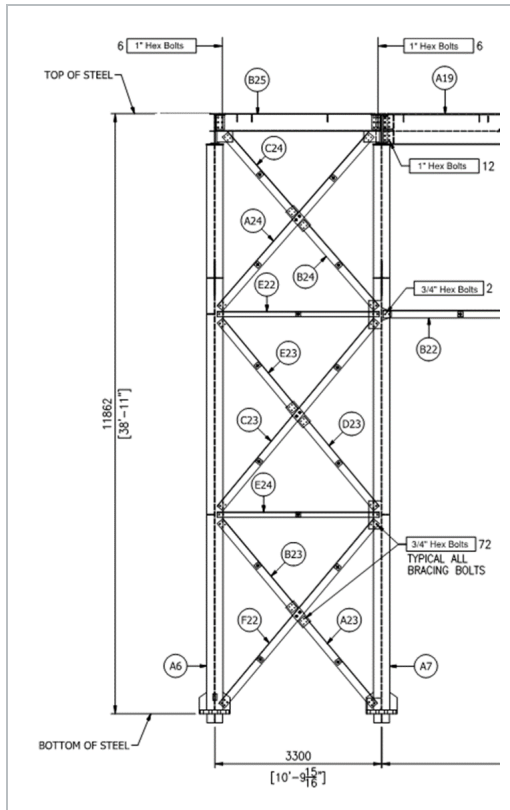
Scenario

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 gives supervisors an 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.

The screenshot shows the 'Steel Structure Job' interface. At the top, there's a blue header with a back arrow, 'Projects', the job title 'Steel Structure Job', and icons for help, refresh, and a menu with a red notification badge. Below the header, a green circle with a plus sign is next to 'Daily Plans' with a downward arrow. To the right, it says 'View by executor : [My Plans](#)' and a search icon. The main content area lists two daily plans:

- WED 26 SEP 2018**: **Module 01 - Light Steel Erection**. Plan ID: 21364. Location: Sydney, Australia. Shift: Second Shift. Approver: Jacob Rose - Account Administrator- Copy. Executor: Jacob Rose - Kiewit Foreman. Work package: Structural Steel Light Package. Status: Awaiting Approval. Progress bar shows 0% completion. Icons for edit, add, and delete are visible. A right arrow indicates more options.
- TUE 25 SEP 2018**: **Light Steel Install - Structure 1**. Plan ID: 21362. Location: Scottsdale. Shift: First shift9 2324. Approver: Jacob Rose - Account Administrator- Copy. Executor: Bridgette Quintero - Foreman. Work package: N/A. Status: Awaiting Approval. Progress bar shows 0% completion. Icons for edit, add, and delete are visible. A right arrow indicates more options.

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.

Plans

14 - Module 01 - Light Steel Erection
Tuesday, August 27, 2019

Waiting 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

MON

TUE

WED

THU

FRI

SAT

25

26

27

28

29

30

31

AUG 2019

AUG 2019

AUG 2019

AUG 2019

AUG 2019

AUG 2019

AUG 2019

0.00

0.00

8.00

0.00

0.00

0.00

0.00

Total hours : 8.00

As employee

On behalf of employee

Enter employee pin

1

2

3

4

5

6

7

8

9

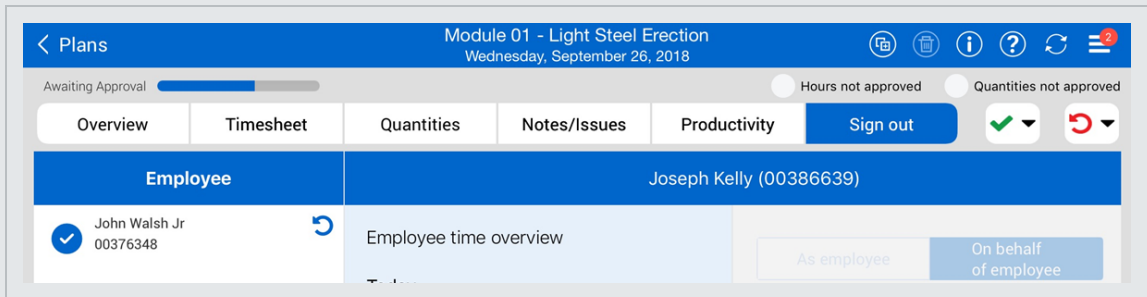
0

✕

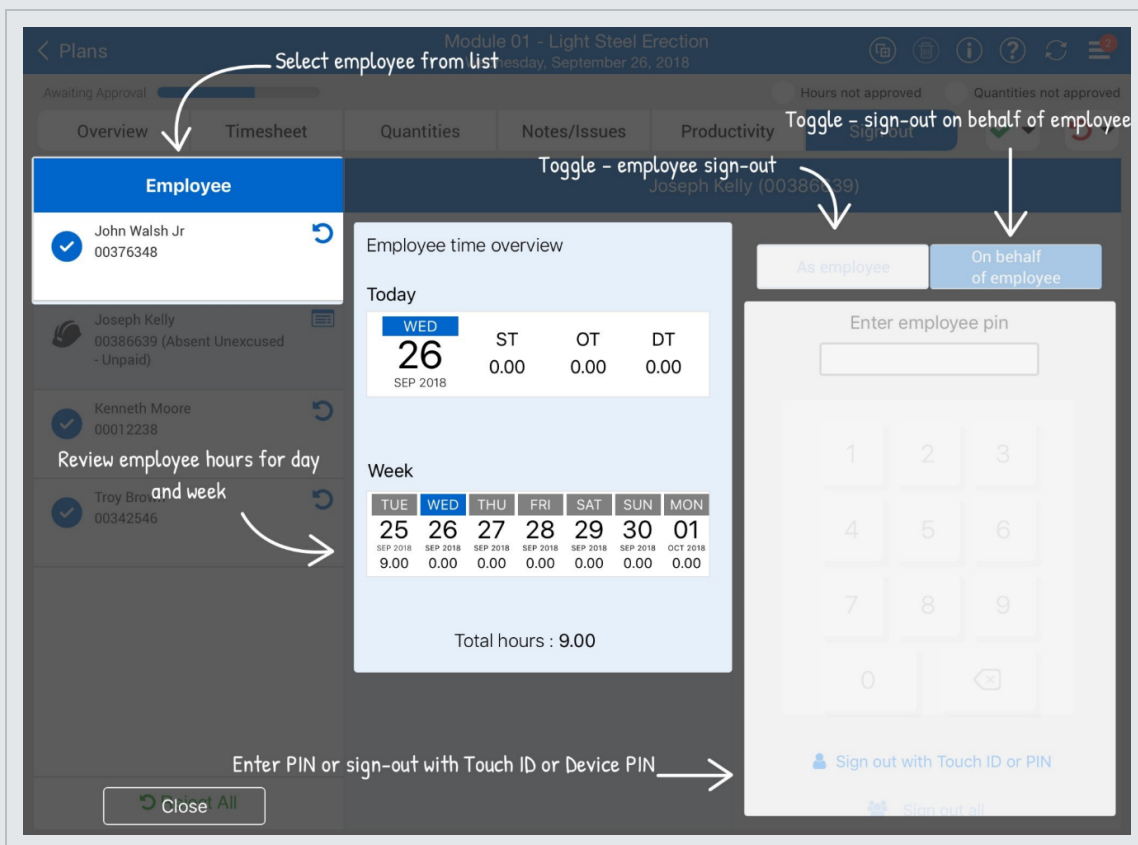
Sign out with Signature

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.

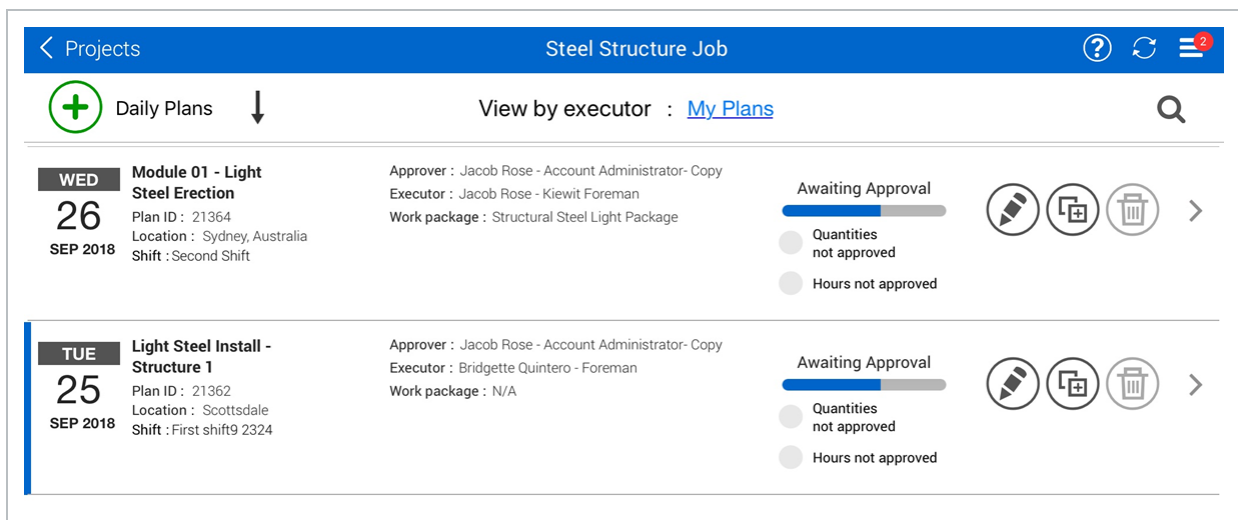
5.2.1 Edit Submitted Daily Plan

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.

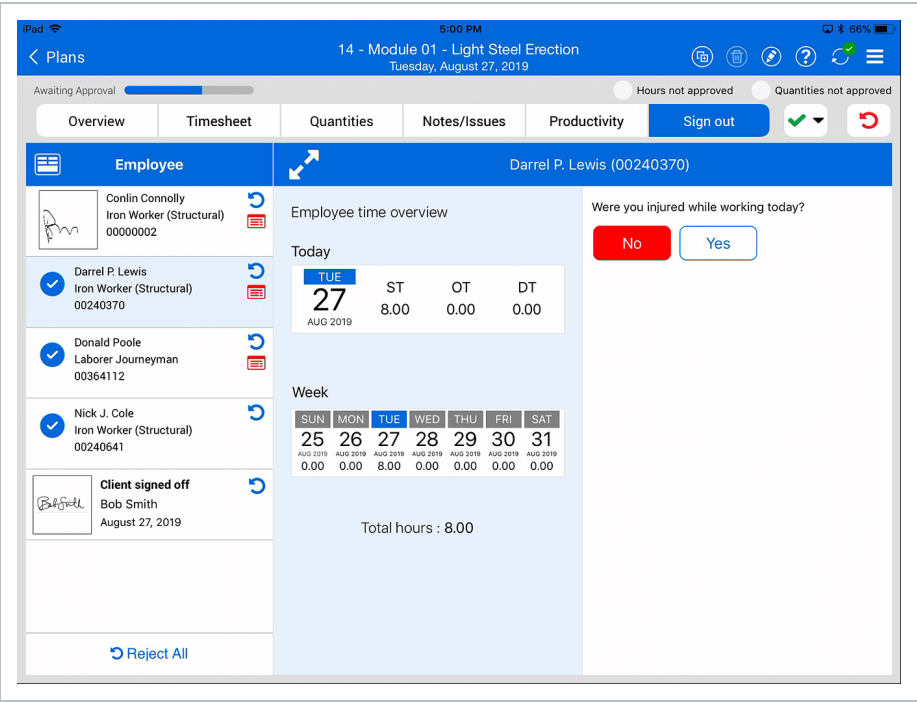
The following Step by Step walks you through how to reject an employee's sign out, modify their actual hours and re-sign them out on their behalf.

Adjust the Hours of a Signed Out Employee

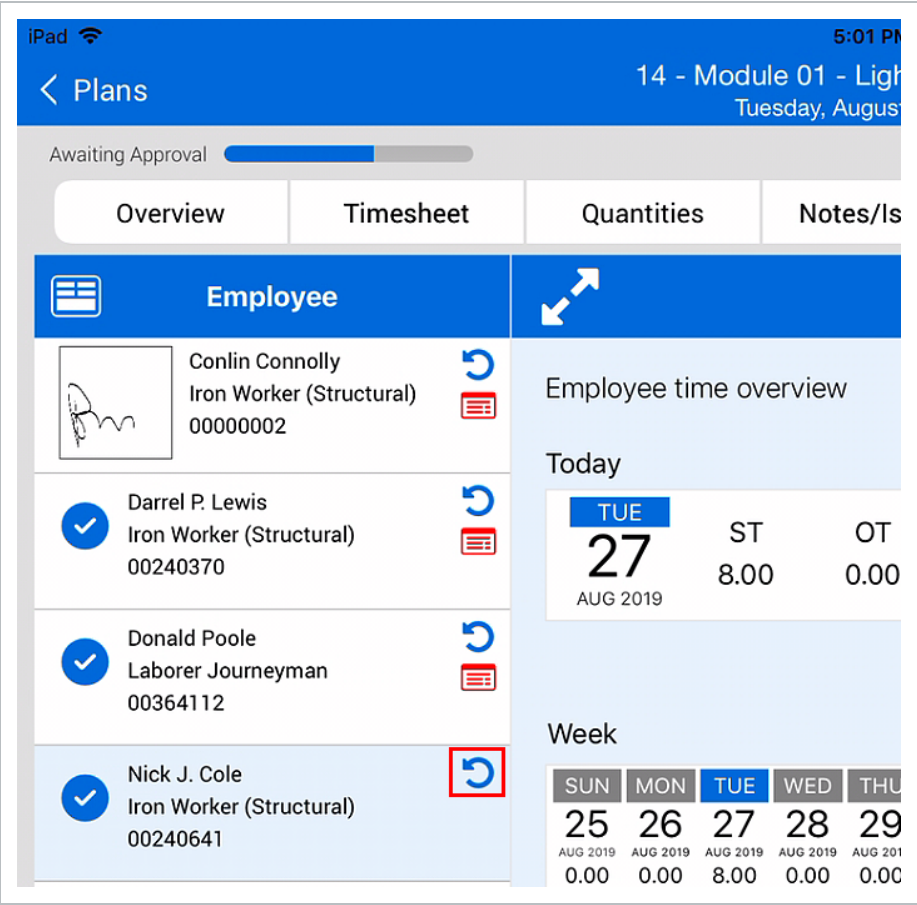
1. From the Daily plans page, open your daily plan.



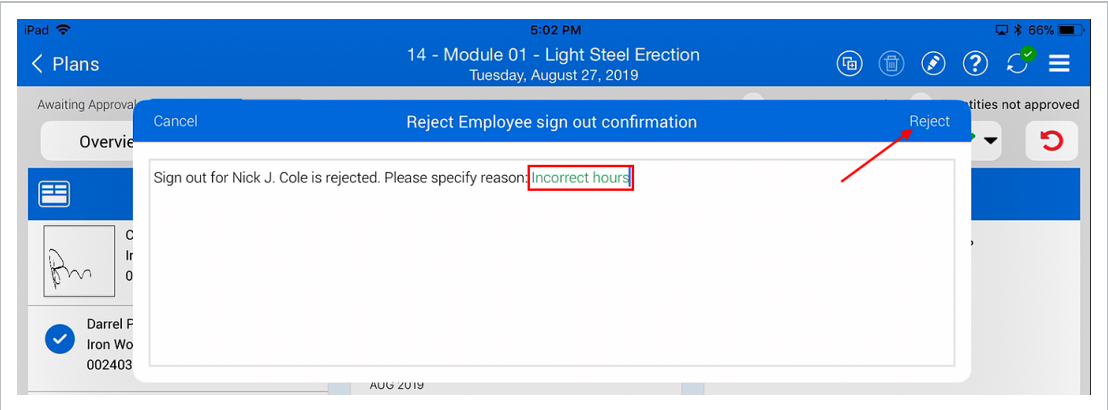
2. Tap on the **Sign Out** tab.



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



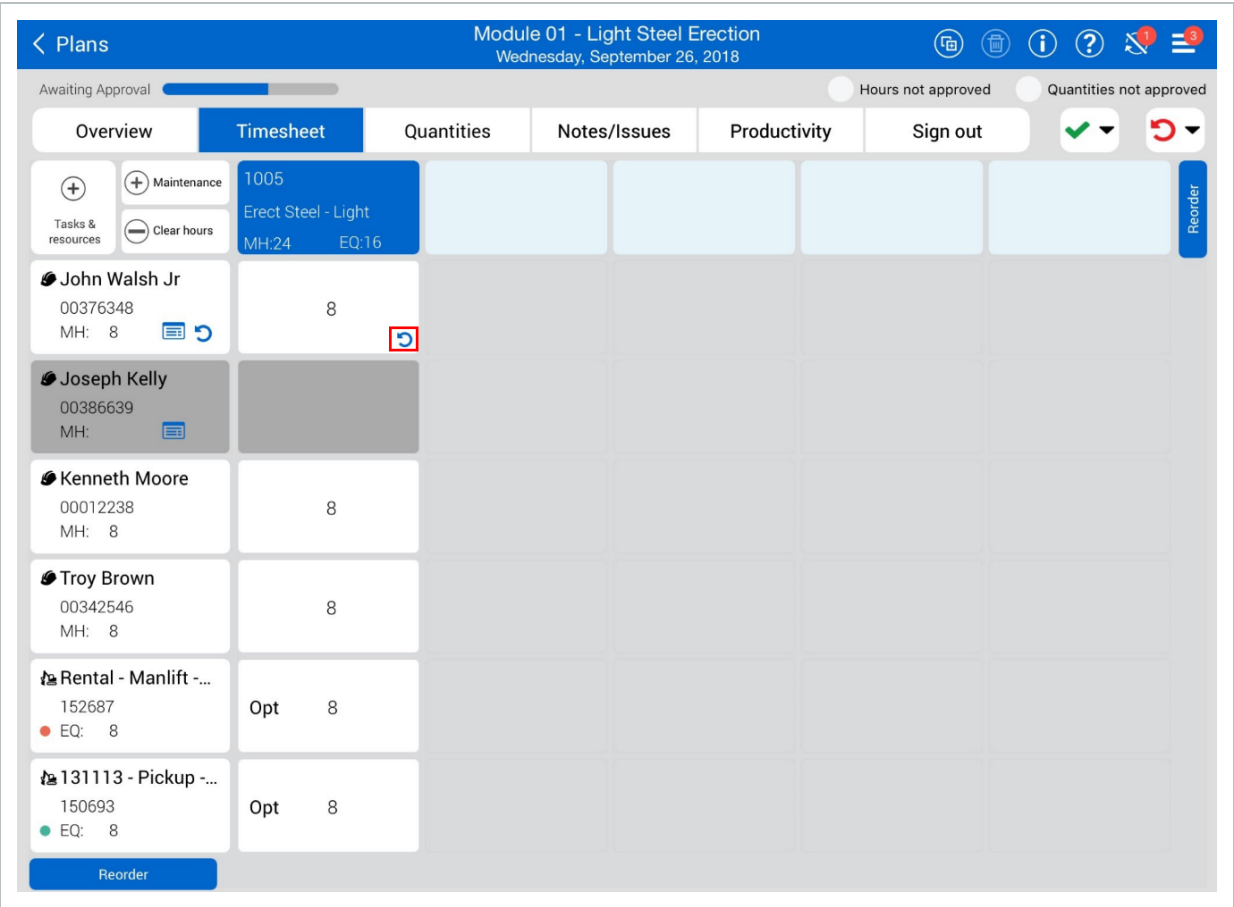
4. Type a reason for rejection and then tap **Reject**.



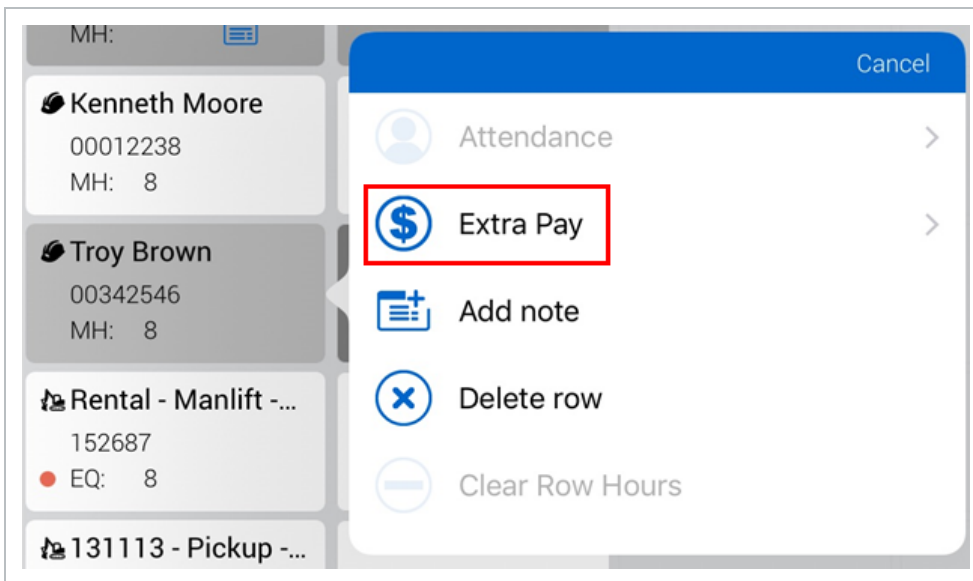
5. Tap on the **Timesheet** tab.

6. Tap in the hours entry area for the employee whose hours you rejected.

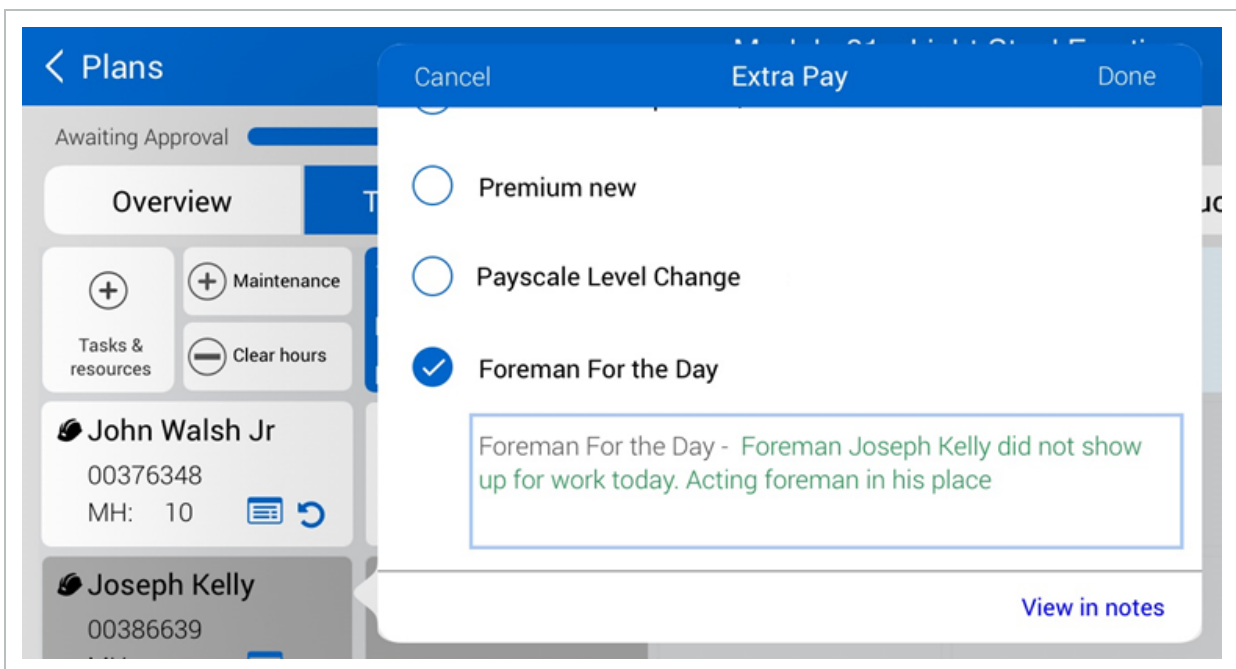
- You can tell which hours have been rejected by the **Reject** icon  in the bottom corner



7. Adjust the employees hours.
8. Tap **Done**.
9. Tap on one of your employees and select **Extra Pay**.



10. Select a reason for the extra pay (i.e. Foreman for the Day) and add a note (i.e. 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 an employee from the employee list on the left.

14. Select **On behalf of Employee** and then **Sign out with Touch ID or PIN**.

The screenshot shows the 'Plans' screen for 'Module 01 - Light Steel Erection' on Wednesday, September 26, 2018. The 'Sign out' button is active. The employee list on the left includes John Walsh Jr (00376348), Joseph Kelly (00386639 - Absent Unexcused - Unpaid), Kenneth Moore (00012238), and Troy Brown (00342546). The time overview for John Walsh Jr. shows 'Today' with 10.00 ST, 0.00 OT, and 0.00 DT. The 'Week' summary shows a total of 18.00 hours. The sign-out section on the right has the 'On behalf of employee' tab selected, and a pin entry field is present. A red box highlights the 'Sign out with Touch ID or PIN' button at the bottom.

15. Enter the passcode for your iPad.

The screenshot shows the iPad passcode entry screen. The text reads: 'Enter iPad passcode for "Progress" Authenticate Device Identity by Passcode or Fingerprint'. Below the text are four dots indicating the passcode length. A numeric keypad is displayed with digits 1-9, 0, and a '+' sign. A 'Cancel' button is located at the bottom right.

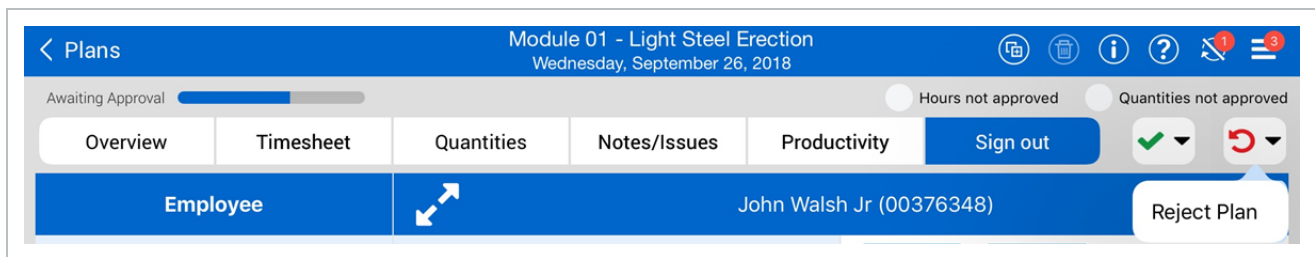
16. Answer the compliance question.

17. Tap **Done**.

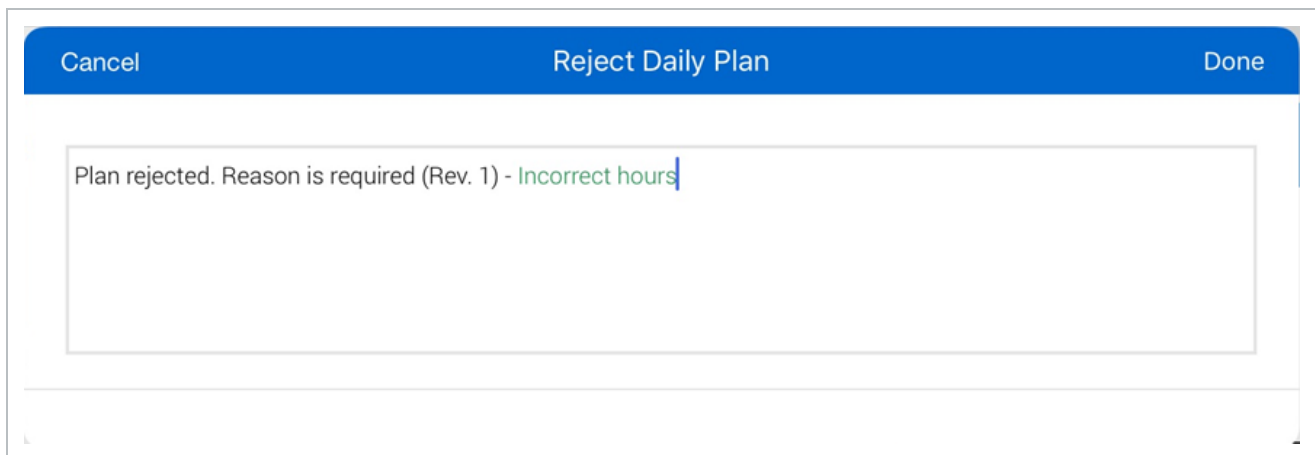
5.2.2 Reject a Daily Plan

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.

WED
26
SEP 2018

Module 01 - Light Steel Erection
 Plan ID : 21364 (Rev. 1)
 Location : Sydney, Australia
 Shift : Second Shift

Approver : Jacob Rose - Account Administrator- Copy
 Executor : Jacob Rose - Kiewit Foreman
 Work package : Structural Steel Light Package

Execution

 Rejected 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.

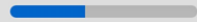
< Plans

Module 01 - Light Steel Erection
 Wednesday, September 26, 2018








Execution 

Overview Timesheet Quantities **Notes/Issues** Productivity Sign out **Submit**


Timeline

Tuesday, 1:17 PM
 


 Plan rejected. Reason is required (Rev. 1) - Incorrect hours
1:17 PM

Foreman For the Day - Foreman Joseph Kelly did not show up for work today. Acting foreman in his place
 Foreman For the Day, 00342546 - Troy Brown
1:04 PM

Cross brace member E24 does not conform to issued engineering drawings. RFI may be required.
 Change Order, Module 01 - E24: Beam Assemb...
11:19 AM

Plan rejected. Reason is required (Rev. 1) - Incorrect hours

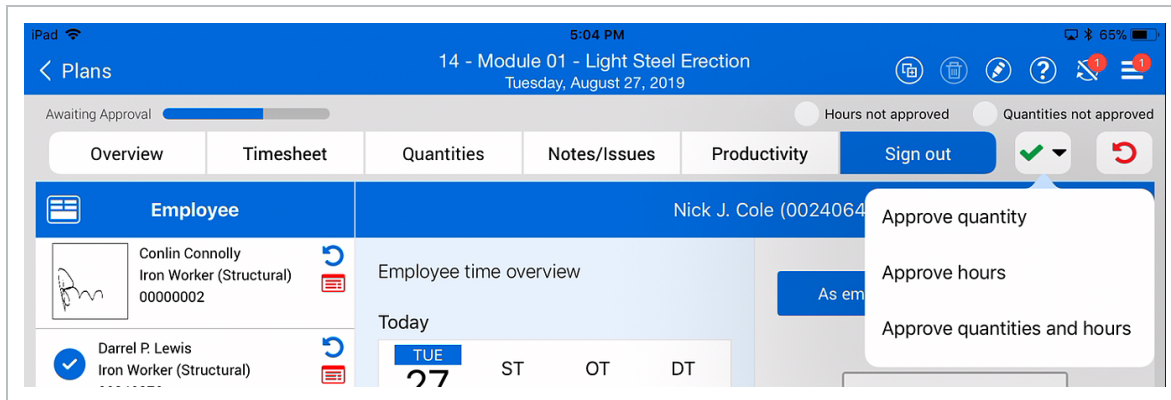
5.3 APPROVE A DAILY PLAN

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.

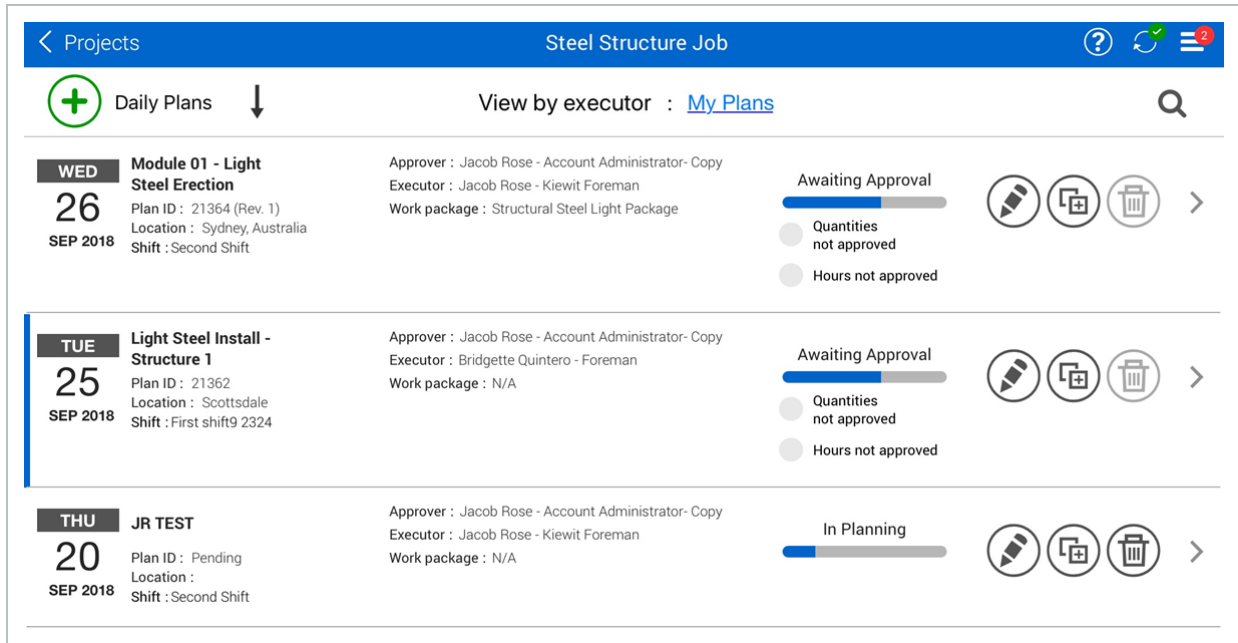
If you select “Approve Quantity and Hours”, you will approve both.

NOTE

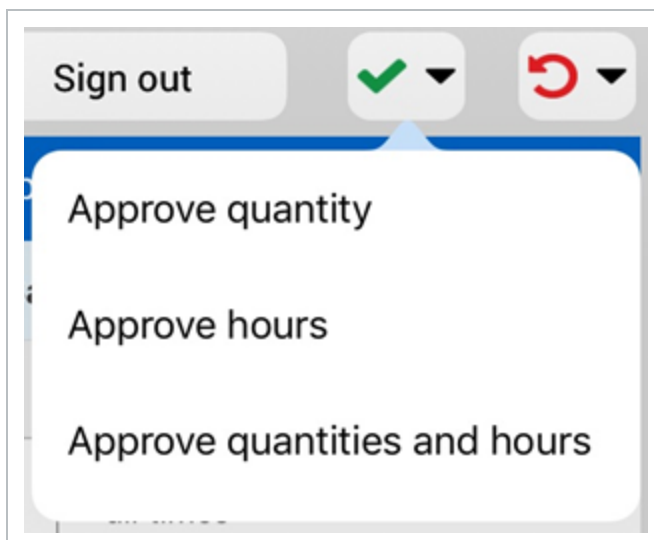
You can approve a plan with a future date that has no quantities, even if quantities and hours are required. This might be useful for approving holiday hours in advance.

Approve a Daily Plan

1. From the Daily plans home page, open your daily plan.

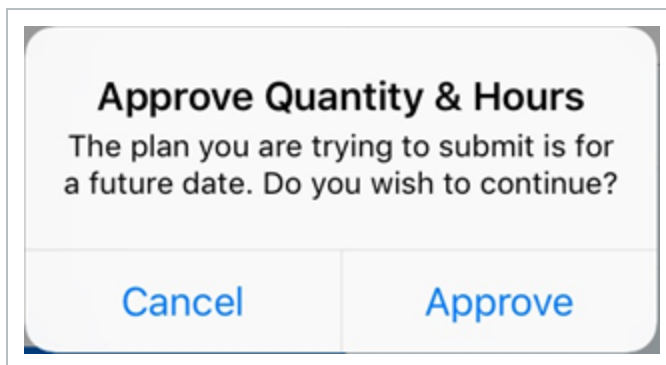
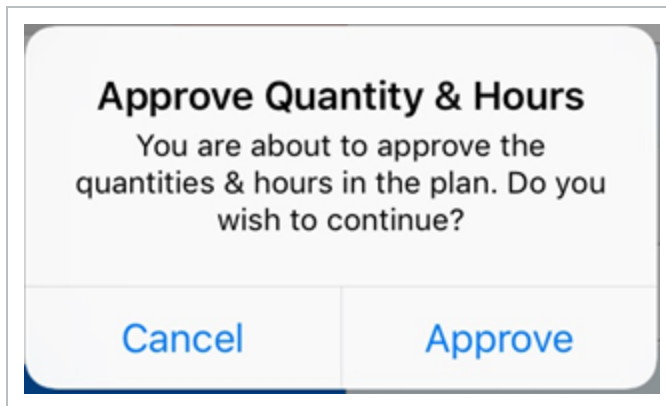


2. Select the **Approve**  icon.
3. From the drop-down list, select **Approve quantity and hours**.



4. You are shown a dialog box asking if you are sure you want to submit. Select **Approve**.

- You might see a dialog box saying your plan is for a future date. 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