

PROGRESS USER GUIDE

Daily Plan Mobile



Release 26.7
Last Updated: 08 September 2026

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EXERCISES

CHAPTER 1 – MOBILE OVERVIEW

1.0.1 Login

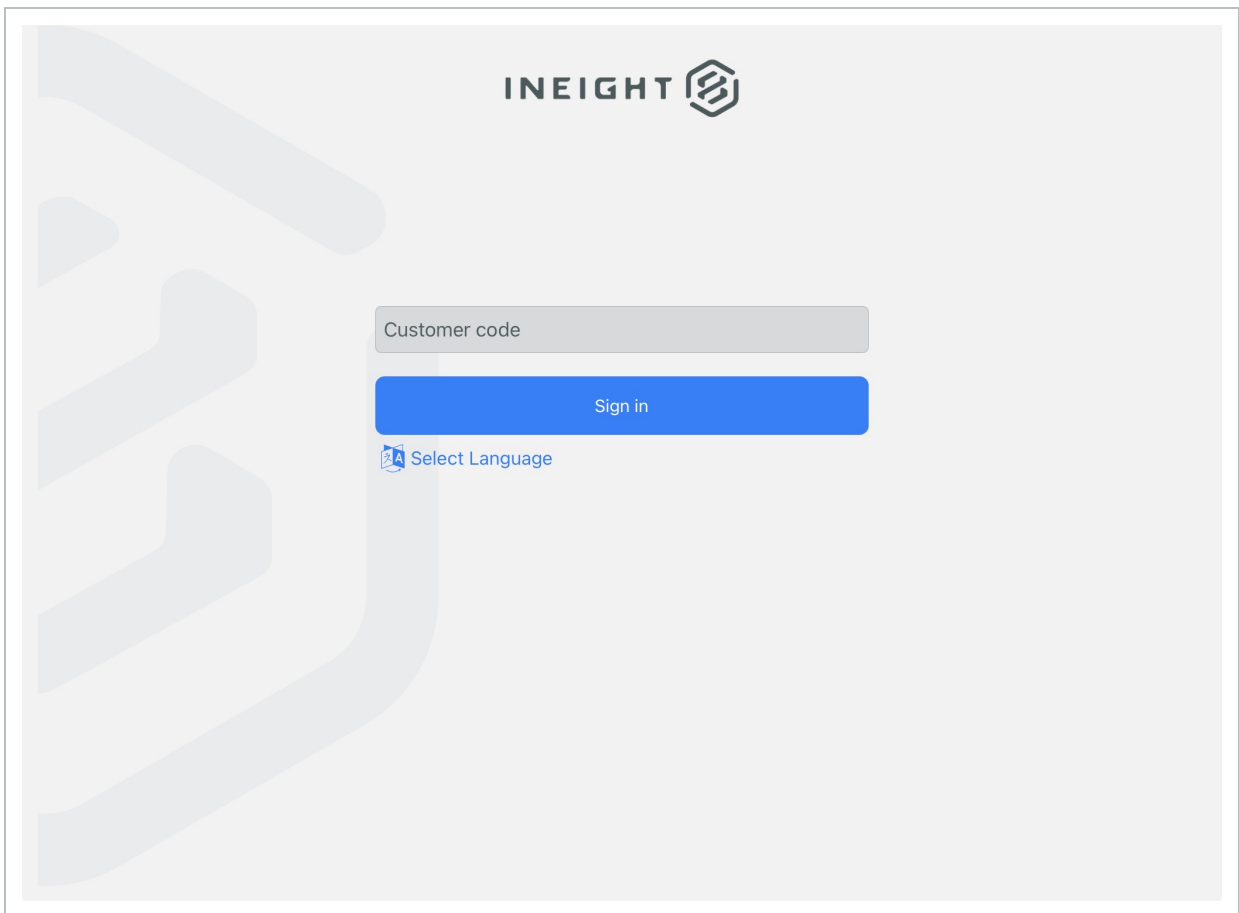
InEight Progress Mobile is a mobile application only and must be installed on an Apple iPad to be used. Once installed, you take the following steps to log in to the application:

Log into InEight Progress

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



2. Enter the customer code for your organization.



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

1.0.2 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.

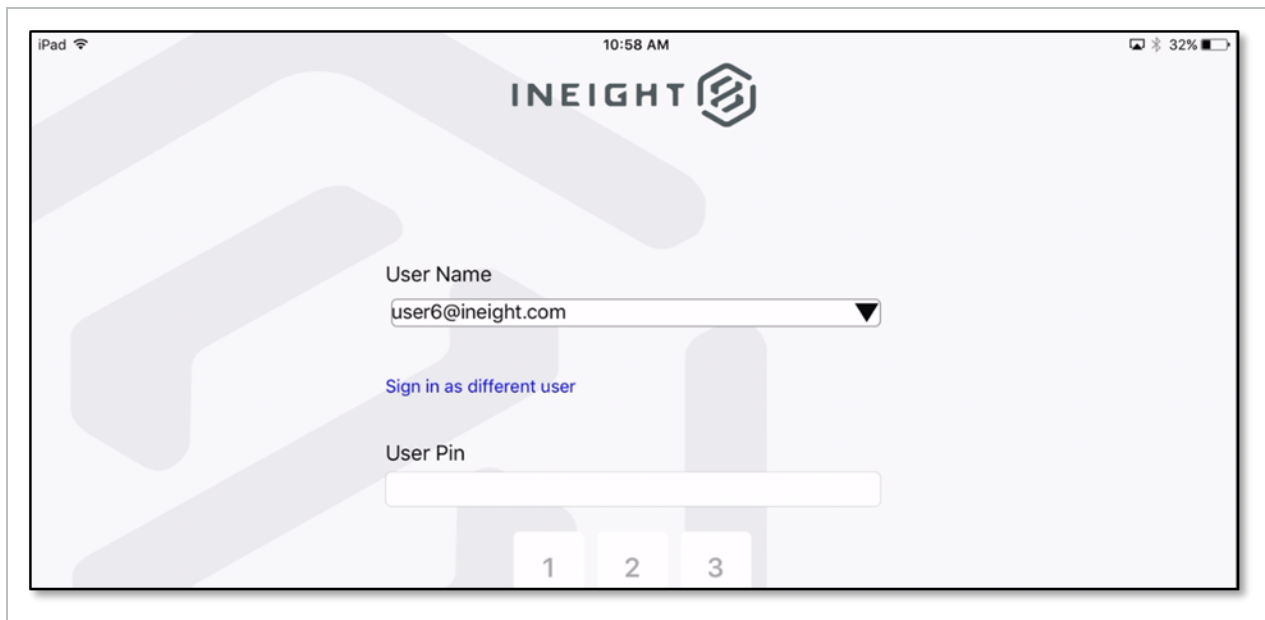
- Users can log in whether they have the same or differing roles
- When a different user logs in, it does not affect the existing logged in user
- The user logged in at the time will only see their own data

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

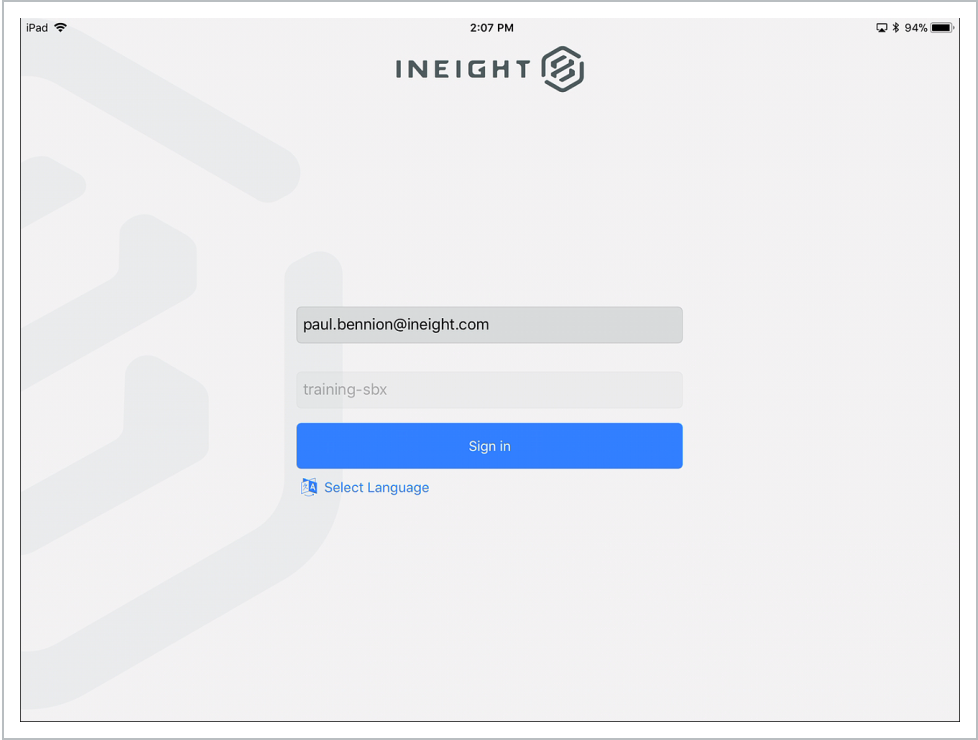
You can also sync in the background while using the application. To sync in the background, open Settings, and then tap **Enable background sync**.

1.0.2.1 Kiosk Workflow

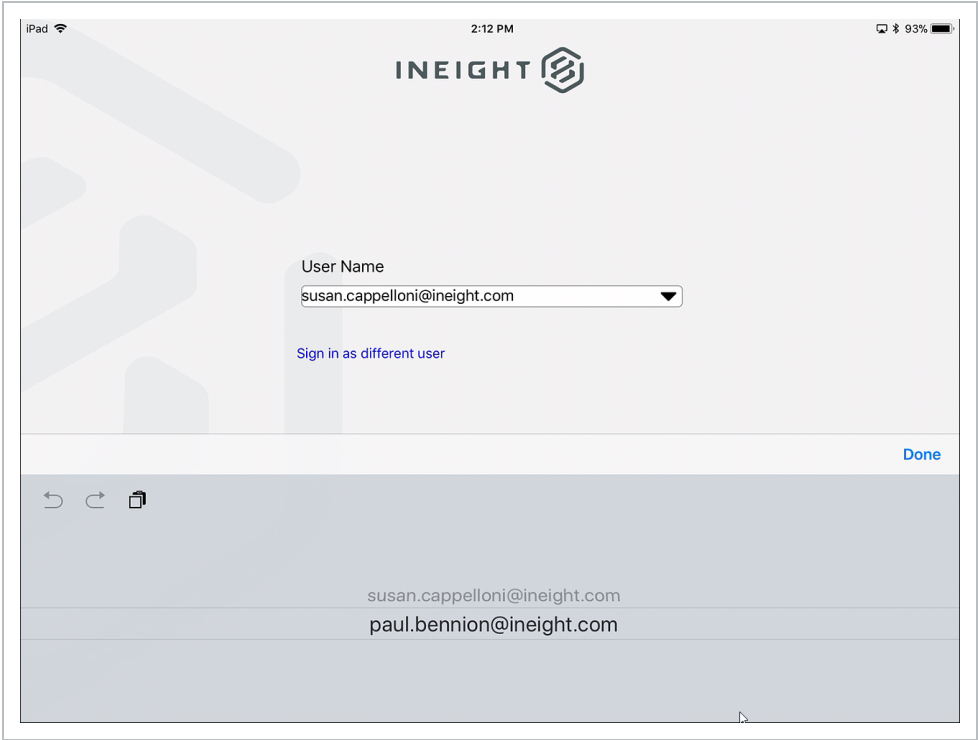
When a previous user logs out, the new user is presented with a login screen that includes a hyperlink to **Sign in as different user**.



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.

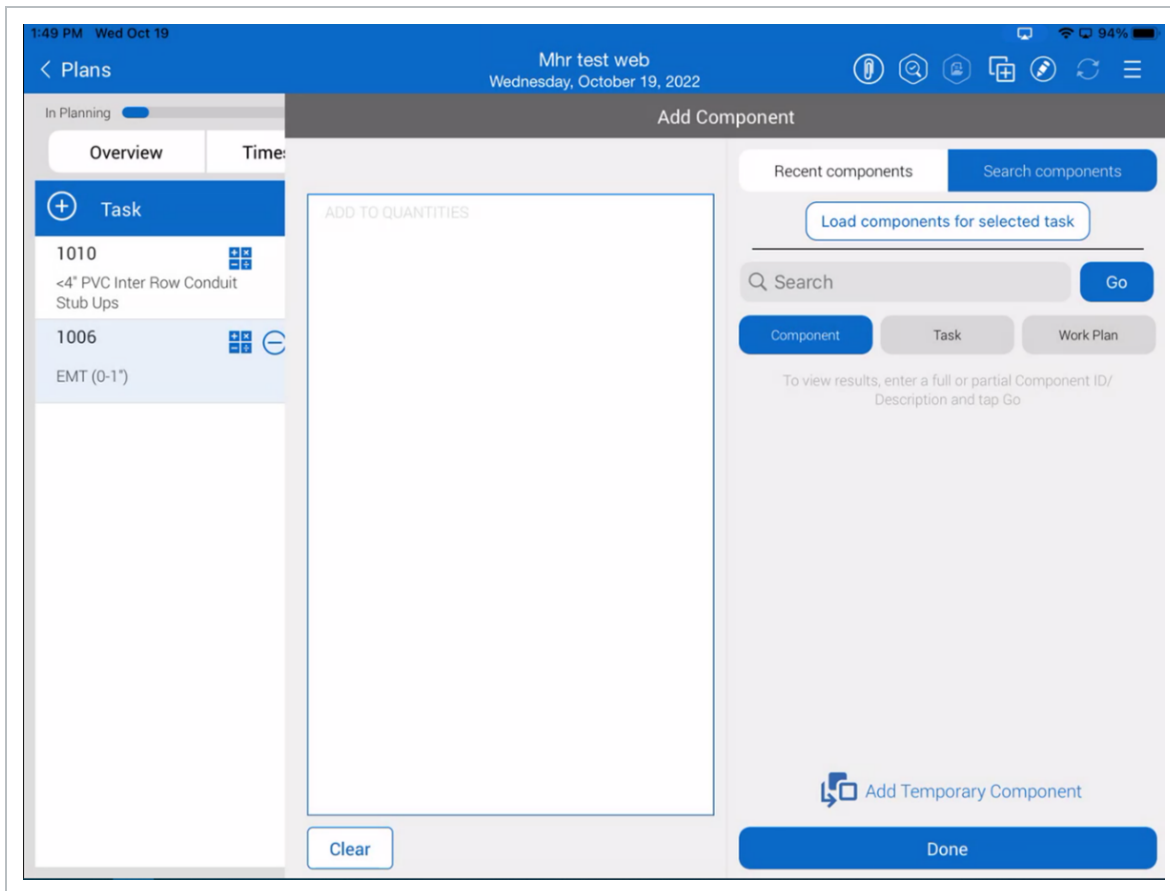


Once you have logged in, the next time you use the device you can select your email from a drop-down list and then sign in.



1.0.2.2 Component Search

To search components in the mobile app, go to Quantities, and then select a task that has components. An icon labeled Recent components and the search components show. Tap Search components to search for all components under the selected task.



1.0.3 Project List

Scenario

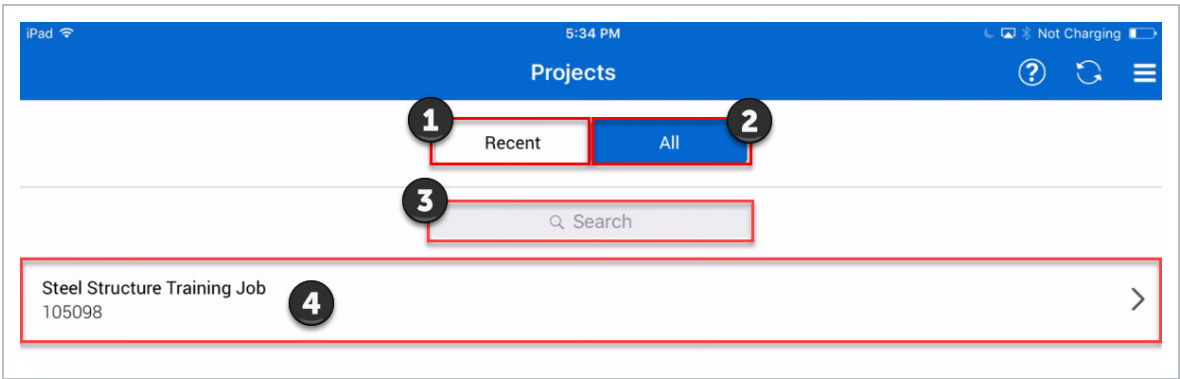
Paul is an electrical superintendent on a project. Earlier that afternoon, he asked his foreman to create a daily plan for tomorrow's work. At the end of the day Paul sits down to review the plan the foreman created.

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 Projects	Select to view all projects that you have opened recently.
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.

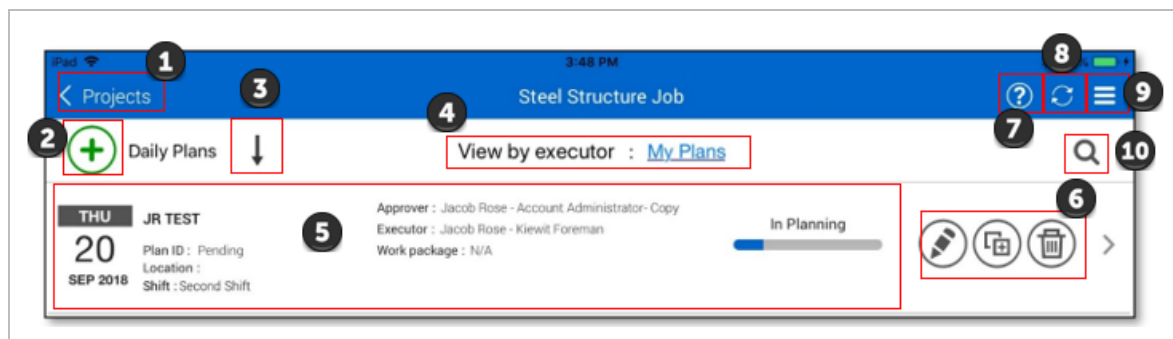


1.0.4 Plan List

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

Overview - Plan List

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



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.

1.1 NAVIGATE 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
----------	-----------	------------	--------------	--------------	----------

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

1.1.1 Overview

After Once a daily plan is created, you are taken to thean Overview pagescreen. Initially this page screen is blank because you have not entered any information. The Overview screen letallows 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.

Plans

Structural Crew May-02-17
MAY 02, 2017

In Planning

Overview Time Sheet Quantities Notes/Issues Productivity Sign out Submit

Planned Tasks		Quantity	Time	Budget	
Task ID	Description	Planned	UOM	Planned	Plan G/L

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 Edit

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

On the Overview tab, you can:

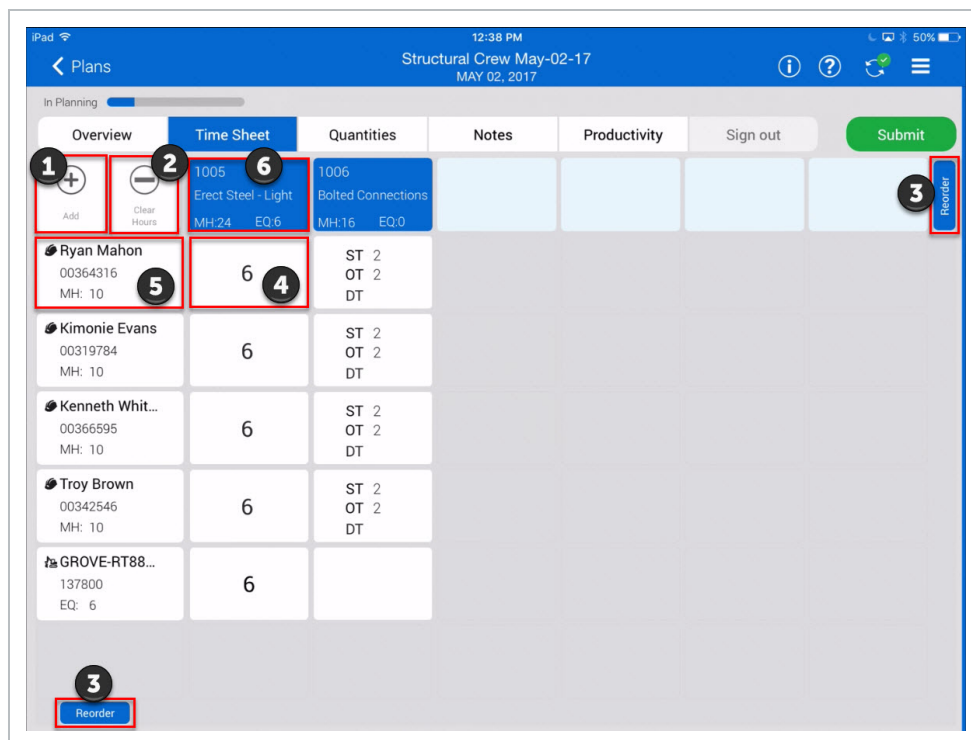
- Add tool box talk items by tapping the  icon
- Tap the  icon to expand to a larger view
- Minimize planner notes by tapping the  icon

1.1.2 Time Sheet

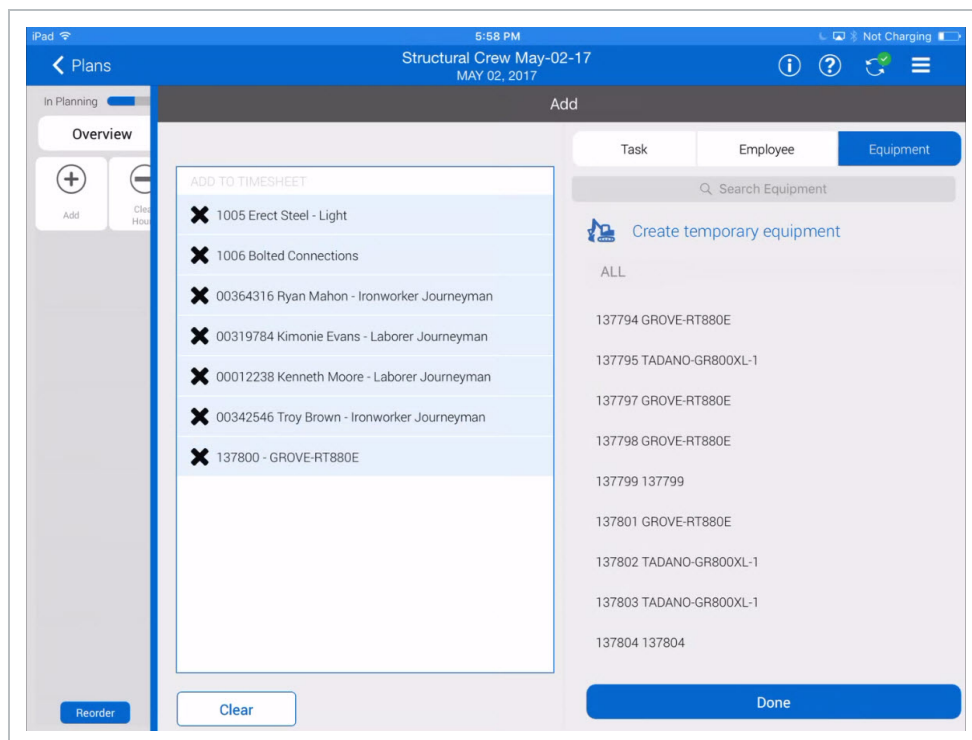
On the Time Sheet tab, you can enter all your tasks, employees and equipment and assign hours to each. The table below explains key navigation points.

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.



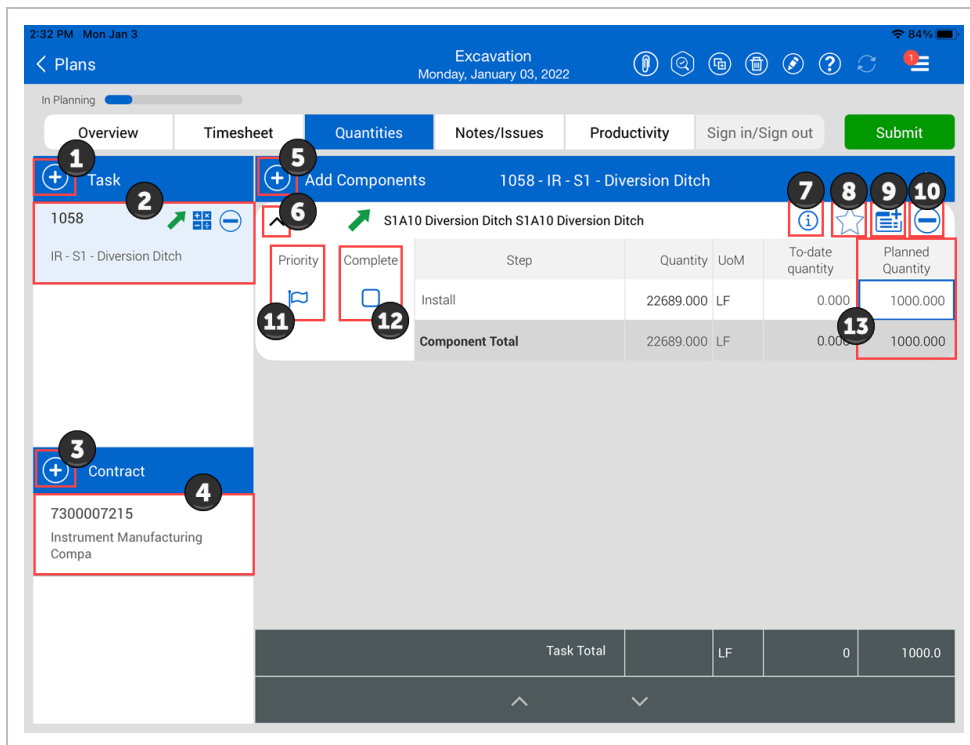
- View your lists of all available tasks, employees and equipment by tapping on the appropriate tab at the top of the window
- Once selected from a list, items appear on the left-hand side of the window under Add To Time Sheet as shown above
- Tapping on the **X** next to an item removes it from the 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

1.1.3 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.



1.1.4 Notes/Issues

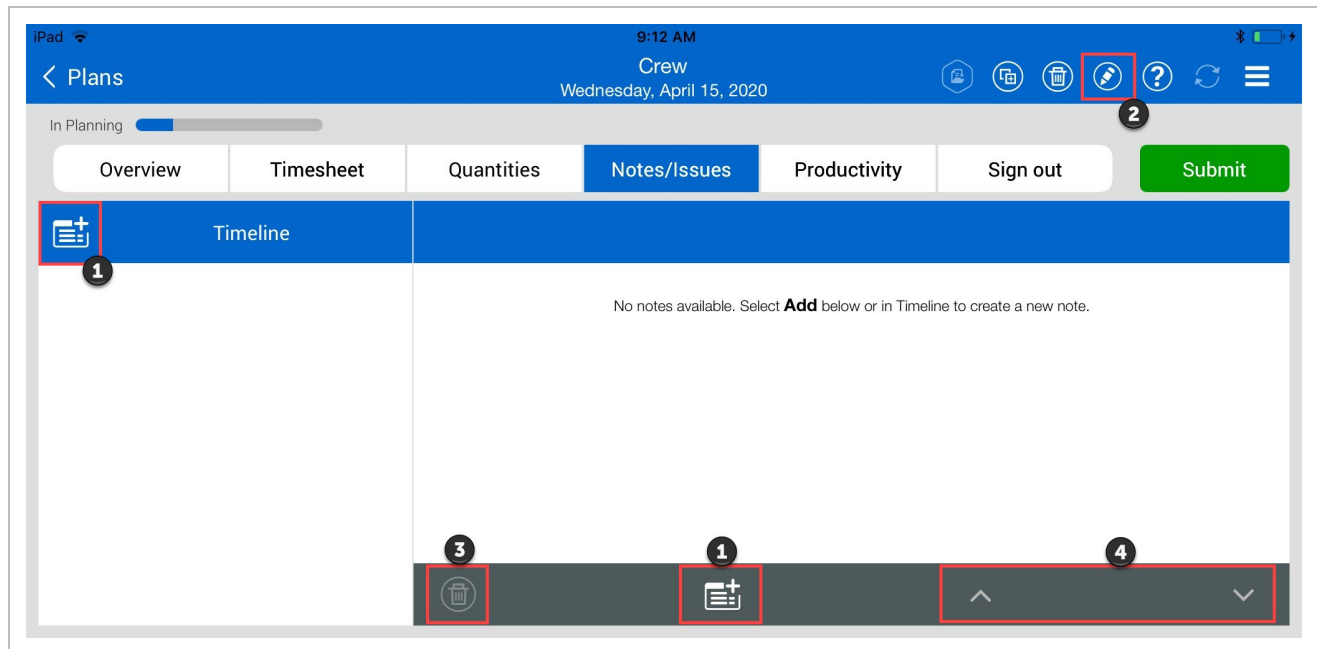
The Notes/Issues tab is where you can enter additional information regarding a task or component for the crew to be aware of when they execute the plan. You can add safety, quality control, environmental, subcontract, and other information. If an issue is added it will automatically show up on the issue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



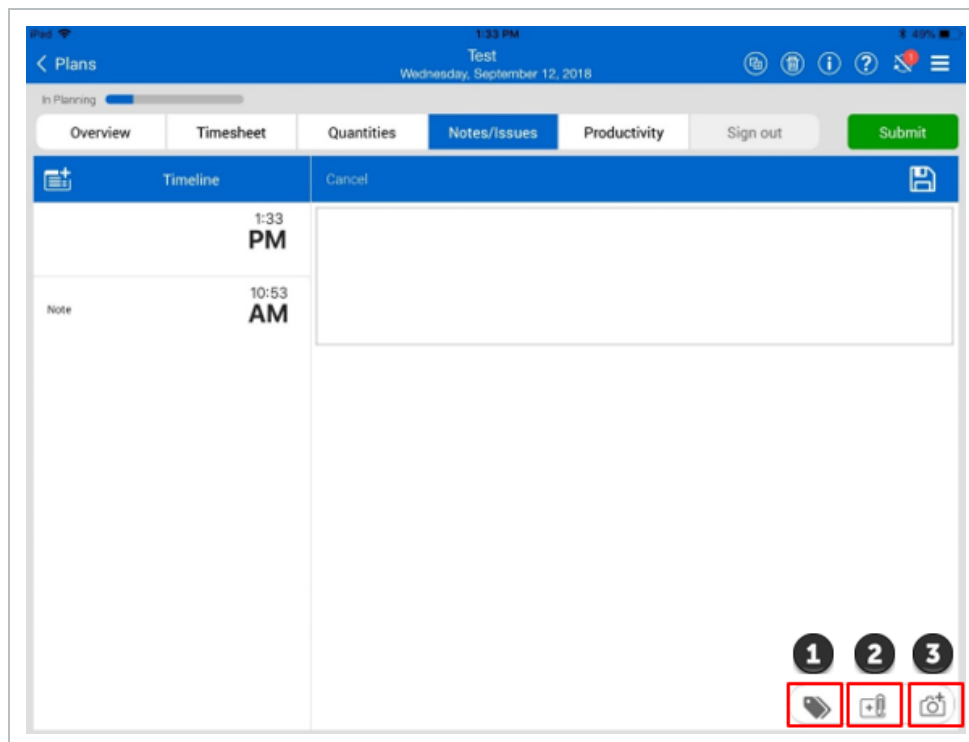
When you add a new note or issue, three icons will appear at the bottom. The following overview explains these icons.

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.



1.1.5 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

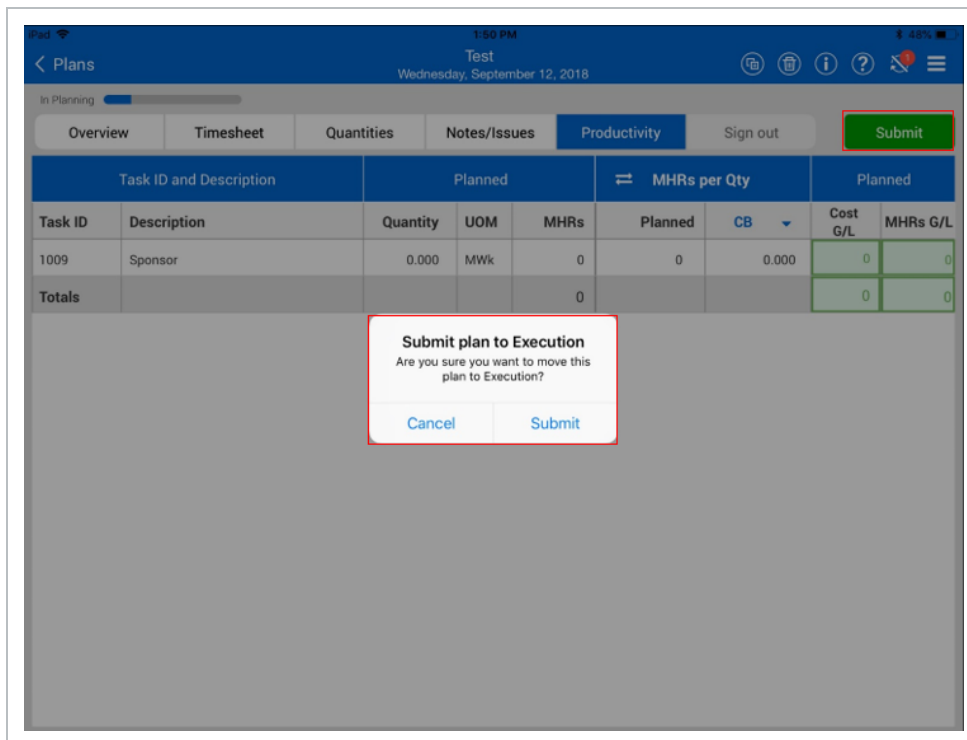
Title		Description
1	Task ID and Description	Indicates the tasks planned for the crew to perform that day.
2	Planned	Displays the plan information you entered in the Quantity tab (quantity, unit of measure, and man-hours).
3	MHRs per Qty	Compares the planned values to the current budget values.
4	Planned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

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

A Daily Plan still in the planning phase and created in the mobile app will not be available in the web app until it's moved to the execution phase and synced. A Plan ID is assigned once the Daily Plan is in execution in the mobile app.

Scenario Recap

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

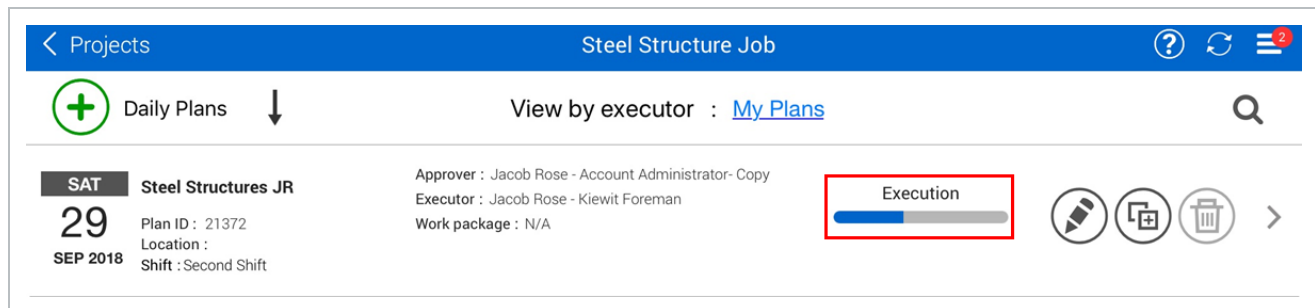
1.2 NAVIGATE EXECUTION

Scenario

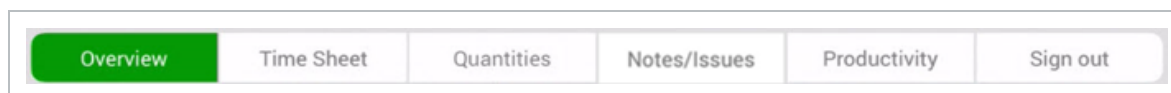
Steve is an electrical foreman on a project. Yesterday he created a daily plan that was reviewed by his superintendent, Paul. He is now preparing for the morning meeting and getting ready to execute the daily plan.

1.2.1 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.



1.2.2 Overview

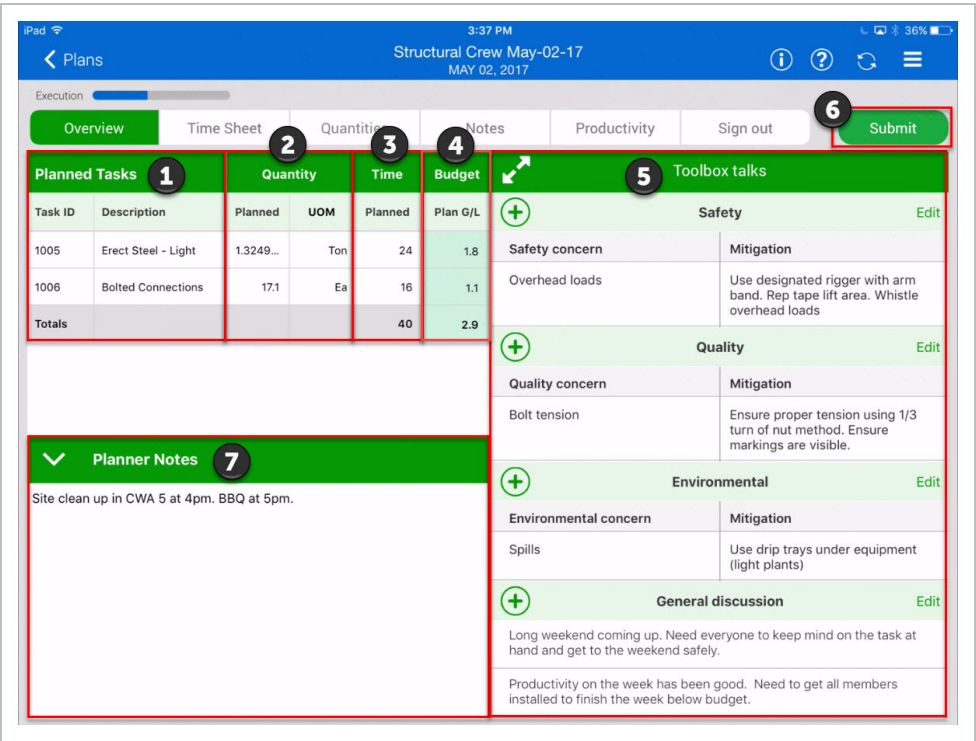
The first tab that you open to is the Overview tab. The Overview tab contains key information you would want to review with your crew at the start of the shift such as:

- Planned tasks
- Planned quantity for each task

- Planned budget
- Tool Box Talks (Safety, Quality, Environmental, and General Discussion)
- Planner Notes

Overview - Overview Tab

Title		Description
1	Planned Tasks	Displays the Task ID and Description of each planned task.
2	Quantity	Displays the Planned Quantity and Unit of Measure for the task. The Planned Quantity comes from information 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.



1.2.3 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.

Time Sheet Tab (continued)

Title	Description
5 Employees & Equipment	Displays the employees and equipment assigned to the Time Sheet.
6 Hours	Displays the actual hours each employee worked. These fields should be edited to reflect what employees actually work on and for how long.

The screenshot displays the 'Time Sheet' tab for 'Structural Crew May-02-17'. The interface includes a top navigation bar with tabs: Overview, Time Sheet (selected), Quantities, Notes/Issues, Productivity, Sign out, and a Submit button. Below the tabs, there are two columns of tasks and equipment. The first column lists tasks like 'Erect Steel - Light' and 'Bolted Connections'. The second column lists equipment like 'MH:20' and 'EQ:5'. Below these, a list of employees and their assigned hours is shown. The 'Hours' column is highlighted with a red box, and a 'Reorder' button is visible on the right.

Task/Equipment	Hours	ST	OT	DT
1005 Erect Steel - Light	5	3	2	
1006 Bolted Connections	5	3	2	
Ryan Mahon	5	3	2	
Kimonie Evans	5	3	2	
Kenneth Whit...	5	3	2	
Troy Brown	5	3	2	
GROVE-RT88...	5			

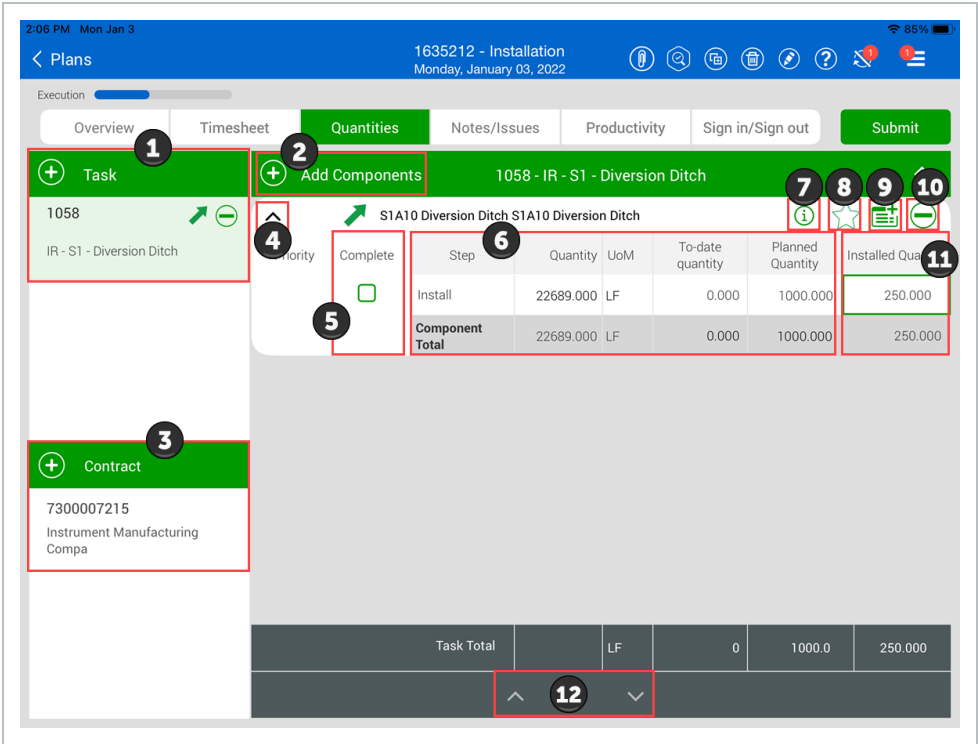
- To enter hours for equipment and crewmembers, you click on the hour box under each task and next to the crewmembers' name
- A window appears where you can enter ST (Straight Time), OT (Over Time), or DT (Double Time)

1.2.4 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.
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.



1.2.5 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.

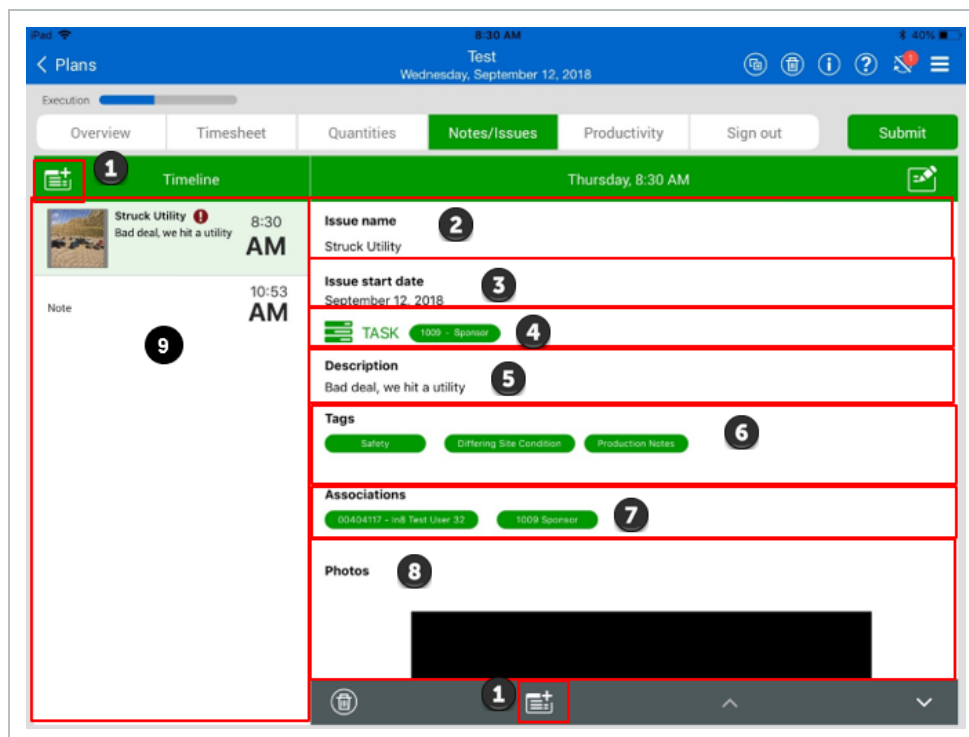
Overview - Notes/Issues Tab

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.

Overview - Notes/Issues Tab (continued)

Title		Description
3	Date	The start date of the note or issue
4	Tasks	Associates the note/issue to a specific task.
5	Description	A free text field of the description of the note/issue.
6	Tags	 Allows you to tag the notes/issues to a certain category such as Safety, Quality, Environmental, Extra Work/Change, Delay, or Production Notes. To see this icon, you must click on the add button.
7	Associations	 Allows you to add associations to your notes, such as task, employee, equipment, 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.



1.2.6 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

1.2.7 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 displays the 'Plans' screen on an iPad. The top status bar shows 'iPad', '9:44 AM', and '64%' battery. The app header is 'Plans' with a back arrow. Below the header, there's a 'Test Jr Jr' section with the date 'Wednesday, September 26, 2018'. A progress bar labeled 'Execution' is visible. The main interface has several tabs: 'Overview', 'Timesheet', 'Quantities', 'Notes/Issues', 'Productivity', 'Sign out', and 'Submit'. The 'Overview' tab is active, showing a list of employees on the left and a detailed view for 'Joseph Kelly (00386639)' on the right. The employee list includes Joseph Kelly, Troy Brown, Kenneth Moore, and John Walsh Jr. The detailed view for Joseph Kelly shows 'Employee time overview' for 'Today' (WED 26 SEP 2018) with ST 15.00, OT 0.00, and DT 0.00. It also shows a 'Week' overview from TUE 25 to MON 01. The total hours for the week are 34.00. On the right side of the detailed view, there are options to 'As employee' or 'On behalf of employee', a pin entry field, and buttons for 'Sign out with Touch ID or PIN' and 'Sign out all'.

Employee 1

Joseph Kelly (00386639) 2

Employee time overview 3

Today

WED 26 SEP 2018	ST	OT	DT
15.00	0.00	0.00	

Week

TUE 25 SEP 2018	WED 26 SEP 2018	THU 27 SEP 2018	FRI 28 SEP 2018	SAT 29 SEP 2018	SUN 30 SEP 2018	MON 01 OCT 2018
17.00	15.00	0.00	0.00	0.00	0.00	2.00

Total hours : 34.00

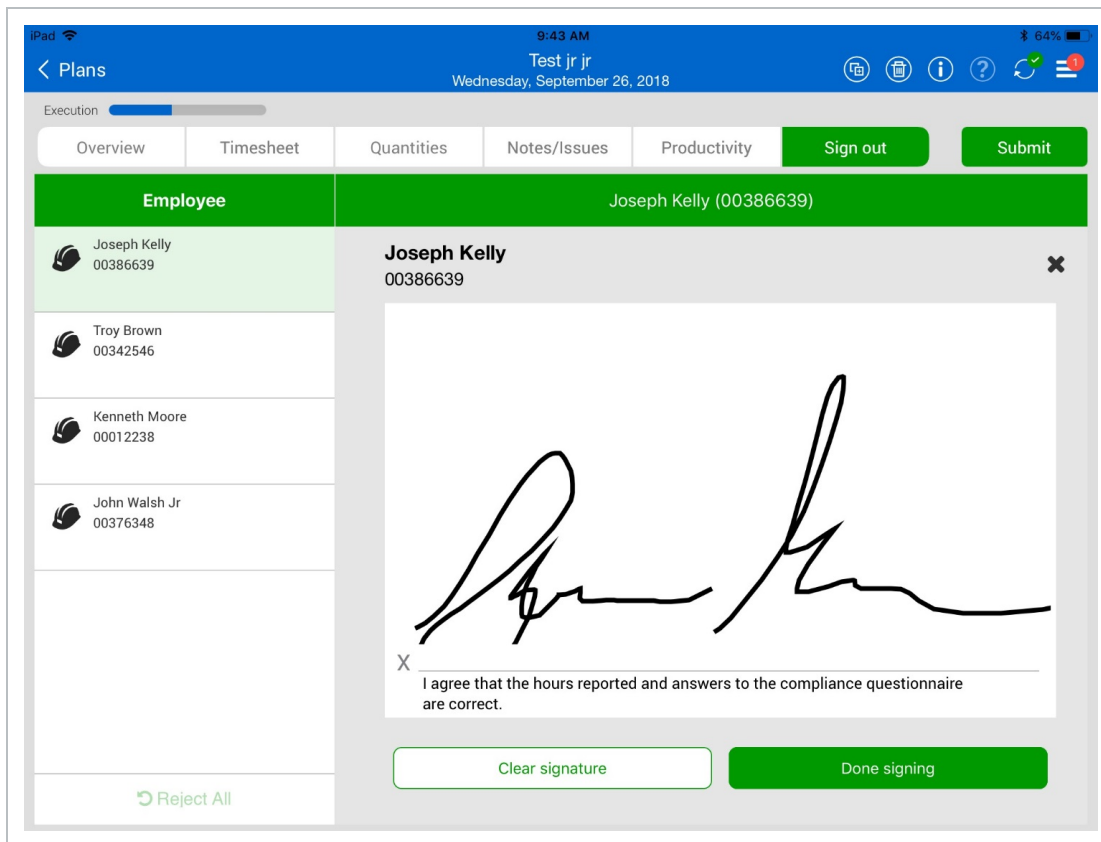
4 As employee On behalf of employee

5 Enter employee pin

6 Sign out with Touch ID or PIN

7 Sign out all

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



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

1.2.8 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.

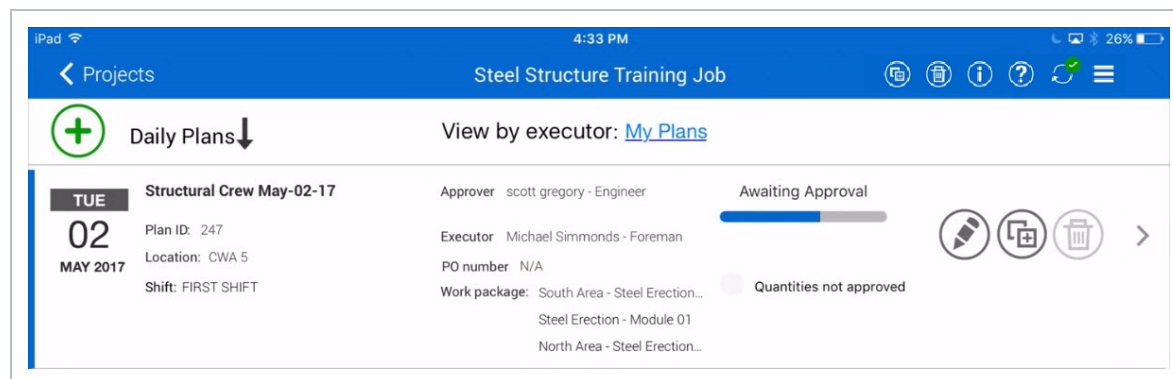
Scenario Recap

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.

1.3 NAVIGATE APPROVAL

1.3.1 Plan List

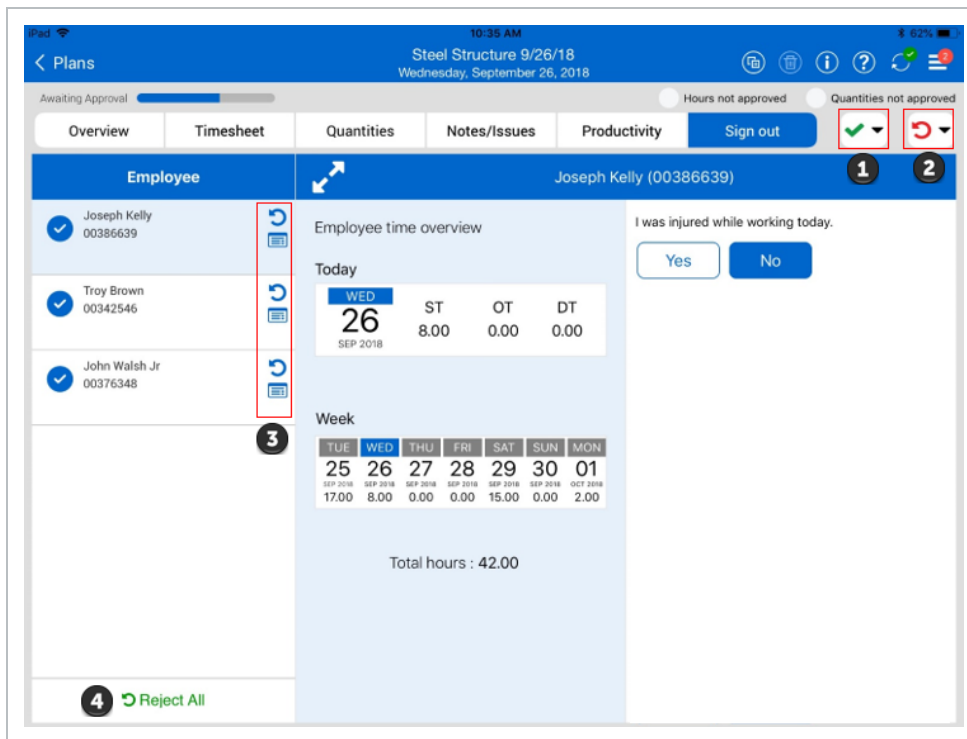
You access a daily plan from the list of daily plans. Note that the current status is now Awaiting Approval. There is also a note indicating that the quantities have not been approved.



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

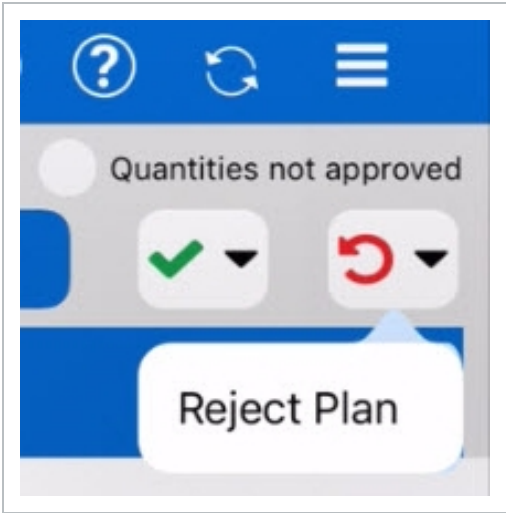
Title		Description
1	Approval	Approves actual quantities, hours or both.
2	Reject	Rejects the plan and sends it back to the Execution Phase.
3	Reject Sign out	Rejects the sign out for an individual employee. This must be done before editing any hours on the Time sheet. The employee must sign out again 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 Time sheet. 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.

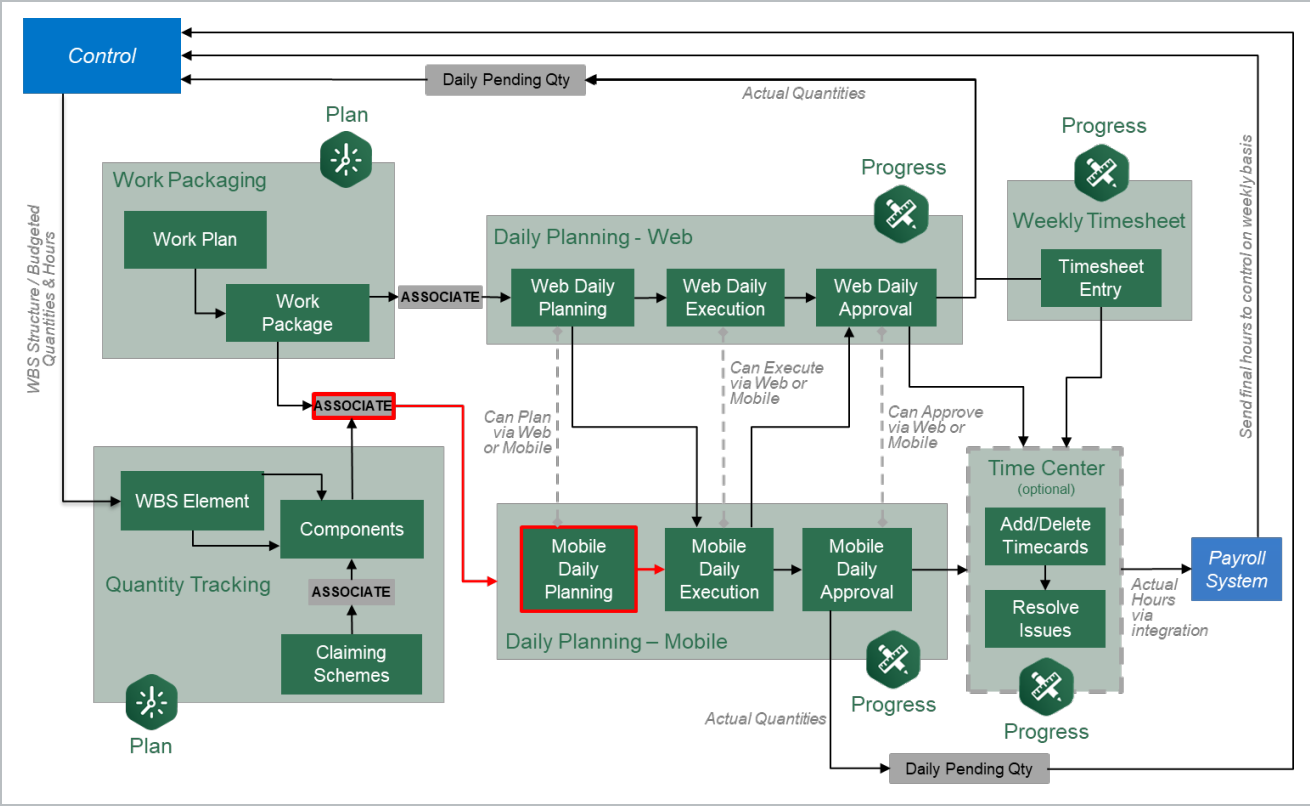


If significant changes are required, or if the Executor is the member required to make changes, it is recommended to revert the Daily Plan back to the Execution Phase before making the changes. In this case, you can select the “Reject Plan” button.



2.1 DAILY PLAN CREATION - MOBILE

CHAPTER 2 – DAILY PLANNING MOBILE



2.1 NAVIGATE 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
----------	-----------	------------	--------------	--------------	----------

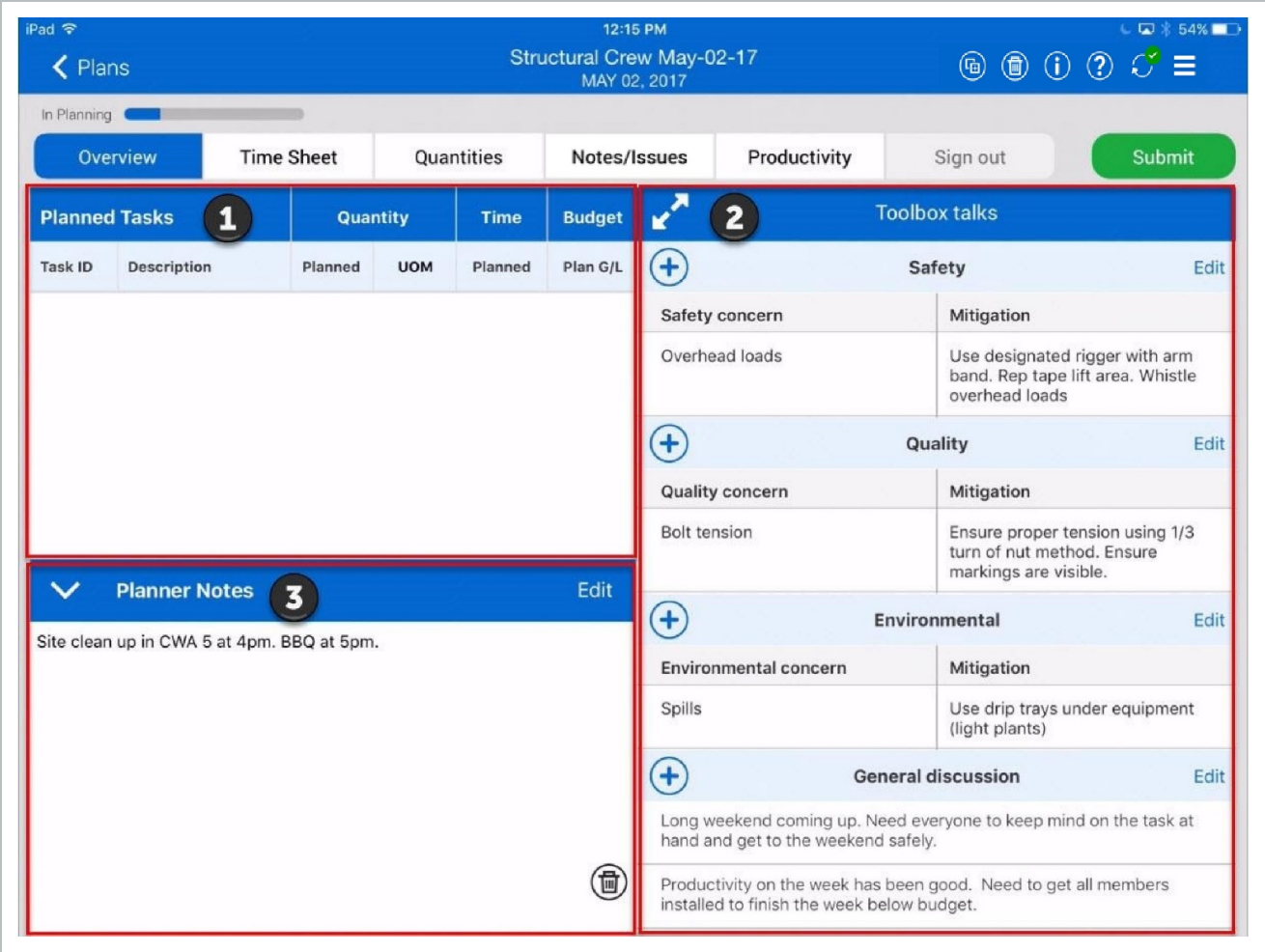
While in the Planning pPhase, the page screen is highlighted with a blue accent. When in the Execution pPhase, this changes to green. This helps asto a reminder ofyourself which phase of the process you are in.

2.1.1 Overview

After Once a daily plan is created, you are taken to thean Overview pagescreen. Initially this page screen is blank because you have not entered any information. The Overview screen letallows 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:

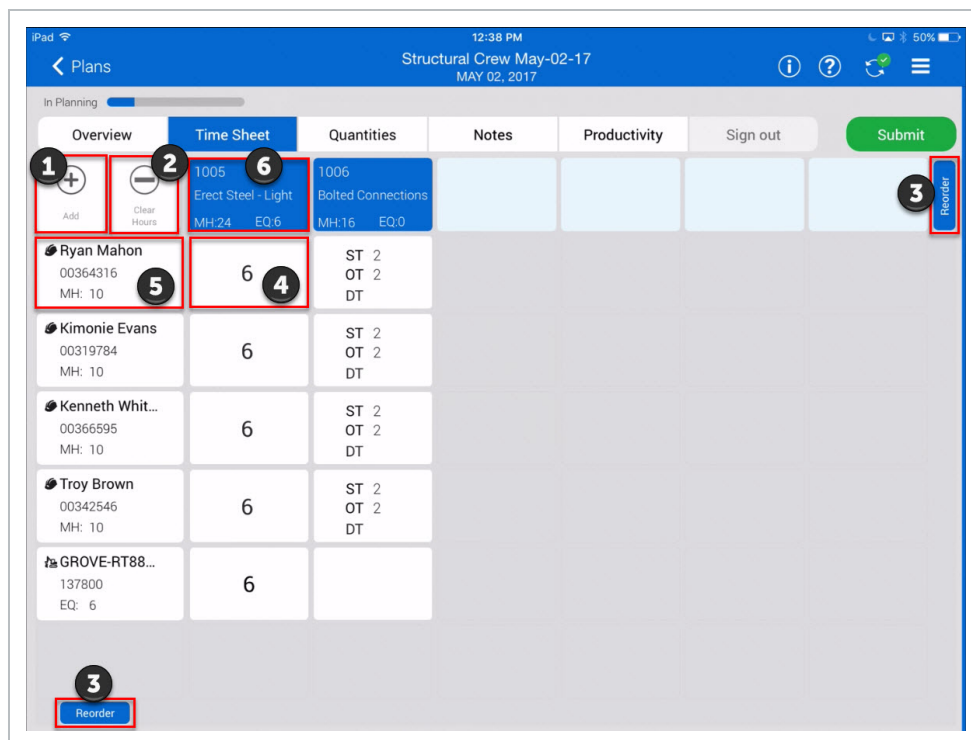
- Add tool box talk items by tapping the  icon
- Tap the  icon to expand to a larger view
- Minimize planner notes by tapping the  icon

2.1.2 Time Sheet

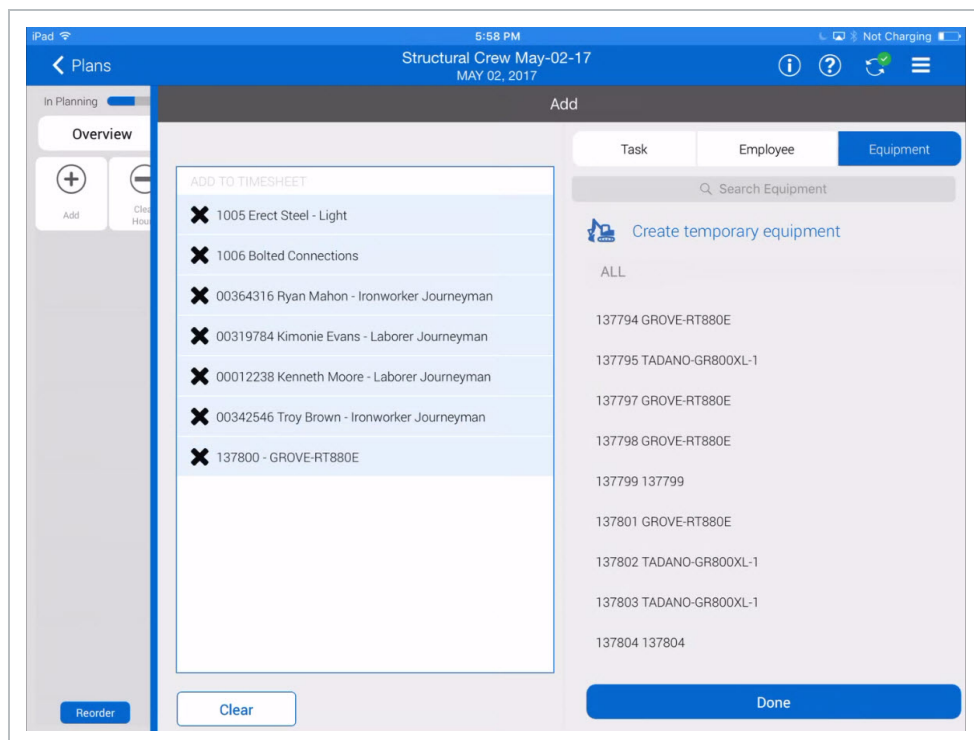
On the Time Sheet tab, you can enter all your tasks, employees and equipment and assign hours to each. The table below explains key navigation points.

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.



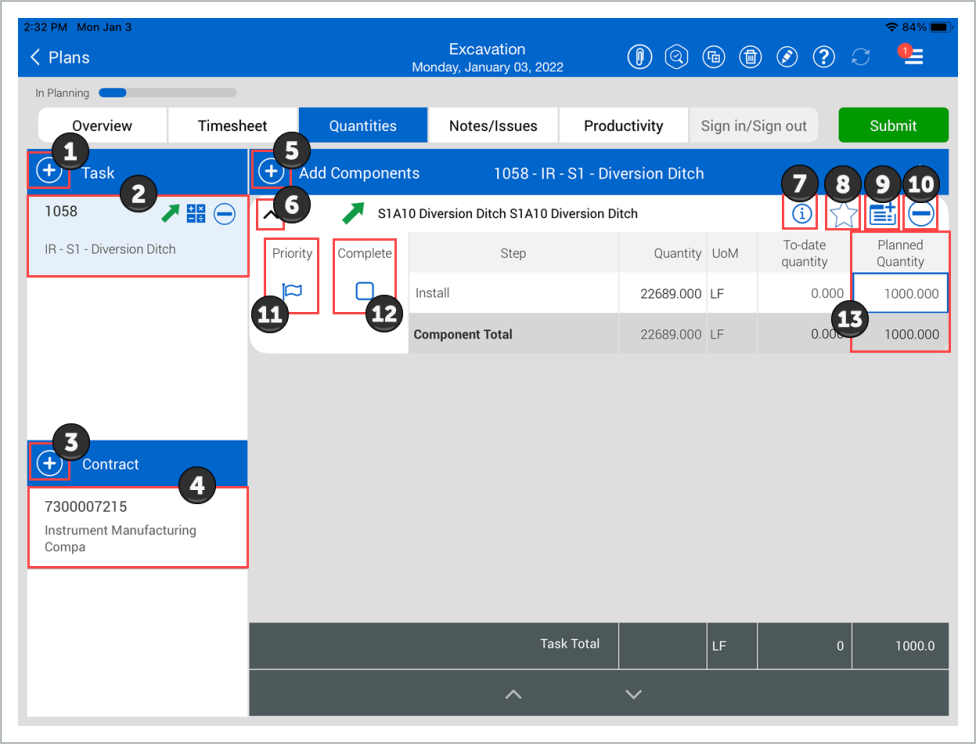
- View your lists of all available tasks, employees and equipment by tapping on the appropriate tab at the top of the window
- Once selected from a list, items appear on the left-hand side of the window under Add To Time Sheet as shown above
- Tapping on the **X** next to an item removes it from the 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

2.1.3 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.



2.1.4 Notes/Issues

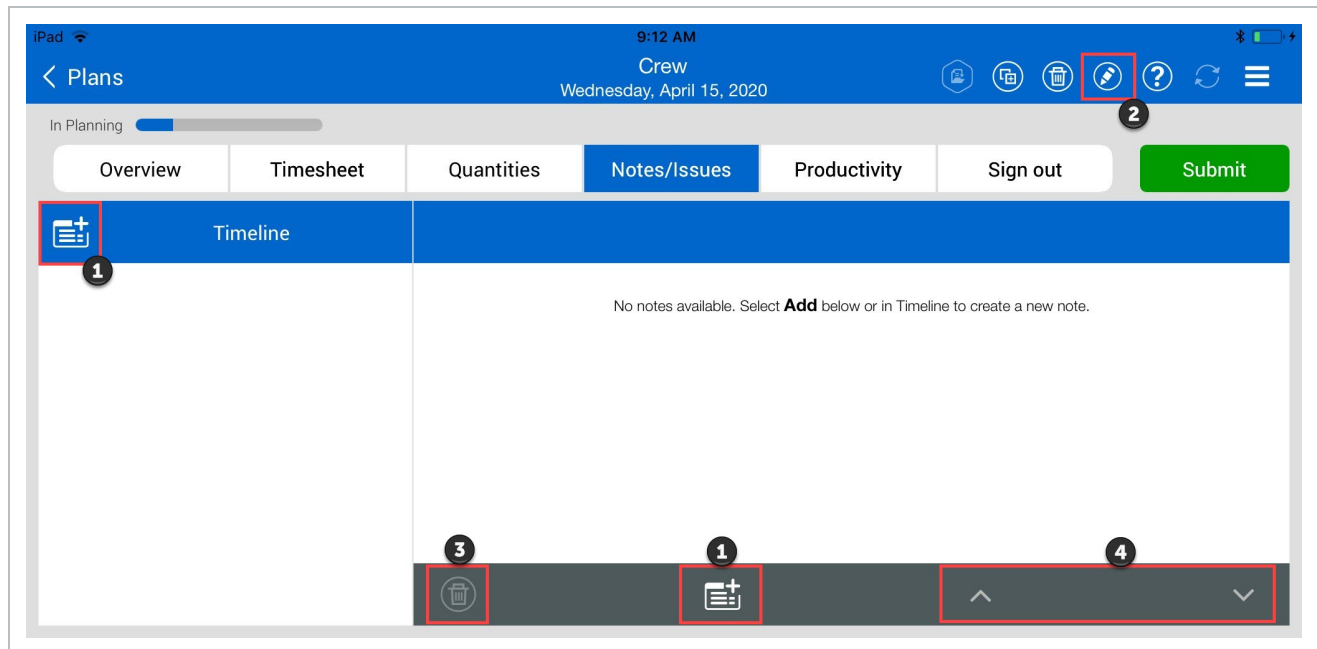
The Notes/Issues tab is where you can enter additional information regarding a task or component for the crew to be aware of when they execute the plan. You can add safety, quality control, environmental, subcontract, and other information. If an issue is added it will automatically show up on the issue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



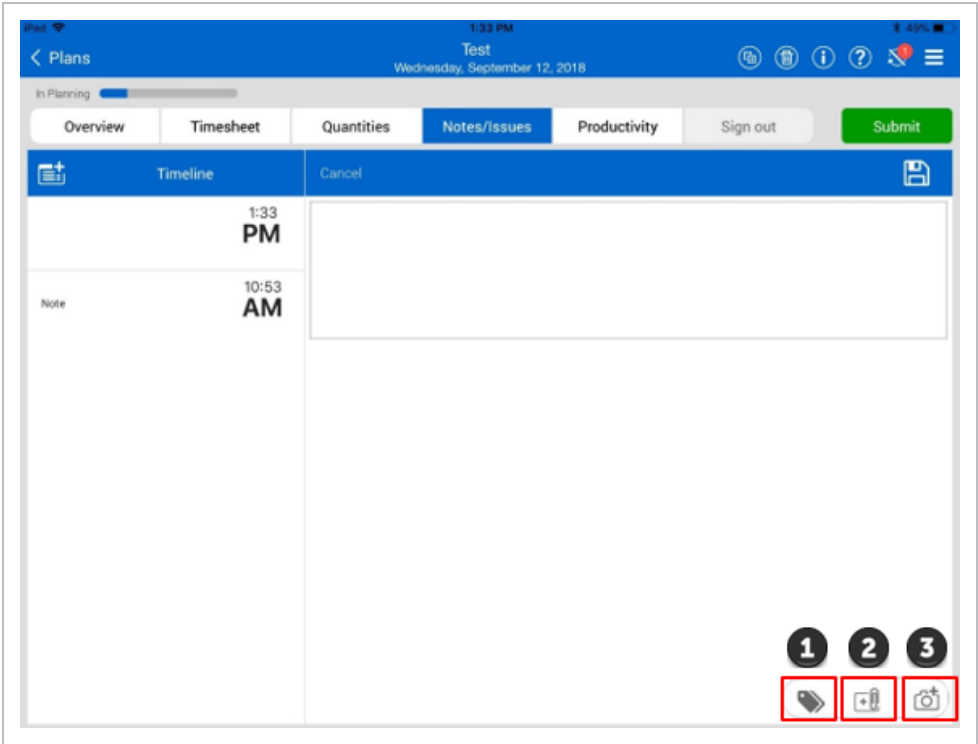
When you add a new note or issue, three icons will appear at the bottom. The following overview explains these icons.

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.



2.1.5 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

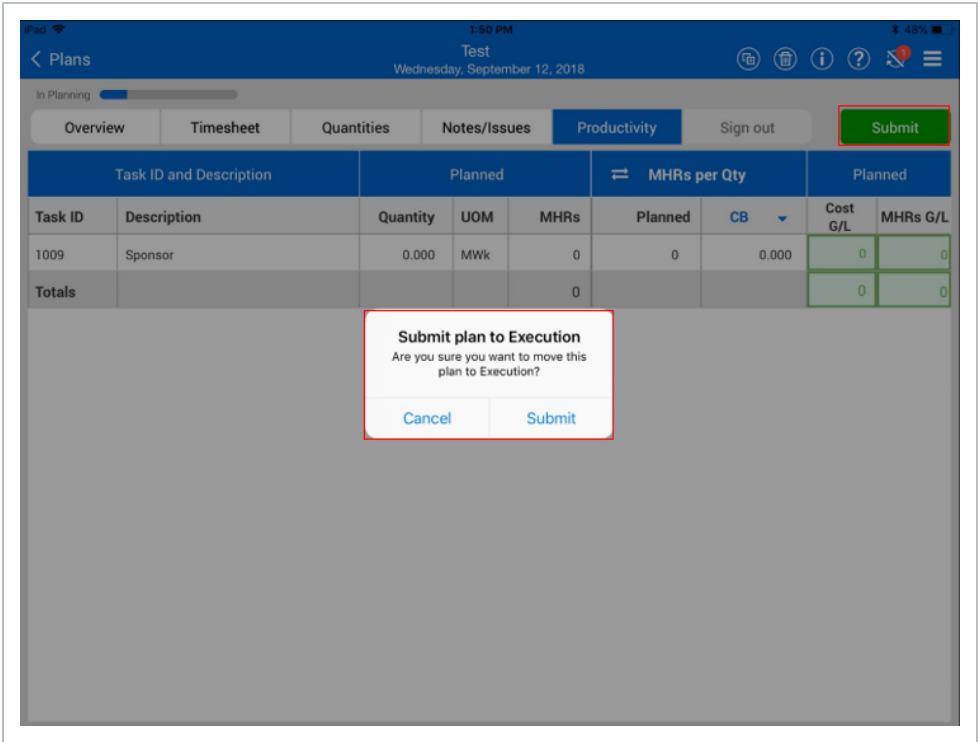
Title		Description
1	Task ID and Description	Indicates the tasks planned for the crew to perform that day.
2	Planned	Displays the plan information you entered in the Quantity tab (quantity, unit of measure, and man-hours).
3	MHRs per Qty	Compares the planned values to the current budget values.
4	Planned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

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

A Daily Plan still in the planning phase and created in the mobile app will not be available in the web app until it's moved to the execution phase and synced. A Plan ID is assigned once the Daily Plan is in execution in the mobile app.

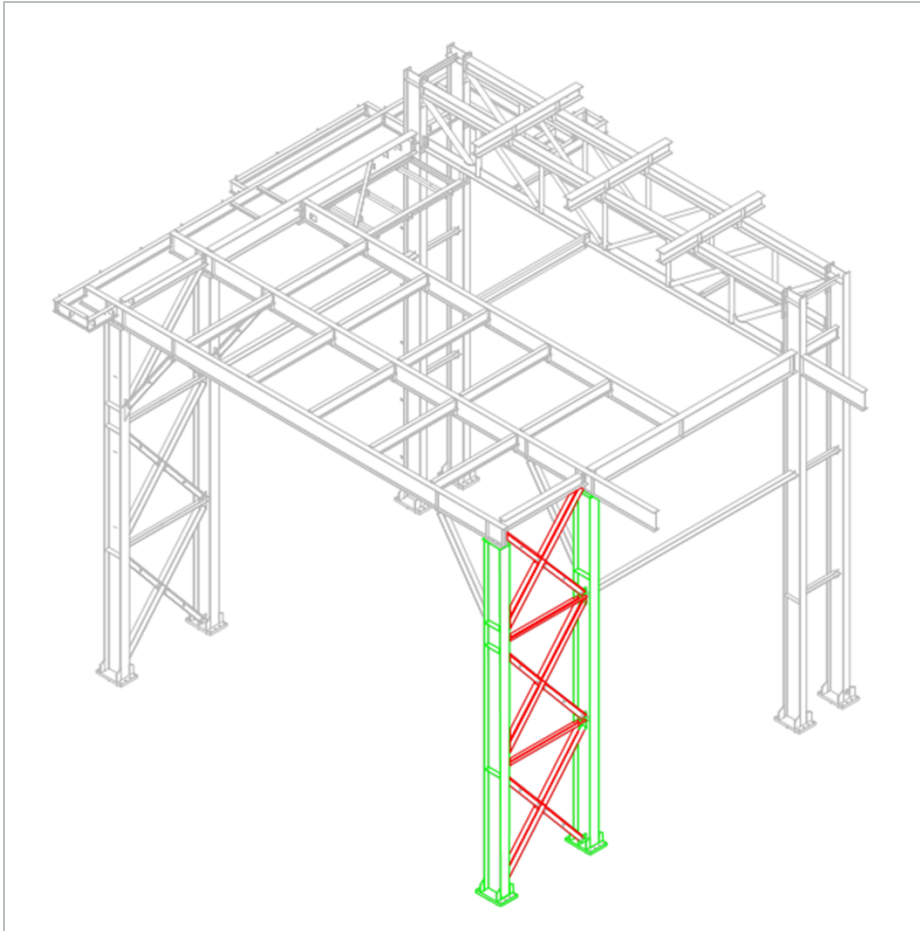
Scenario Recap

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

2.2 DAILY PLAN FROM SCRATCH

Scenario

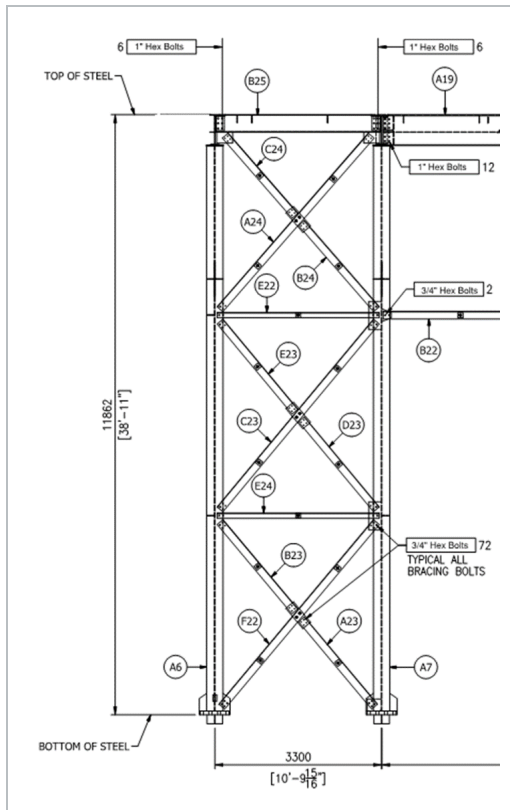
Today, your crew is installing two columns of the Support Steel Structure 1 (green columns). Your plan for tomorrow is to install the horizontal and cross member assemblies (red cross bracing).



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.

2.2.1 Plan Creation

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

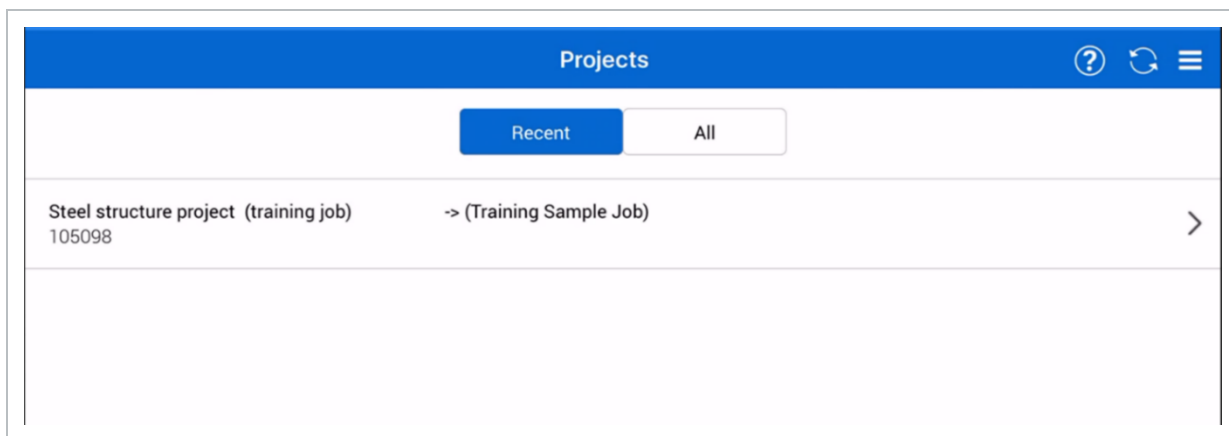
- The date the plan will be executed
- The approver of the plan (normally the originator of the plan, such as a field engineer or superintendent)
- The executor of the plan (normally the overseer of the work, such as a foreman)

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 opens, where you will see the **Add**  button.

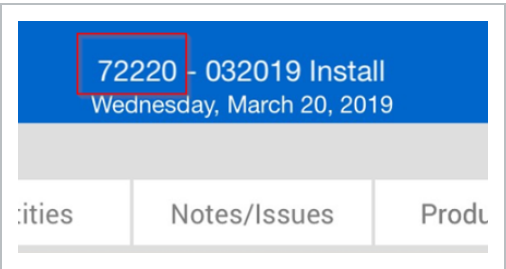
When you tap The Add button icon, a slide-out panel opens from the left where you can provide a plan description, location and date. You can also select an approver, executor, Work plan/package ID, and

associated vendor. When you have completed the plan information, you create the plan by selecting Add in the top right corner.

A screenshot of the 'New daily plan' form in the Progress Mobile application. The form is titled 'New daily plan' and has a green plus icon in the top left corner. It includes several input fields: 'Date' (set to June 02, 2022), 'New Plan Name', 'Location (optional)', 'Shift' (set to FIRST SHIFT), 'Approver', 'Executor', 'Work plan/ package' (with an 'Optional' link), 'Associated vendor' (with an 'Optional' link), and a 'Skip planning' toggle switch which is currently turned on.

2.2.1.1 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. After a daily plan ID is assigned to the plan, it will be visible along with the plan description at the top of the screen.



After you create your plan, you will open to the Overview tab of the plan opens 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 Information  icon.

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

2.2.1.2 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 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	Mitigation
						Human - Equipment Interface	Use spotter at all times.
						Quality	
						Quality concern	Mitigation
						Material Quality	Cover stockpiles
						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.							

2.2.2 Time sheet Tab

2.2.2.3 Add Tasks

The key aspect to planning work is the task or objective that needs to be completed. You add tasks under the Time sheet 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.

The screenshot displays the 'Plans' application interface for a project titled 'Light Steel Install - Structure 1' on Tuesday, September 25, 2018. The interface is divided into three main sections:

- Left Panel (Resources):** Labeled 'Overview' and 'In Planning'. It lists resources with their names, IDs, and hours (MH: 0):
 - Troy Brown (00342546)
 - Joseph Kelly (00386639)
 - John Walsh Jr (00376348)
 - Kenneth Moore (00012238)
 - Rental - Manlift (152687, EQ: 0)Buttons for 'Tasks & resources', 'Maintenance', and 'Clear' are visible.
- Center Panel:** A large area labeled 'ADD TO TIMESHEET' with a 'Clear' button at the bottom.
- Right Panel:** Labeled 'Add', it features tabs for 'Task', 'Employee', and 'Equipment'. A search bar 'Search tasks' and a 'Create temporary task' link are present. A list of 'RECENT' tasks is shown, including 'Equipment', 'Structure Steel - Materials', '1002 Job Overhead', '1005 Erect Steel - Light', '1006 Bolted Connections', '1069 Earthwork', '1071 Concrete', '1074 Erect Steel - Heavy', and '1085 Earthwork - Materials'. A 'Done' button is at the bottom.

2.2.2.4 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 Time sheet 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, add a temporary employee or scan a QR code to look up employees.

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

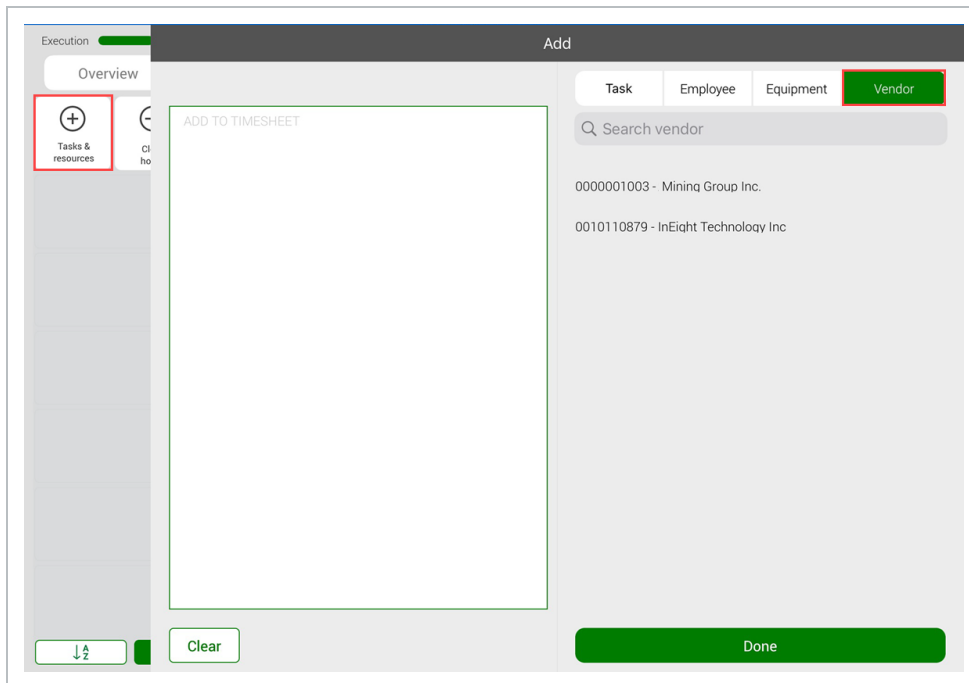
You can add employees and equipment only if the plan date is within the resources' project start and end dates. These dates are managed in your project's Assigned operational resources page.

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.

2.2.2.5 Add vendors

If your project has vendors who are completing work, you can add the vendors to a Time sheet 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 Time sheet, 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**.



2.2.2.6 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.

2.2.2.7 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.

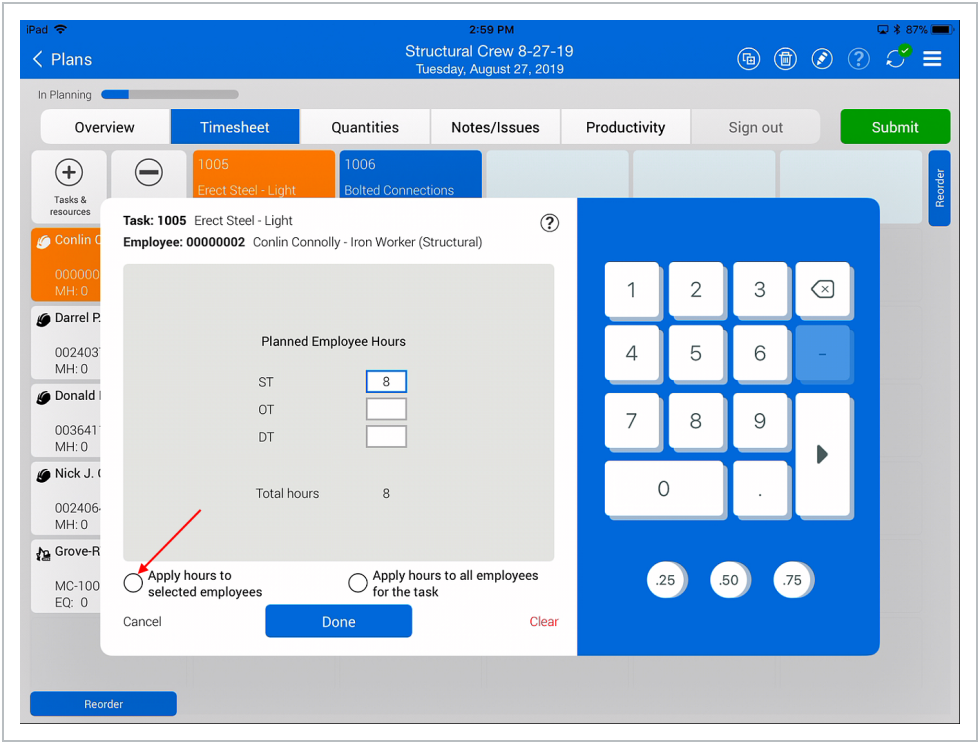
The screenshot shows the 'Plans' screen in the InEight mobile app. A modal dialog titled 'Task: 1005 Erect Steel - Light' is open. The dialog shows the selected employee 'Conlin Connolly - Iron Worker (Structural)' with ID '00000002'. It contains a table for 'Planned Employee Hours' with columns for ST (Straight Time), OT (Overtime), and DT (Double Time). The 'ST' box is currently set to '8', and the 'Total hours' is calculated as '8'. To the right of the table is a numeric keypad with digits 0-9, a decimal point, and fraction buttons (.25, .50, .75). At the bottom of the dialog are two radio buttons: 'Apply hours to selected employees' (which is selected) and 'Apply hours to all employees for the task'. There are also 'Cancel', 'Done', and 'Clear' buttons.

Planned Employee Hours	
ST	8
OT	
DT	
Total hours 8	

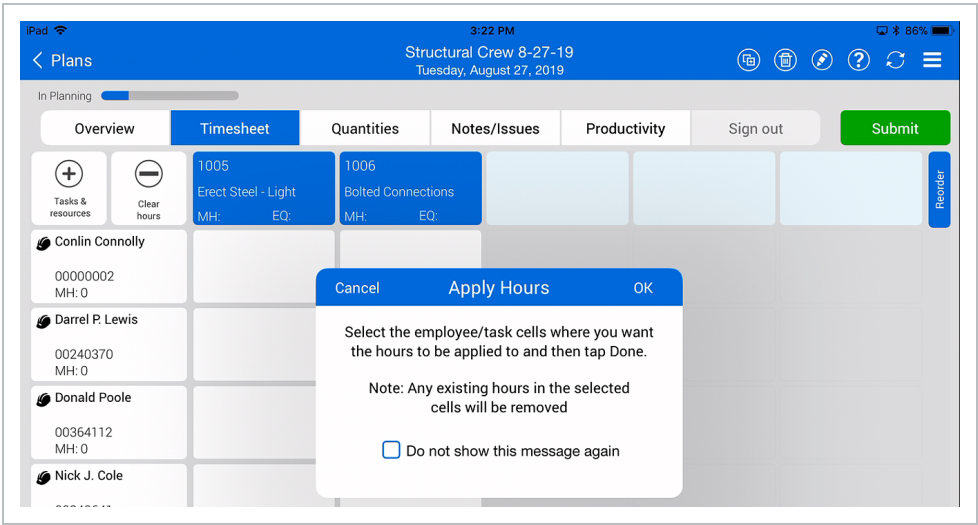
2.2.2.8 Apply Hours to Selected Employees

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

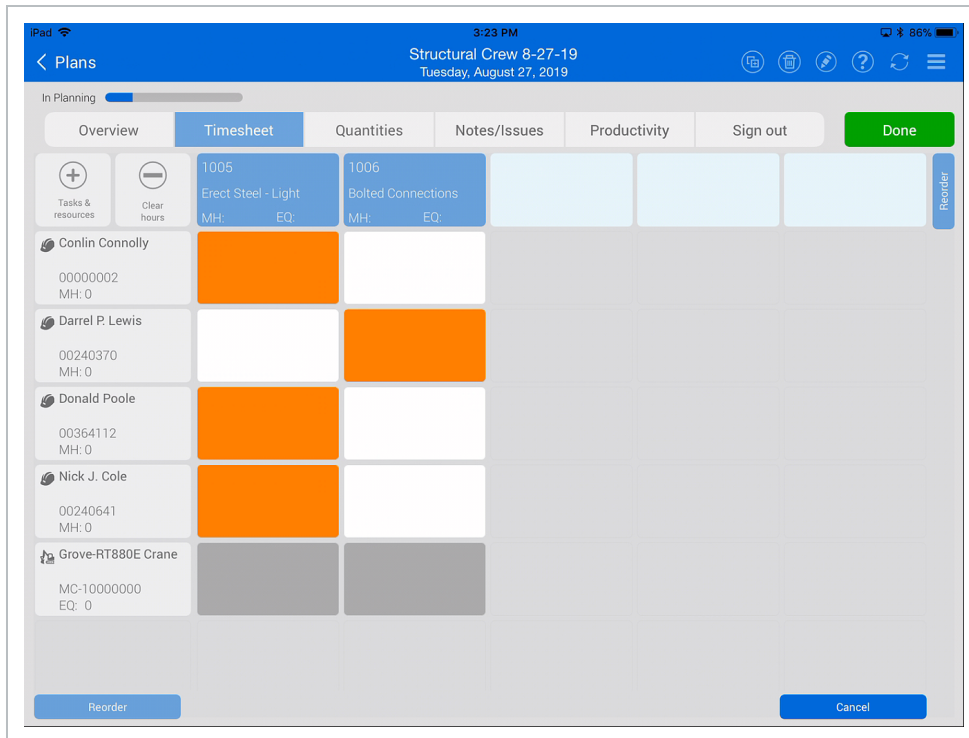
Apply hours to selected employees.



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.

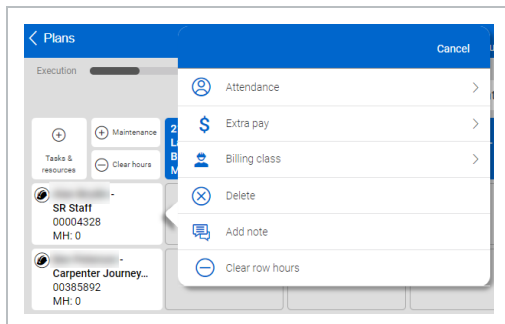


When you tap OK to close the dialogue, you can then select the hours boxes for all the employees you want to assign the same number of hours to, then tap Done.



2.2.2.9 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.

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

- Add a note
- Delete row
- Clear row hours

2.2.3 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

1005 - Erect Steel - Light

Module 01 - 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

2.2.3.10 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

The screenshot shows the 'Add Component' interface. On the left, under 'Task', task '1005 Erect Steel - Light' is selected. The central area is a large box labeled 'ADD TO QUANTITIES'. On the right, under 'Associated Components', a search bar shows 'A23' and a list of 10 modules (21-30) all associated with 'A23: Cross Brace Assembly Mod...'. A 'Clear' button is at the bottom left, and a 'Done' button is at the bottom right.

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.

2.2.3.11 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.

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

In Planning 0%

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
	☐	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

2.2.3.12 Contracts

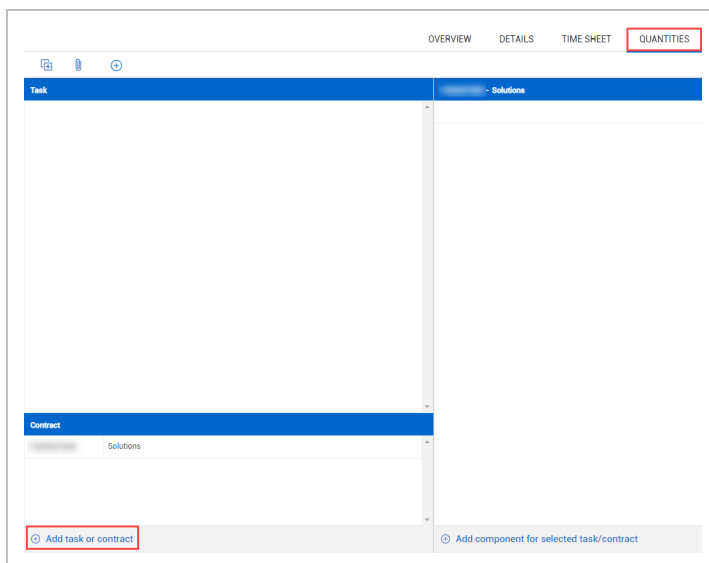
Contracts can be added to a daily plan so that you can add associated contract components to track for billing validation.

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.

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.

2.2.3.13 Contract components

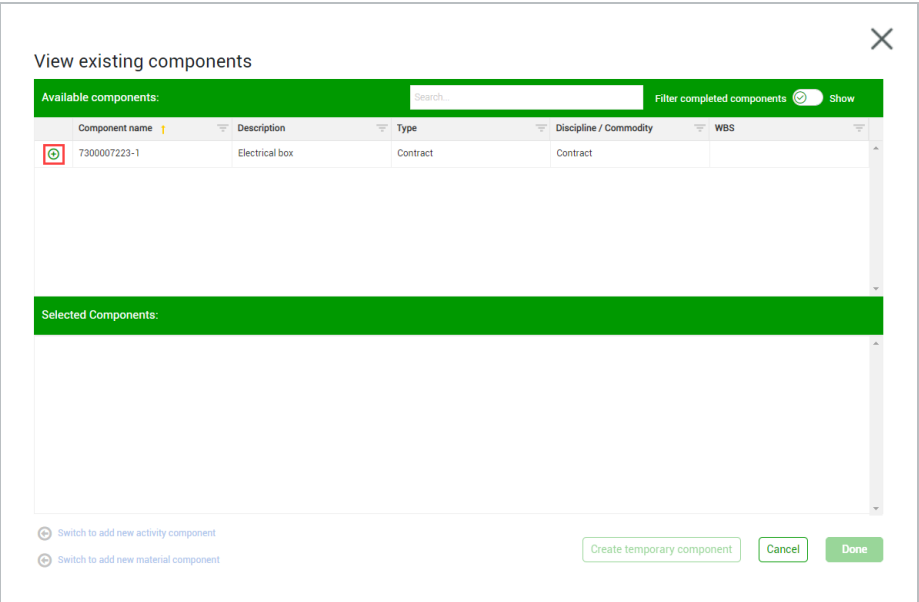
Contract components are used to track quantities for billing validation.

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.

Add a Contract Component to a Daily Plan

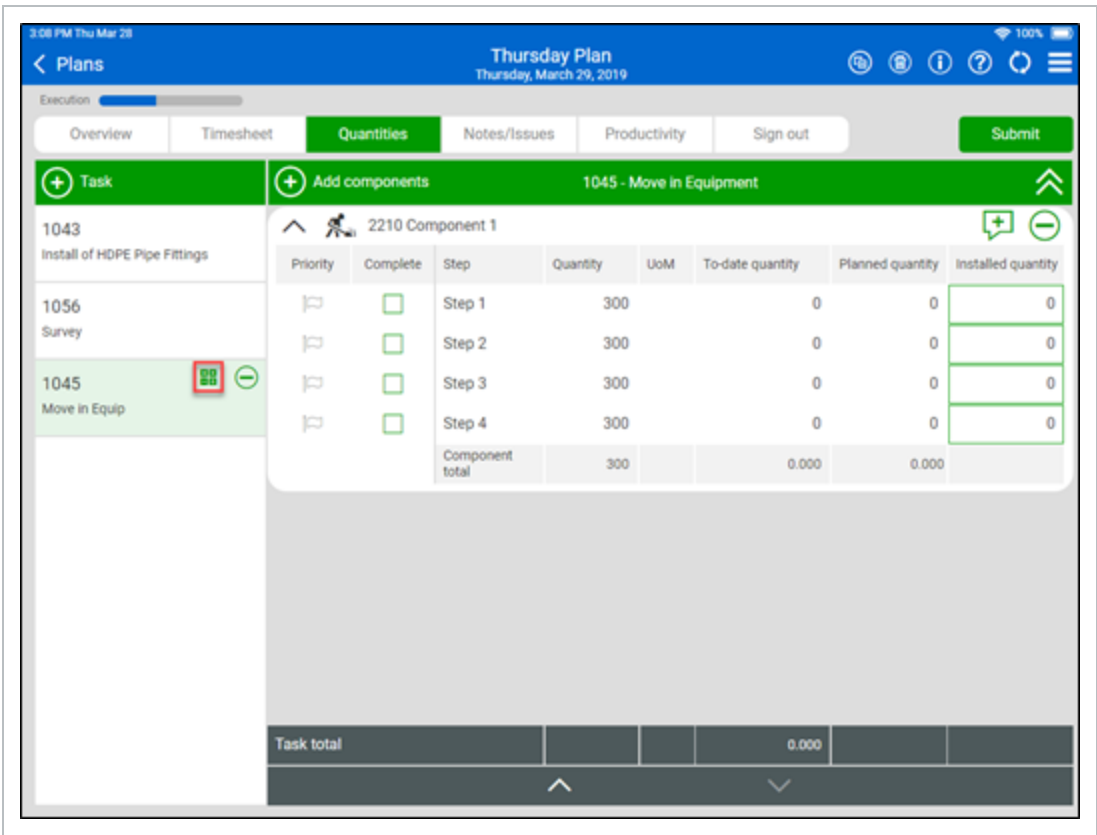
- 1. Select a contract from the Contract list in the lower left of the Quantities tab.
- 2. Click **Add component for select task/contract**.



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

2.2.4 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 shows the 'Calculate costs' dialog box in the Progress User Guide app. The dialog is titled 'Calculate costs' and has a 'Cancel' button on the left and a 'Done' button on the right. It contains a 'Cost summary' table with the following data:

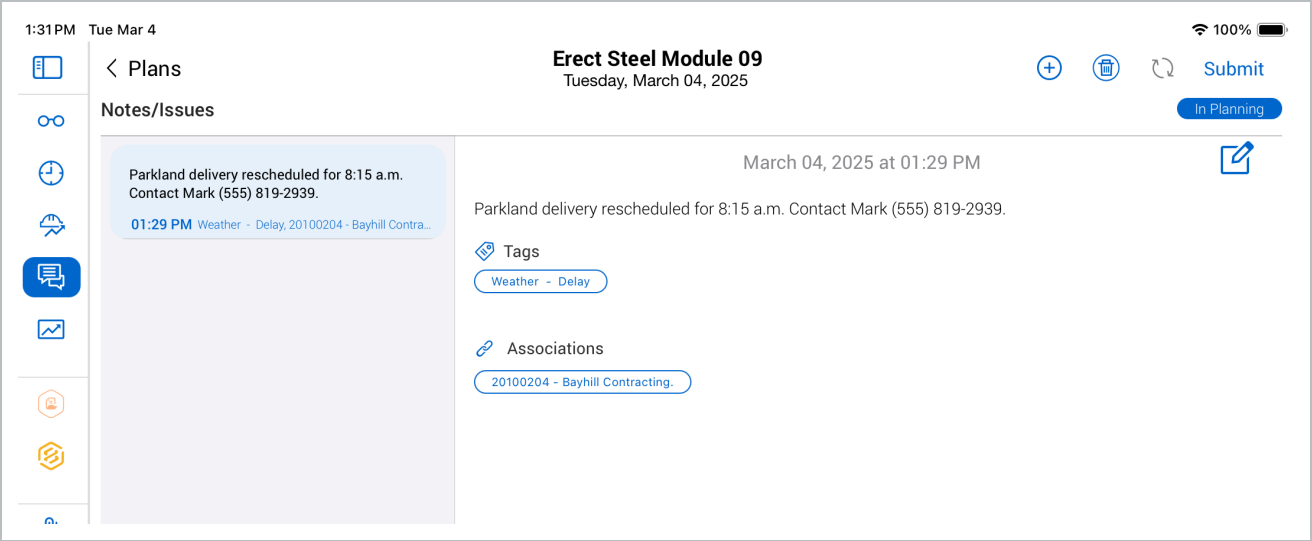
Task	UoM	Cost
Labor		\$ 3,600.00
Equipment		\$ 940.00
Task total cost		\$ 4,540.00

Below the table, there is a 'Break even' section with a 'Quantity needed to break even for this task' label. The 'Qty' field is set to '454' and the 'UoM' is 'LF'. There is a 'Calculate G/L' section with a 'Calculate' button. At the bottom, there is a calculation: 'Earned' (empty) minus 'Cost' (\$ 4,540.00) equals 'G/L' (empty). A numeric keypad is visible on the right side of the dialog.

2.2.5 Notes/Issues Tab

The Notes/Issues tab is where you can note important information critical to your daily plan. Example notes might include:

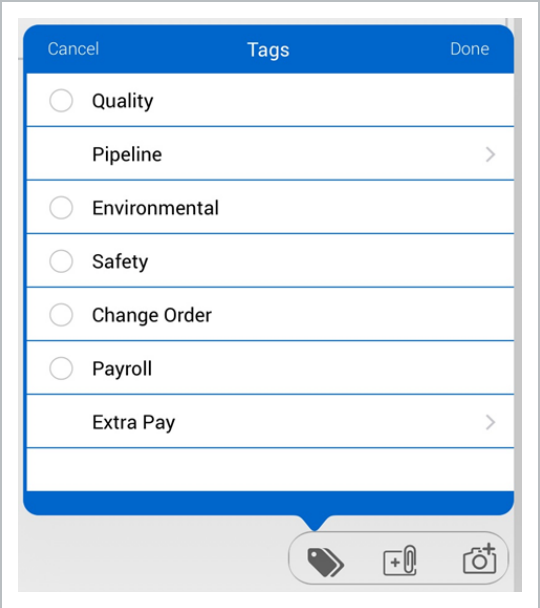
- A permanent material needed as part of the installation work
- A Request for Information involving a change in the design that impacts the installation and daily plan
- An environmental concern
- Leave of Absence or extra pay for an employee



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

2.2.5.14 Tags and Associations

You can tag your notes or issues to group similar items for reporting purposes. Tags are configured in Organization Settings > Progress > Notes.

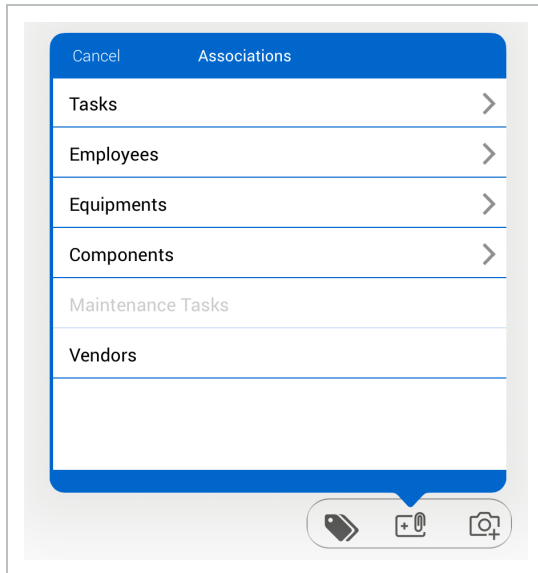


You can also associate notes and issues to any of the following categories:

- Task
- Employee

- Equipment
- Component
- Maintenance Task
- Vendor

After you tap a category name, you can select an association.



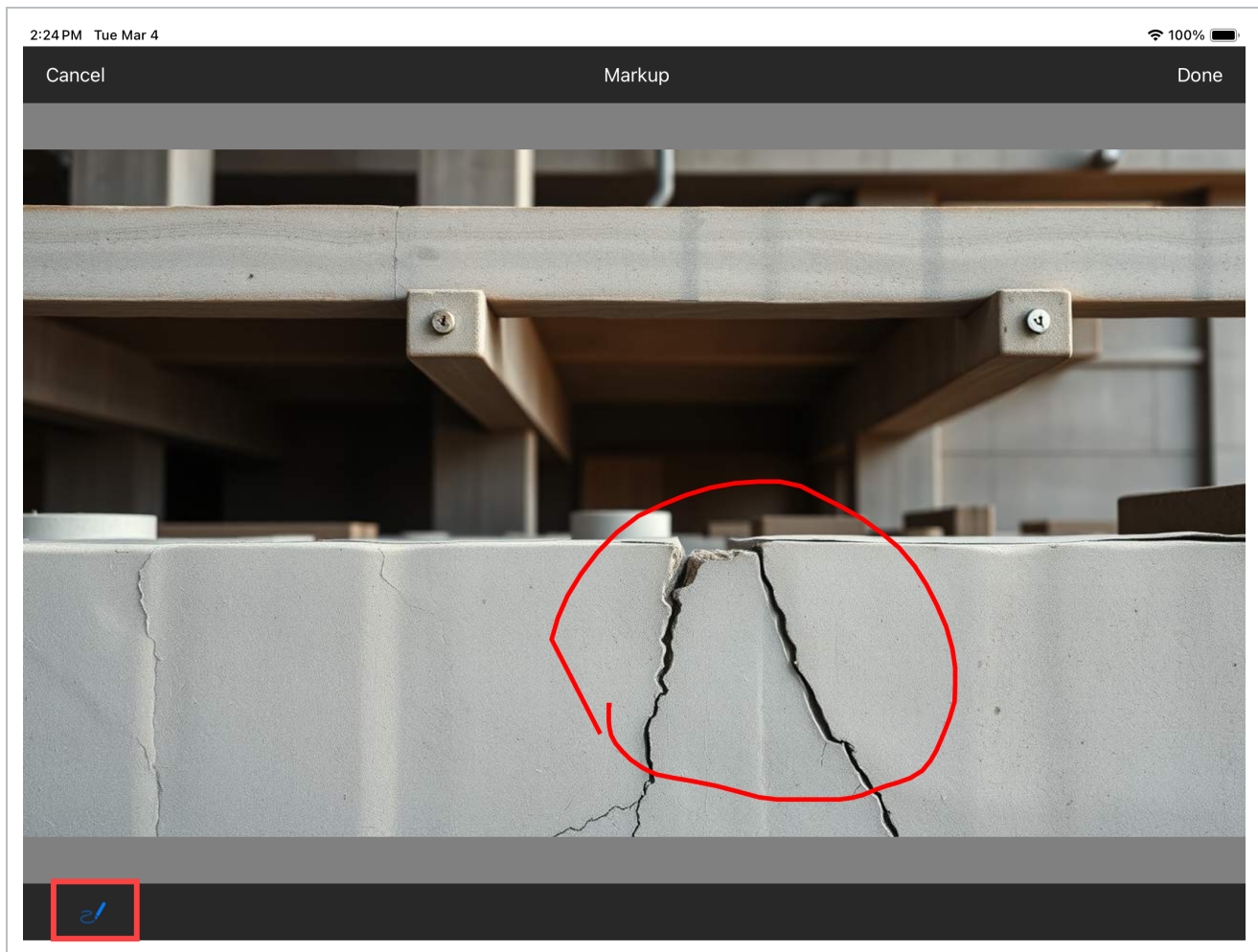
2.2.5.15 Adding and Editing a Picture

You can add images to your notes or issues in the planning phase of your daily plan. You can add up to 20 total images from your Photo Library or take one directly from your device. As you select photos, a counter shows how many you have left.



After you select photos, you can move or resize the photo before adding markups.

You can markup photos directly in the app by selecting the **Pen** icon at the bottom left of your screen. When you're finished, click **Done**.



You can also download or remove photos from the notes tab.

2.2.6 Productivity Tab

After planning your work within the Time sheet 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

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☰

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

2.2.7 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.

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

< 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

Submit plan to Execution

Are you sure you want to move this plan to Execution?

Cancel

Submit

2.2.8 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.

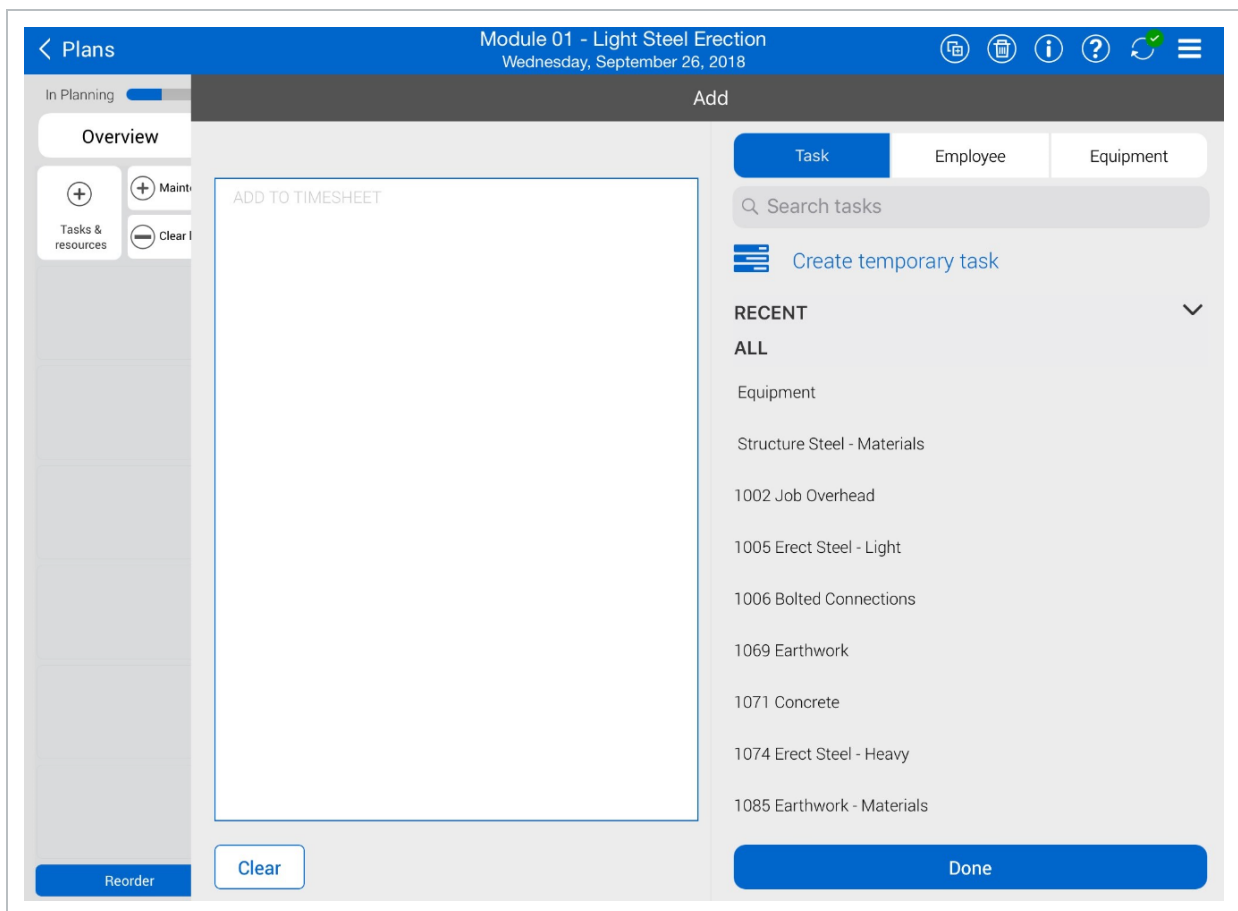
Select a project from the Projects home page.
3.

Tap on the **Add**  button to create a plan from scratch.

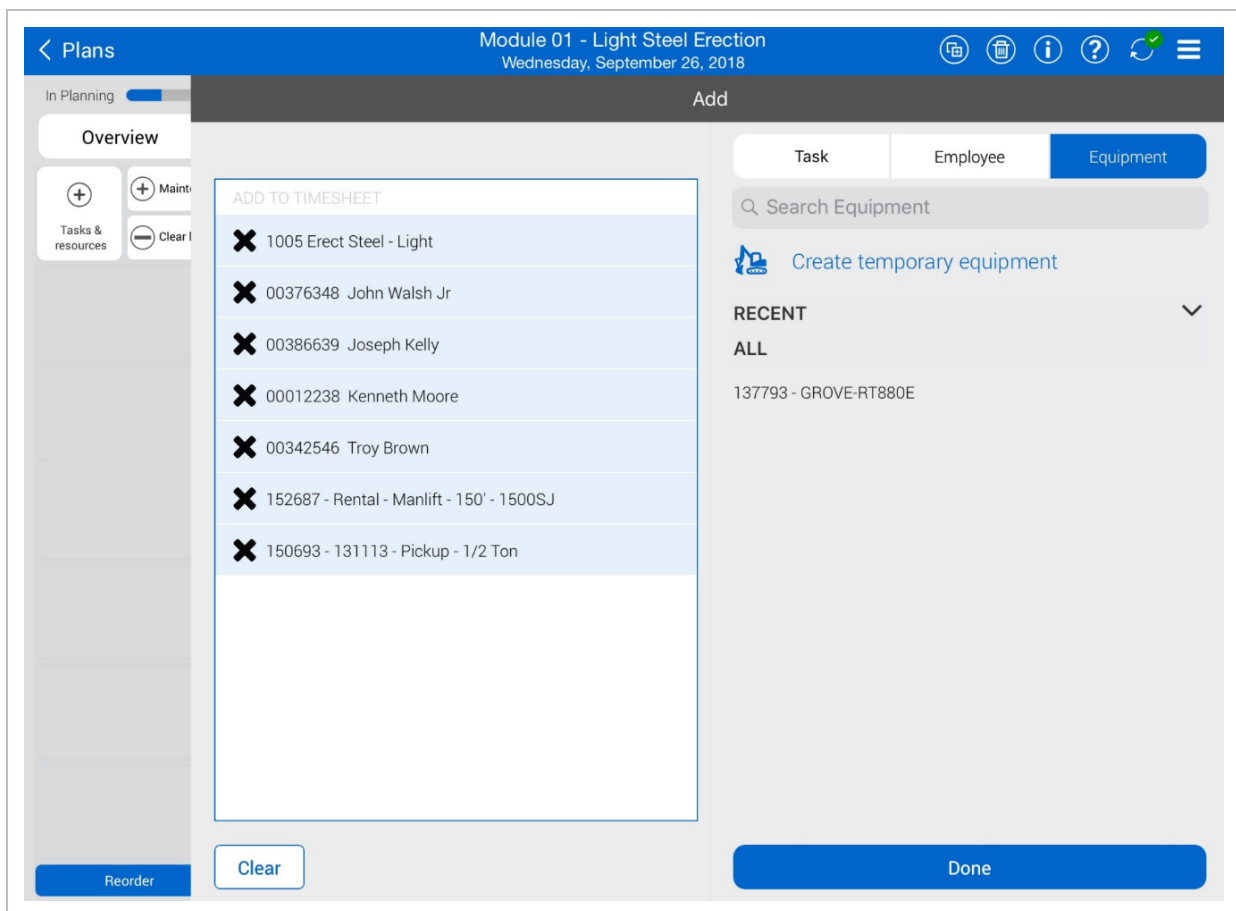
The screenshot shows the 'Steel Structure Job' app interface. At the top, there's a blue header with a back arrow, 'Projects', the job name 'Steel Structure Job', and icons for help, refresh, and menu. Below the header, a green plus icon in a circle is next to 'Daily Plans' with a dropdown arrow. To the right, it says 'View by executor : [My Plans](#)' and a search icon. A modal form titled 'New daily plan' is open, showing fields for Date (September 25, 2018), New Plan Name, Location (optional), Shift (Second Shift), Approver (Jacob Rose - Account Administrator-...), Executor (Jacob Rose - Kiewit Foreman), Work plan/ package (Optional), and a Skip planning toggle. In the background, a list of existing plans is visible, showing names like 'Rose - Account Administrator- Copy' and 'Rose - Kiewit Foreman', with progress bars indicating 'Execution' or 'In Planning' status, and icons for edit, share, and 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 **Executor**.
 - 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 Time sheet tab

23. Add employee time by tapping on the empty box next to an employee name.

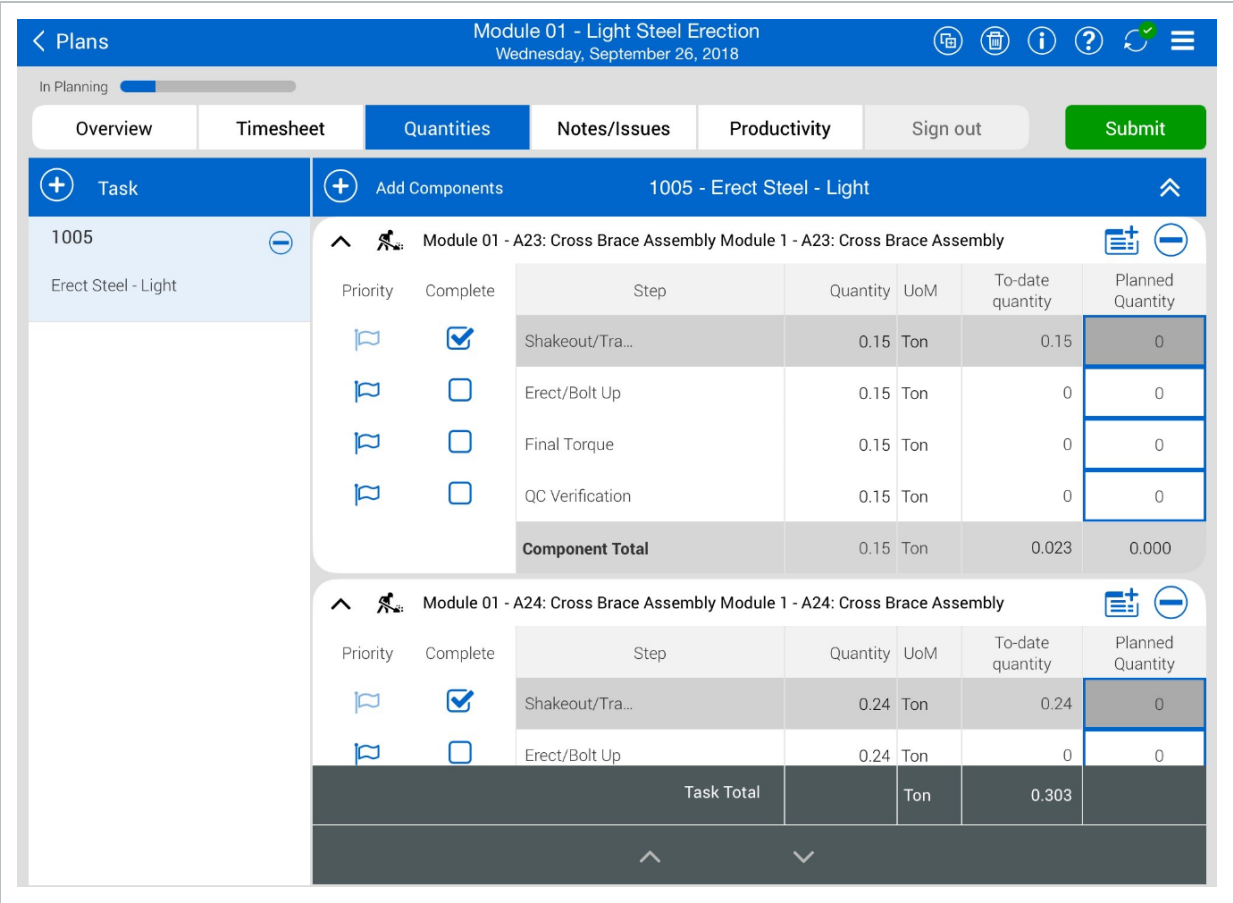
Check the box for **“Apply hours to all employees for the task”** and then select **Done** to apply these hours to all of the employees selected for this daily plan.

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.

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

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



26. Select your task (i.e. 1005 – Erect Steel Light).
27. Tap the **Add Components**  button.
28. Then, tap on the **Search All** tab.
29. In the search bar, type in a keyword and select your components.
30. Tap **Done** to add the component to the quantities.

31. Check the check boxes in the Complete column as needed for your components or their broken down steps.
- By checking these boxes you are communicating to your crew that you expect these steps or components to be completed in the daily plan

Plans

Module 01 - Light Steel Erection

Wednesday, September 26, 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 - B23: Cross Brace Assembly

Module 1 - B23: Cross Brace Assembly

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	0.25816
		Erect/Bolt Up	0.25816	Ton	0	0.25816
		Final Torque	0.25816	Ton	0	0
		QC Verification	0.25816	Ton	0	0
Component Total			0.25816	Ton	0.000	0.155

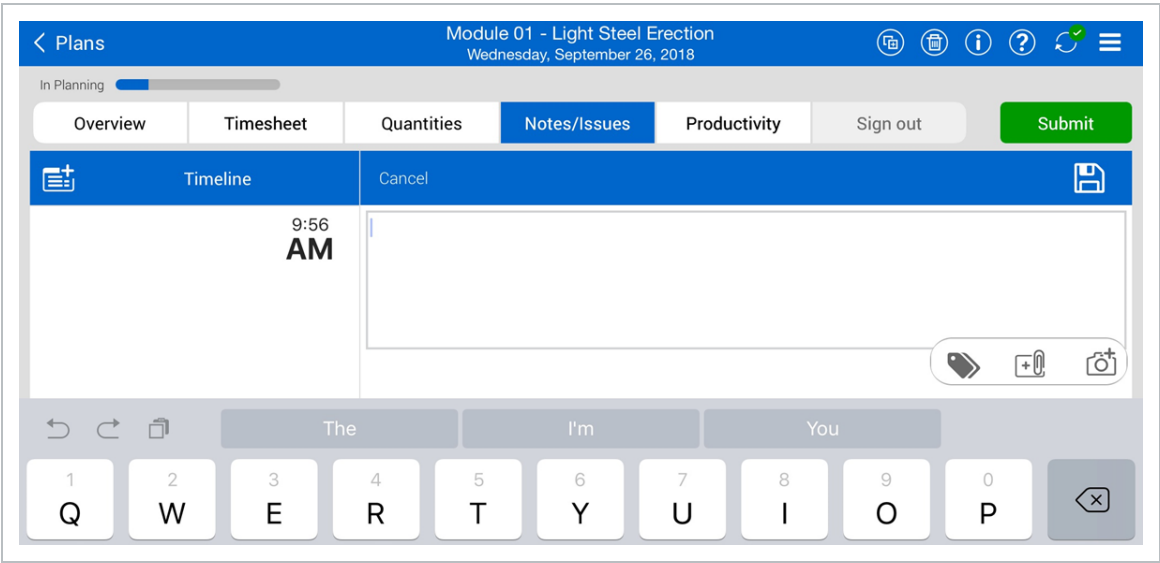
Module 01 - E22: Horizontal Brace Assembly

Module 1 - E22: Horizontal Brace Assembly

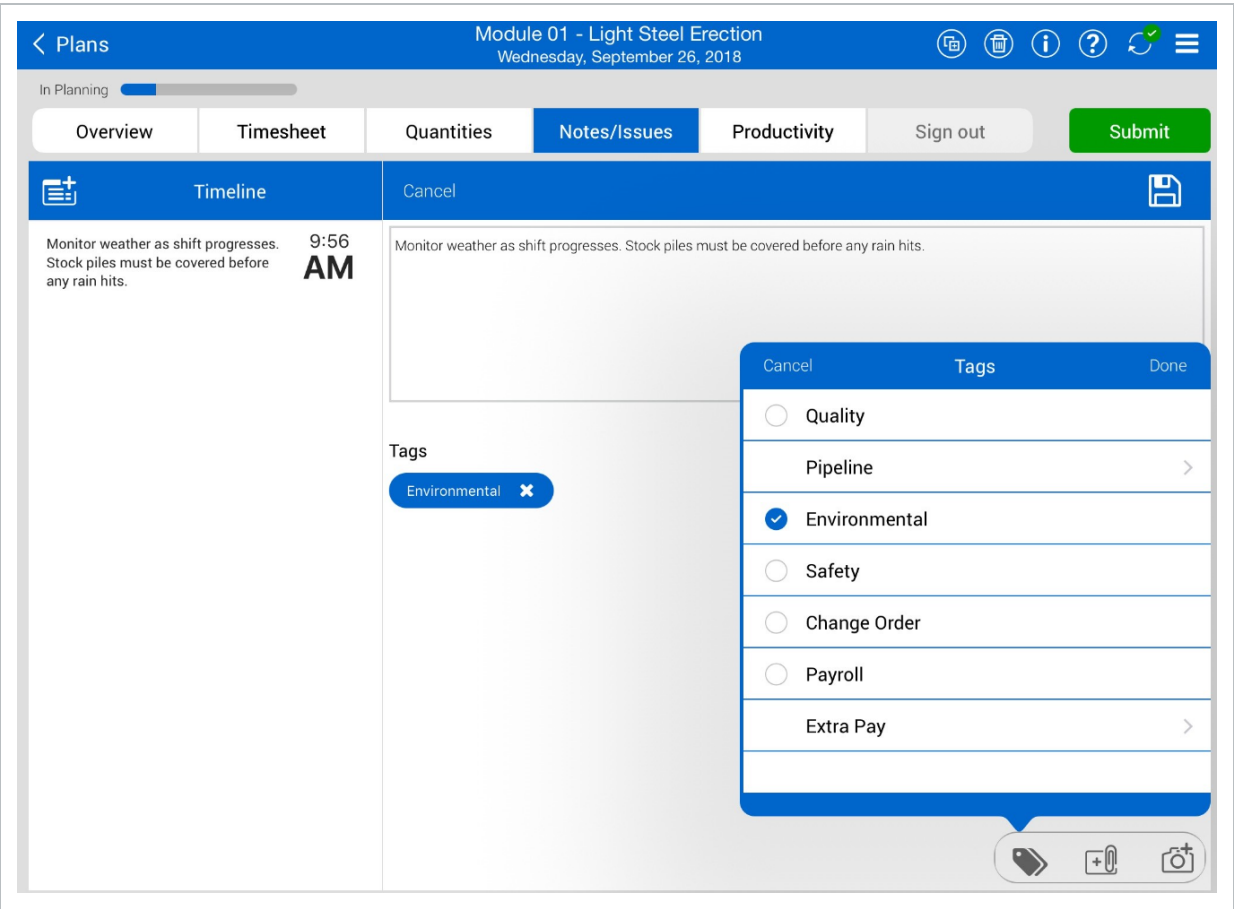
Priority	Complete	Step	Quantity	UoM	To-date quantity	Planned Quantity
		Shakeout/Tra...	0.1	Ton	0.1	0
Task Total				Ton	0.303	0.353

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.



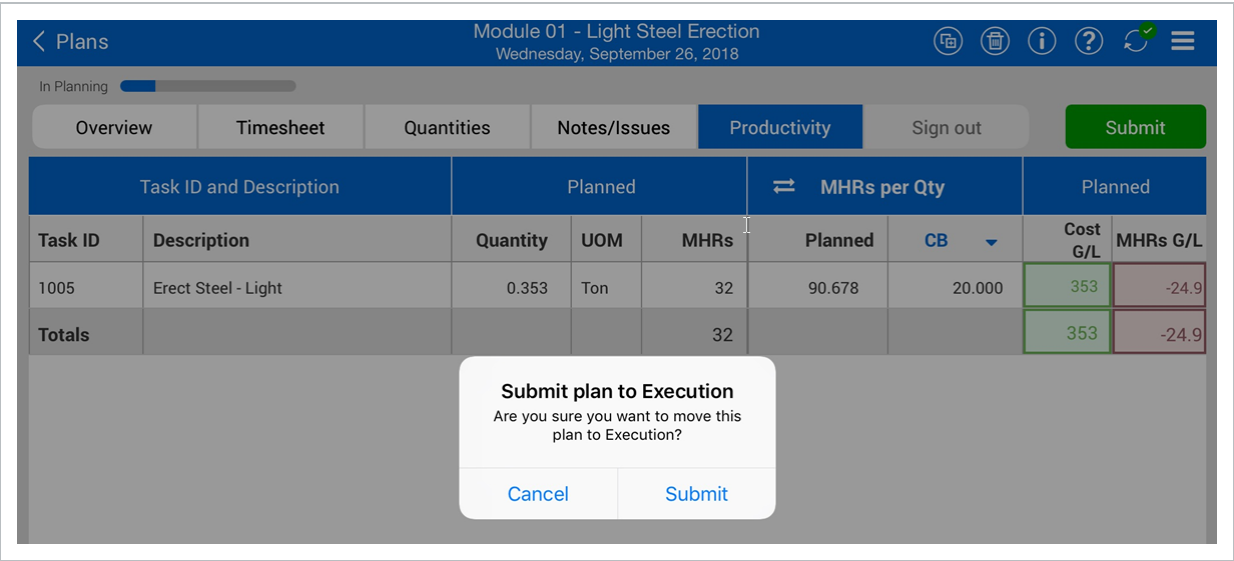
- 35. Tap on the **Camera**  icon to take a photo, make markups, or add text.
- 36. Select **Done**.
- 37. Tap on the **Productivity** tab and review your daily plan.

The screenshot shows the 'Plans' app interface with the 'Productivity' tab selected. The table below displays the planned quantities, MHRs, and gain/loss for the task 'Erect Steel - Light'.

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



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.

2.3 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.

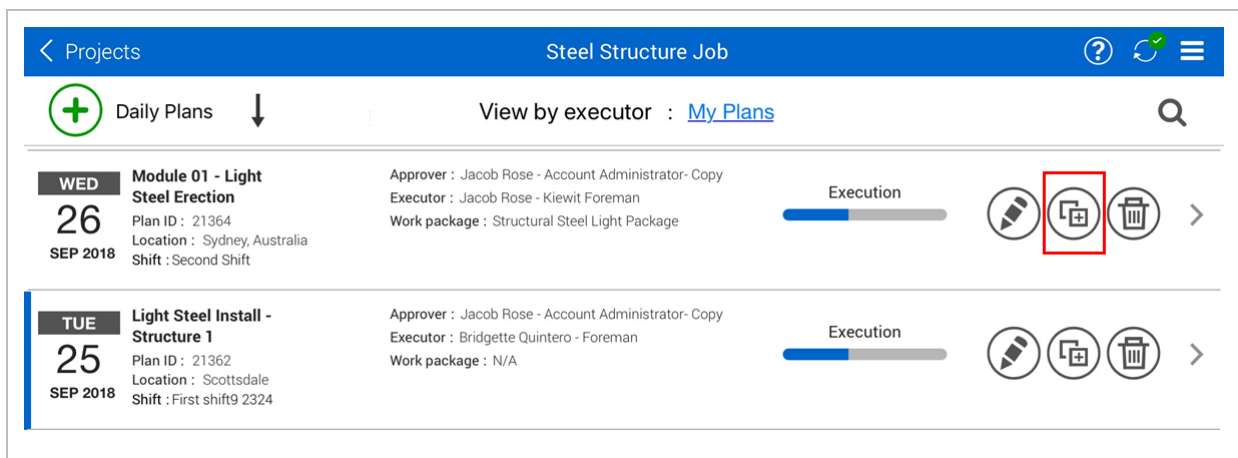
The copy of the Daily plan will be a mirror of the existing plan and you can edit the plan to tailor it to the new days objectives. For instance, if you have more crew members then when you last performed the work, you can add the new crew members to the Daily plan.

2.3.1 Create a Plan from Copy

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

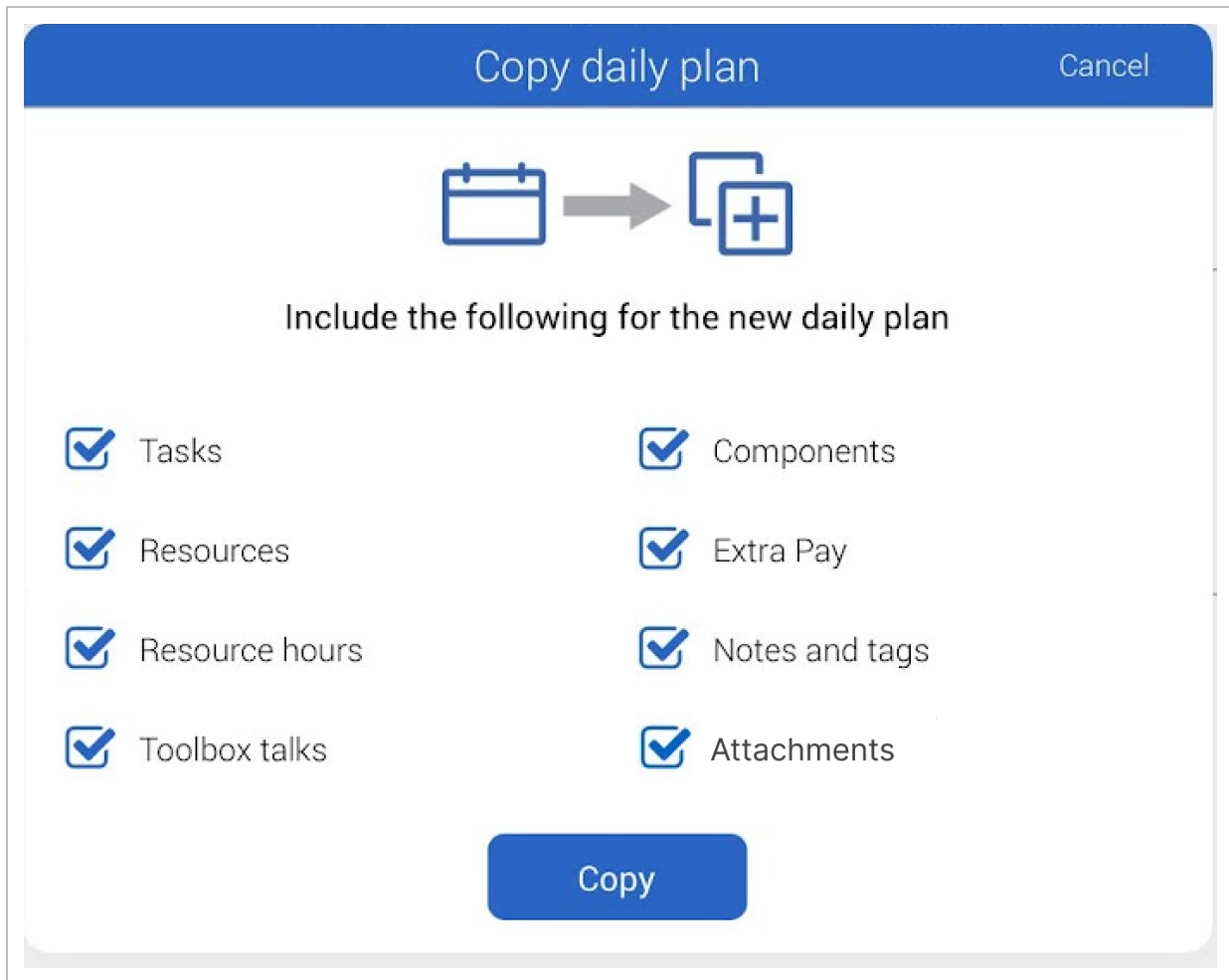
Create a Daily Plan from Copy

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.

An exact copy of your existing daily plan has been created. All tasks, components, employees, equipment, notes, planned quantities, and tool box information has been copied.

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CHAPTER 3 – DAILY PLAN EXECUTION - MOBILE

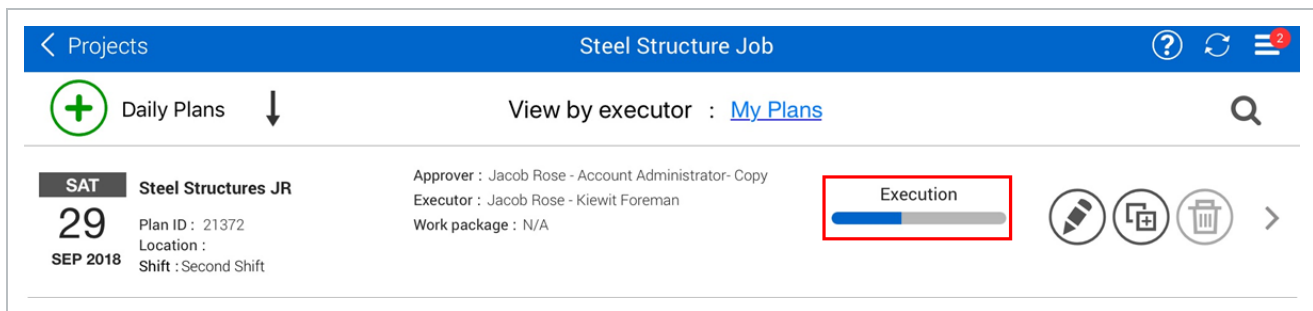
3.1 NAVIGATE EXECUTION

Scenario

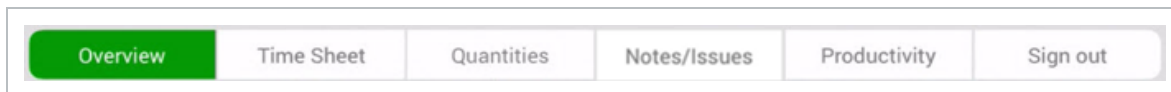
Steve is an electrical foreman on a project. Yesterday he created a daily plan that was reviewed by his superintendent, Paul. He is now preparing for the morning meeting and getting ready to execute the daily plan.

3.1.1 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.



3.1.2 Overview

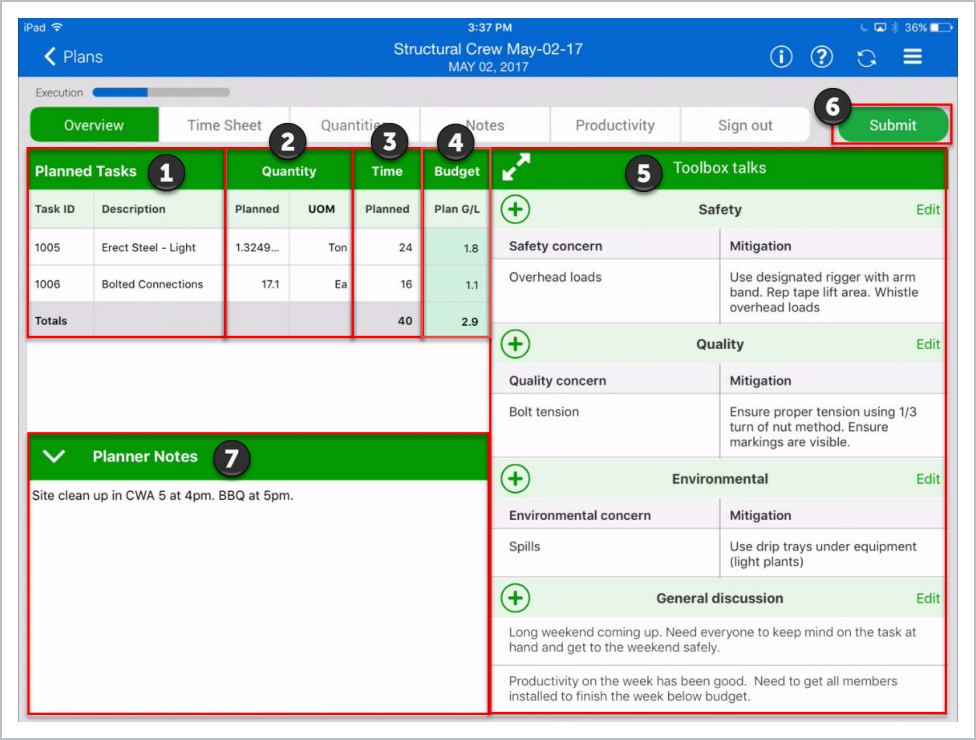
The first tab that you open to is the Overview tab. The Overview tab contains key information you would want to review with your crew at the start of the shift such as:

- Planned tasks
- Planned quantity for each task

- Planned budget
- Tool Box Talks (Safety, Quality, Environmental, and General Discussion)
- Planner Notes

Overview - Overview Tab

Title		Description
1	Planned Tasks	Displays the Task ID and Description of each planned task.
2	Quantity	Displays the Planned Quantity and Unit of Measure for the task. The Planned Quantity comes from information 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.



3.1.3 Time Sheet

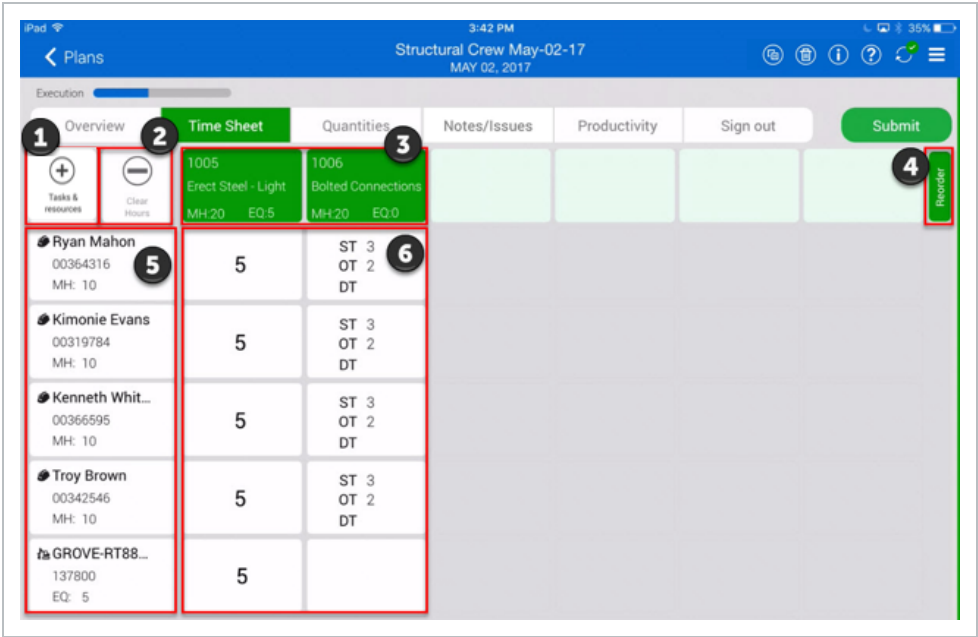
In the Time Sheet tab, the planned tasks, resources and hours are all displayed. As the day progresses you can enter in actual hours for each resource and task. If you need to add tasks or resources, you can do it here as well.

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,

Time Sheet Tab (continued)

Title		Description
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)

3.1.4 Quantities

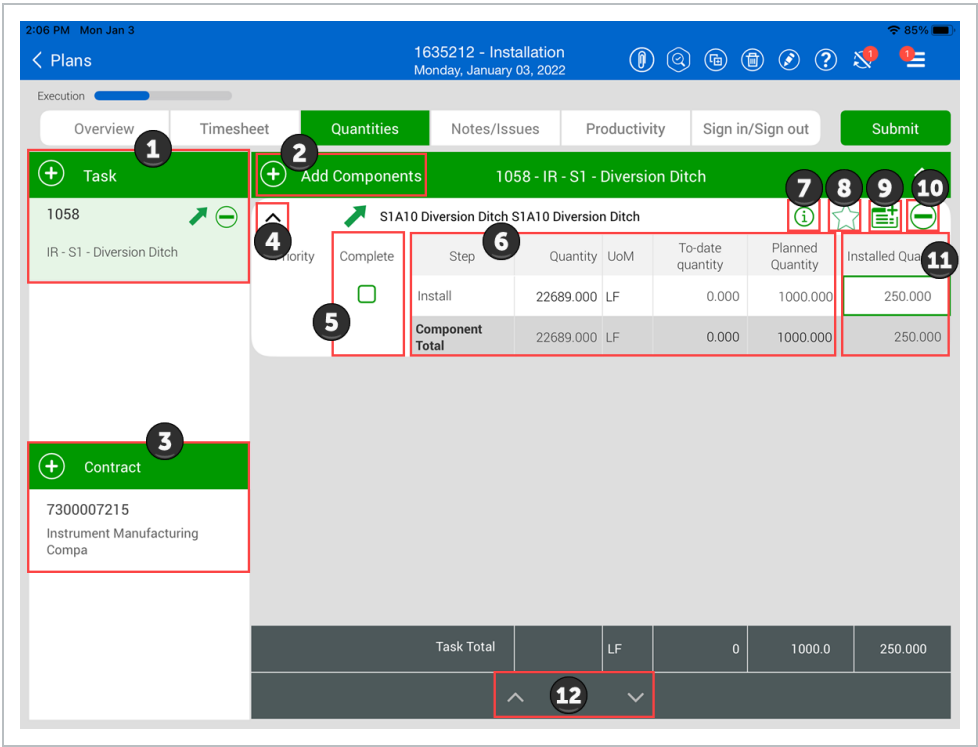
In the Quantities tab, all the components that were included in the planning process for each task are shown. Actual quantities are claimed by entering the quantity or tapping the Complete check box. You can add or delete components at this point if required.

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.
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.

Overview - Quantities Tab (continued)

Title	Icon	Description
-------	------	-------------



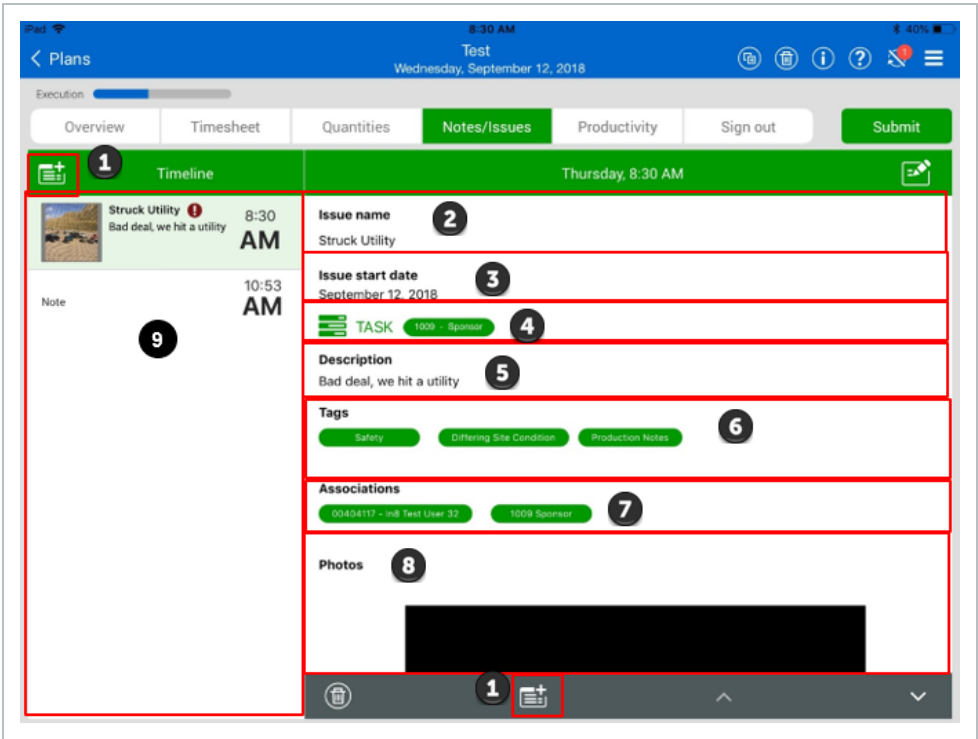
3.1.5 Notes/Issues

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
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.



3.1.6 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 Foecast 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		1	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

3.1.7 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.

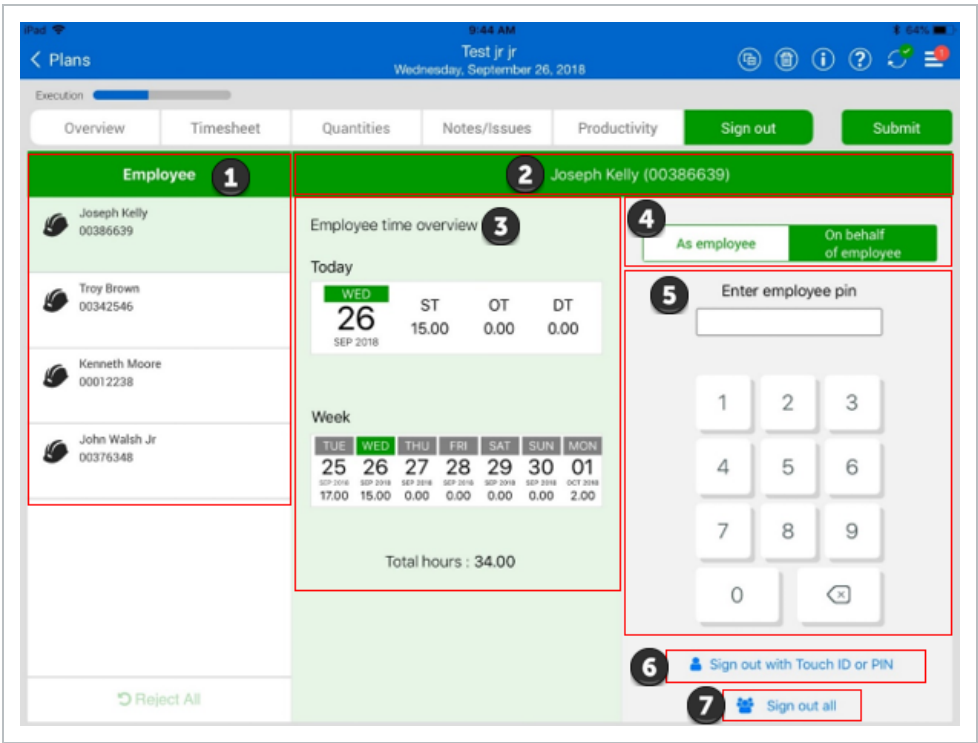
The employee will be able to review the hours input by the Foreman before signing the card. At this point, they can agree or disagree with the hours and negotiate the hours before signing out.

Overview - Sign out Tab

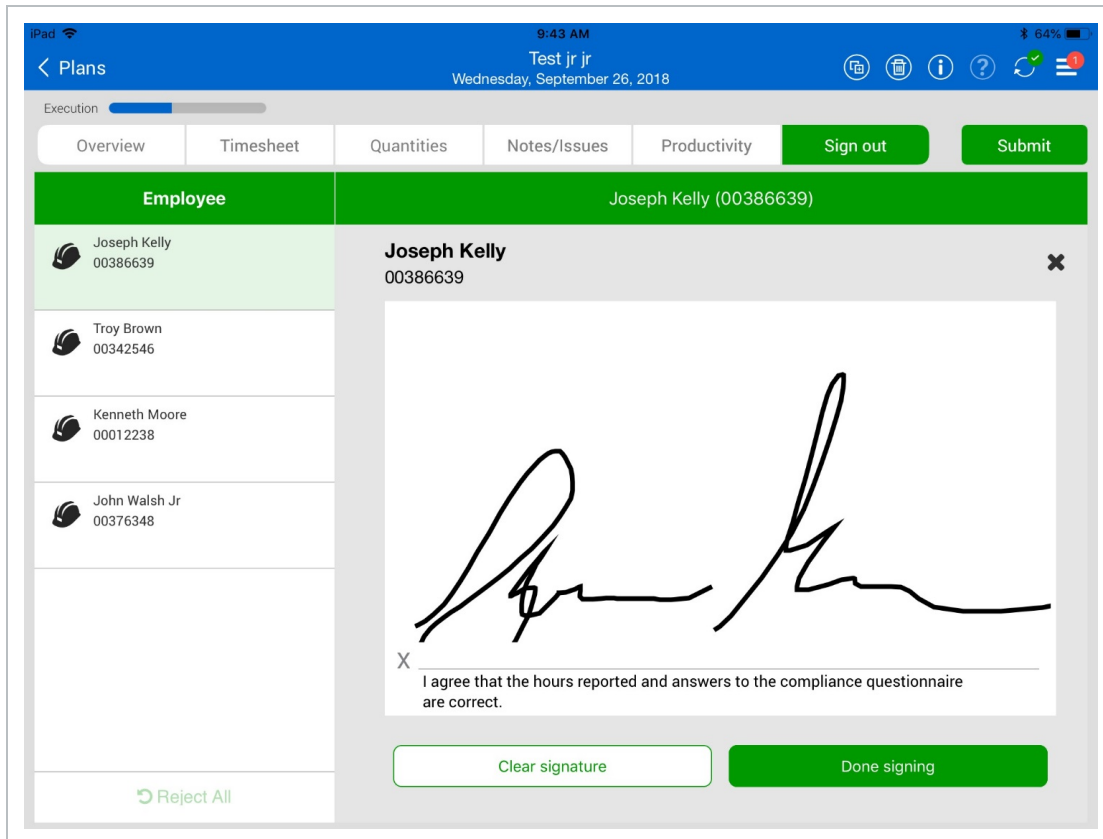
Title		Description
1	Employee	Displays all the employees including the foreman on a specific daily plan.
2	Employee Name	Displays the name of the employee selected to sign out.
3	Employee Time Overview	Displays a summary of hours for the day and week entered for that employee.
4	As Employee/On Behalf 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.

Overview - Sign out Tab (continued)

Title		Description
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.



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



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

3.1.8 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.

3.2 INPUT ACTUALS

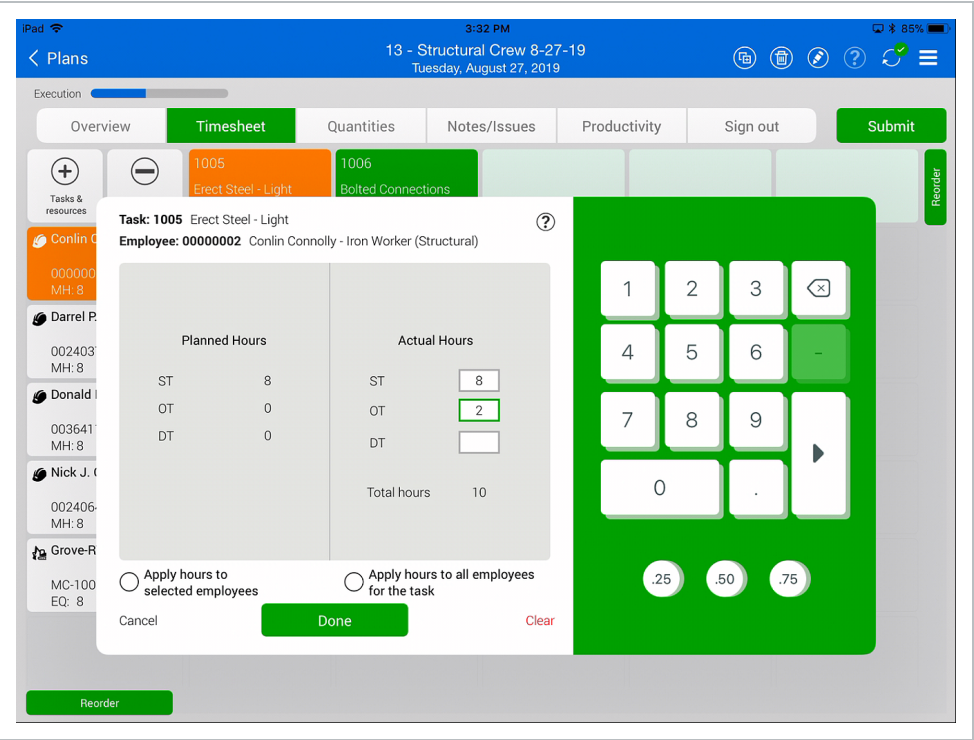
As the workday progresses, within Progress you can input the hours each crew member worked on a task, and the amount of quantity installed or completed. Inputting actuals for the Daily Plan takes place in the Time sheet and Quantities tabs.

3.2.1 Time sheet Tab

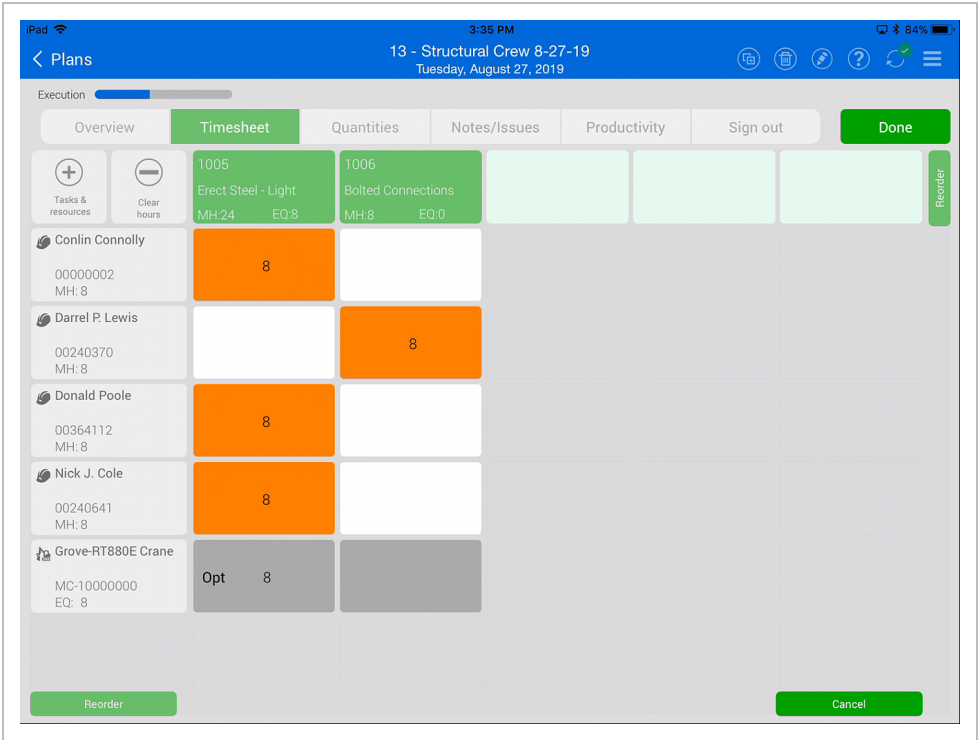
Within the Time sheet tab, you can enter the exact hours each crew member worked and the amount of hours the equipment was used.

You may need to track that a crew member 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 crew members that must work overtime or double time to meet the schedule deadline, on the Time sheet 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.



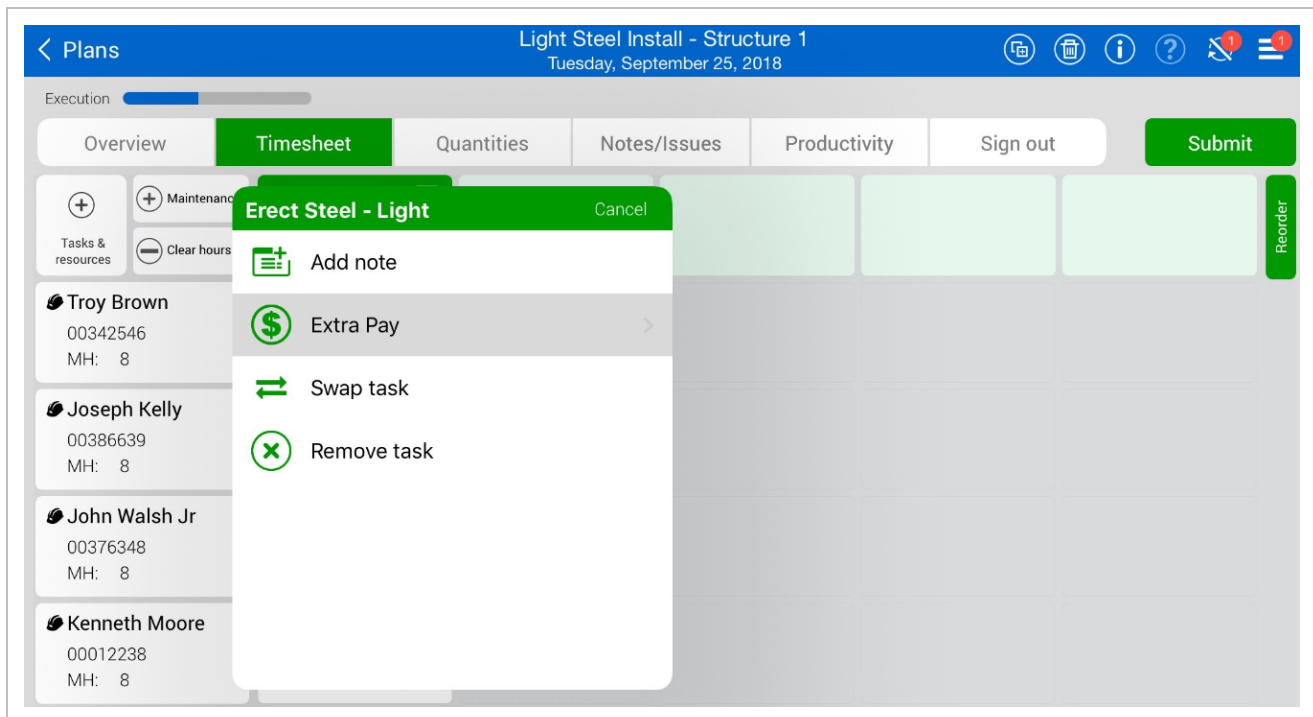
If everyone in your crew has worked the same hours, you can select the **Apply hours to all employees for the task** box. If you want to apply the same hours to some of the employees on the daily plan, you can select **Apply hours to selected employees** and select the hours boxes for all the employees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

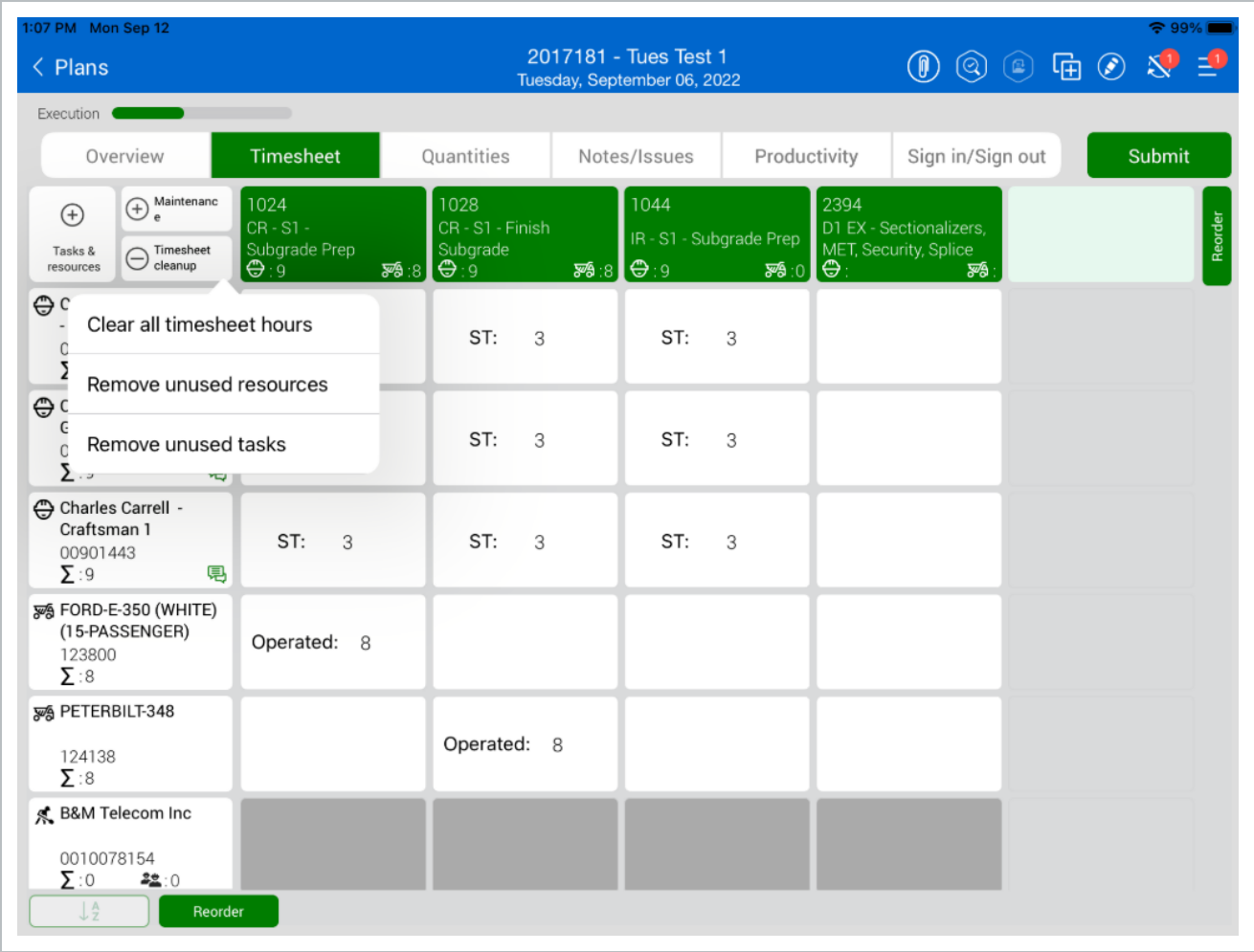
You can also add a note or define any extra pay from this screen.



3.2.1.1 Remove unused tasks and resources

You can remove all unused tasks or resources from a daily plan at the same time. At the top of the Time Sheet tab, click the **Remove unused tasks and resources** icon, and then select one of the following options:

- Remove unused resources: All employees with no daily plan data associated with them are removed from the daily plan.
- Remove unused tasks: All tasks with no daily plan data associated with them are removed from the daily plan.



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

3.2.2 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

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	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

3.2.3 Notes/Issues Tab

On the Notes/Issues tab, you can add new notes or issues or make updates to any notes or issues created during the planning phase.

< Plans

Notes/Issues

Cracked concrete slab
11:22 AM Crack in concert slab observed on Column B...
Send issue

Parkland delivery rescheduled for 8:15 a.m.
Contact Mark (555) 819-2939.

01:37 PM Weather - Delay, 20100204 - Bayhill Contra...

March 05, 2025 at 11:22 AM

Issue name

Cracked concrete slab

Issue start date

March 04, 2025

TASK

1006 - Bolted Connections

Description

Crack in concert slab observed on Column B3. Crack appears to be deep/spreading.

Tags

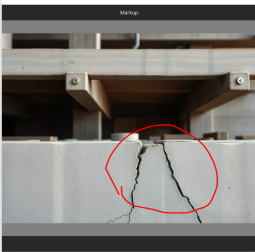
Quality

Weather - Delay

Associations

Module 09 - A6 Connection to Foundation Module 9 - A6...

Photos (1 of 20 photos added to plan)

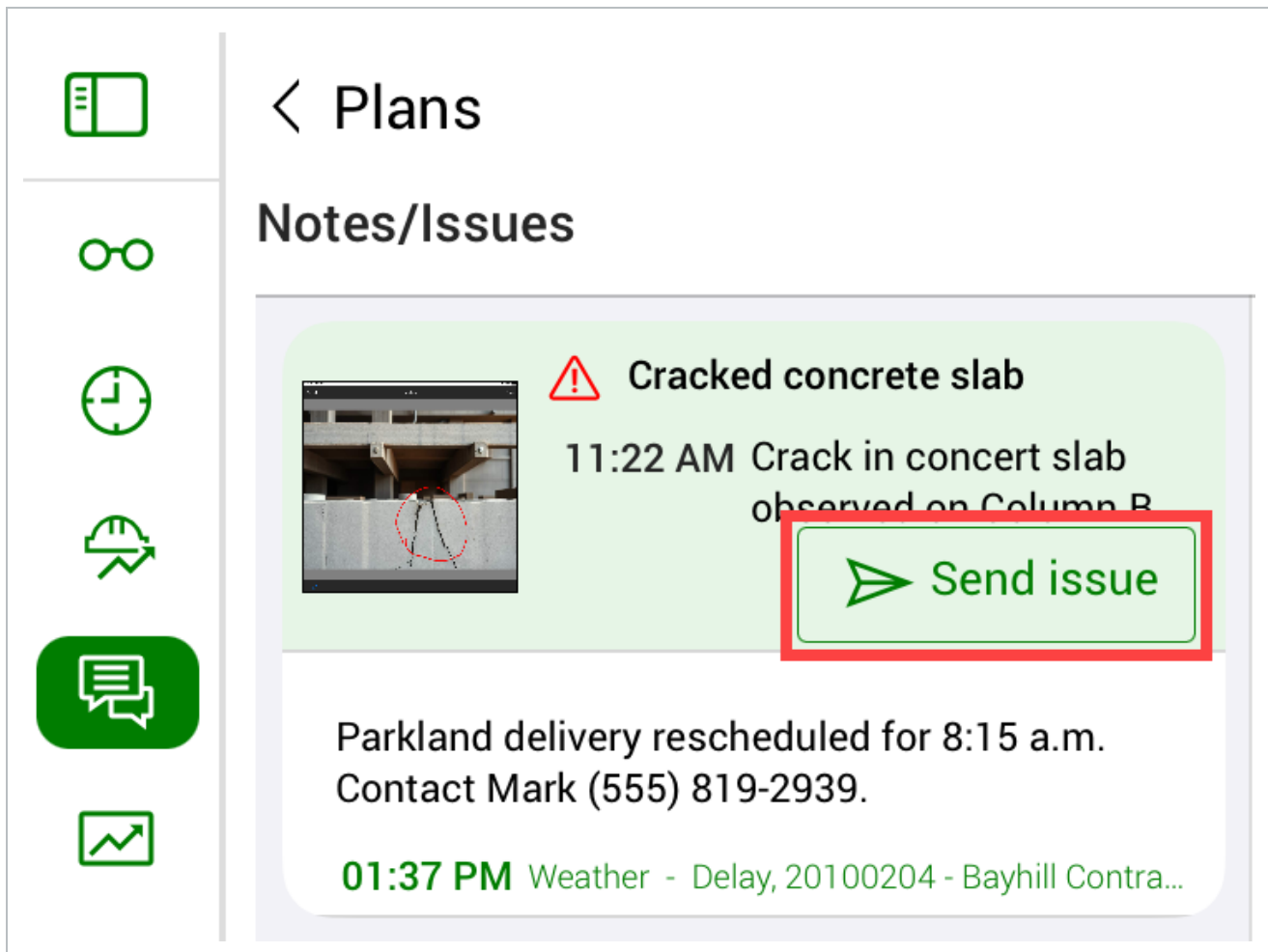


3.2.3.2 Send Issue to InEight Change

If your organization uses InEight Change, issues generated in Progress are sent to Change for review, and may be associated with change orders.

After an issue is created, the issue shows in the Timeline section of the Notes/Issues tab. The issue is sent to Change after the daily plan is approved.

When the issue requires immediate attention, click **Send issue** to immediately send the issue to InEight Change for review.



3.2.4 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

1

1

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

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)

3.2.5 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.

Sign in and Sign out are compatible with iPad and iPhone Face ID.

3.2.5.3 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

< 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
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.

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

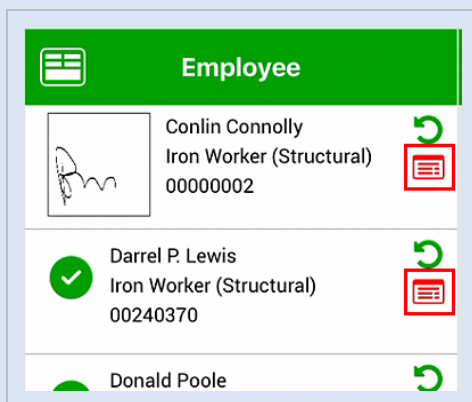
Depending on project settings you might also have the option to sign in on behalf of employees by using Touch ID or PIN. This project setting is recommended because crewmembers might forget to sign in when the crew iPad is not around, which prevents the daily plan from being submitted. As a field engineer, 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

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.



3.2.5.4 Breaks Subtab

In the Breaks subtab, you can enter up to five 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

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

3.2.6 Crew Break Hours

If you click the **Crew hours** icon at the top of the Employee side panel, the Enter crew hours dialog box opens. In Crew break details, you can enter break start times and lengths for the entire crew.

1:04 PM Mon Sep 12

2017181 - Tues Test 1
Tuesday, September 06, 2022

< Plans

Execution

Overview

Timesheet

Quantities

Notes/Issues

Productivity

Sign in/Sign out

Submit

Employee

Cesar Chavez Jasso
Specialist
00406023

Cezario Miranda
General Foreman
00478883

Charles Carrell
Craftsman 1
00901443

Sign out all eligible

Client sign off

Reject All

Cancel

Crew shift and breaks

Done

Enter crew hours and shift breaks

Adjust time for all crew members. Individual crew member time can be edited on crew member sign-out.

Shift start

Tue Sep 06

07:00 AM

Shift end

Tue Sep 06

05:00 PM

Total time

10 HR 00 min

Break 1 start time

01:00 PM

Break 1 length

60 minutes

Break 2 start time

03:00 PM

Break 2 length

15 minutes

Break 3 start time

04:00 PM

Break 3 length

15 minutes

Sign out

OT

0.00

hours

DT

0.00

hours

Total

9.00

hours

FRI

SAT

Total

ST

0.00

ST

0.00

ST

9.00

OT

0.00

OT

0.00

OT

0.00

DT

0.00

DT

0.00

DT

0.00

Sign out

As employee

On behalf of employee

If you enter a break time for an individual employee, it overrides the crew break time for that employee.

At the top of the page, the total number of break hours is shown.

Page 114 of 156

InEight Inc. | Release 26.7

1:29 Mon, Sep 12 2017181 - Tues Test 1
Tuesday, September 6, 2022

Execution 0%

OVERVIEW TIME SHEET QUANTITIES NOTES/ISSUES PRODUCTIVITY **SIGN IN/SIGN OUT** **SUBMIT**

Employee Cesar Chavez Jasso (00406023)

SIGN IN **BREAKS** **SIGN OUT**

Shift start	Shift end	Shift time	Break time	ST	OT	DT	Total
07:00 AM	05:00 PM	10:00 (hr:min)	01:30 (hr:min)	9.00 hours	0.00 hours	0.00 hours	9.00 hours

[Edit shift time](#)

This week's hours

SUN	MON	TUE	WED	THU	FRI	SAT	Total
ST 0.00	ST 0.00	ST 9.00	ST 0.00	ST 0.00	ST 0.00	ST 0.00	ST 9.00
OT 0.00	OT 0.00	OT 0.00	OT 0.00	OT 0.00	OT 0.00	OT 0.00	OT 0.00
DT 0.00	DT 0.00	DT 0.00	DT 0.00	DT 0.00	DT 0.00	DT 0.00	DT 0.00

Sign out questions
No sign-out questions are required

Sign out
[AS EMPLOYEE](#) [ON BEHALF OF EMPLOYEE](#)

[Reject All](#)

Shift Start/End Time

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

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

3.2.6.5 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.

3.2.6.6 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.

3.2.6.7 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.

3.2.6.8 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.

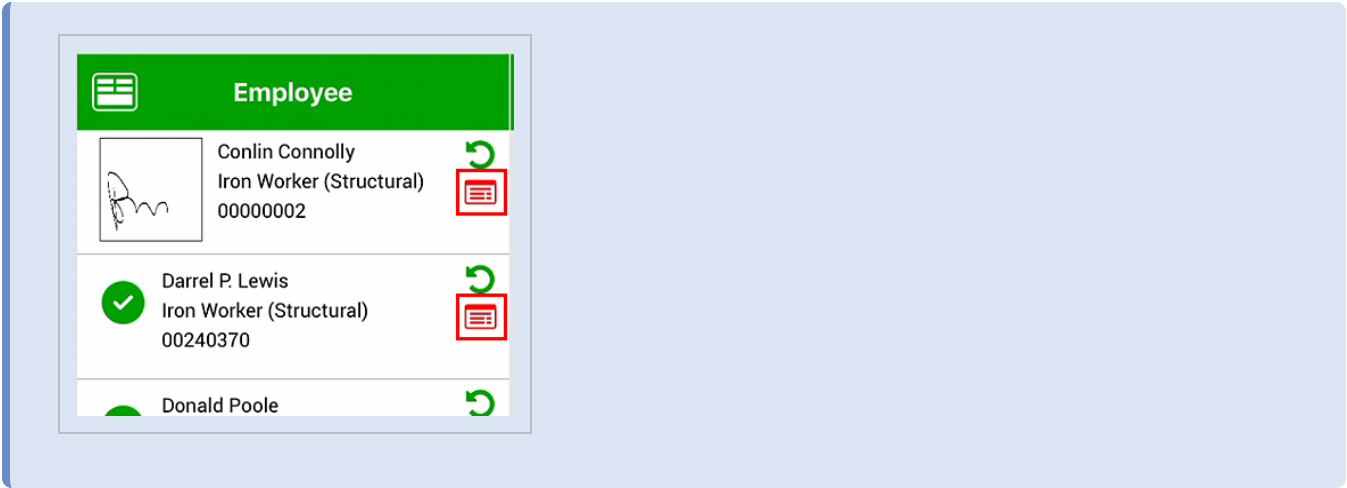
The Client sign off is available until all employees are signed out.

3.2.6.9 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

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.

3.2.6.10 Time sheet Summary

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

9:16 AM

93747 - Crew

Wednesday, April 15, 2020

Plans

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 Time sheet and Notes/Issues tabs of the daily plan.

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

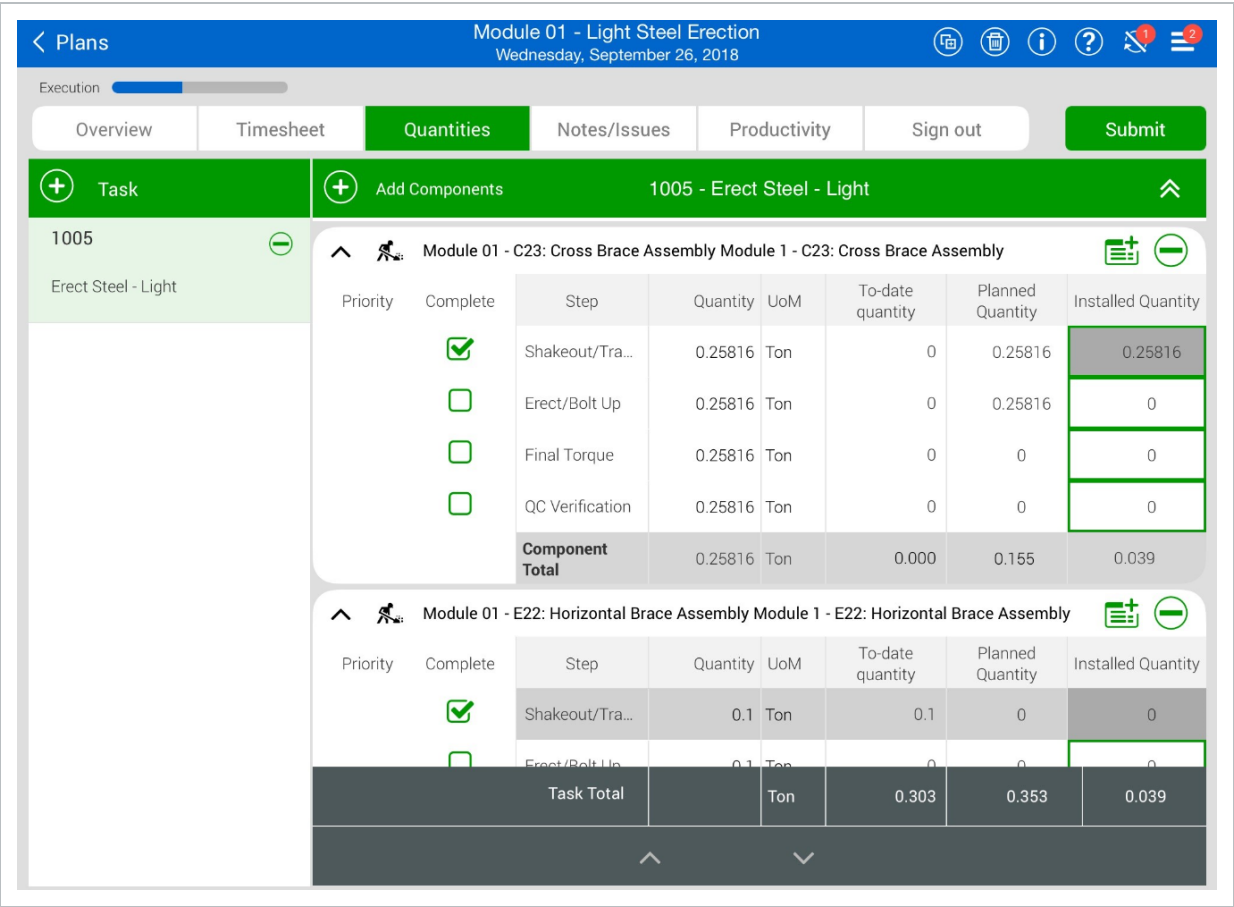
Input Actuals

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

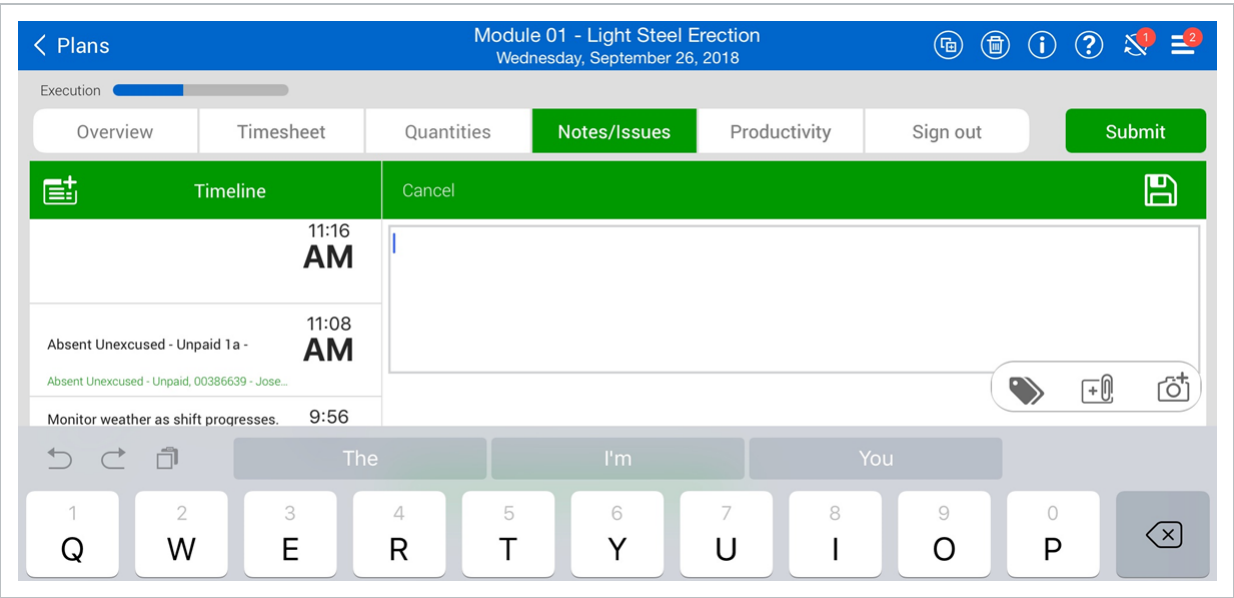
The screenshot displays the 'Steel Structure Job' project interface. At the top, there's a blue header with a back arrow, 'Projects', the job name 'Steel Structure Job', and icons for help, refresh, and a notification. Below the header, a green plus icon and 'Daily Plans' with a dropdown arrow are on the left, and 'View by executor : [My Plans](#)' is on the right. A search icon is also present. The main area lists three 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: Execution (blue progress bar). Icons: edit, add, delete.
- 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 (blue progress bar). Sub-status: Quantities not approved, Hours not approved. Icons: edit, add, delete.
- THU 20**: **JR TEST**. Plan ID: Pending. Approver: Jacob Rose - Account Administrator- Copy. Executor: Jacob Rose - Kiewit Foreman. Work package: N/A. Status: In Planning (blue progress bar). Icons: edit, add, delete.

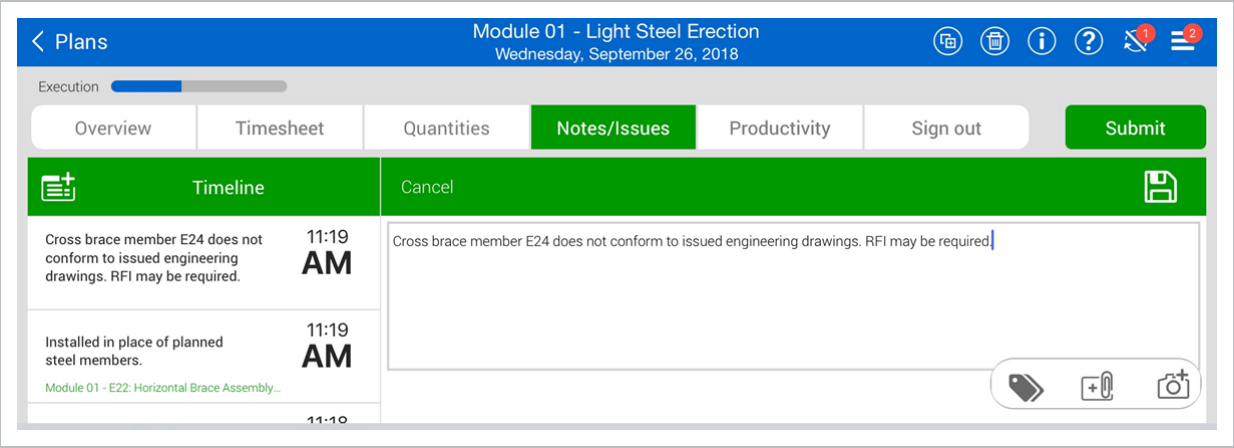
2. Tap on the **Time sheet** tab.
3. Input hours for all your employees and equipment.
4. Tap on the **Quantities** tab.
 - You will see the component assigned to the task from the planning phase
5. Check the check boxes in the "Complete" column wherever necessary for assigned components or their broken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



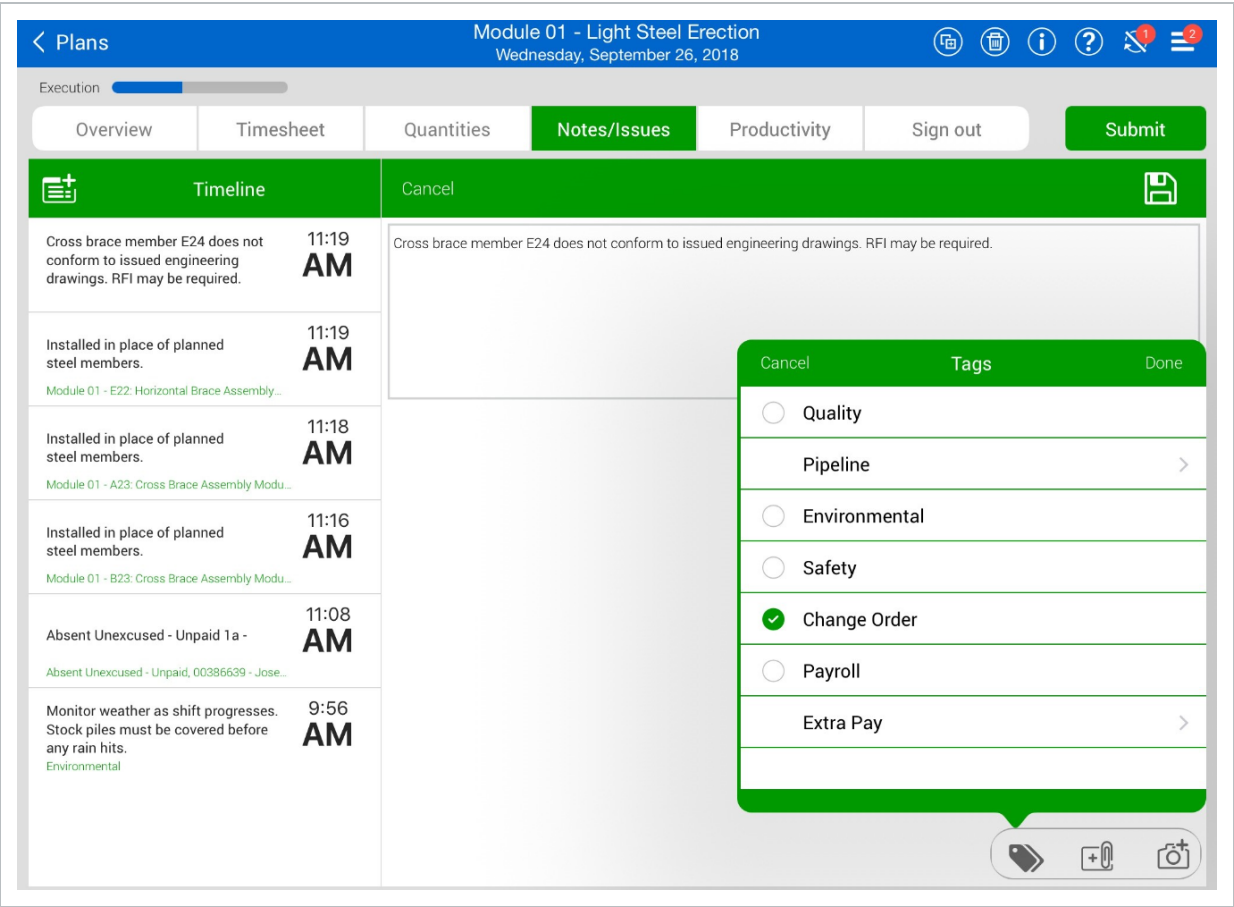
6. Tap the **Note**  icon to add a component note.
- Tap in the text entry field and your device keyboard will automatically appear



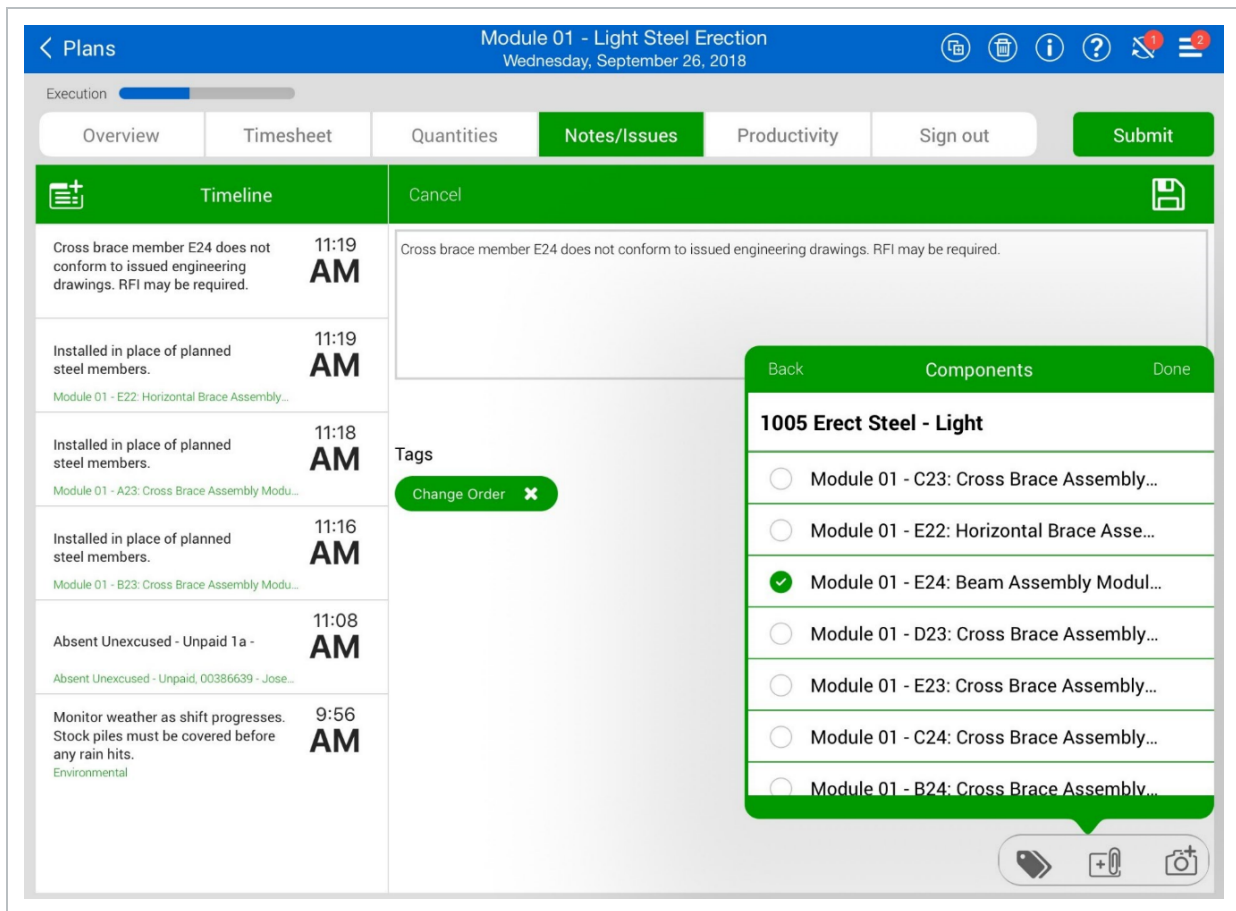
- 7. Tap **Save** to return to the Quantities tab.
- 8. Tap on the **Notes/Issues** tab.
- 9. Tap on the **Note**  icon to add a project note or concern.



- 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

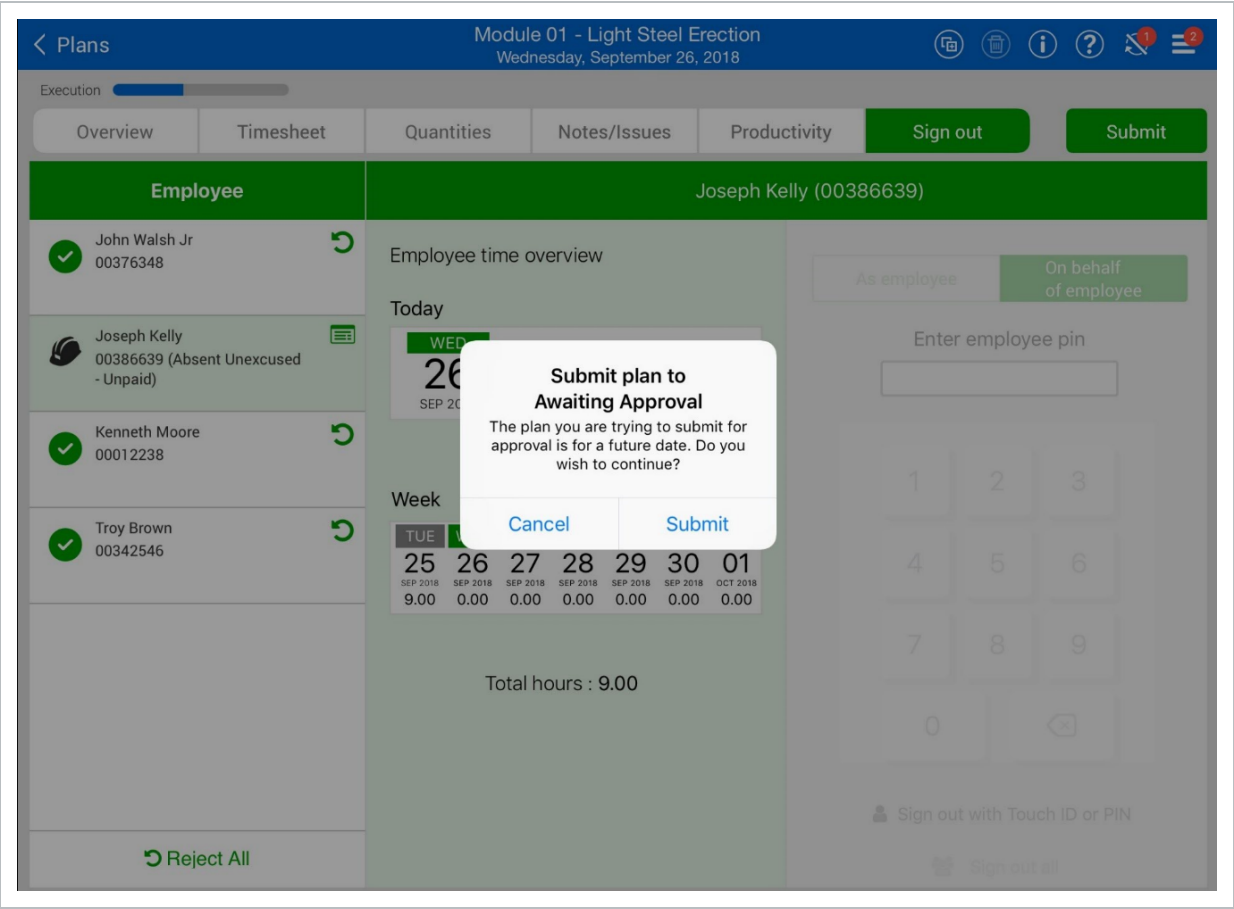
Productivity

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

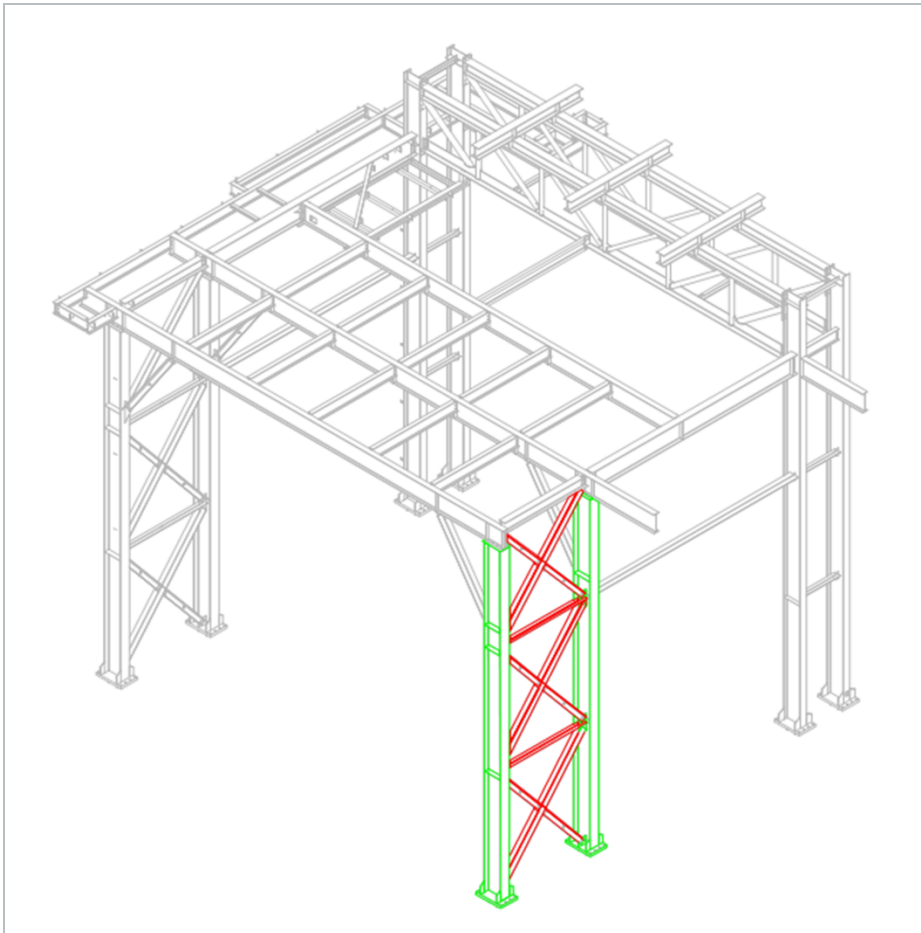
20. Tap on the **Sign In/Sign Out** tab, and then tap the **Sign Out** subtab.
21. Sign out each employee by selecting **On Behalf of Employee**.
22. Tap on **Sign out with Touch ID or PIN**.
23. Enter the ID number for your iPad.
 - The first name in the employee list is automatically highlighted and 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



3.3 PLAN REVIEW

Scenario

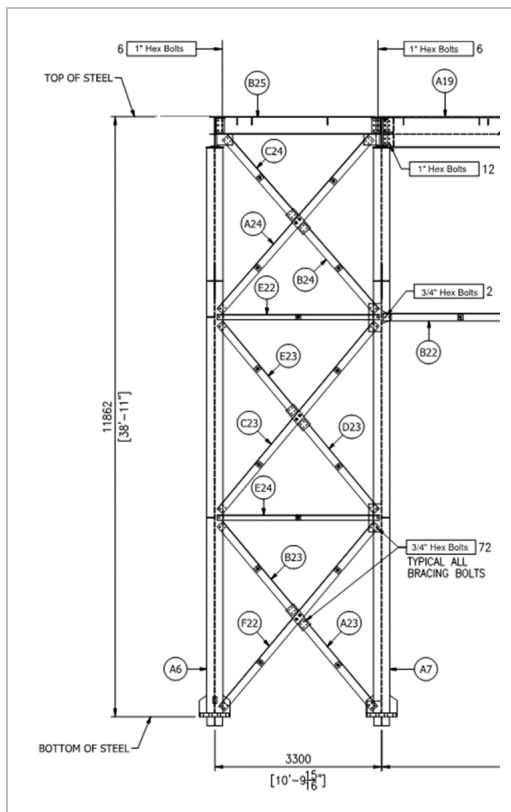
Your plan to install the horizontal and cross member assemblies (red columns) has been finalized and sent to the field for execution.



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.

3.3.1 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 Time sheet 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 Safety concern Mitigation
Totals				32	-28.9		Human - Equipment Interface Use spotter at all times.
						+	Quality Quality concern Mitigation
							Material Quality Cover stockpiles
						+	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.

Planner notes

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

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:

Plans

Light Steel Install - Structure 1
Monday, 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	Safety	
1005	Light Steel - Light	0.155	Ton	32	-28.9	Safety concern	Mitigation
Totals				32	-28.9	Human - Equipment Interface	Use spotter at all time

Planner notes

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

Quality

Quality concern

Material Quality

Environmental

Environmental concern

Spills from JLG

General discussion

RFI-Metals-001 submitted to client. Allow 5 days for review and answer.

Close

Navigation bar

View planned tasks and productivity(if entered)

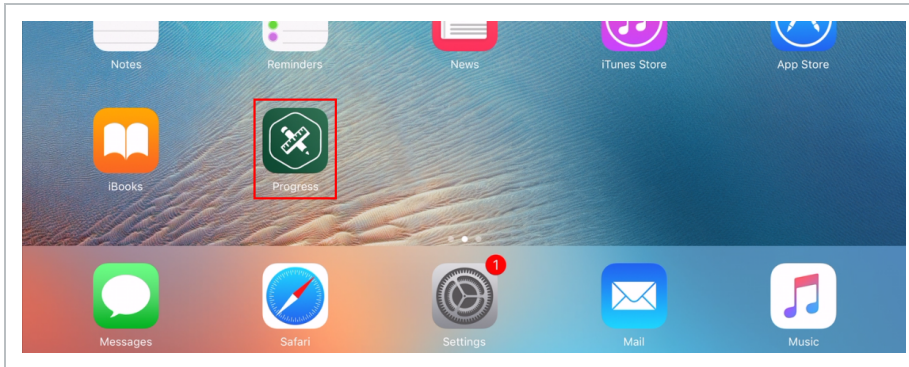
View/edit toolbox talk items

View/edit planner notes

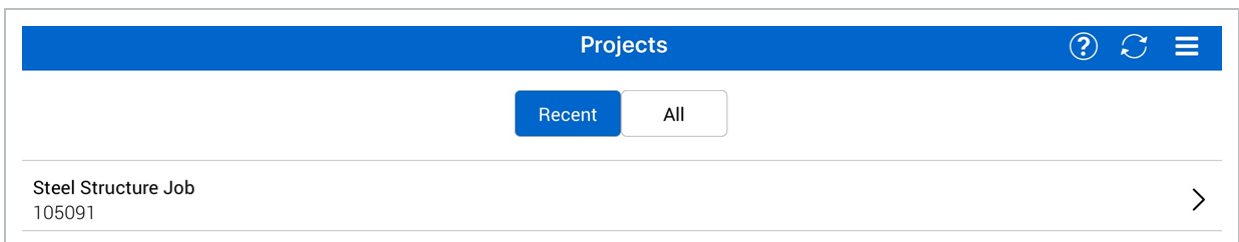
Simply select the close button at the bottom of your screen to close the help screen.

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.

Projects
Steel Structure Job

Daily Plans
View by executor : [My Plans](#)

THU 27 SEP 2018	Good Luck Plan ID : 21354 Location : Shift : First shift9 2324	Approver : Jacob Rose - Account Administrator- Copy Executor : Jacob Rose - Kiewit Foreman Work package : N/A	Execution	
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	Execution	
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	Execution	

- 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			
Totals						32	-28.9	Human - Equipment Interface Use spotter at all times.	
						Quality Quality concern Mitigation			
						Material Quality Cover stockpiles			
						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.			

Planner notes

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

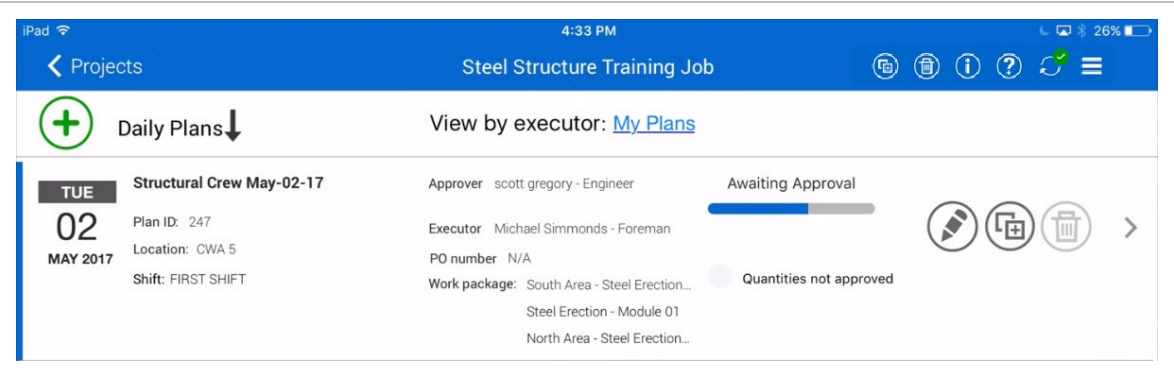
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CHAPTER 4 – DAILY PLAN APPROVAL

4.1 NAVIGATE APPROVAL

4.1.1 Plan List

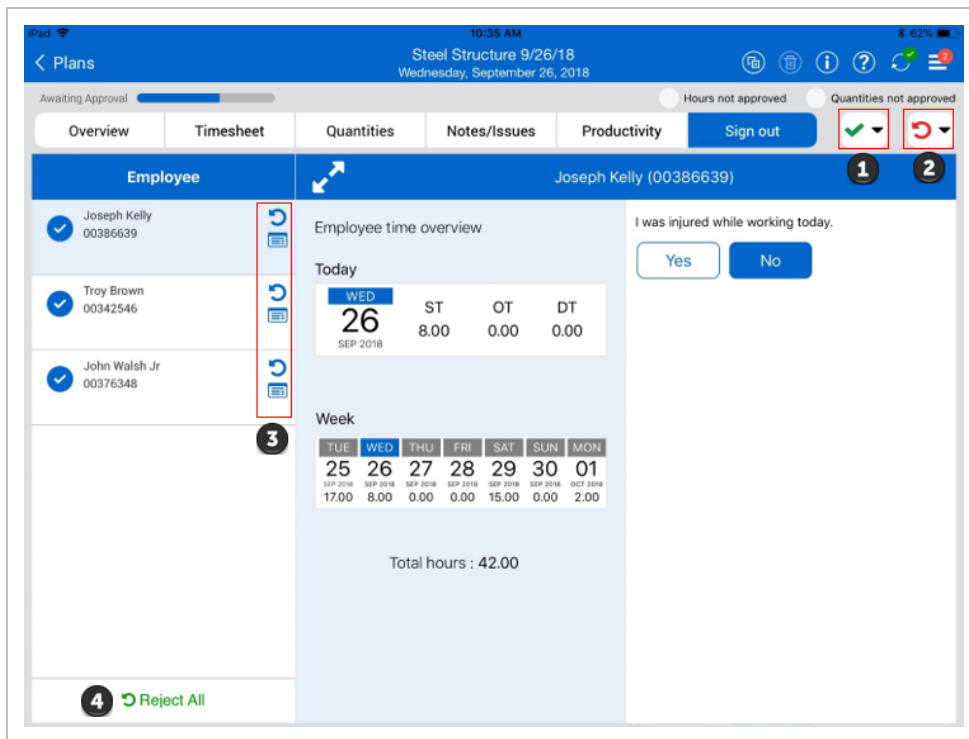
You access a daily plan from the list of daily plans. Note that the current status is now Awaiting Approval. There is also a note indicating that the quantities have not been approved.



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

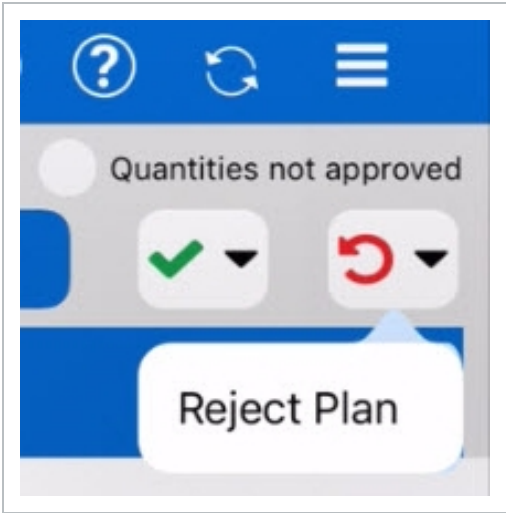
Title		Description
1	Approval	Approves actual quantities, hours or both.
2	Reject	Rejects the plan and sends it back to the Execution Phase.
3	Reject Sign out	Rejects the sign out for an individual employee. This must be done before editing any hours on the Time sheet. The employee must sign out again 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 Time sheet. 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.



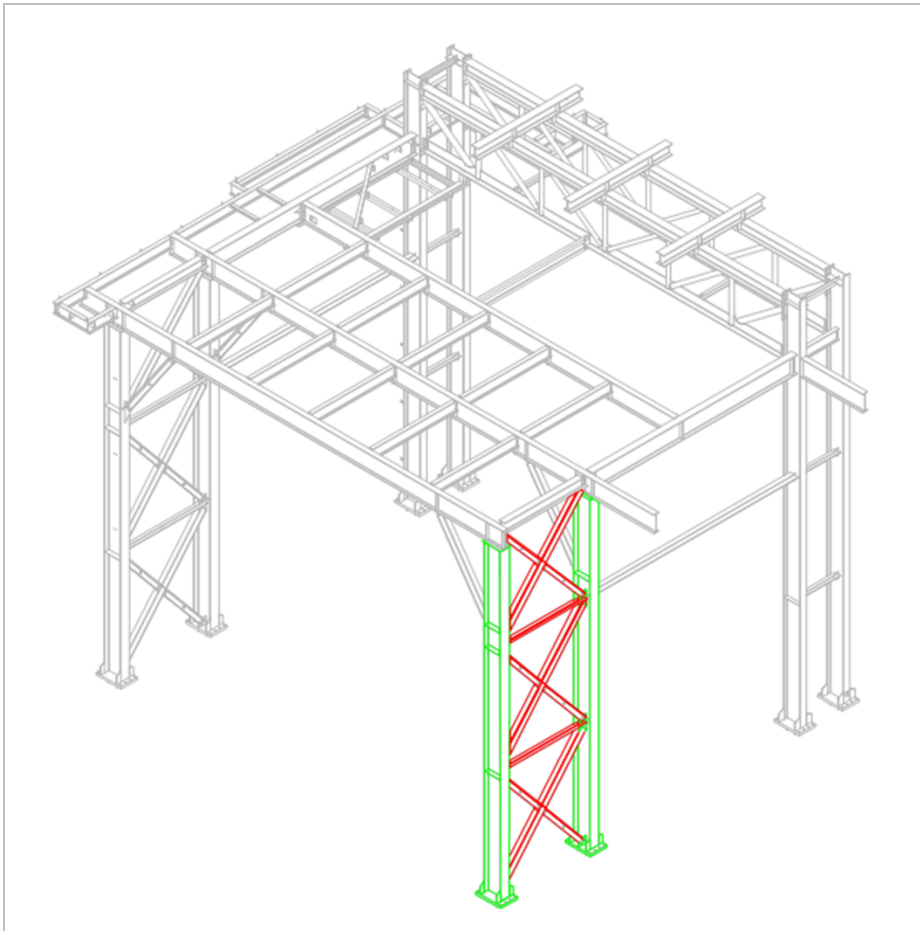
If significant changes are required, or if the Executor is the member required to make changes, it is recommended to revert the Daily Plan back to the Execution Phase before making the changes. In this case, you can select the “Reject Plan” button.



4.2 REVIEW ACTUALS

Scenario

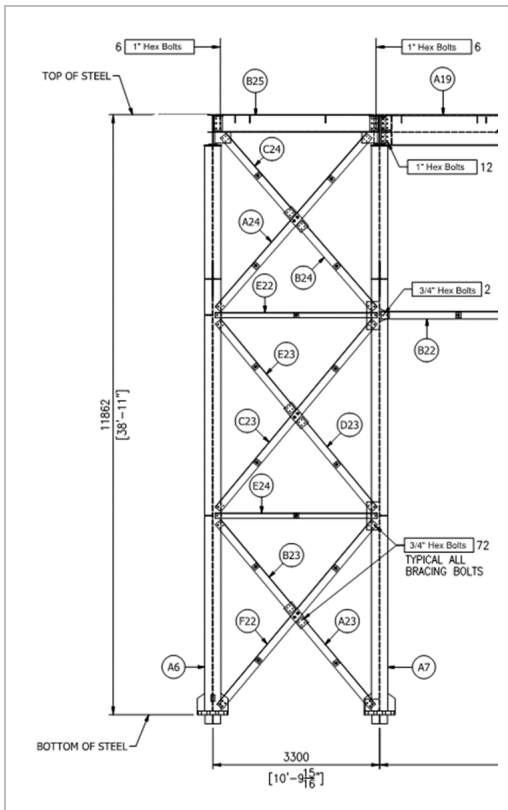
Your plan to install the horizontal and cross member assemblies (red columns) has been executed and sent for approval.



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.

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 a mobile application interface for a 'Steel Structure Job'. At the top, there's a blue header with a back arrow, 'Projects', the job name '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 and 'Daily Plans' is followed by a dropdown 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. Indicators: Quantities not approved, Hours not approved. Action icons: Edit, Add, Delete, and a chevron.
- 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. Indicators: Quantities not approved, Hours not approved. Action icons: Edit, Add, Delete, and a chevron.

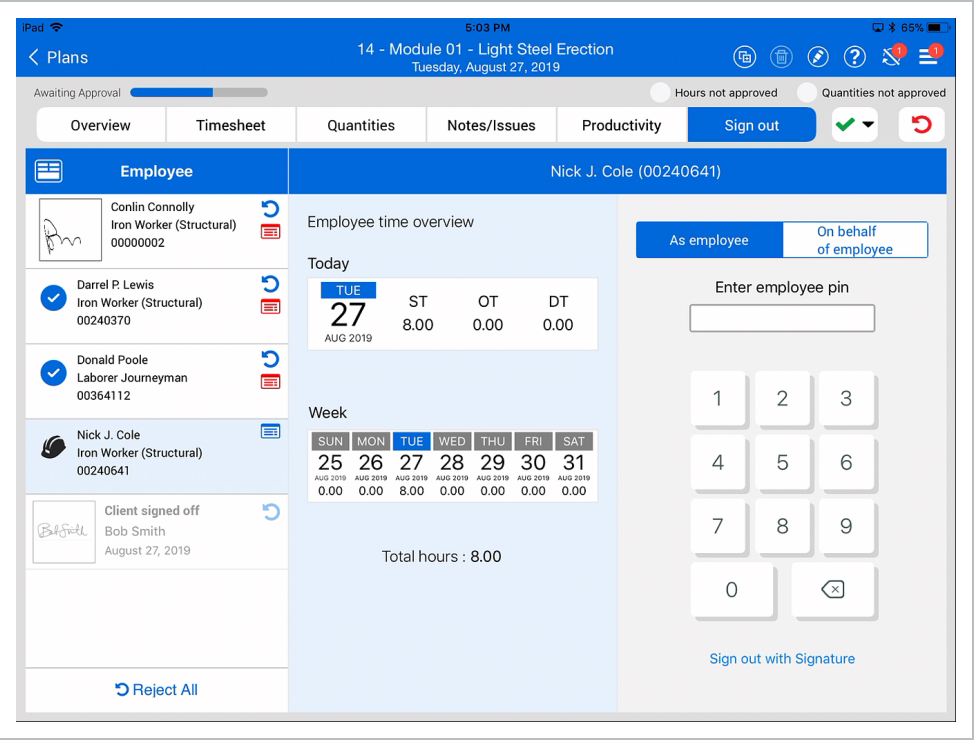
In the Awaiting Approval Phase, a daily plan will have six tabs (same as the Execution Phase) :

- Overview
- Time sheet
- Quantities
- Notes/Issues
- Productivity
- Sign Out

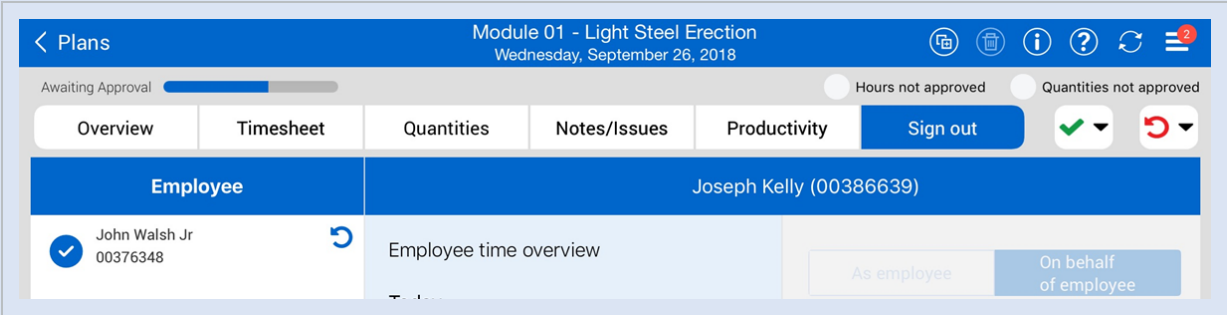
The first five tabs, (Overview, Time sheet, Quantities, Notes/Issues, and Productivity), in the Awaiting Approval Phase are identical to their respective tabs in the Execution Phase. All information entered, edited, or removed in the Execution Phase will be reflected in the Awaiting Approval Phase. Furthermore, 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

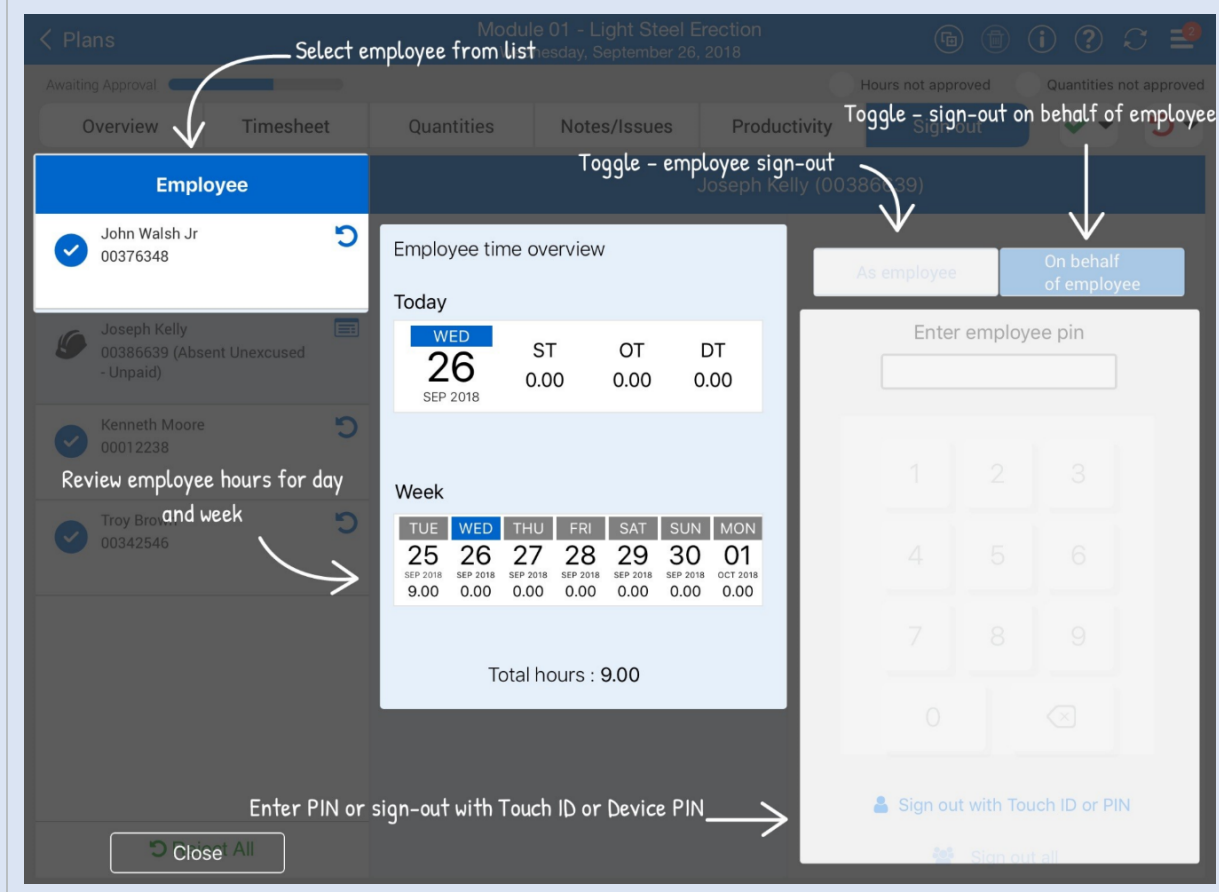
this point, you are also able to make changes to an employee’s hours by rejecting an employee’s sign out. If you are completely unsatisfied with the plan, you have the option to reject the plan and send it back to execution for editing.



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.

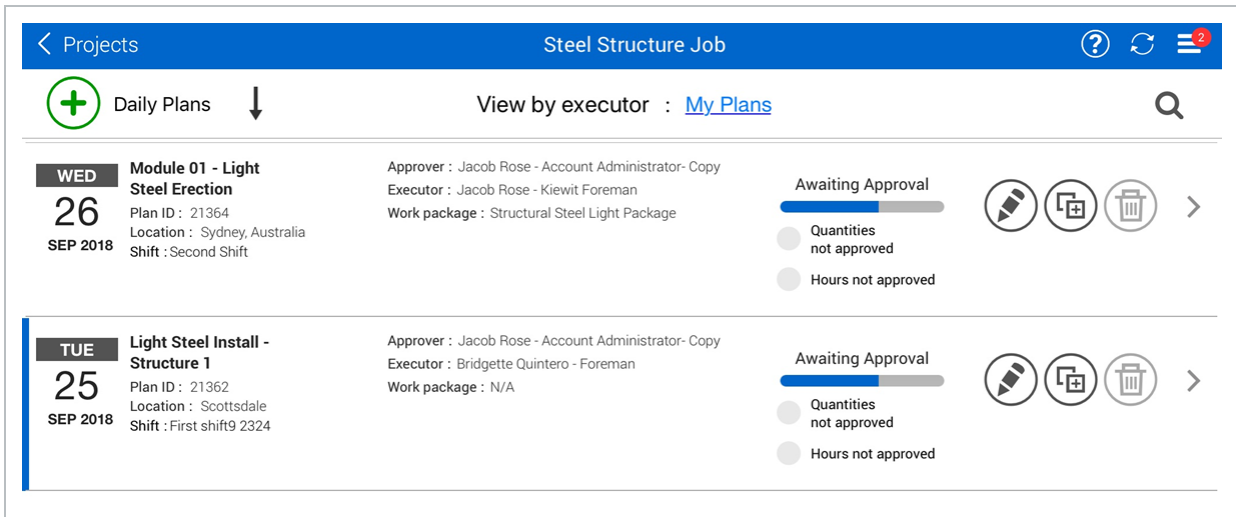
4.2.1 Edit Submitted Daily Plan

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.

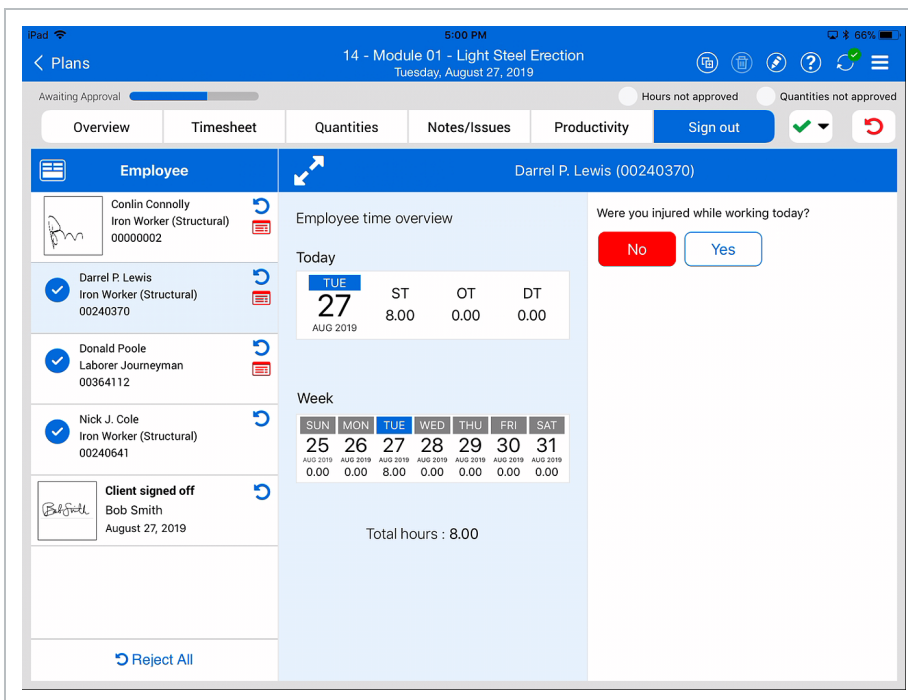
The following Step by Step walks you through how to reject an employee's sign out, modify their actual hours and re-sign them out on their behalf.

Adjust the Hours of a Signed Out Employee

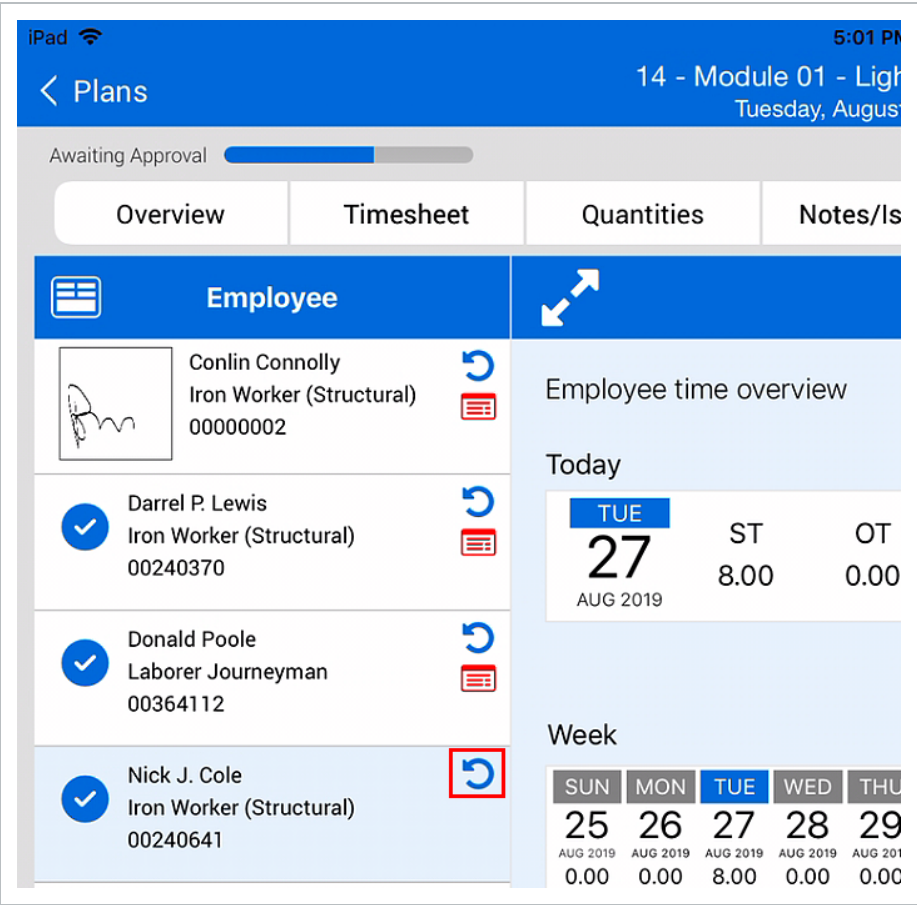
1. From the Daily plans page, open your daily plan.



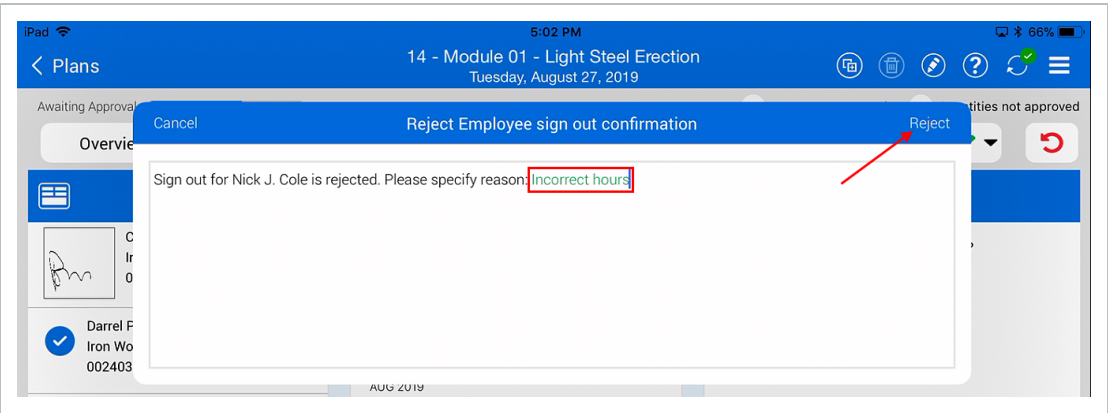
2. Tap on the **Sign Out** tab.



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

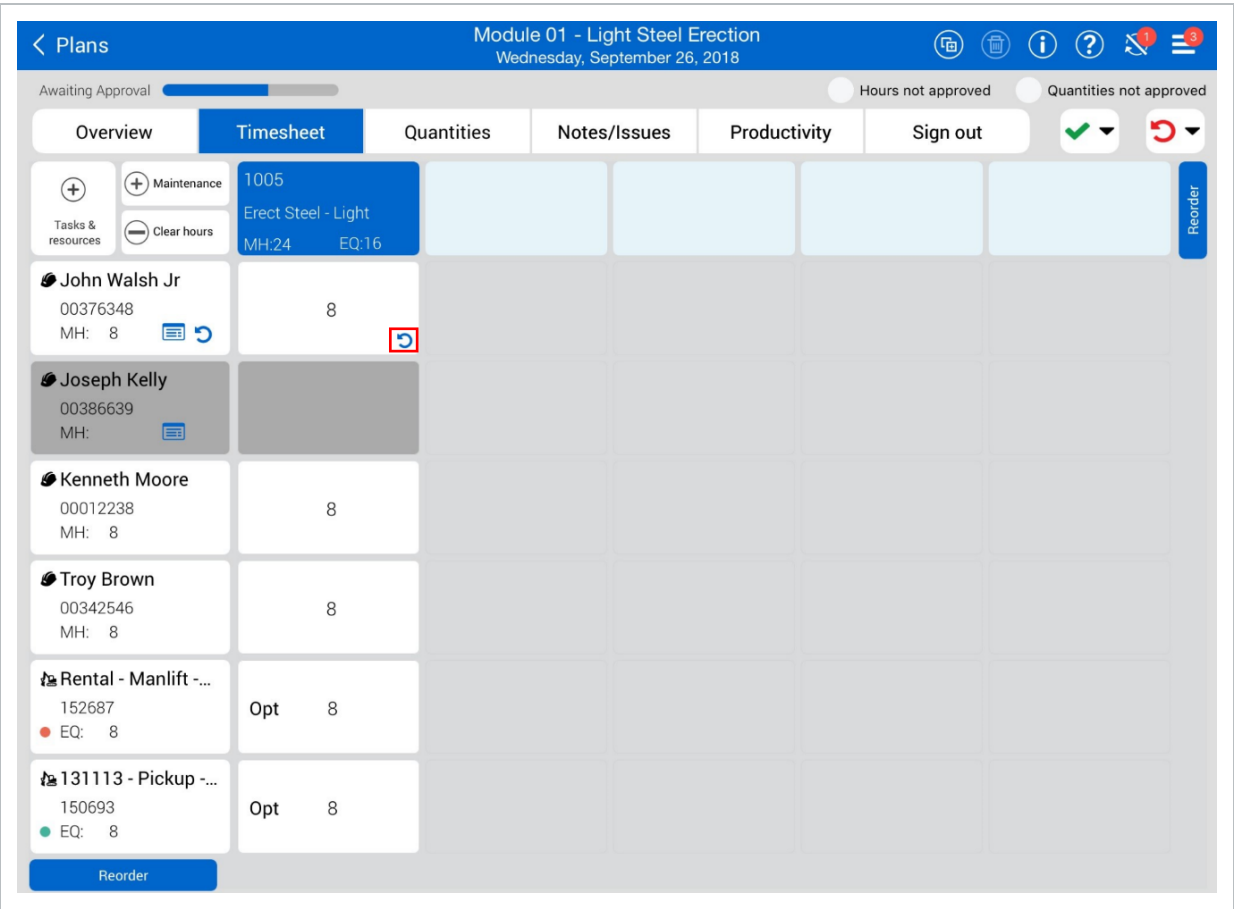


4. Type a reason for rejection and then tap **Reject**.

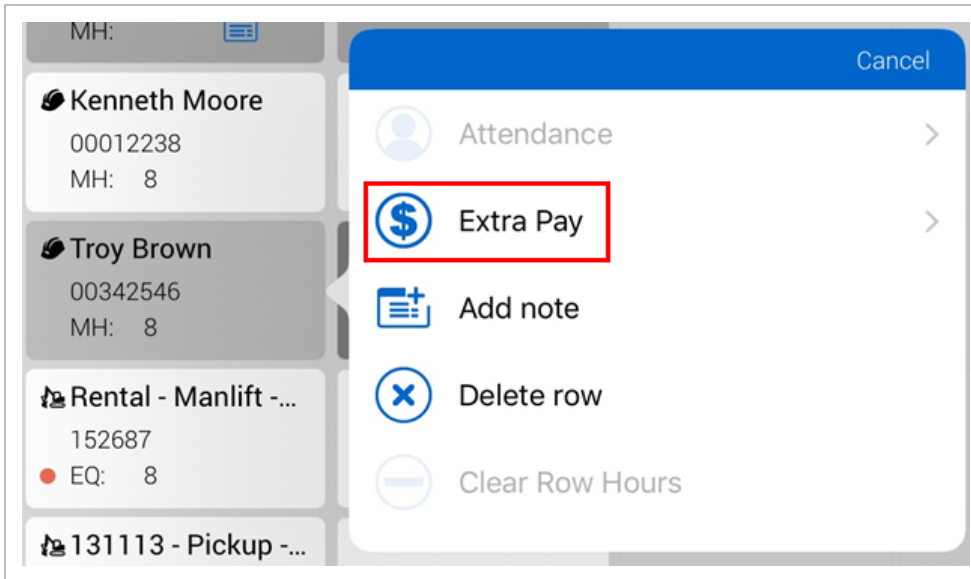


- 5. Tap on the **Time sheet** tab.
- 6. Tap in the hours entry area for the employee whose hours you rejected.

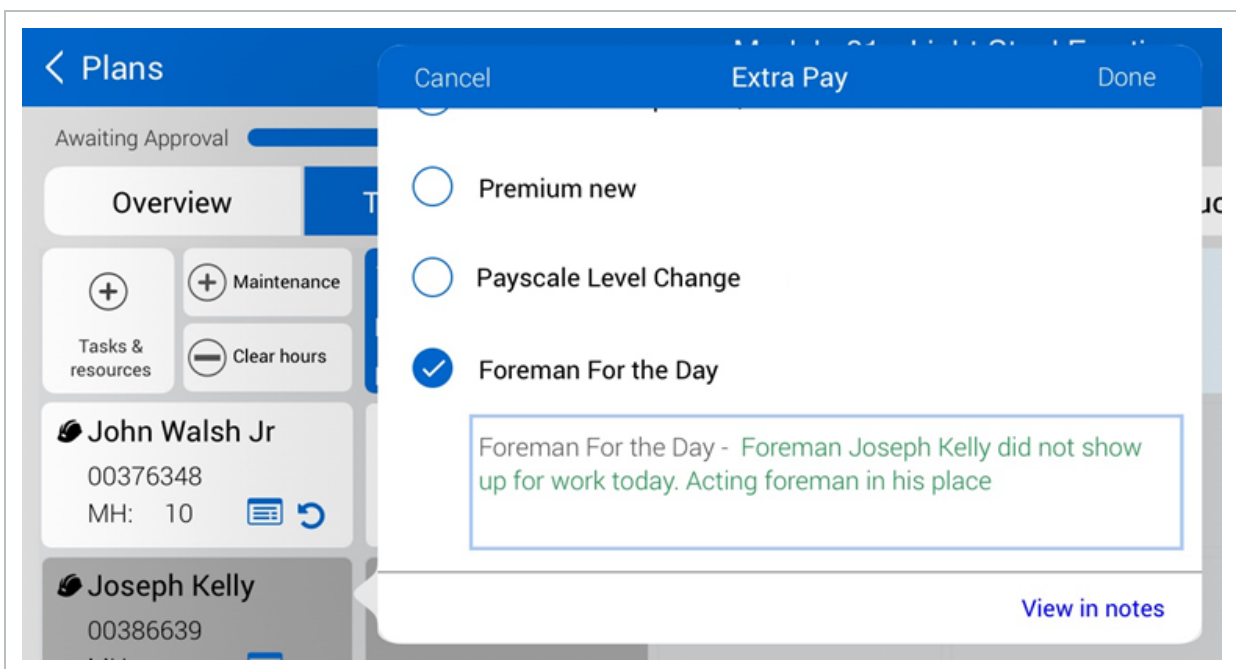
- You can tell which hours have been rejected by the **Reject** icon  in the bottom corner



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**.

< Plans

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

Awaiting Approval

Hours not approved

Quantities not approved

Overview

Timesheet

Quantities

Notes/Issues

Productivity

Sign out

Employee

John Walsh Jr (00376348)

John Walsh Jr
00376348

Joseph Kelly
00386639 (Absent Unexcused - Unpaid)

Kenneth Moore
00012238

Troy Brown
00342546

Employee time overview

Today

WED

26

SEP 2018

ST

10.00

OT

0.00

DT

0.00

Week

TUE	WED	THU	FRI	SAT	SUN	MON
25	26	27	28	29	30	01
SEP 2018	SEP 2018	SEP 2018	SEP 2018	SEP 2018	SEP 2018	OCT 2018
8.00	10.00	0.00	0.00	0.00	0.00	0.00

Total hours : 18.00

As employee

On behalf of employee

Enter employee pin

1

2

3

4

5

6

7

8

9

0

Sign out with Touch ID or PIN

15. Enter the passcode for your iPad.

Enter iPad passcode for "Progress"

Authenticate Device Identity by Passcode or Fingerprint

1

2

3

4

5

6

7

8

9

0

+

Cancel

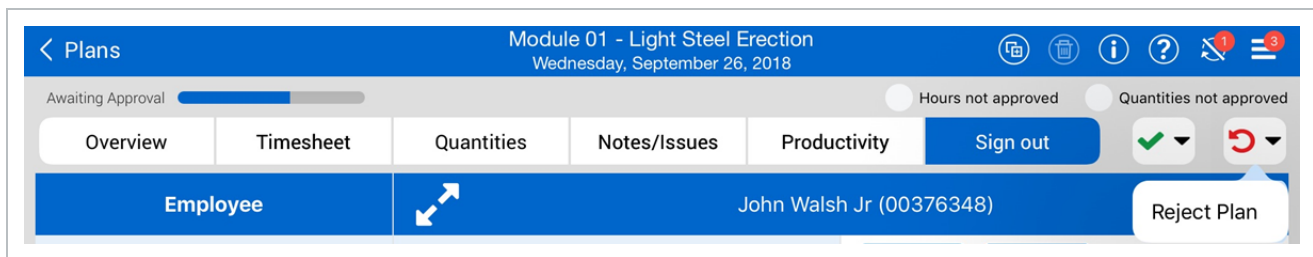
16. Answer the compliance question.

17. Tap **Done**.

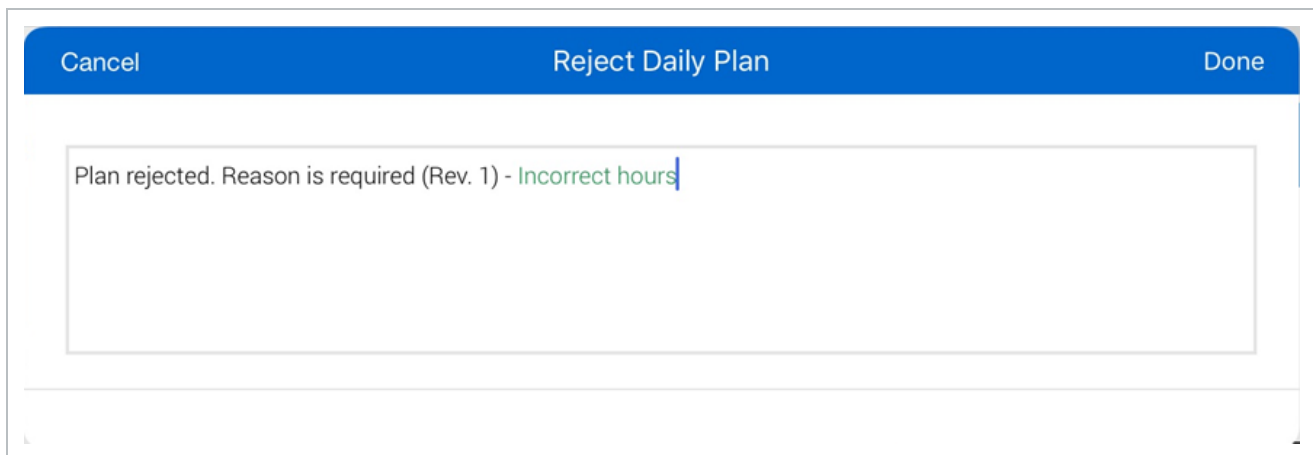
4.2.2 Reject a Daily Plan

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

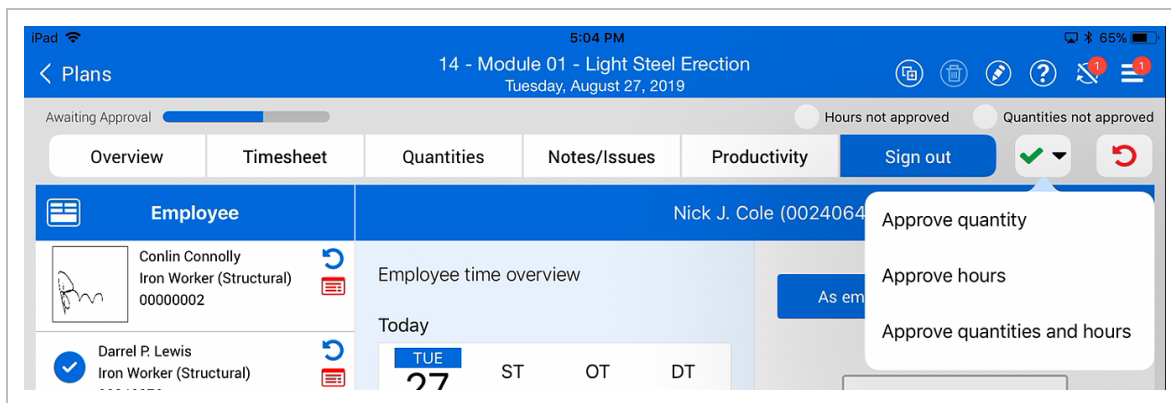
4.3 APPROVE A DAILY PLAN

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.

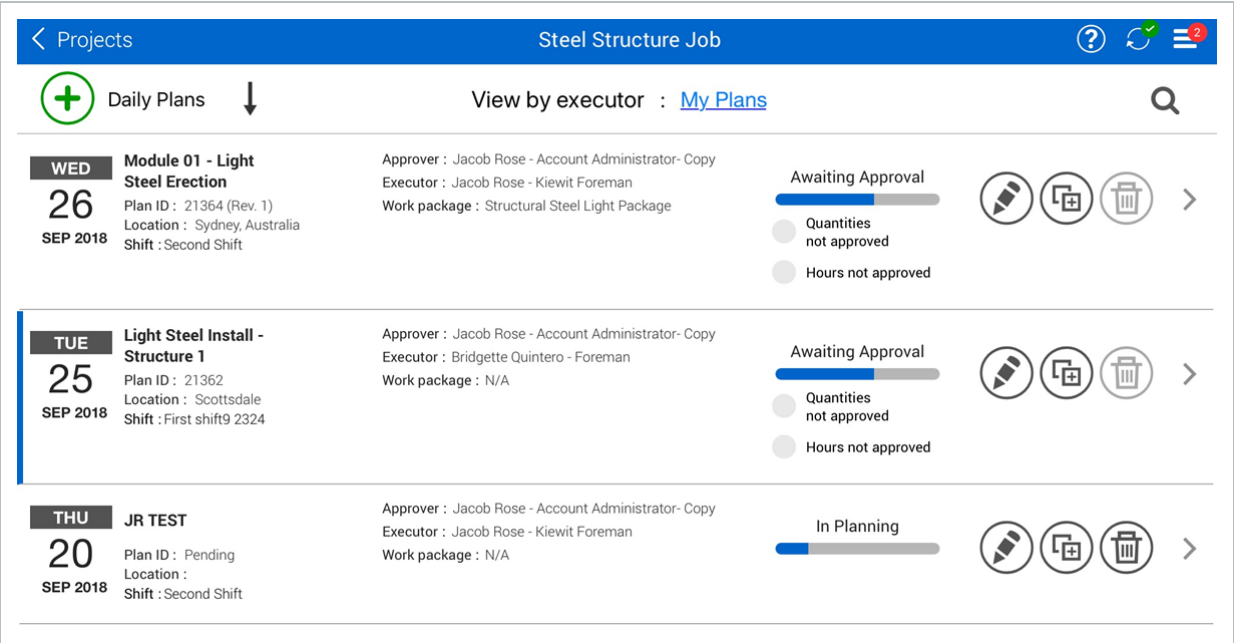
If you select “Approve Hours”, the hours for the daily plan will be approved and the quantities will still need to be approved separately.

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

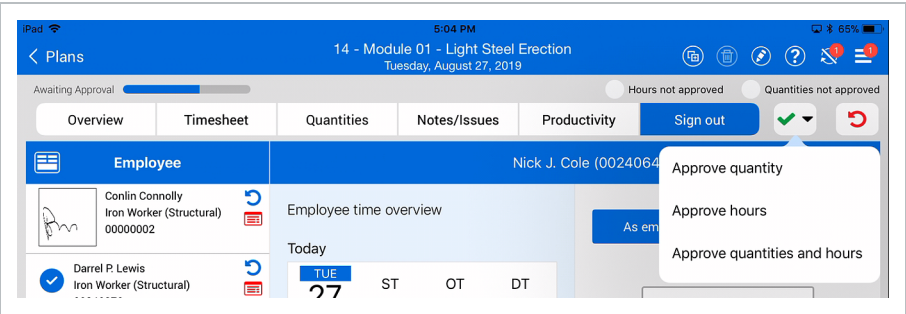
You can approve a plan with a future date that has no quantities, even if quantities and hours are required. This might be useful for approving holiday hours in advance.

Approve a Daily Plan

- 1. From the Daily plans home page, open your daily plan and select a daily plan.

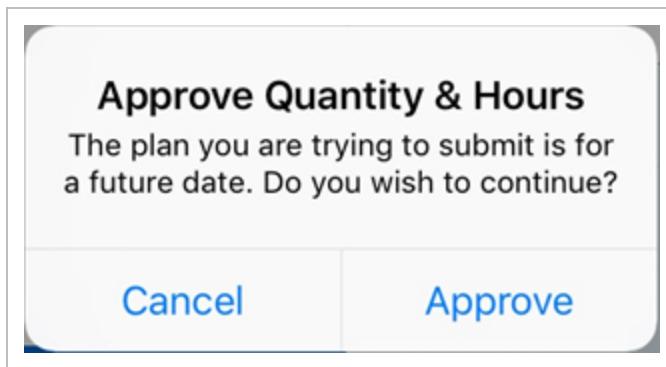
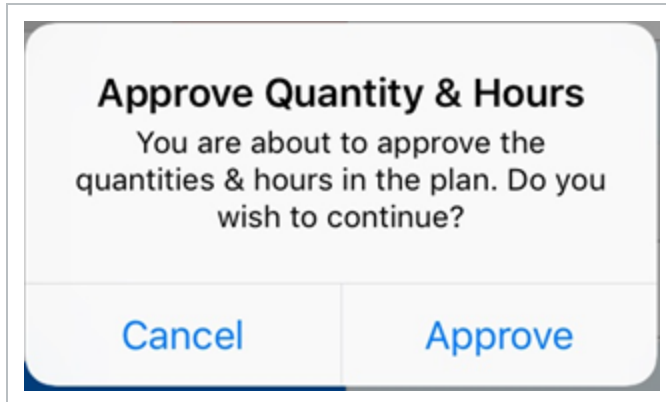


- 2. Select the **Approve**  icon.
- 3. From the drop-down list, select **Approve quantity and hours**.



- 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**



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

4.4 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.

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

4.5 ATTACHMENTS ON MOBILE

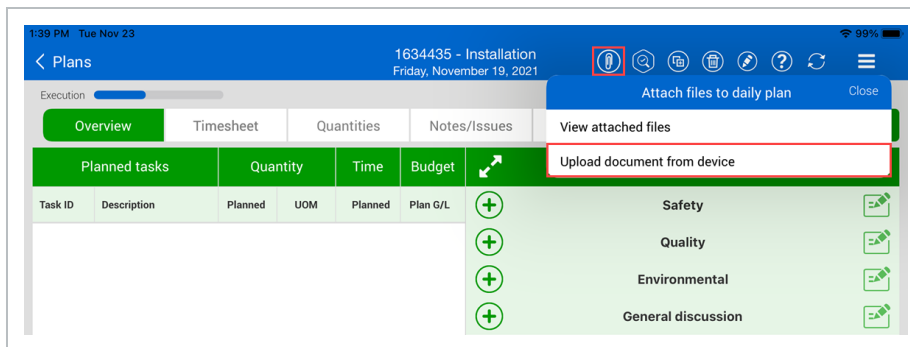
In the mobile application, you can attach files to a daily plan and view existing attachments.

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.

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**.

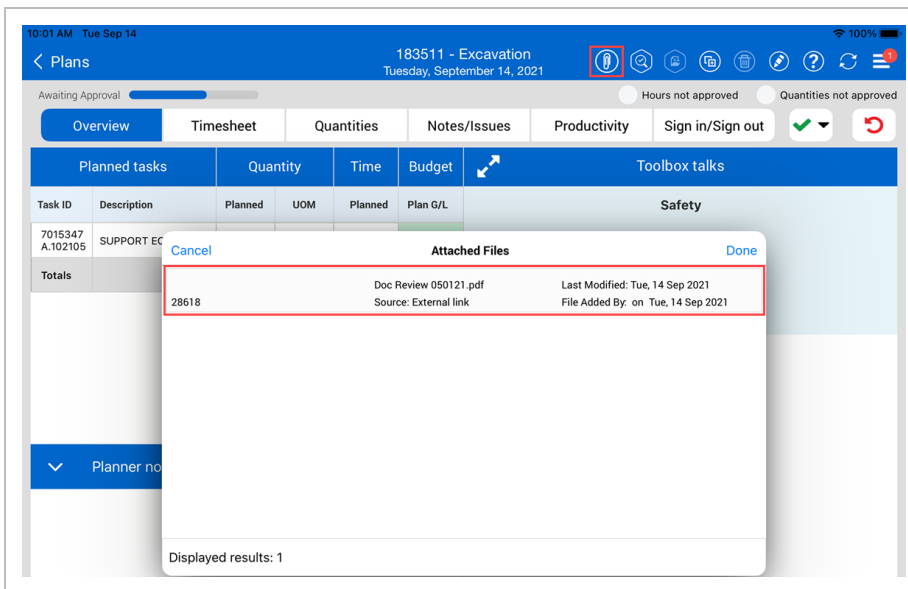
An attachment must be 10 MB or less.

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

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.



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.