PROGRESS USER GUIDE

Daily Plan Web

FIELD EXECUTION MANAGEMENT

INEIGHT

Release 24.3
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STEP-BY-STEP PROCEDURES

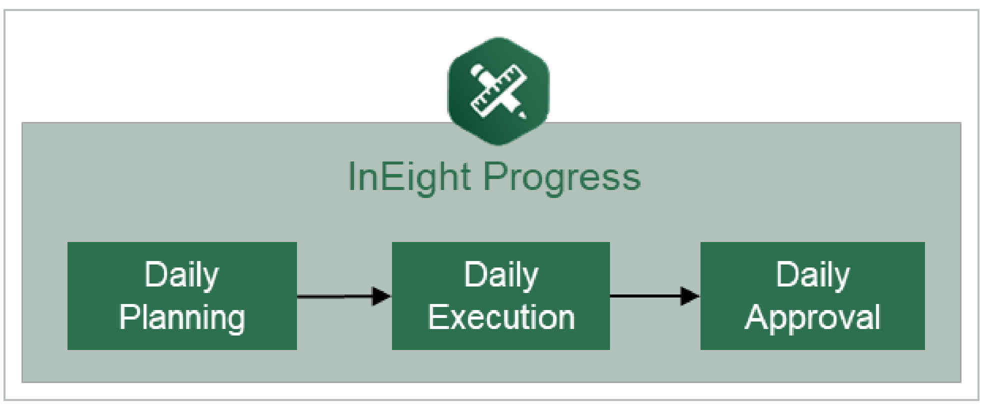
EXERCISES

1.1 INEIGHT PROGRESS OVERVIEW

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

1.1.1 InEight Progress Daily Planning Phases

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



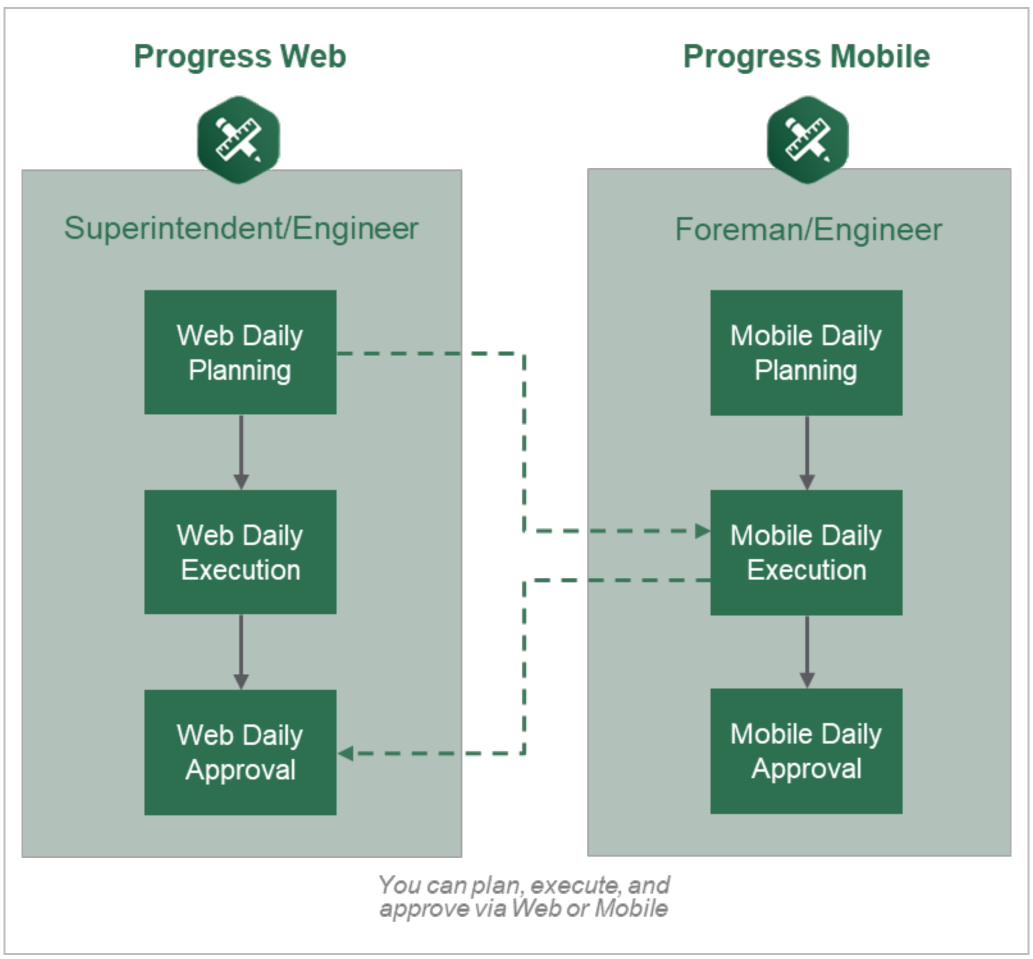
A daily plan is created by a project member to specify the tasks to be completed by a given crew, and to ensure productivity targets are met. Budget, quantity, safety, quality and other details are entered during the Planning phase to provide streamlined communication from the office to the field. Once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

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

In the Approval Phase, a project member reviews the actual tasks, employees, equipment, hours, quantities and productivity for the plan. In this phase, the hours and/or quantities can be approved as is, or if the approver would like something changed, the plan can be edited or sent back to the Execution Phase. The approver can approve the hours submitted, the quantities submitted or both. Approving the hours will send them to payroll for processing and approving the quantities will send them to the quantity tracking module of InEight Plan which syncs directly with InEight Control.

1.1.2 Daily Plan Work Flow

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

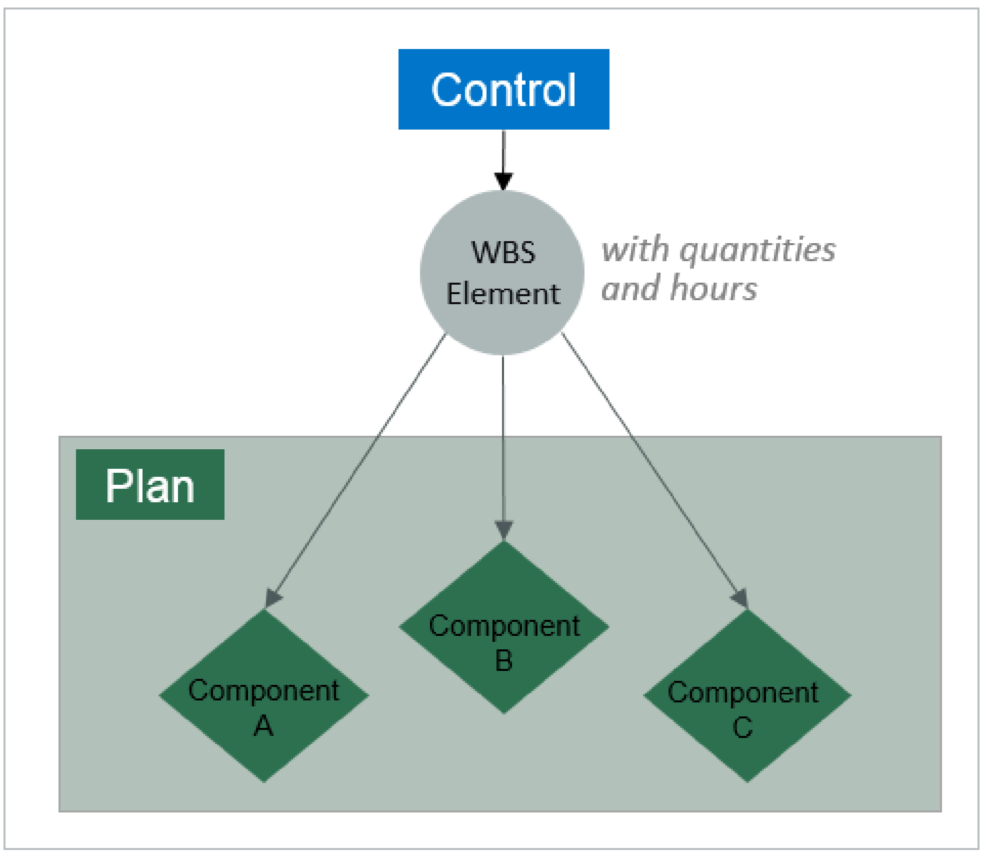


A daily plan can be accessed in either program in any of the phases of daily planning. The program used for a phase may vary from project to project and depends largely on the roles of the project members involved. For example, it may be preferable to have a staff member such as a superintendent or engineer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

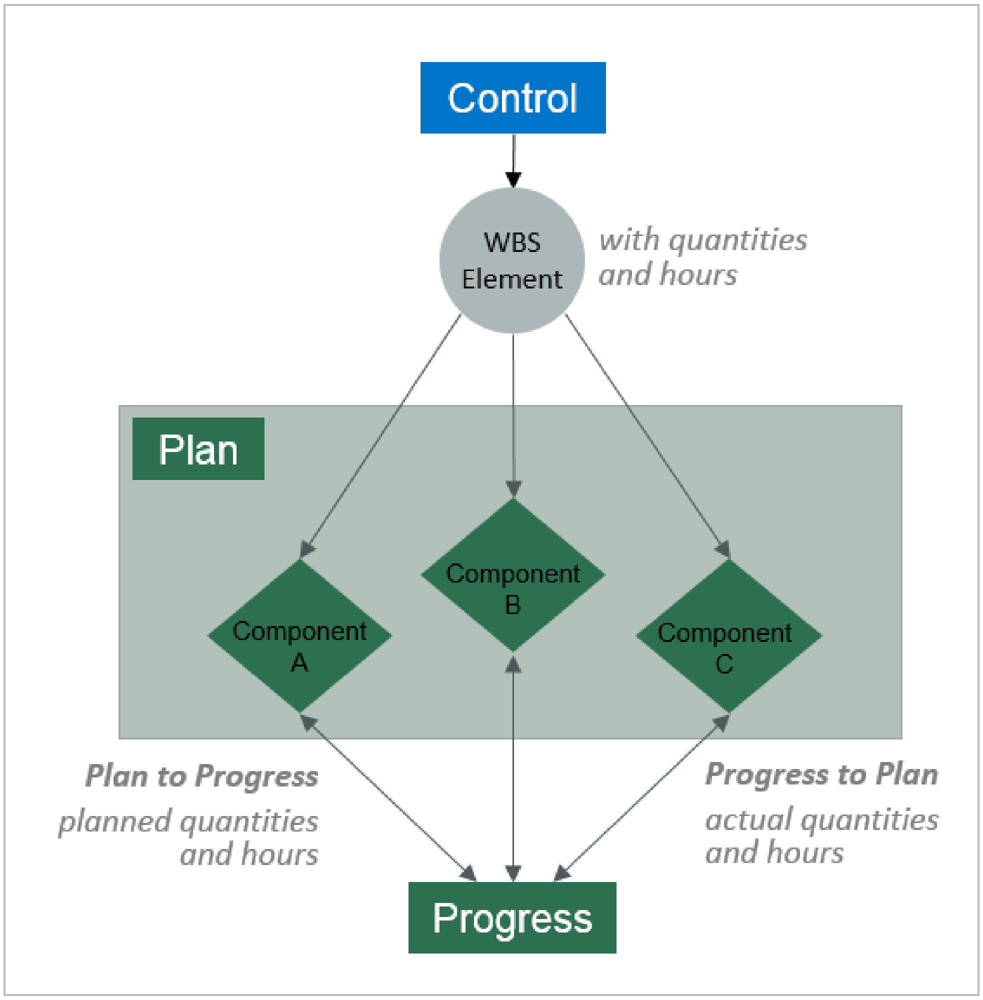
TIP Mobile Daily Planning has all the same functionality as Web Daily Planning for InEight Progress, but is available as a mobile-only application.

1.1.3 InEight Control Integration

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



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



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

1.1.4 Daily Planning

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

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

- **Overview** – Modify or enter plan details, approvers, and executors
- **Details** – Enter planner notes and tool box talk items

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

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

1.1.5 Daily Execution

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

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

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

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

1.1.6 Daily Approval

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

There are 3 options in the Approval Phase:

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

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

1.1.7 Work Flow Beyond InEight Progress

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

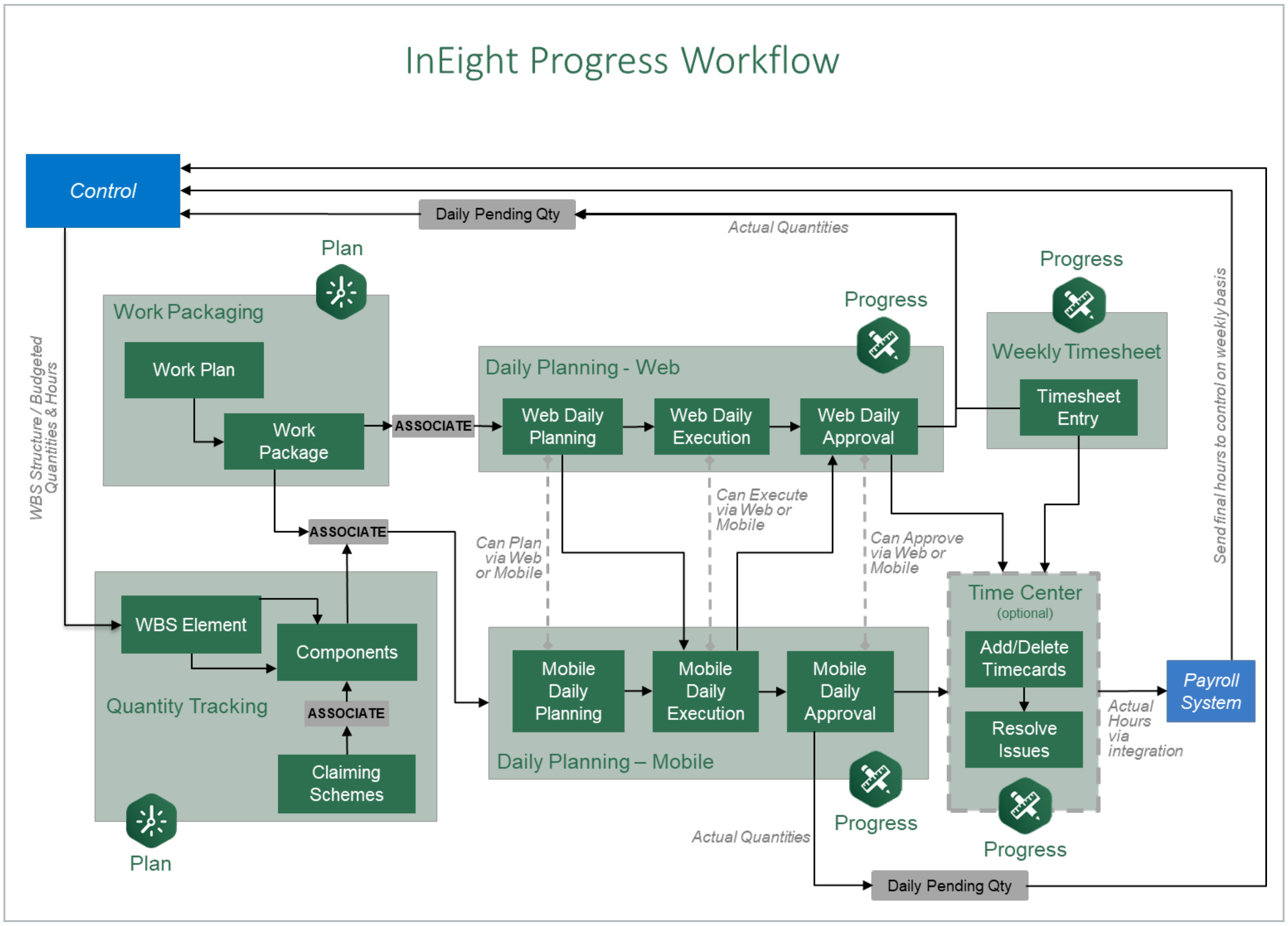
1.1.7.1 Hours

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

1.1.7.2 Quantities and Costs

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

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


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

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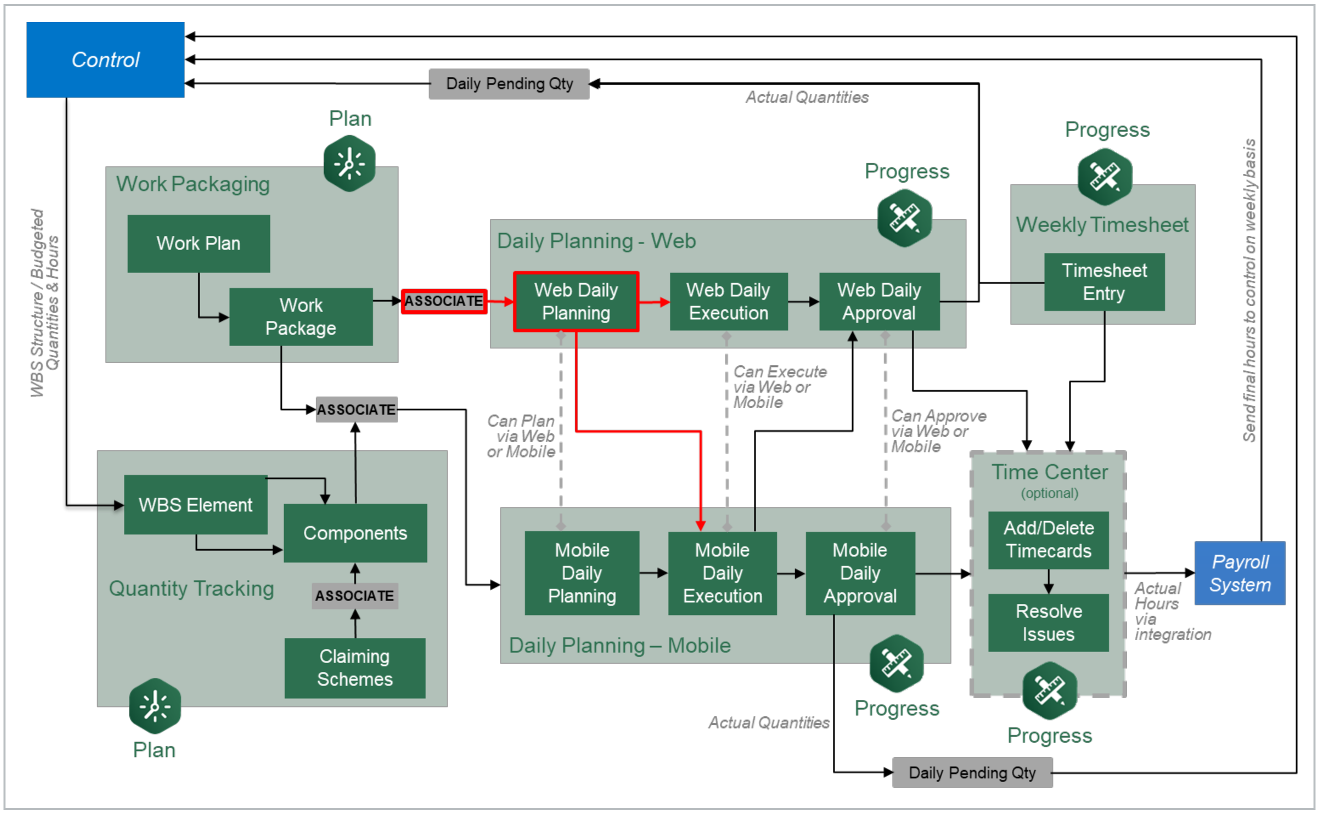
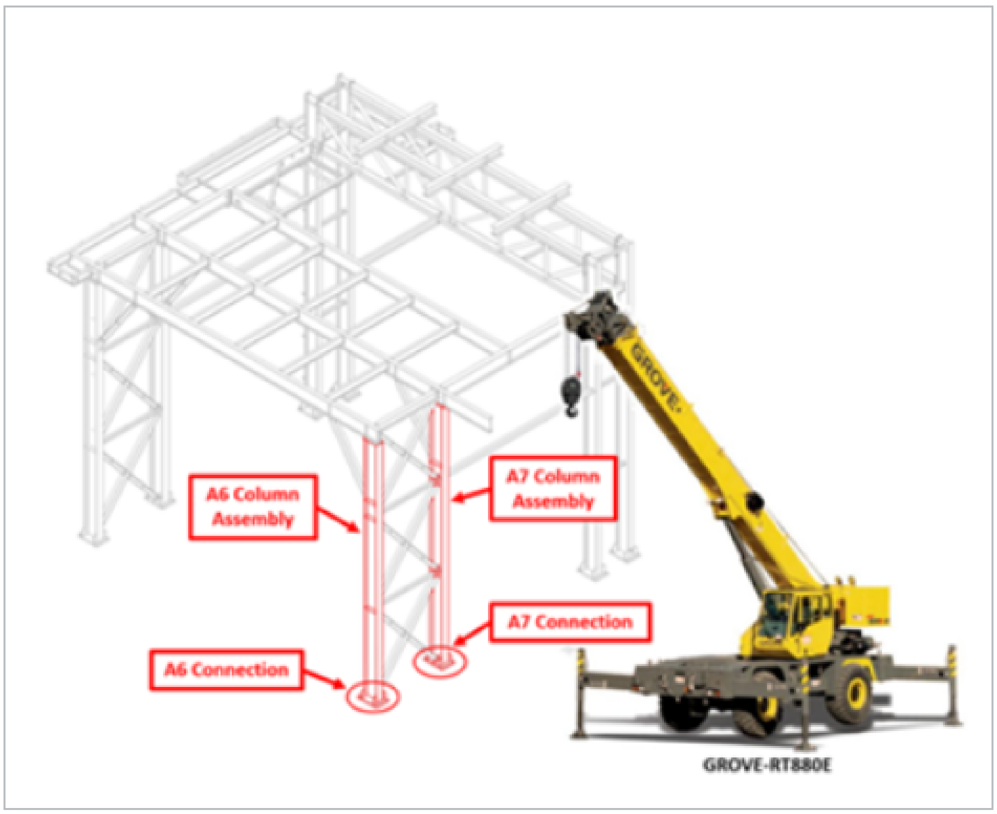
2.1 INEIGHT PLAN WORKFLOW - DAILY PLAN CREATION WEB



2.2 DAILY PLAN FROM WORK PACKAGE (DAILY PLAN WIZARD)

Scenario

> Tomorrow, your crew will be starting the steel erection work on your module. You are now ready to plan the work for your crew. During this first day, you want your crew to install the A7 connections to foundations. Your crew will consist of a Grove-RT880E crane, 3 Ironworkers and 1 Laborer. You want to make sure to communicate the work to your crew and identify safety concerns for the day.



In this topic, you will create a daily plan from an already existing work package using the Daily Plan Wizard in the InEight Plan web application.

2.2.1 What is a Daily Plan?

After you put your work package together, you break it down into daily segments, or the work you plan to accomplish in a given day.

Using the scenario above as an example, your steel erection work package for your module will take multiple days to complete. You will use daily planning to plan the work in the sequence you are looking to do it in, day by day. Daily planning is a good tool to communicate to your crew your safety concerns, quality and environmental risks, and expected productivity.

Daily planning combines:

- Components
  - Activity components
  - Material components associated with WBS
- Resources (employees, and equipment)
- Planned hours
- Planned quantities
- Notes/Issues
- Attachments (for example, safety notes, plan specifications)

2.2.2 Daily Plan Wizard

The Daily Plan Wizard is a powerful tool that can help automate the process of setting up daily plans by copying information from an already existing work package to avoid duplicate work. The Daily Plan Wizard allows you to choose which parts of the work package will be brought into the daily plan.

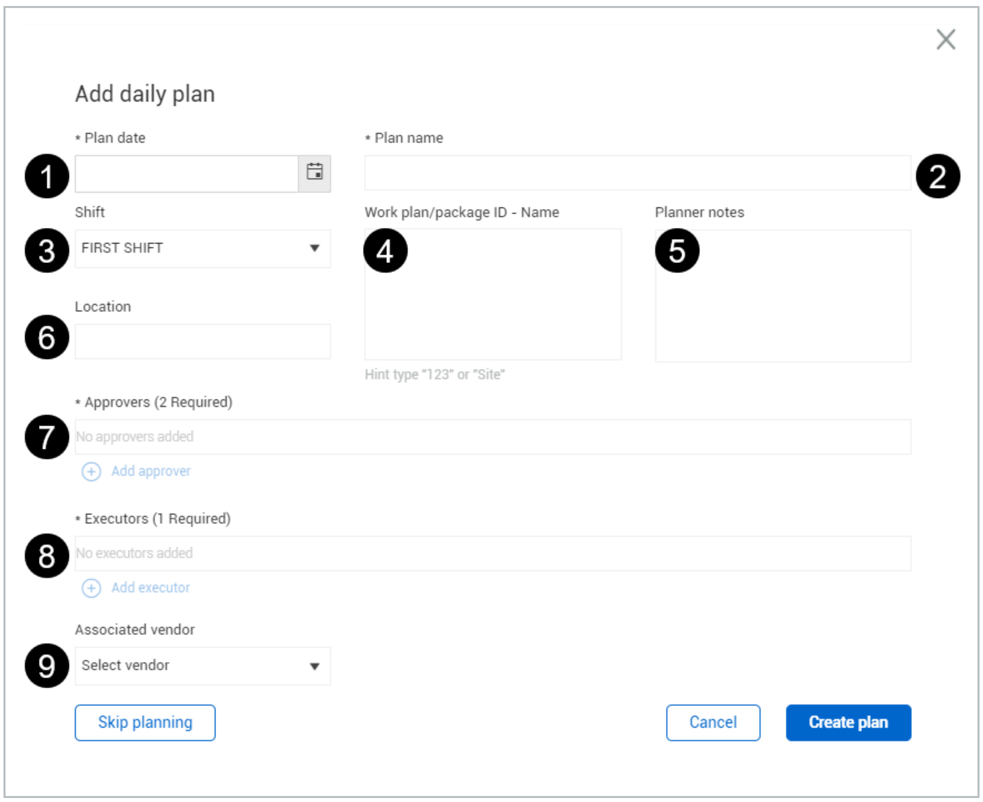
You access the Daily Plan Wizard from Plan Work packaging module.

Overview – Daily Plan Wizard

Title		Description
1	Plan date	The date that the plan will be executed.
2	Plan name	Unique name for the daily plan.
3	Shift	A drop-down field where you can select either First, Second or Third Shift.
4	Work plan/package ID-Name	This should be automatically populated with the name of the work plan/package that the current daily plan is being created from.
5	Planner notes	A free text field where any relevant notes can be added in.

Overview – Daily Plan Wizard (continued)

Title		Description
6	Location	A free text field where the location of where the work will be performed can be entered.
7	Approvers	From the drop-down field, you can add the responsible approver(s) of the daily plan. Superintendent or Engineer is a common choice.
8	Executors	From the drop-down field, you can add the assigned user responsible for executing the daily plan.
9	Associated vendor	Select a vendor from the drop-down list. Available vendors are populated based on vendor associations for your project in InEight Control.Provides different options of how to complete the daily planning process: includes Create Plan, Cancel, and Skip Planning.

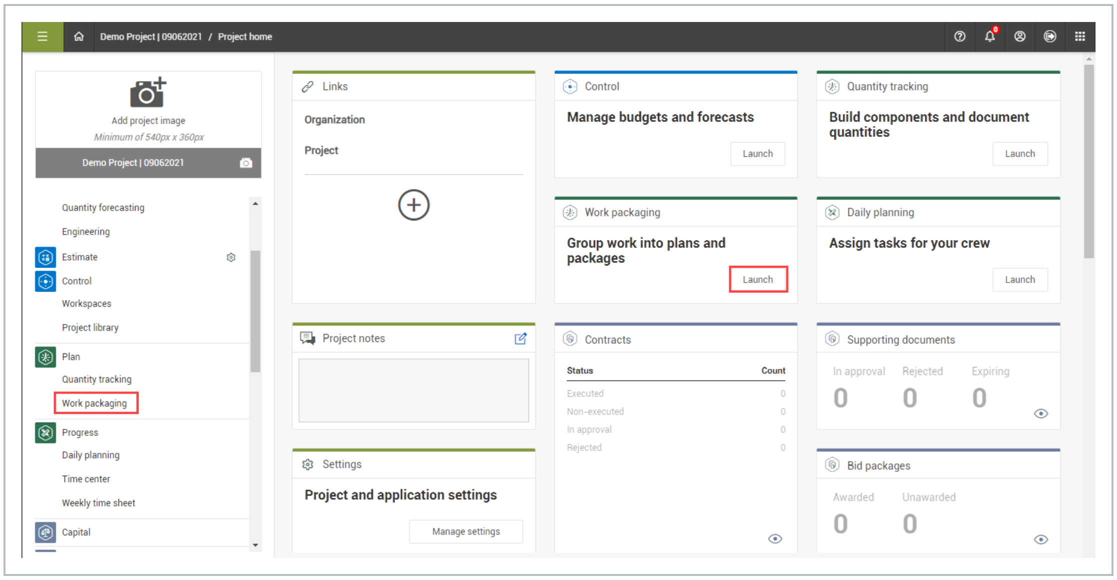


The following Step by Step walks you through how to use the Daily Plan Wizard.

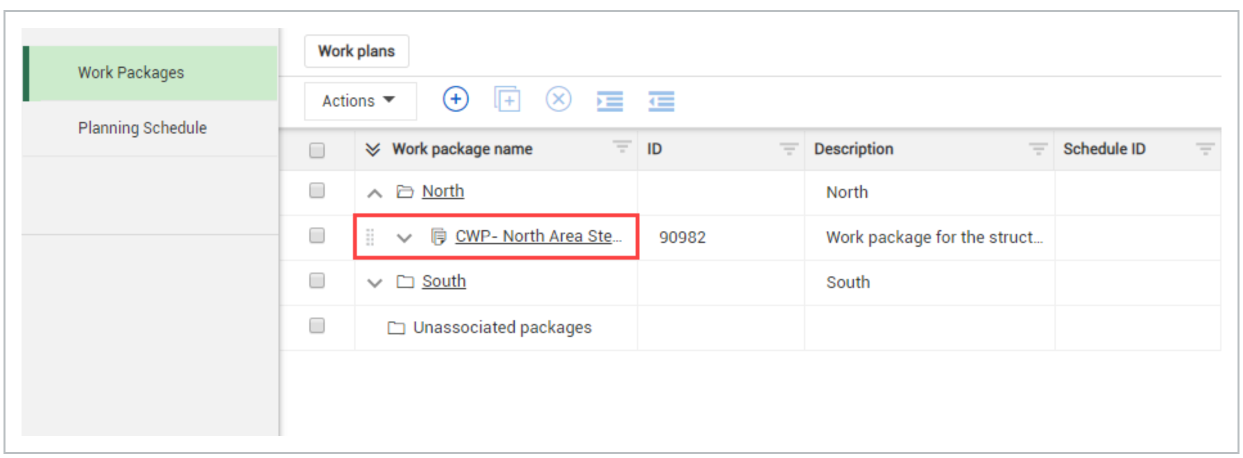
NOTE This Step by Step assumes you already have a work package (CWP or IWP) created containing work package details (e.g., labor, equipment, components, safety). See Work Package Creation for details on setting up work packages.

Create a Daily Plan Using the Daily Plan Wizard

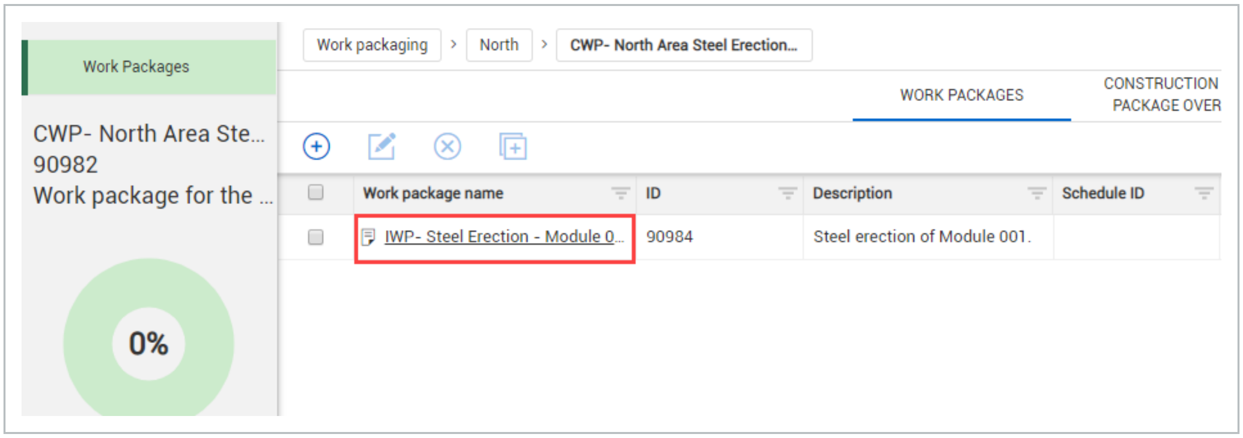
1. From your project home page, navigate to Plan > **Work packaging**.



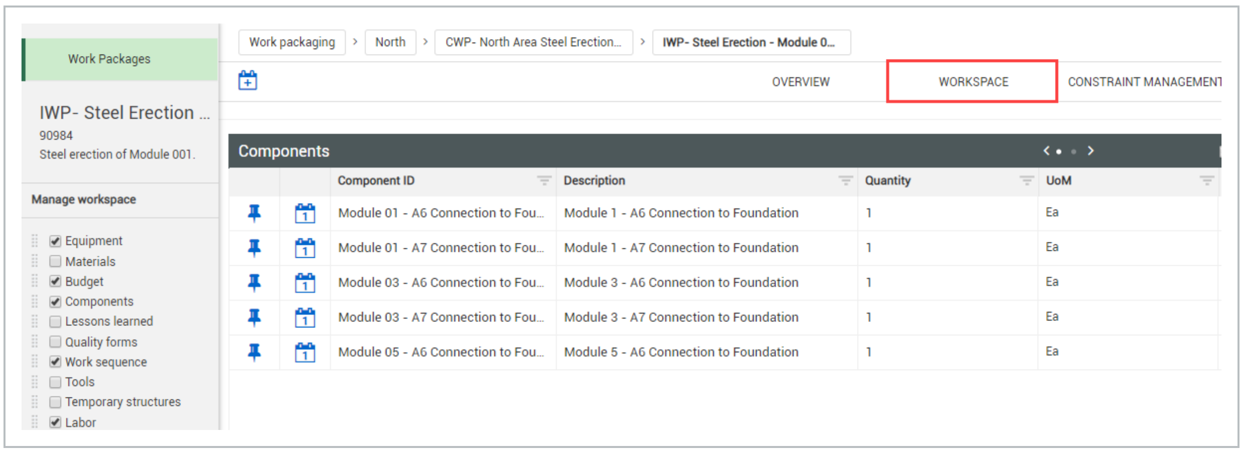
2. From the Work Packages tab, open a Construction Work Area (CWA) and click on the **arrow** in the ID column of your Construction Work Plan (CWP) to extend the work package below.
3. Select a Construction Work Package (CWP) by clicking on its **hyperlink ID**.



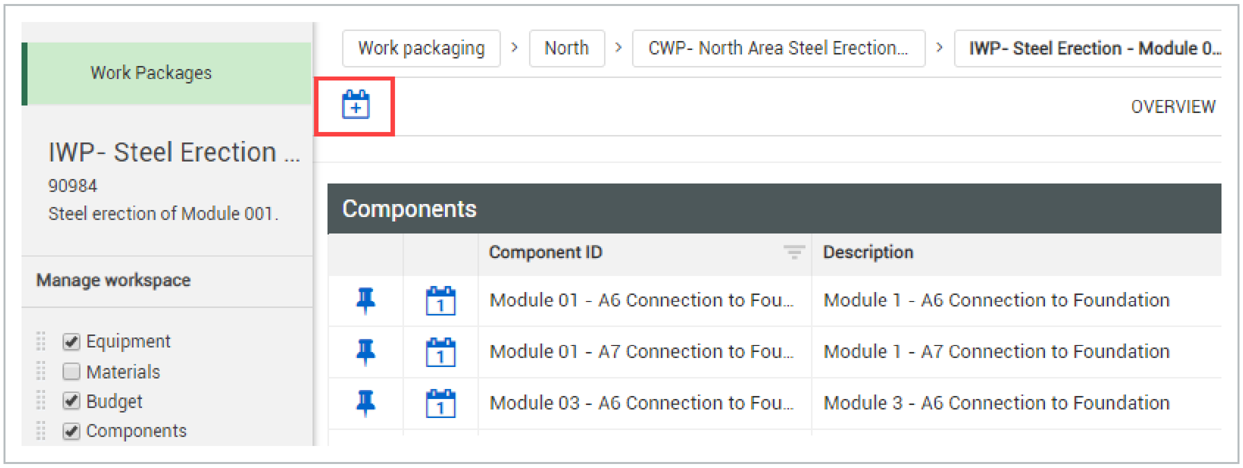
4. Open your Installation Work Package (IWP) by clicking on its **hyperlink ID**.



5. From the IWP page, click on the **Workspace** tab.

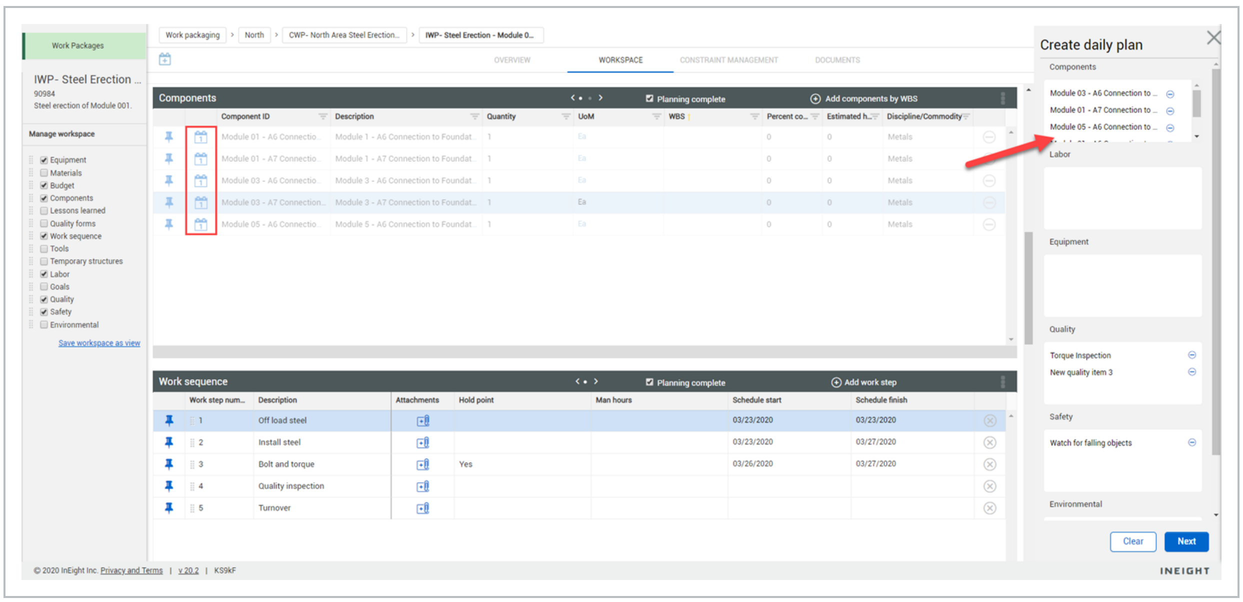


6. Click on the **Daily Plan** icon.



- This opens the Daily Plan Wizard slide-out panel

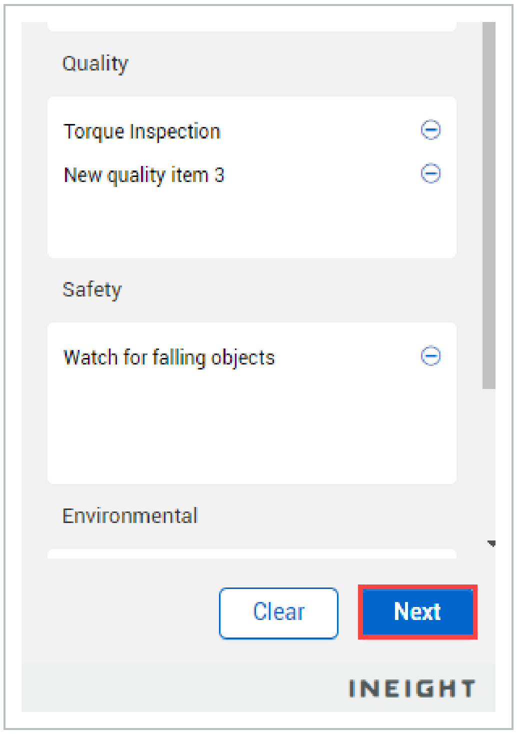
7. With the Daily Plan Wizard open, select the components, resources, etc. that you want to copy by clicking on the calendar icon from your data blocks.



- Your selections are shown in the Wizard

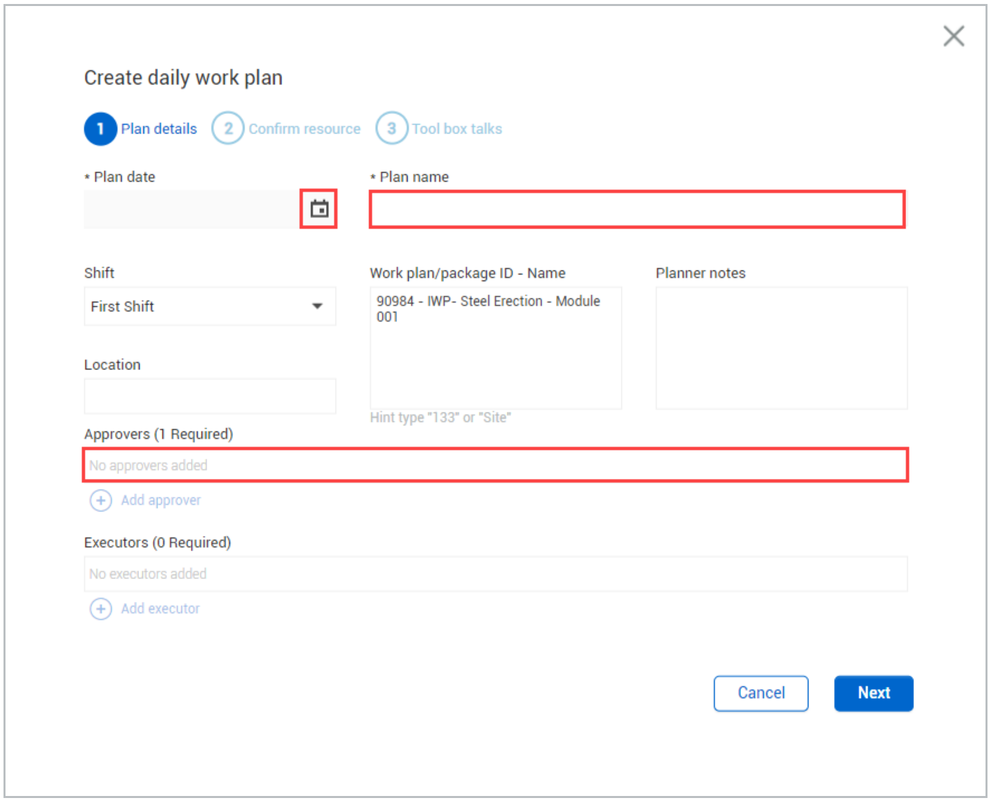
NOTE	Not all data blocks can be copied. If no calendar icon is shown, that data block is not available to be populated in daily planning. Activity components can only be used if they can be claimed in Plan Quantity tracking. Labor and equipment can only be used if they are active in the project date range.

8. When finished, click **Next** on the Daily Plan Wizard.

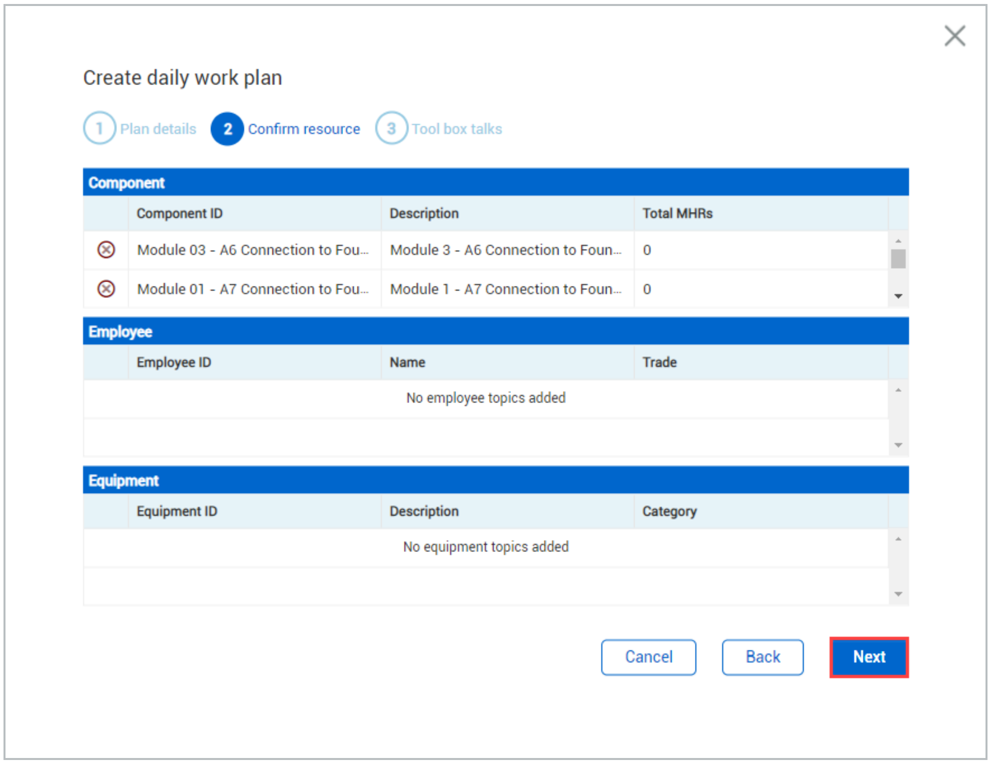


9. Enter your new daily plan details.

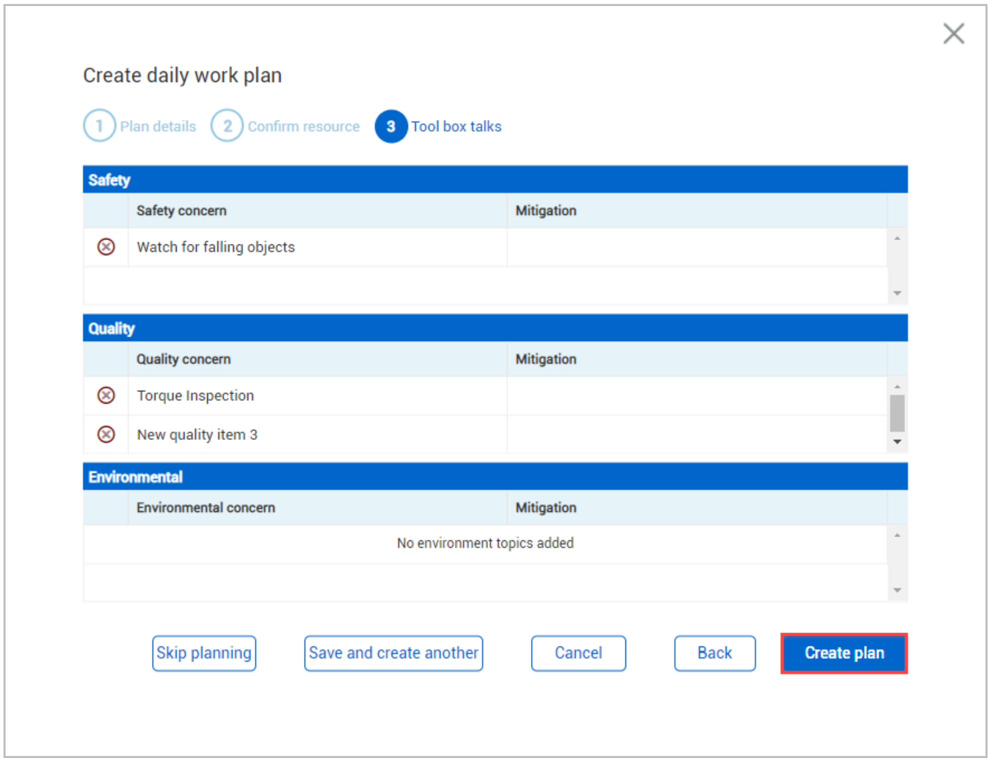
NOTE	You can complete and edit these daily plan details at any point. Notice that only some fields are required to create a new daily plan.



10. Click **Next**.
11. Confirm that all your selected components and resources are correct for your new daily plan. Then, click **Next**.



12. Verify that everything is correct for the Tool box talks section. Then, click **Create plan**.



- Once created, you can edit your new daily plan by navigating to Progress > Daily Planning page > My Daily Plans Tab

2.3 COMPLETING A DAILY PLAN

Scenario

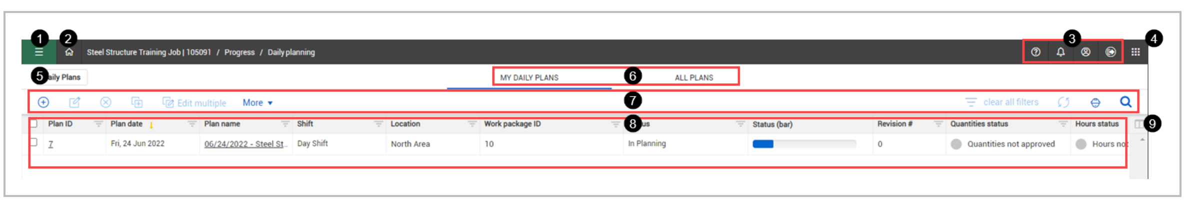
> You have just finished creating a new daily plan using the Daily Plan Wizard. However, some specific information was not available on the work package. You will now add this information to inform your crew.

Once you finish creating your daily plan via the Daily Plan Wizard, the next step is to assign specifics to your plan. In other words, even though you already populated the basic information via the Daily Plan Wizard you are still missing some important information required to execute the intended work. For example, you still need to enter the planned quantities or components and claiming steps to be completed and hours each employee and/or piece of equipment will work for the day.

This planning phase is crucial to making sure the work executes efficiently and on budget. To complete this phase, you'll move from InEight Plan to InEight Progress.

Overview – Daily Plans Page

Title		Description
1	Main Menu	Shows the selected project and provides access to favorites, All projects and organizations, reports, master data libraries, and suite administration.
2	Home	Opens your user home page.
3	Notifications and User Profile	Allows you to view notifications and your user profile or to log out.
4	App launcher	Opens applications and modules.
5	Breadcrumbs	Navigational links that allow you to track your path from the page you are currently viewing back to the daily plans page. Furthermore, identifies what and where you are within the daily planning module.
6	Tabs	Allow you to navigate between different functions on a page. The blue underline indicates what tab you are currently viewing.
7	Toolbar	Contains functions for the page you are on: add, edit, delete, copy, and Employee Register.
8	Daily Plan Register	Contains a list of all your daily plans.
9	Column Chooser	Allows you to add or hide columns from your user specific register view.

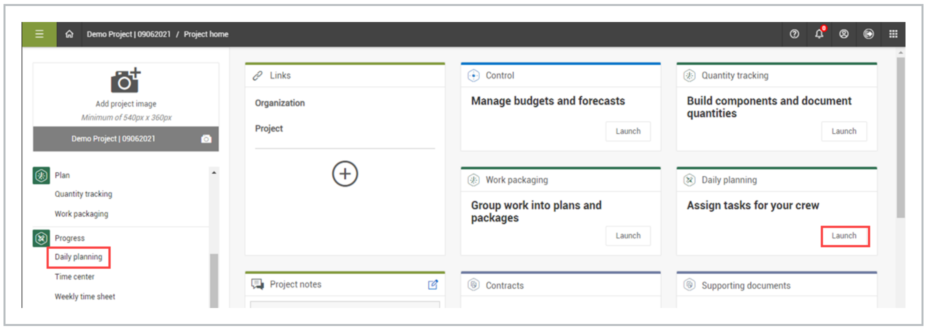


2.3.1 Daily Plans Page

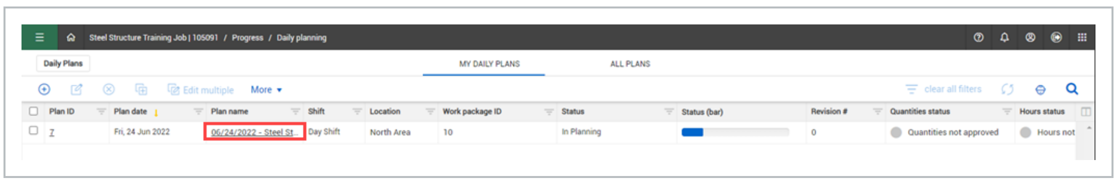
To begin the Planning Phase of a daily plan, you must first open a daily plan. In the following Step by Step, you will navigate to the Daily Plans page and then open a daily plan.

Open a Daily Plan

1. From your project home page, open the **Daily planning** module of Progress. The Daily plans page opens to a list of your daily plans.



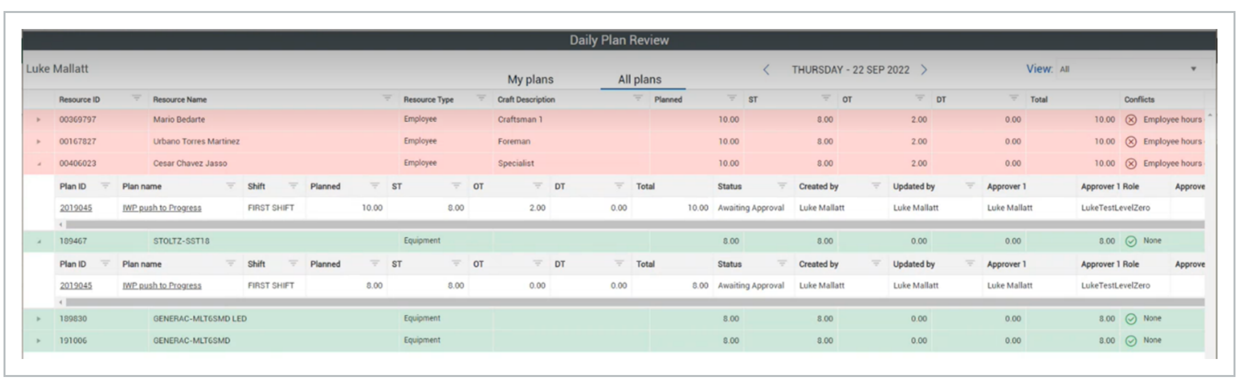
2. Click on your daily plan's name.



When opened for the first time, a daily plan is in the planning phase by default and opens to the Details tab. In the planning phase, there are six different tabs where you can enter plan information.

Equipment review

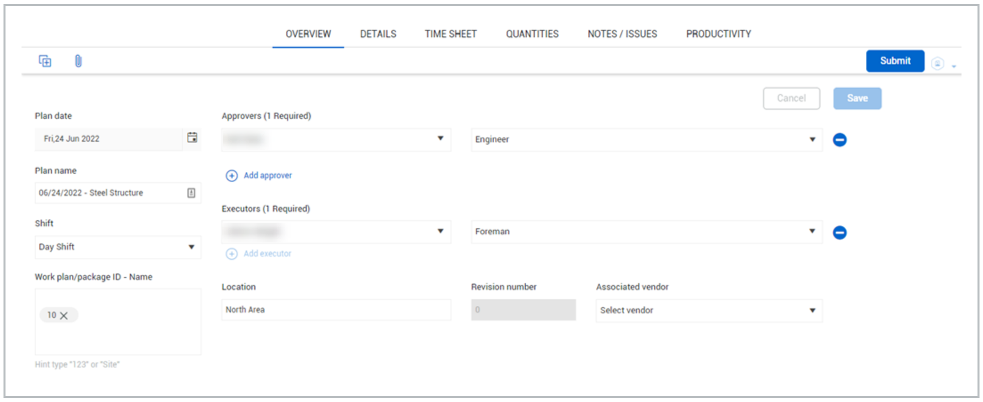
In Daily Plan Review, you can select employees or equipment and filter by date. A live report shows all resources that are being used. You can make adjustments by clicking the plan name.



The following sections give an overview of each tab of the Planning Phase of the daily plan and include Step by Steps to enter additional information where applicable.

2.3.2 Overview Tab

The **Overview** tab provides a summary level of all information related to the current daily work plan. The fields on this tab lets you modify basic daily plan information, approvers, executors, and associated work plans and vendors.

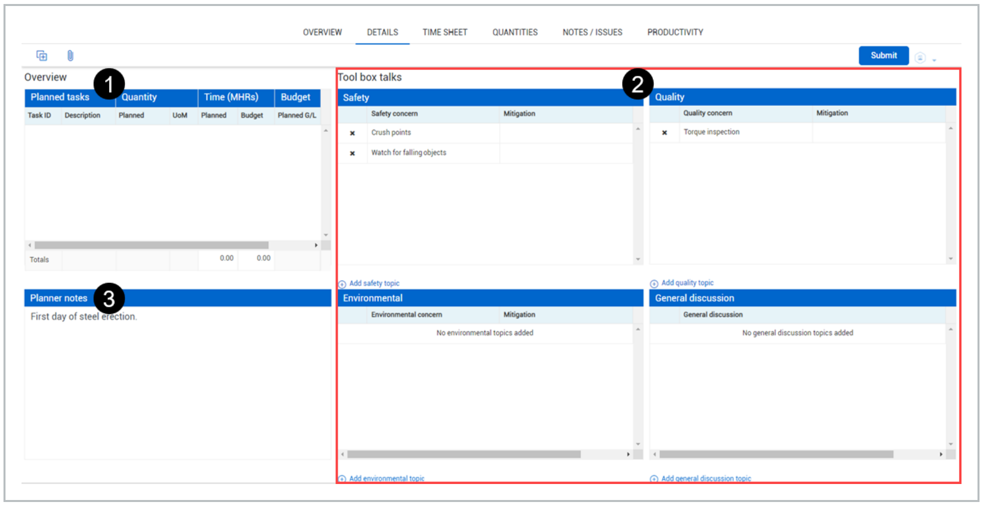


2.3.3 Details Tab

The **Details** tab is the default tab that displays when you open a daily work plan. The Details tab provides a summary level of all information related to the current daily work plan. This includes the capability to modify the plan description, plan date, location, approvers, executors, and work plan/package number.

Overview – Details Tab of a Daily Plan

Title		Description
1	Overview data block	Shows the tasks, employees, hours, and quantity you are planning on having or completing the next day. This is a useful tool for the foreman to review with their crew as a morning meeting.
2	Tool box talks data blocks	Provides important messages on the concerns and mitigation measures for various risks which should be reviewed by your crew.
3	Planner notes data block	Letss you enter daily plan notes in an easily accessible section.

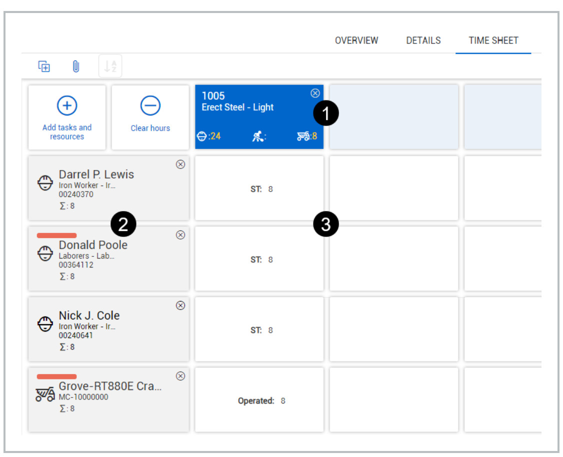


2.3.4 Time Sheet Tab

The **Time Sheet** tab is primarily used for entering the planned man-hours for each resource on each task. You can also add resources and tasks to the daily plan in this tab as needed. You can also add notes and assign or tag them to specific tasks or resources in this tab.

Overview – Time Sheet Tab of a Daily Plan

Title		Description
1	Task columns	All tasks that are to be worked are shown here.
2	Resource rows	All resources being used are shown here.
3	Hours entry area	Hours for each resource on a given task are entered here.

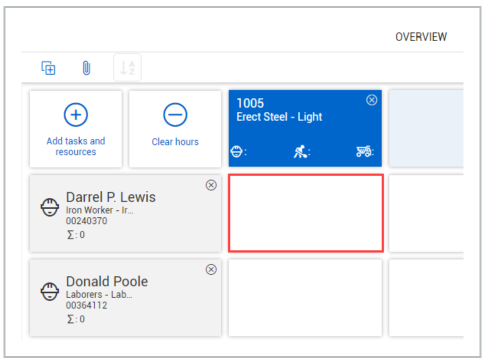


The following steps walk you through entering planned employee hours into a daily work plan. You must have added an employee and a task to the time sheet.

NOTE These steps assume that your project has reason codes enabled. If you do not use reason codes, the labor hours entry dialog box looks slightly different.

Enter planned employee hours into a daily plan

1. Open your daily plan.
2. Click on the **Time sheet** tab.
3. Click in the hours entry cell for your first listed worker. The Labor Hours dialog box opens.



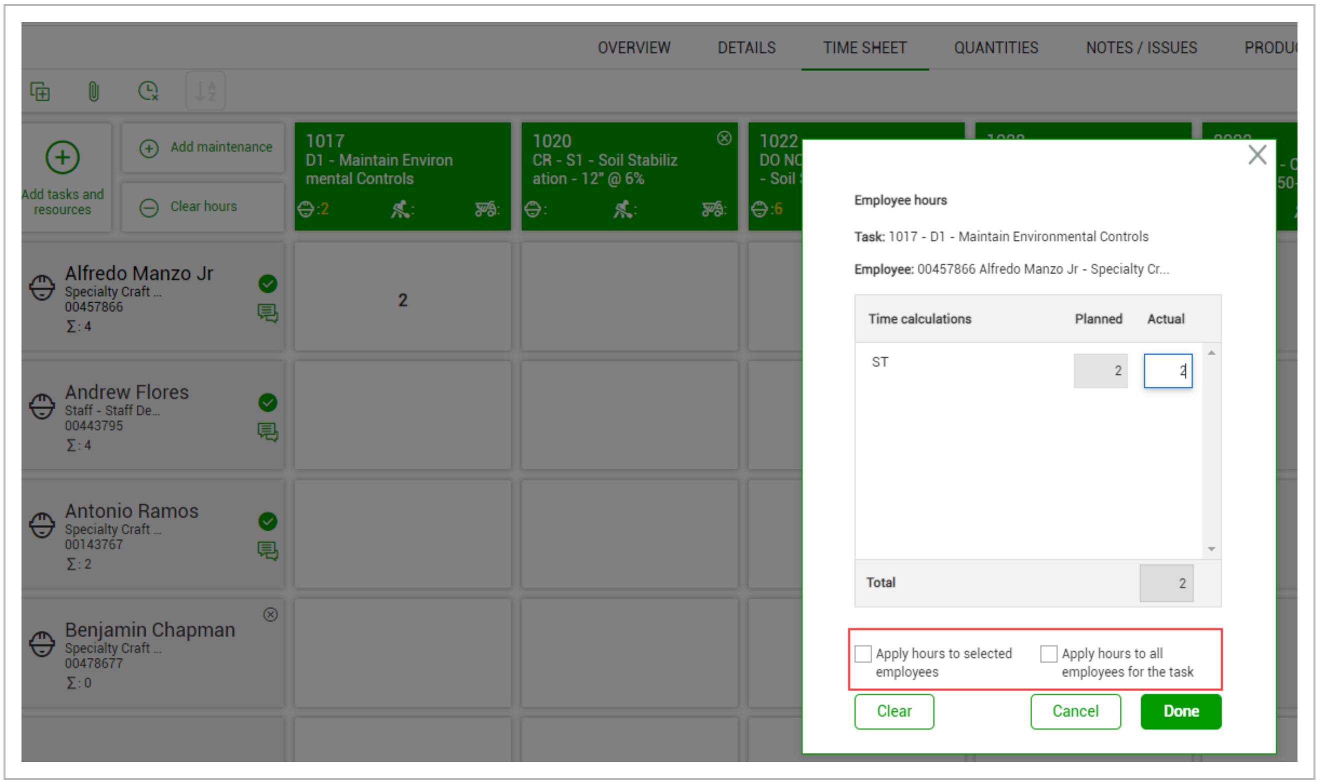
4. Click the **Add** icon, and then select a reason code.
5. Enter the number of hours you expect the employee to work in the blank field, and then click **Done**.

NOTE You can also click the **Premiums** icon to apply premiums to hours if they are set up for your project.

2.3.4.1 Apply hours to multiple employees

You can apply hours to multiple employees on the web. When you click the intersection of an employee and a task, the Employee hours dialog box now has the following options:

- Apply hours to selected employees: This option lets you select the intersections of employees and tasks to apply the entered hours. When you are finished selecting intersections, click Done.
- Apply hours to all employees for the task: This option automatically applies the entered hours to all employees.

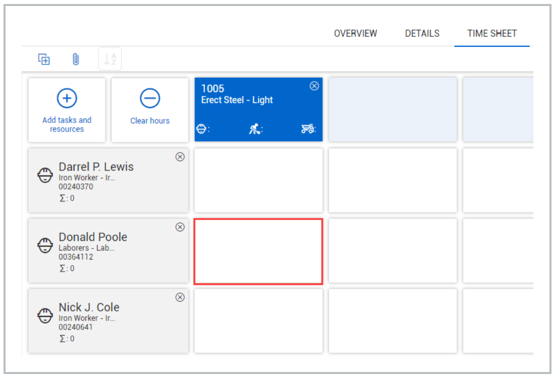


The following steps walk you through entering planned equipment hours and operator hours for an employee into a daily plan. You must have added an employee, a piece of equipment, and a task to the time sheet.

NOTE These steps assume that your project has reason codes enabled. If you do not use reason codes, the labor and equipment hours entry dialog boxes look slightly different.

Enter planned euipment hours into a daily plan

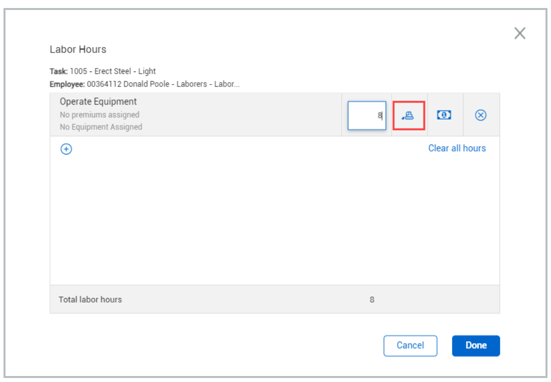
1. Open your daily plan.
2. Click on the **Time sheet** tab.
3. Click in the hours entry cell for your first listed worker. The Labor Hours dialog box opens.



4. Click the **Add** icon, and then select the **Operate Equipment** reason code. Click **Done**.

   NOTE The Operate Equipment reason code might be called something different depending on how reason codes are set up for your organization.

5. Enter the number of hours you expect the employee to operate the equipment in the blank field.
6. Click the **Equipment** icon, and then select the piece of equipment the employee will be operating. Click **Done**.



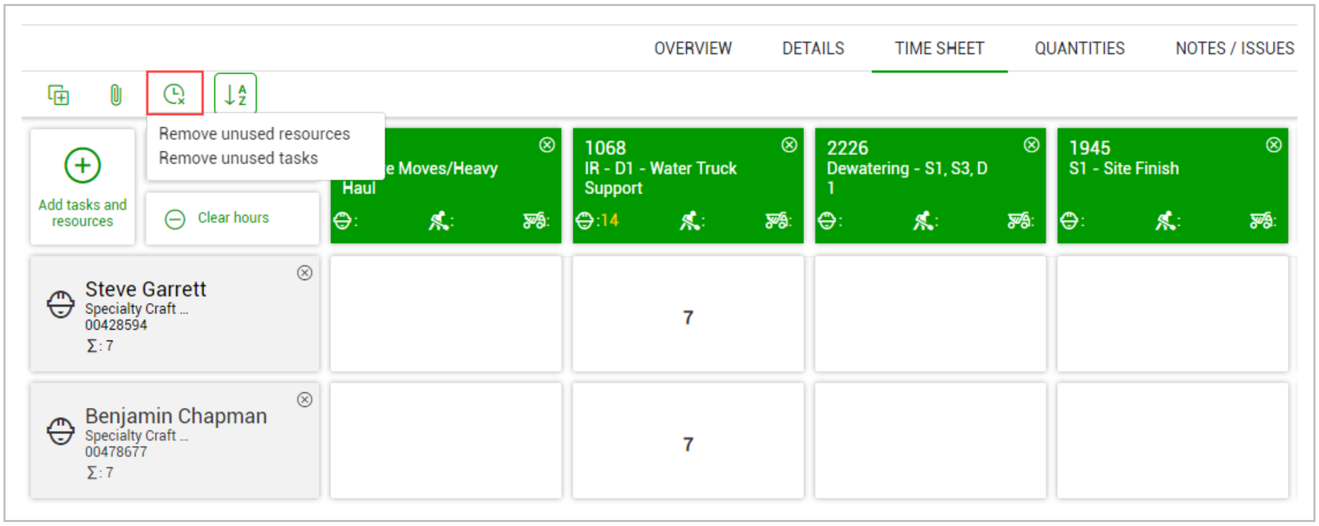
Click **Done**.

TIP You can also add equipment hours without an operator by clicking the hours entry field for the equipment, and then adding hours only to the equipment.

2.3.4.2 Remove unused tasks and resources

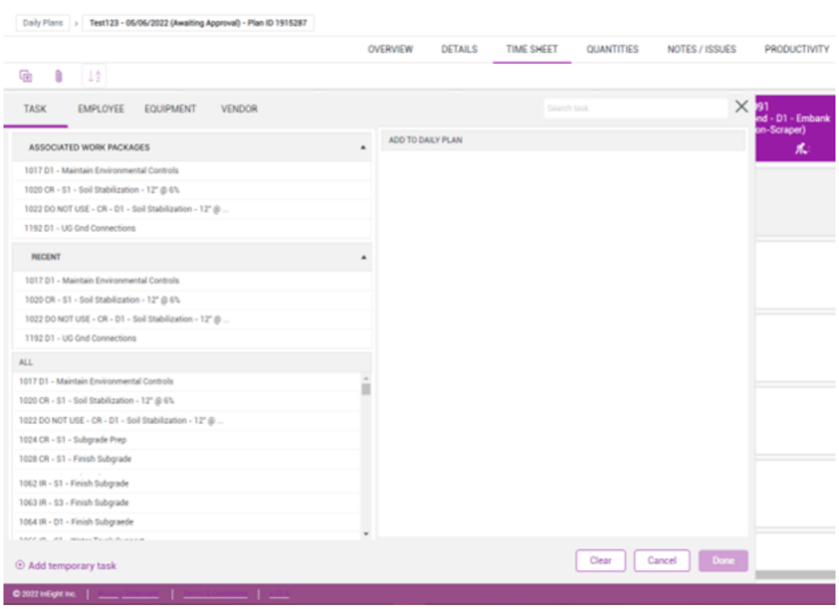
You can remove all unused tasks or resources from a daily plan at the same time. At the top of the Time Sheet tab, click the **Remove unused tasks and resources** icon, and then select one of the following options:

- 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.



Resources Association

When adding resources in time sheets, you can access associated work packages. When selected and added to the plan, the associated work packages will no longer show. A work package in IWP must have resources, equipment, labor, or components with tasks or WSB associations, to bring values into the relevant fields.

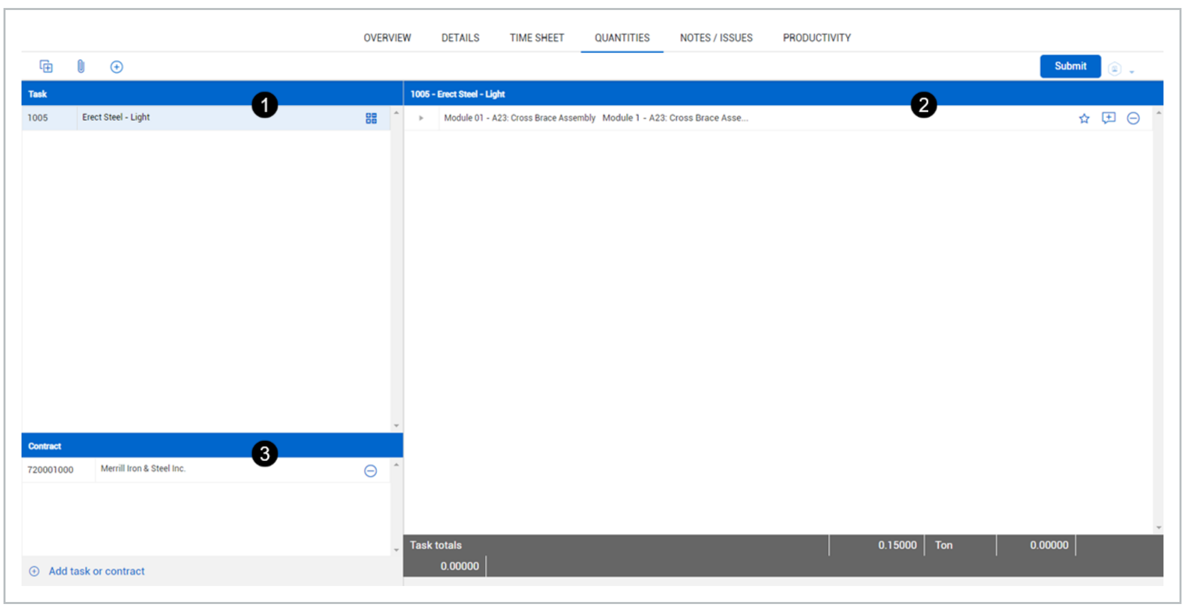


2.3.5 Quantities Tab

The **Quantities** tab is where you can view, add, or remove the components assigned to each task in your daily plan. The Quantities tab is also where you input the planned quantities to be installed for each component.

Overview – Quantities Tab of a Daily Plan

Title		Description
1	Task list	Where all tasks assigned to the daily plan are listed. Tasks can also be added or removed here. The task on the quantities tab corresponds with the task column on the time sheet tab. Populating additional task in either location populates it in the other.
2	Components list	Where all components for each task assigned to the daily plan are listed. Components can also be added or removed here.
3	Contracts list	Where all contracts assigned to the daily plan are listed. Contracts can also be added or removed here. If contracts are not available, this area is not shown.

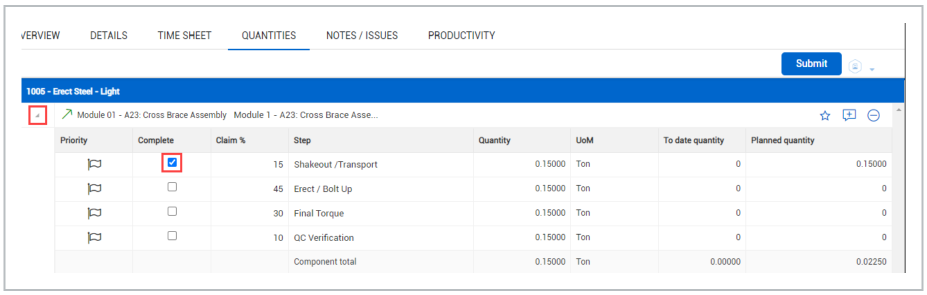


The following steps walk you through how to input the planned quantity for components into a daily plan.

Enter planned quantities into a daily plan

1. Open your daily plan.
2. Click the **Quantities** tab.
3. In the components list, click the arrow next to your claiming scheme.
4. Select the **Complete** check box for the completed steps of the claiming scheme.

NOTE	Selecting Complete indicates you plan for 100% of that step to be completed that day



To calculate a breakdown of the cost and component quantities of a selected task, select the **slide-out panel** icon 

2.3.6 Notes/Issues Tab

The **Notes/Issues** tab is where you can enter additional important information pertaining to the daily plan. You can associate notes and issues to specific tasks, employees, equipment, and components as needed. You can also tag notes and issues with a variety of topics such as quality, safety, environmental, and many others.

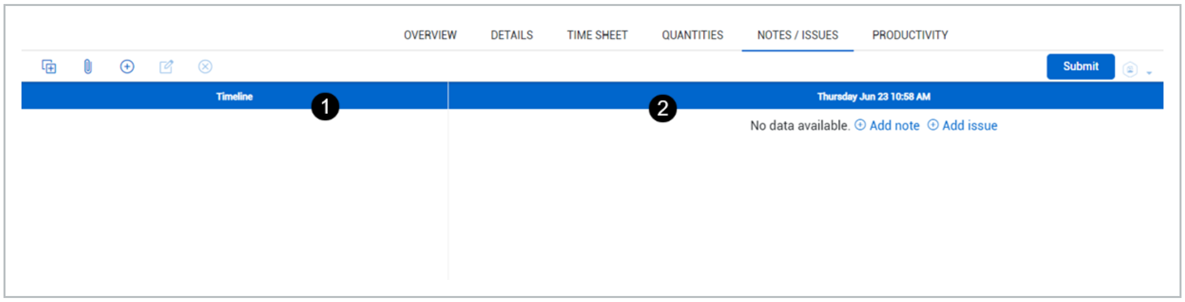
TIP	If your company uses InEight Change, issues generated in Progress are imported to Change automatically for managing those issues, along with potential and contract change orders.

Overview – Notes/Issues Tab of a Daily Plan

	Title	Description
1	Timeline	Where all notes for a daily plan display in a chronological order,

Overview – Notes/Issues Tab of a Daily Plan (continued)

	Title	Description
		with most recent at the top.
2	Notes/Issues Creation Area	Where notes and issues are created.

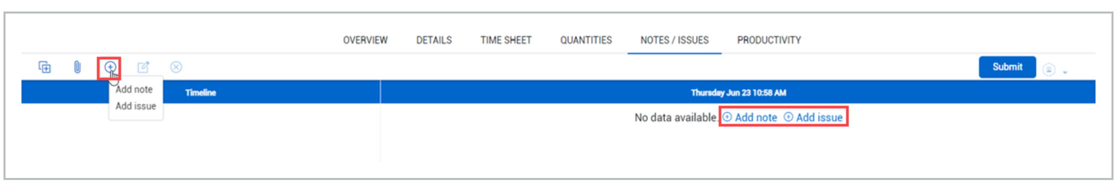


The following Step by Step walks you through how to create a note or issue, and add a tag, association, and photo to that note or issue.

Create a note in a daily plan

1. Open your daily plan.
2. Click the **Notes/Issues** tab.
3. Click the **Add** icon in the upper left, and then select **Add note**or **Add issue**.

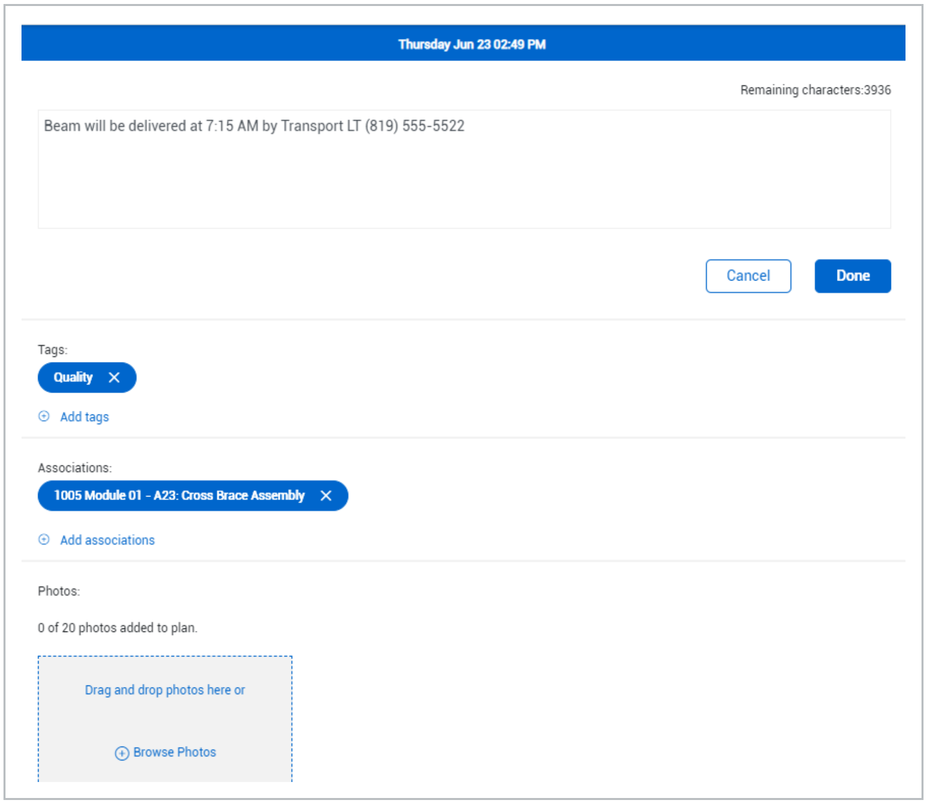
> NOTE If there are no existing notes, you can also click **Add note** or **Add issue** in the notes area on the right.



4. For a note, enter a description for the crew in the text field. For an issue, enter an issue name and issue start date.

   For an issue, you can also select a task associated with the issue.

5. You can tag notes or issues. Tags are defined by your organization and project. Click **Add tags**, and then select a tag in the slide-out panel. Click **Done** to close the slide-out panel.
6. You can associate notes or issues with tasks, employees, equipment, and components in the daily plan. Click **Add associations**, and then select associations in the slide-out panel. Click **Done** to close the slide-out panel.



7. You can attach photos to a note or issue. Under Photos, click **Browse Photos**, and then select an image file. A preview of the photo is shown.

NOTE	You can add up to 20 photos to a plan.

8. Click **Done**.

2.3.7 Productivity Tab

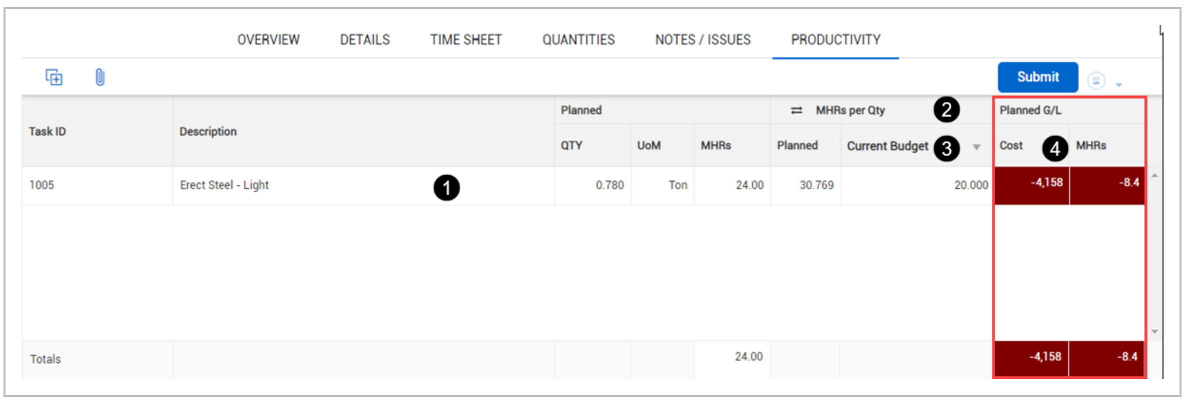
On the **Productivity** tab, you can:

- Toggle the view to see planned production by man-hours per quantity or quantity per man-hours.

- View the planned gain/loss in both dollars and man-hours against the current estimate, current budget, forecast, actuals, or goals, . Selecting the goals option will allow you to manually input a goal unit rate to compare planned and actual crew performance against.
- View the Planned G/L.

Overview – Productivity Tab of a Daily Plan

Title		Description
1	Summary	View a summary of the planned quantity, unit of measure and man hours for each task.
2	Productivity toggle	Switch the view to see planned production by man-hours per quantity or quantity per man-hours.
3	Productivity factor	View the gain/loss versus current estimate, current budget, forecast, actuals, and goals, in both dollars and man-hours.
4	Planned G/L calculator	Contains comparison formulas for the costs and man hours of your plan and your budget.



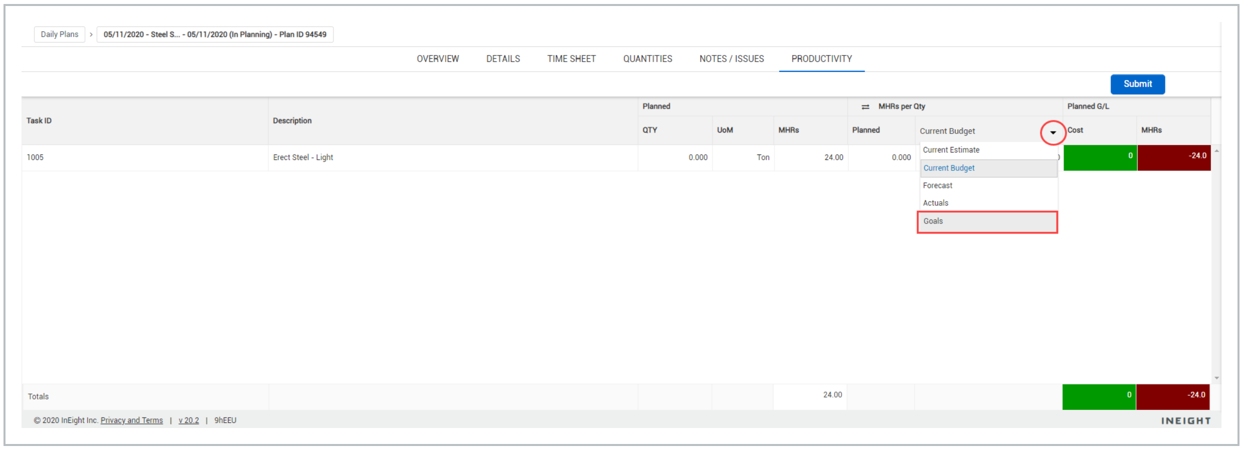
The Planned G/L compares the cost and man-hours of your daily plan to the costs and man-hours budgeted in InEight Control for the planned scope of work using the following equations:

- *Planned Cost G/L = (Sum of (Total planned quantity for the WBS * CE/CB/Forecast/Goals final unit cost) - (Planned total cost of labor + Planned total cost of equipment))*
- *Planned total cost of labor = Sum of Total number of hours worked by the employee * Hourly rate of the employee*
- *Planned total cost of equipment = Sum of (Total number of equipment hours operated * Hourly Unit rate of the equipment)*

The following steps walk you through how to enter a goal productivity factor for a daily plan.

Enter a Goal Productivity Factor for a Daily Plan

1. Open your daily plan.
2. Open the **Productivity** tab. If needed, click the **Productivity toggle** button to switch to MHRs per Qty.
3. Click the **Current Budget** column header.
4. Select **Goals** from the drop-down list.



5. Enter your goal number rate of man hours per quantity in the free text box under the Goals column header.

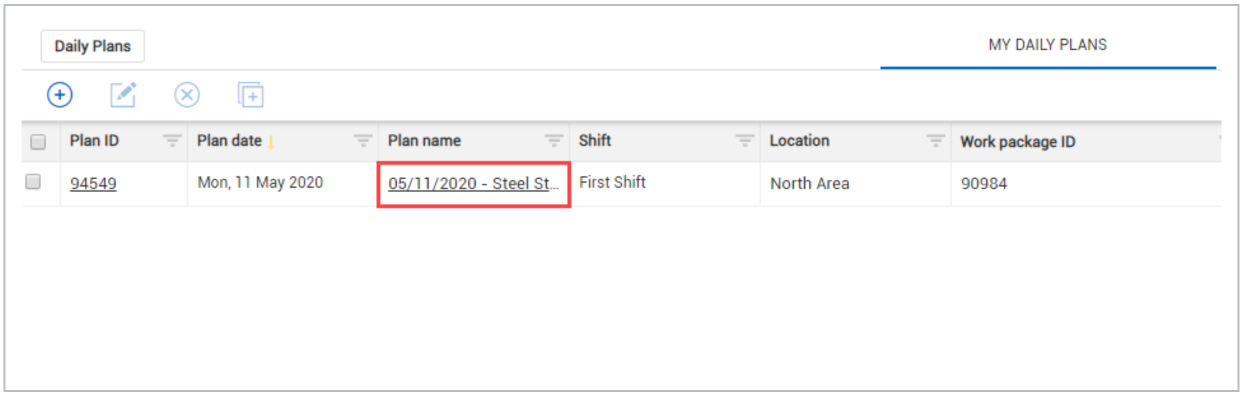
2.3.8 Submit a Daily Plan to Execution

Once you have thoroughly filled out the daily plan, the final step is to submit the plan for execution. By submitting the plan to execution, you are ending the Planning Phase and verifying that the plan is ready to be handed off to a foreman for his crew to execute the work. Once you submit the plan, you cannot “un-submit”.

The following Step by Step walks you through how to submit a daily plan to the Execution Phase.

Submit a Daily Plan to Execution

1. Open your daily plan.



2. Click **Submit** in the upper right corner.
   - A dialog box opens verifying you want to submit the plan to execution

   > NOTE If you want to associate your work packages in InEight Document, select a Work plan or package ID - Name from the Overview tab. A new Document icon appears in the upper-right corner of the tab. Select this icon to see a drop-down list of work packages to open in Document.

3. Click **Yes**.

2.4 DAILY PLAN FROM COPY

In this topic, you will create a daily work plan as a copy of an already existing daily plan.

2.4.1 Copy a Daily Plan

In some cases, you will need to create a very similar daily plan for multiple days with only a few small changes from day to day. Instead of performing the entire process of creating a daily plan from a work package multiple times, the best process would be to:

1. Create one daily plan using the Daily Plan Wizard.
2. Create a copy of that daily plan.
3. Make changes as necessary for each subsequent day.

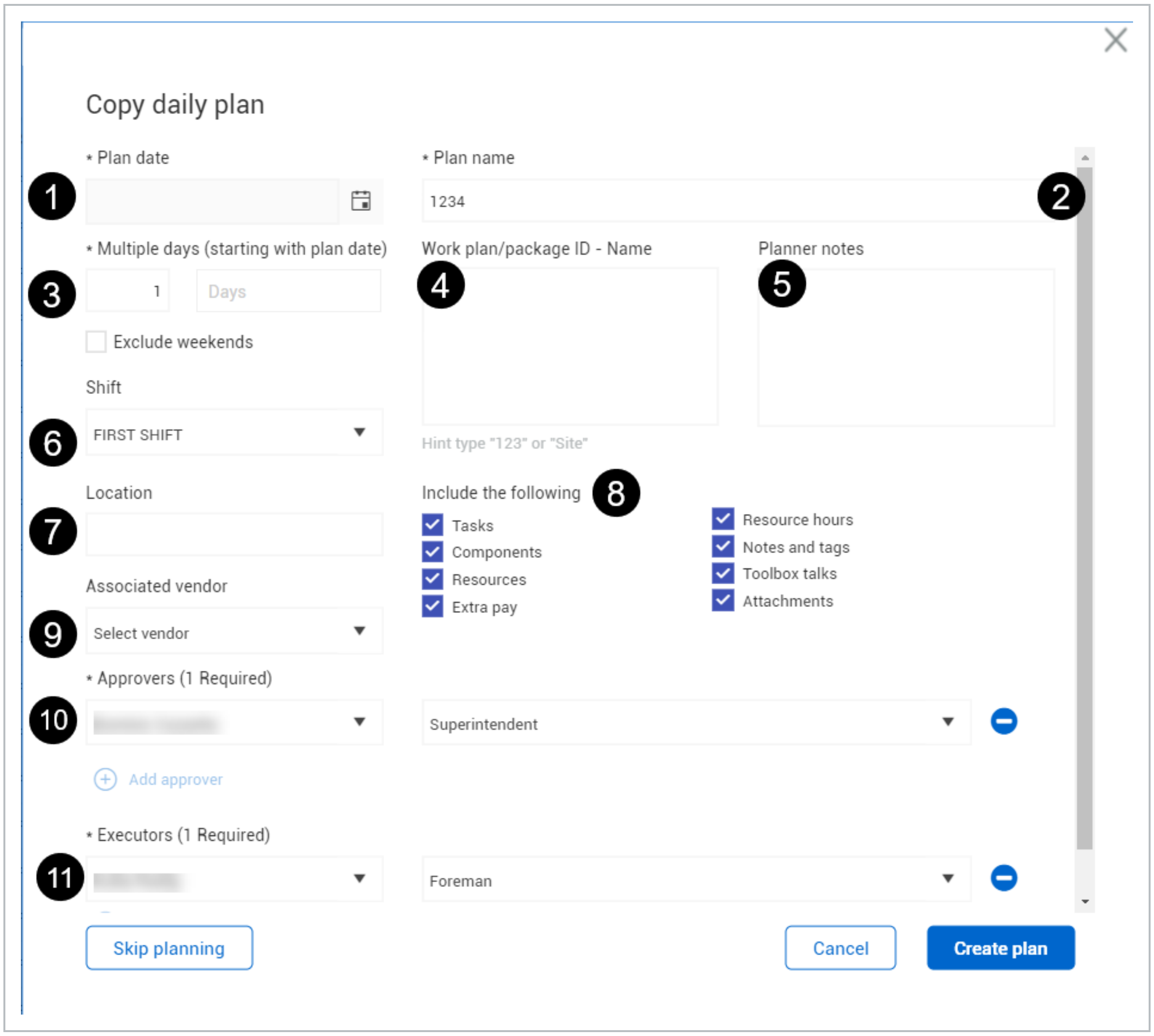
The process to create a copy of an already existing daily plan is like that of using the Daily Plan Wizard. You will need to fill out a window similar to the wizard; however, this window will give the option to copy over all the information you entered in the Planning Phase.

Overview – Copy Daily Plan Window

Title		Description
1	Plan date	The date that the plan will be executed.
2	Plan name	Unique name for the daily plan; this will auto populate with copy - [name of plan you just copied] and should be edited to your desired daily plan name.
3	Multiple days	Specify how many days to copy a daily plan to starting with the entered plan date. You can also select whether to exclude weekends. You can copy to a maximum of 99 days.
4	Work plan/package ID-Name	You can enter a work plan ID here if you want the plan to reference an existing work plan/package.
5	Planner notes	A free text field where any relevant notes can be added in.
6	Shift	A drop-down field where you can select either First, Second or Third Shift.

Overview – Copy Daily Plan Window (continued)

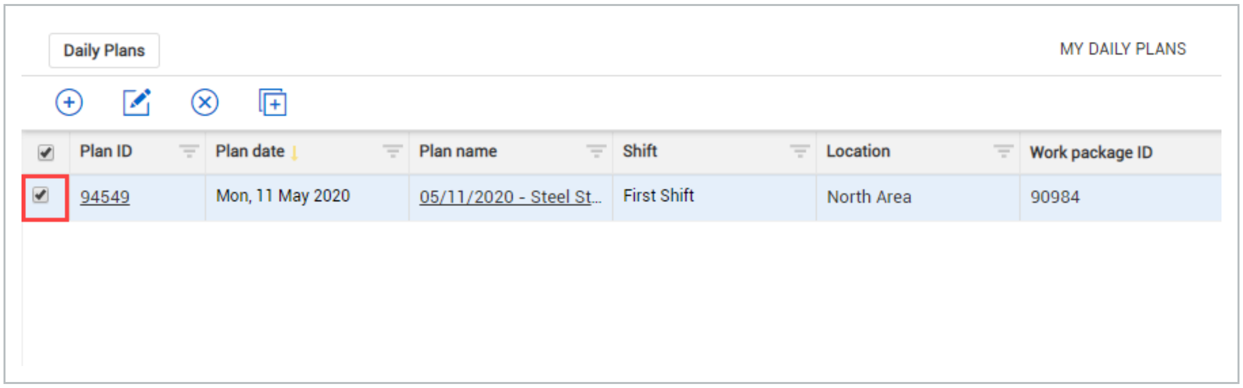
Title		Description
7	Location	A free text field where the location of where the work will be performed can be entered.
8	Include the following check boxes	Allows users to select which attributes from the plan that is being copied will be populated in the new plan.
9	Associated vendor	From the drop-down list, you can associate a vendor assigned to the project in InEight Control.
10	Approvers	From the drop-down list, you can add the responsible approver(s) of the daily plan. Superintendent and/or Engineer is a common choice.
11	Executors	From the drop-down list, you can add the assigned user responsible for executing the daily plan.



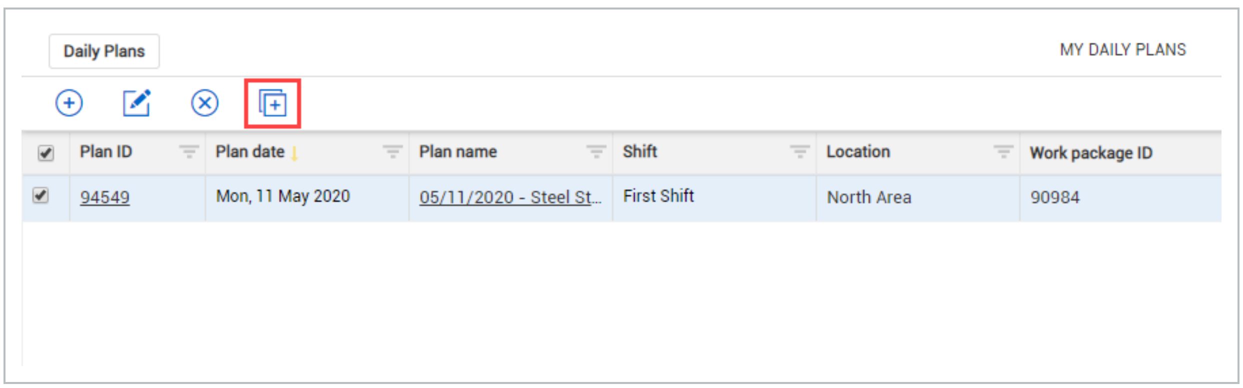
The following Step by Step walks you through how to create a copy of a daily plan.

Create a Daily Plan by Copying an Existing Daily Plan

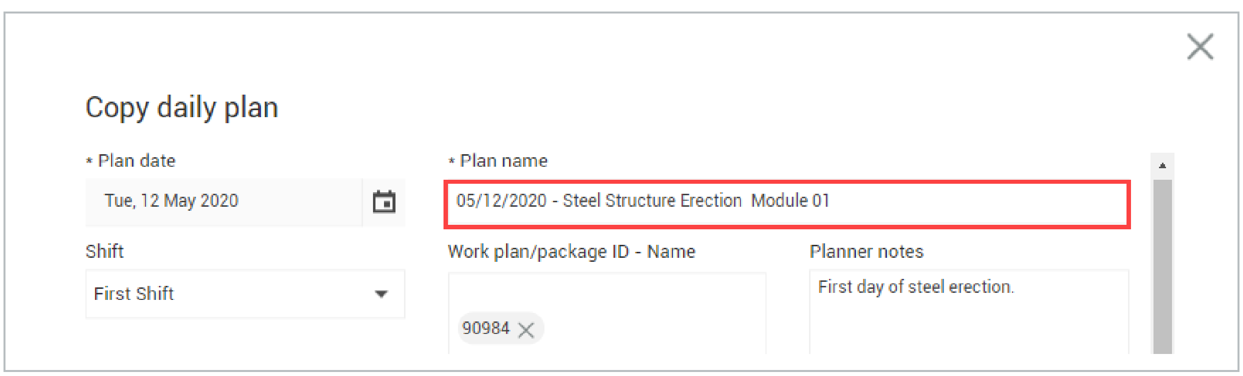
1. From the Daily Plans page, check the box in the far-left column of your daily plan to select it.



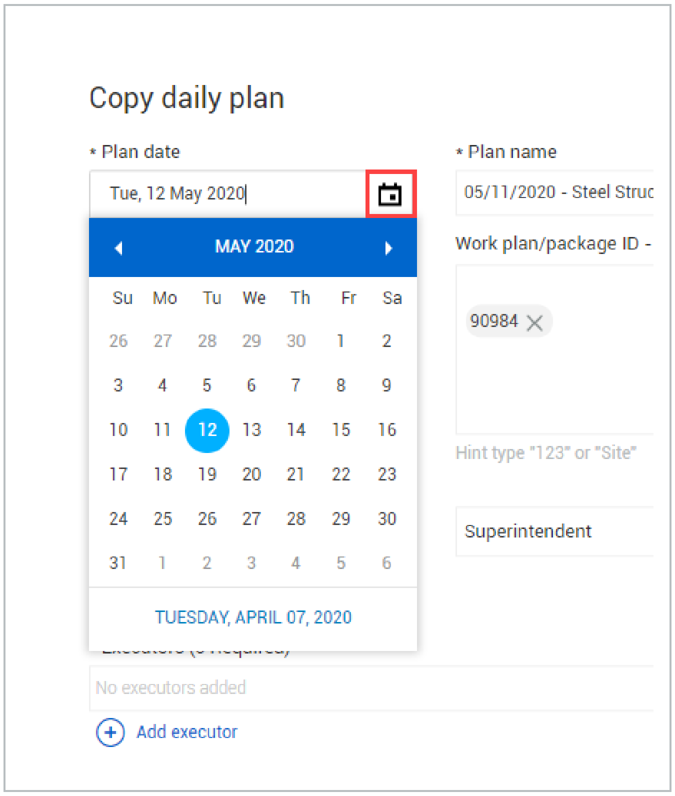
2. Click on the **Copy** icon on the toolbar.
   - This will open the Copy Daily Plan pop up window



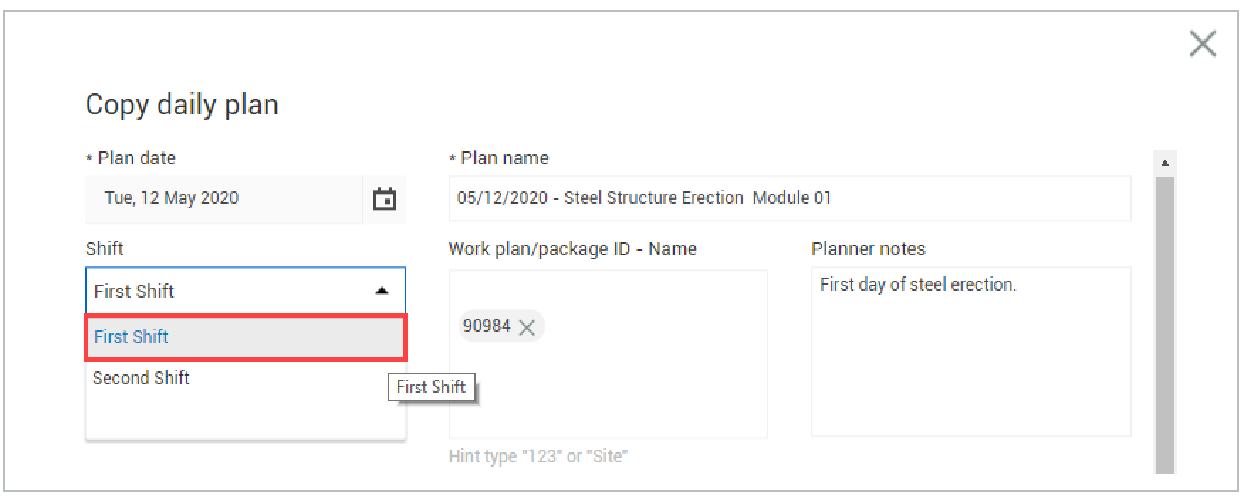
3. Rename your new plan.



4. Click on the **Calendar** icon in the Plan Date Field and select a date.



5. Select a shift from the shift drop-down menu.



- The Work Plan ID, Approvers, Executors, Location and Shift should all be auto-populated with the same values as the plan you copied. Do not change these fields

6. Enter any notes the Planner notes field.

7. Verify all check boxes are selected in the section called Include the following.

> NOTE The Premiums check box is only enabled if the Resources, Extra pay, and Resource hours check boxes are selected.

8. Click **Create Plan**.

> NOTE Do not click on the Skip Planning button. This pushes the daily plan directly to the Execution phase.

At this stage, an exact replica of your existing daily plan has been created. All tasks, components, employees, equipment, notes, planned quantities and tool box info has been copied over

2.5 DAILY PLAN FROM SCRATCH

In this topic, you will create a daily plan from scratch utilizing the InEight Progress web application.

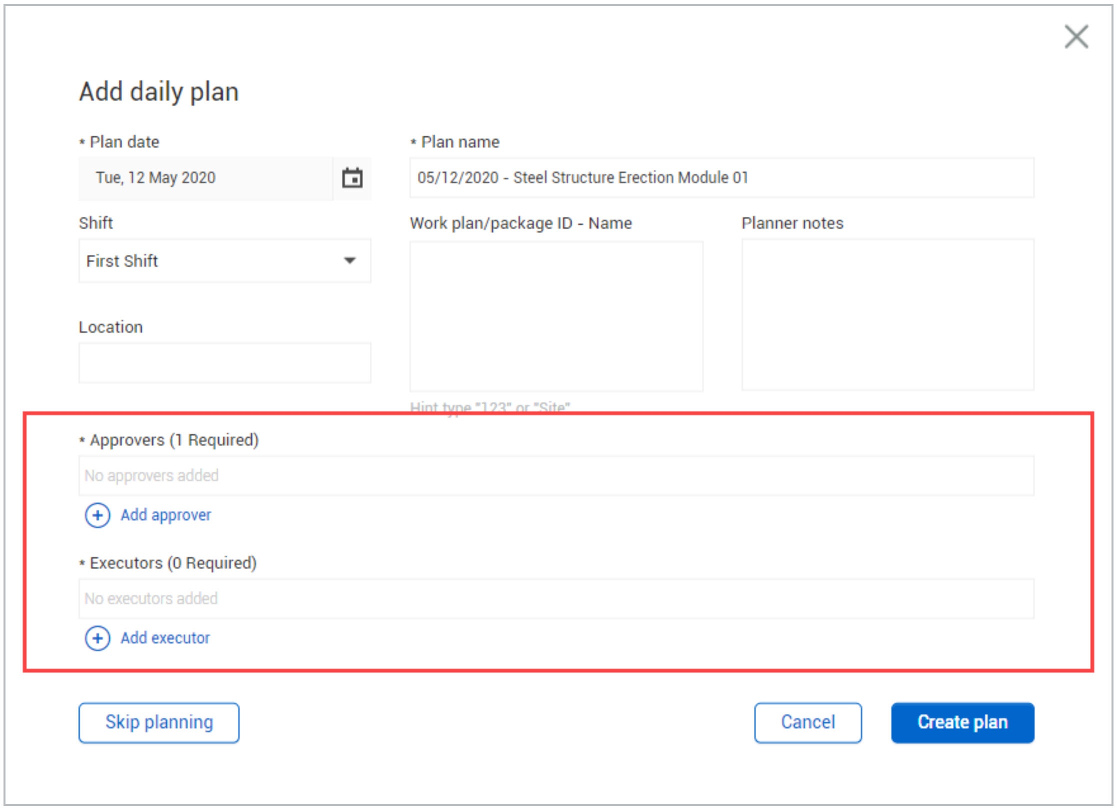
2.5.1 Daily Plan from Scratch

In some cases it may be necessary to create a daily plan without a work package or other daily plan to use as a starting point. In this case, you will need to create a daily plan from scratch. The biggest difference between creating a daily plan from scratch and the other two methods covered earlier is that you must add all resources, tasks, and components to the plan manually.

When creating a daily plan from scratch, you will use the Add daily plan window. This window is very similar to the Daily Plan Wizard covered earlier in the lesson, except there is only one tab for entering setup information.

2.5.1.1 Approver and Executor Roles

Depending on the project settings of your project, your daily plans will require an Approver and/or an Executor. You select Approvers and Executors from a drop-down list of the users assigned to your project.



When deciding on Approver and Executor roles for daily plans, it is important to note that if you use both an Approver and Executor for your daily plans, only the Approvers can have permissions to approve daily plans. Executors must NOT have permissions to approve daily plans.

For example, your project administrator may plan to only allow employees with the Superintendent role to act as Approvers on daily plans. Under the permissions for the Superintendent role, your administrator would ensure that the **Approve daily plan** permissions are enabled.

If you planned to allow employees assigned to the Foreman role to act as Executors for daily plans, your project administrator would need to edit the Foreman role to make sure the **Approve daily plan** permissions are UNCHECKED.

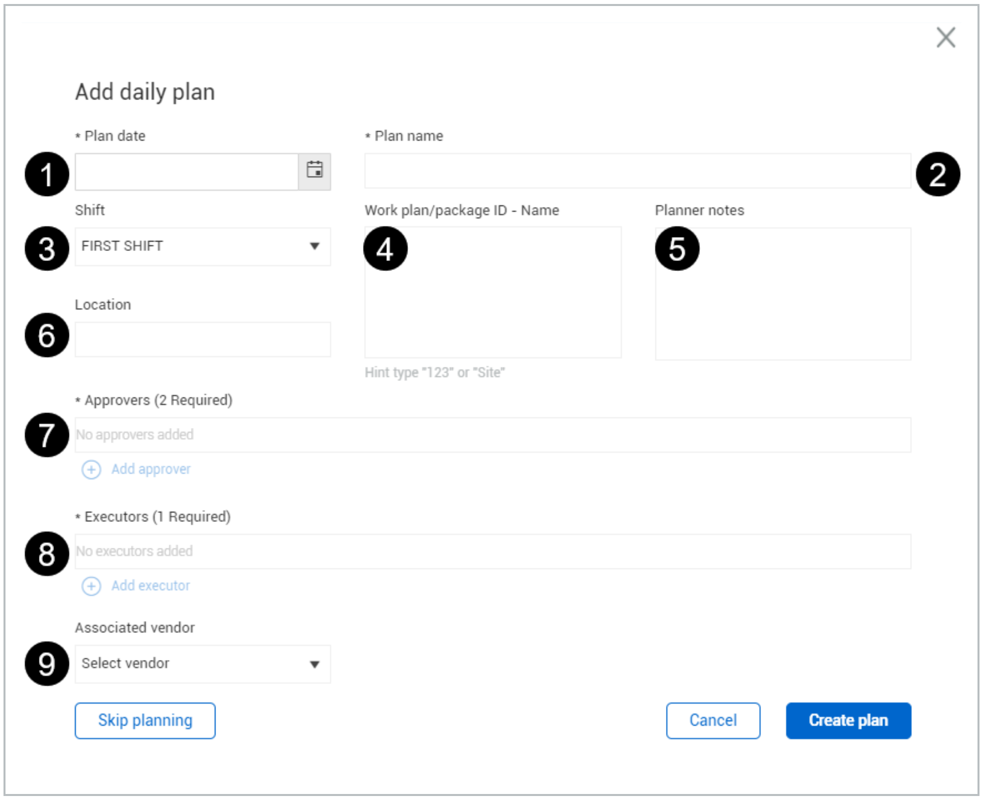
2.5.1.2 Vendor association

In InEight Control, you can assign vendors to individual cost items to indicate that a certain scope of work will be completed by a third-party vendor. That vendor data can be used in daily planning.

You can associate vendors to a daily plan using the Associated vendor field. Select a vendor from the drop-down list. Available vendors are populated based on vendor associations for your project in Control.

Overview – Add Daily Plan Window

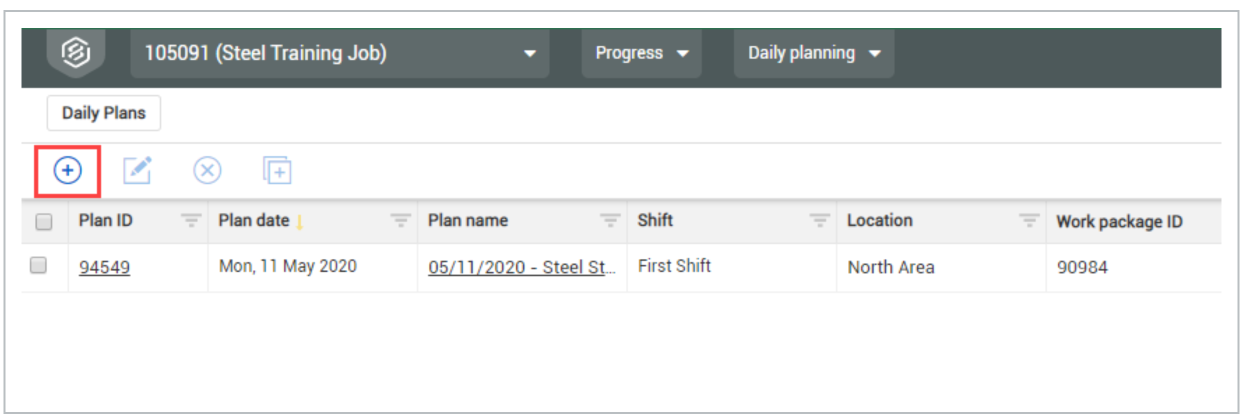
Title		Description
1	Plan date	The date that the plan will be executed.
2	Plan name	Unique name for the daily plan.
3	Shift	A drop-down field where you can select either First, Second or Third Shift.
4	Work plan/package ID-Name	You can enter a work plan ID here if you want the plan to reference an existing work plan/package.
5	Planner notes	A free text field where any relevant notes can be added in.
6	Location	A free text field where the location of where the work will be performed can be entered.
7	Approvers	From the drop-down field, you can add the responsible approver(s) of the daily plan. Superintendent or Engineer is a common choice.
8	Executors	From the drop-down field, you can add the assigned user responsible for executing the daily plan.
9	Associated vendor	Select a vendor from the drop-down list. Available vendors are populated based on vendor associations for your project in InEight Control.



The following Step by Step walks you through how to create a daily plan from scratch.

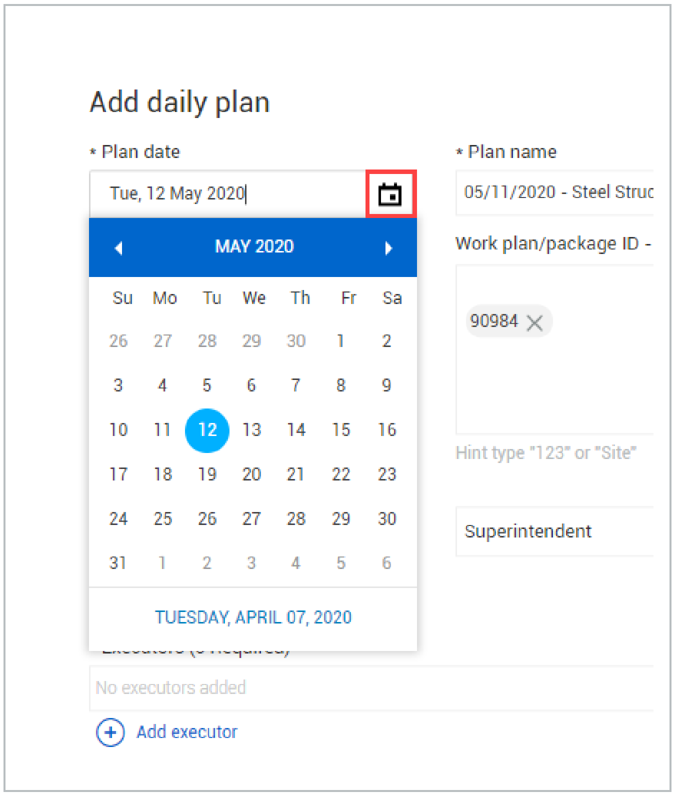
Create a Daily Plan from Scratch

1. From the Daily Plans page, click the **Add** icon in the upper left corner.

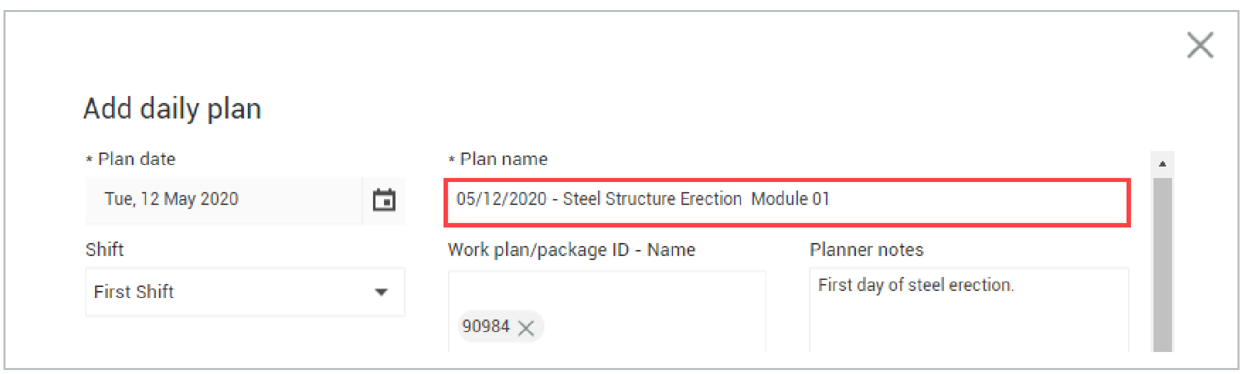


   - This opens the Add daily plan window

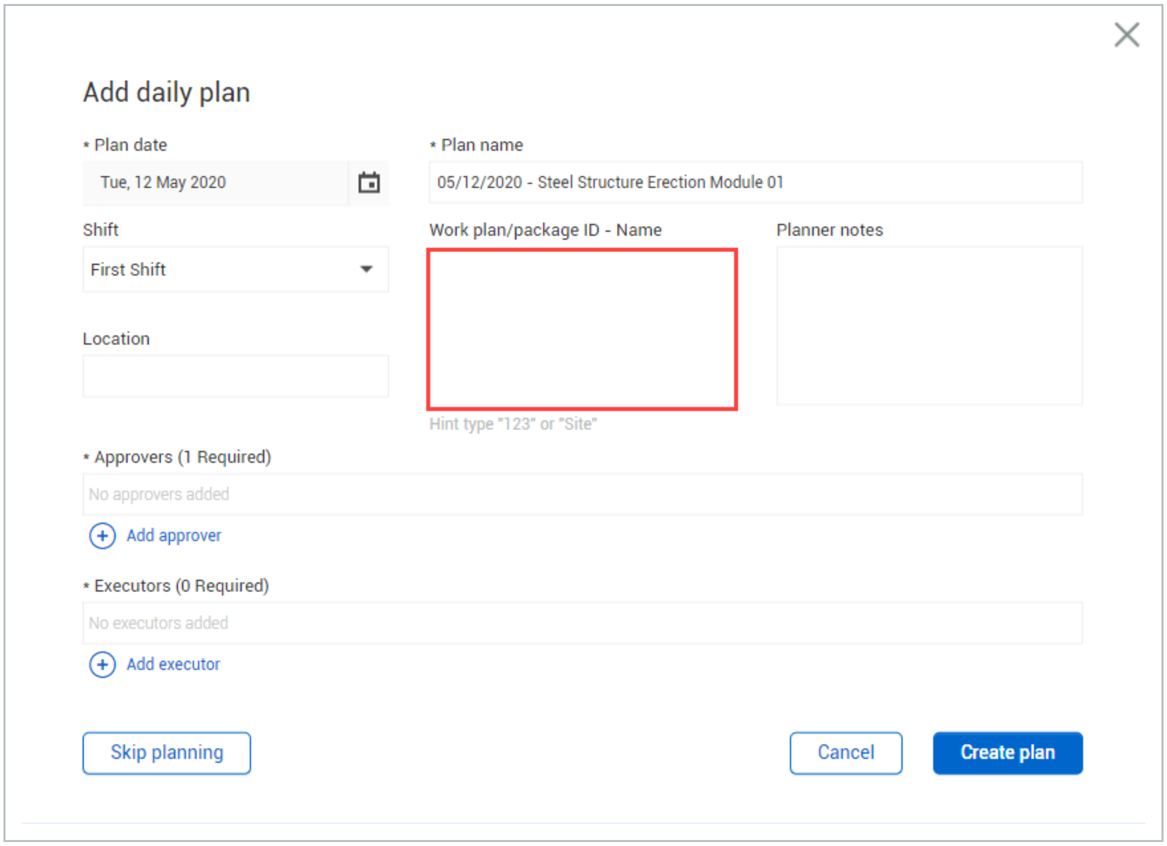
2. Click on the **Calendar** icon in the Plan Date field and select a date.



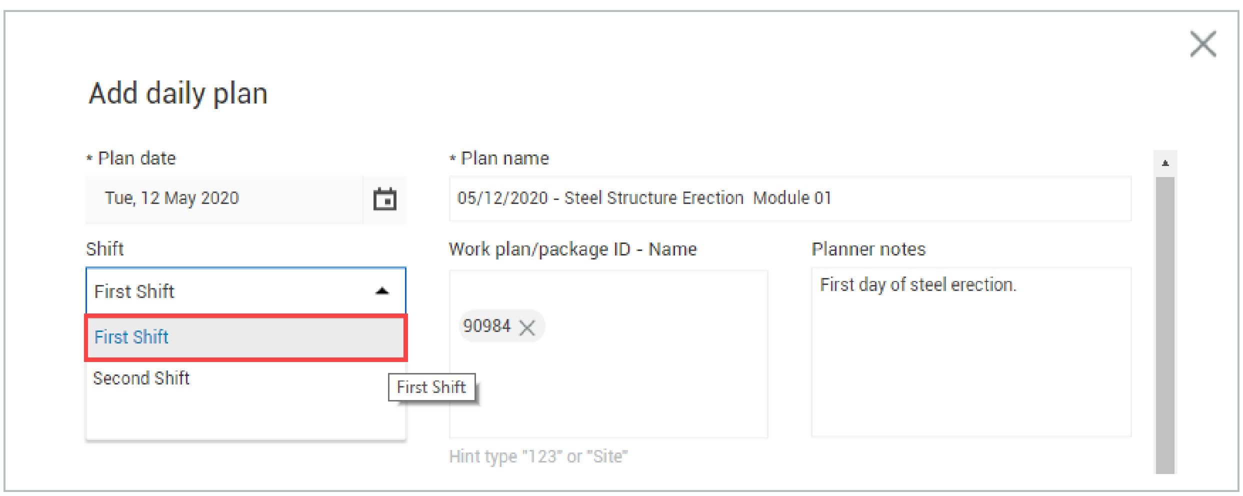
3. Name your daily plan.



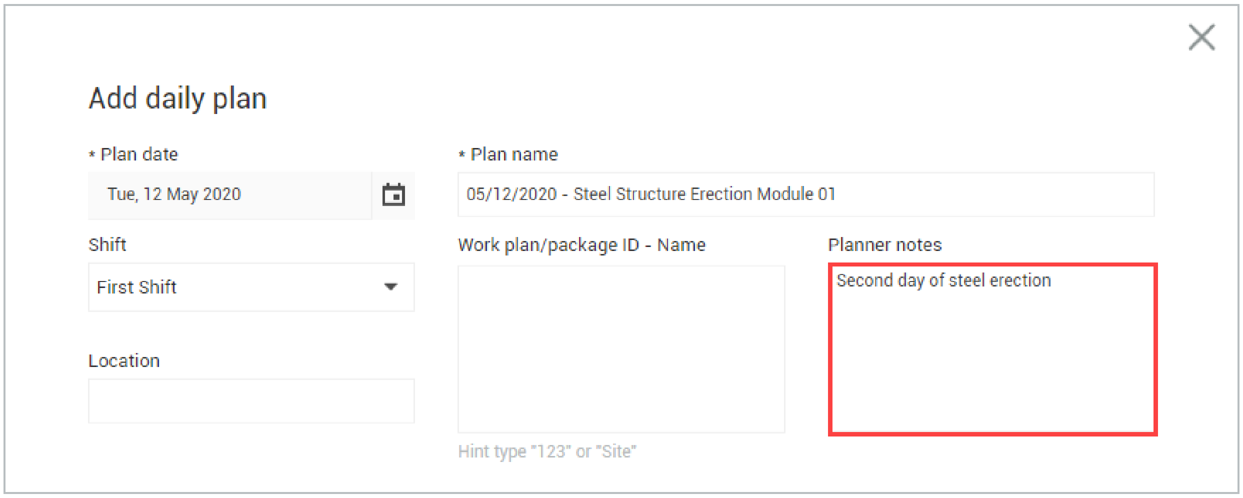
- Leave the Work plan ID field blank



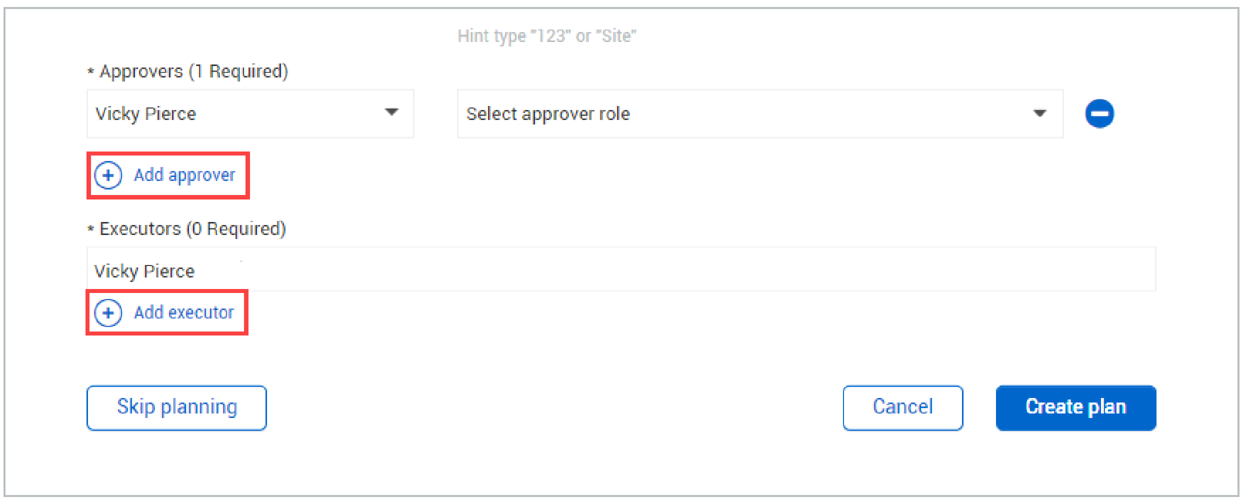
4. Select a shift from the drop-down menu of the Shift field.



5. Enter any notes in the Planner notes field.



6. Click **Add approver** and select someone from the drop-down menu.
   - You may need to search for the name
7. Click **Add executor** and select someone from the drop-down menu.



8. Click **Create Plan**.

NOTE	Do not click on the Skip Planning button; this will push the daily plan directly to the Execution Phase.

3.1 ATTACHMENTS ON THE WEB

In the web application, you can attach files to a daily plan and view them in both the web and mobile applications.

3.1.1 Attach a File in a Daily Plan

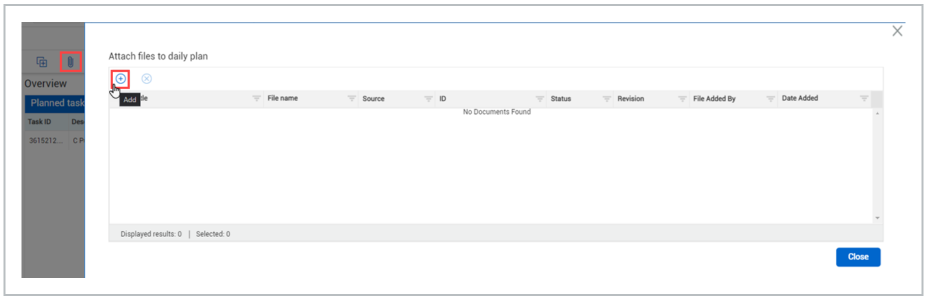
You can attach files from inside an individual daily plan.

TIP	You can also attach files to multiple daily plans from the Management console.

The following Step by Step shows you how to attach a file from your machine to a daily plan.

3.1 Step by Step 1 — Attach a File in a Daily Plan

1. Open a daily plan during any phase of daily planning, and then click the **Attach File** icon in the upper left of the page.
2. Click the **Add** icon in the Attach files to daily plan dialog box.



3. Click **SELECT FILES** to choose a file from your device or drag and drop a file into the gray box.
4. Click **Upload**.

To view an attachment, click a file name in the Attach files to daily plan dialog box to download the file to your device.

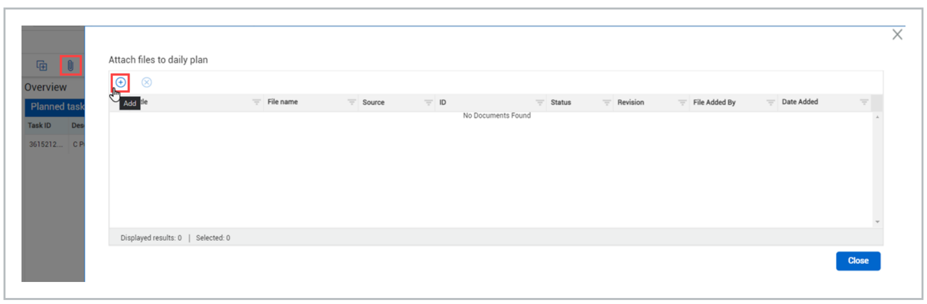
You can attach files from InEight Document inside an individual daily plan.

TIP	You can also attach files to multiple daily plans from the Management console.

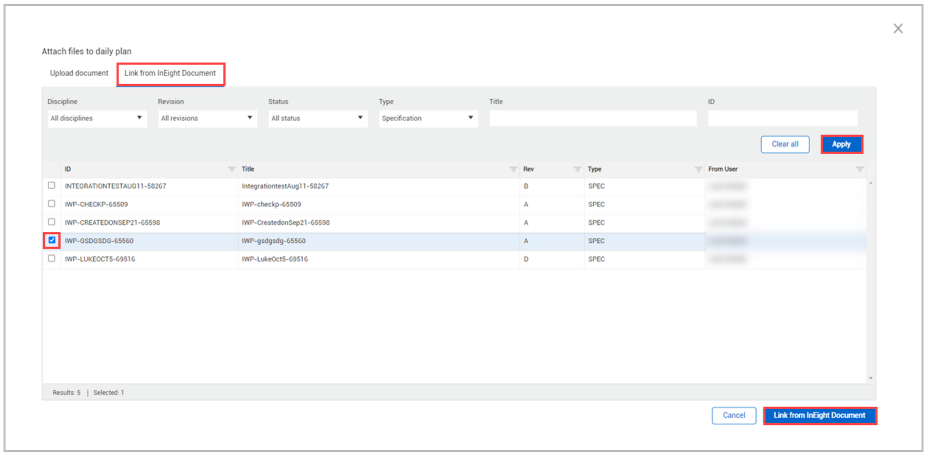
The following Step by Step shows you how to attach a file from InEight Document to a daily plan.

3.1 Step by Step 2 — Attach a Document File in a Daily Plan

1. Open a daily plan during any phase of daily planning, and then click the **Attach File** icon in the upper left of the page.
2. Click the **Add** icon in the Attach files to daily plan dialog box.



3. Open the **Link from InEight Document** tab. You can set filter criteria to narrow the list of records from Document.
4. After you set filter criteria, click **Apply**. Related Document records are shown in the table.
5. Select the files you want, and then click **Link from InEight Document**.

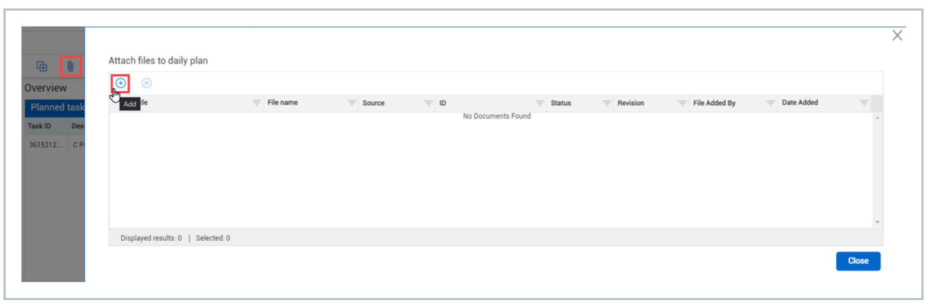


To view a Document attachment, click a file name in the Attach files to daily plan dialog box to open Document in a new window.

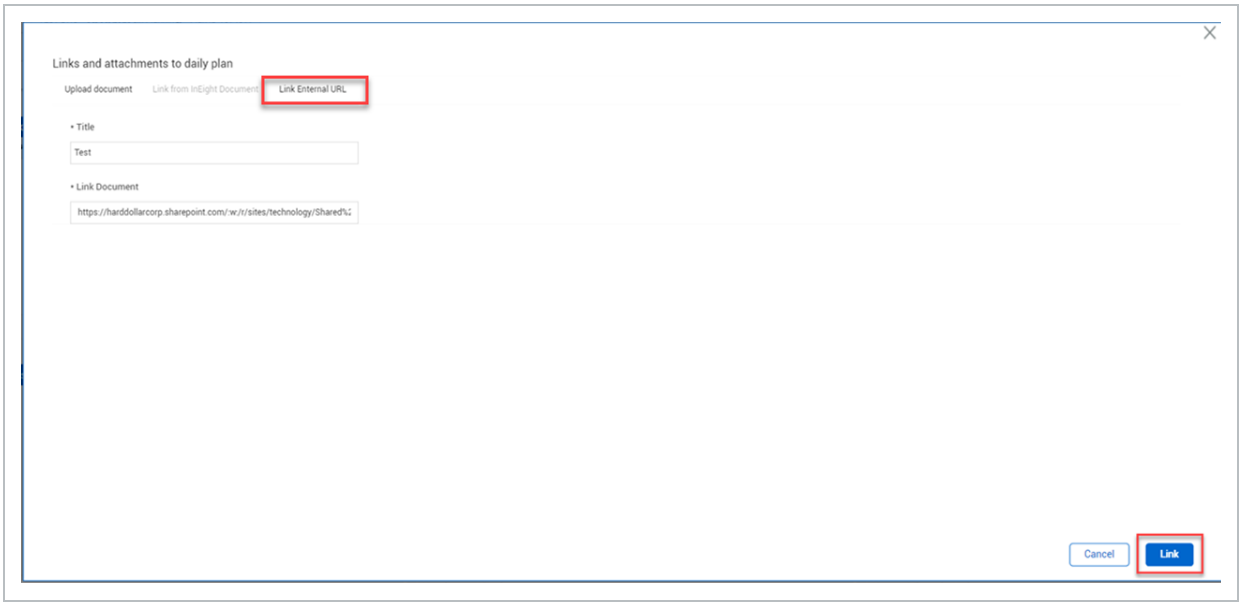
The following Step by Step shows you how to attach a file from an external URL link to a daily plan.

3.1 Step by Step 3 — Attach an External URL Link in a Daily Plan

1. Open a daily plan during any phase of daily planning, and then click the **Attach File** icon in the upper left of the page.
2. Click the **Add** icon in the Attach files to daily plan dialog box.

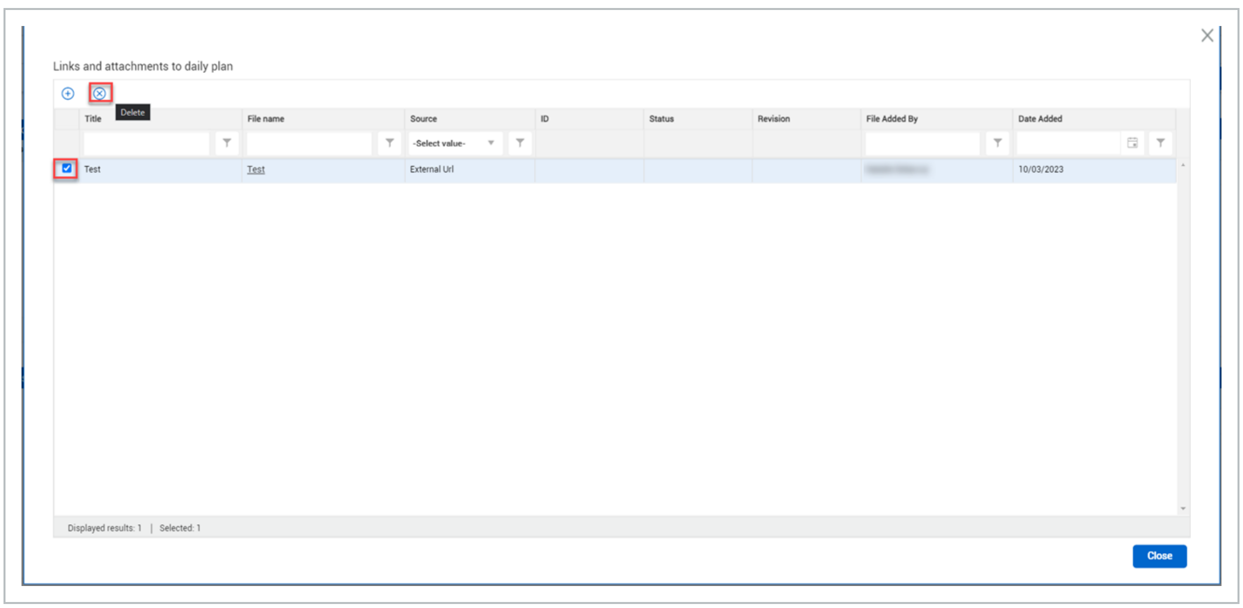


3. Select the **Link External URL** tab.



4. Add a Title and the External URL Link and then select **Link**.

   To remove an attachment from a daily plan, select the attachment and then click the **Delete** icon next to the attachment in the right panel.



3.1.2 Attach a File in the Management Console

In the Management console, you can attach files to multiple daily plans at the same time.

For more information about the Management console, see Management Console.

The following Step by Step shows you how to Aattach files from your machine using the Management console to all selected daily plans.

3.1 Step by Step 4 — Attach a File in the Management Console

1. From the Daily planning home page, select at least one daily plan, and then click **Edit multiple**.
2. Click **Attach and link files** in the left panel of the Management console.
3. In the center panel, click **SELECT FILES**, and then select a file from your device.

   TIP You can also drag and drop files into the Management console.

4. Click **Add to all daily plans**.

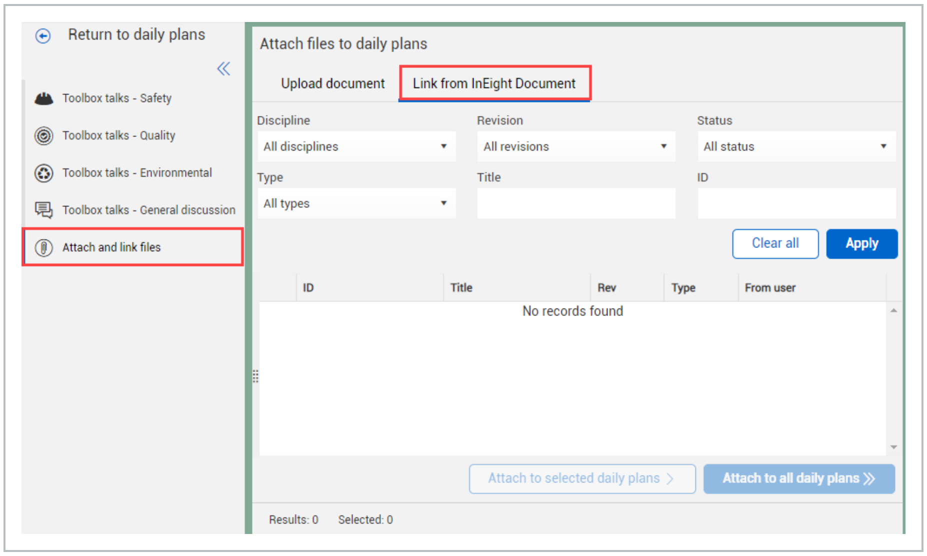
TIP You can also select specific plans in the right panel, and then click **Add to selected daily plans**.

To remove an attachment from a daily plan, click the **Delete** icon next to the attachment in the right panel.

The following Step by Step shows you how to attach files from InEight Document using the Management console to all selected daily plans.

3.1 Step by Step 5 — Attach a Document File in the Management Console

1. From the Daily planning home page, select at least one daily plan, and then click **Edit multiple**.
2. Click **Attach and link files** in the left panel of the Management console.
3. In the center panel, click **Link from InEight Document**. You can set filter criteria to narrow the list of records from Document.
4. After you set filter criteria, click **Apply**. Related Document records are shown in the table.



5. Select one or more records, and then click **Attach to all daily plans**.

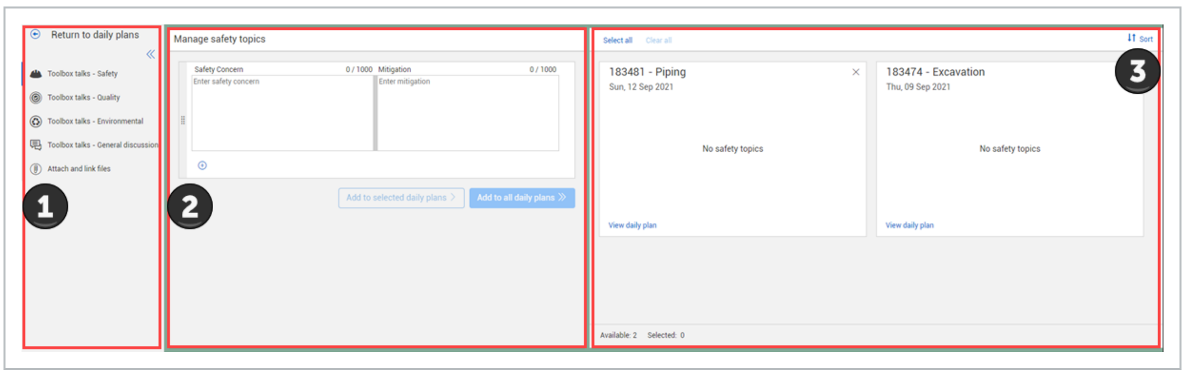
TIP You can also select specific plans in the right panel, and then click **Attach to selected daily plans**.

To remove an attachment from a daily plan, click the **Delete** icon next to the attachment in the right panel.

4.1 MANAGEMENT CONSOLE

The Management console gives you one location to manage attachments and toolbox talks for general, safety, environmental, and quality topics. The console lets you add these items and apply them to multiple daily plans at the same time.

To open the Management console, select at least one daily plan from the Daily planning home page, and then click **Edit multiple**.



The Management console has three panels:

1. The left panel is a menu of options you can manage. The options include:
   - Toolbox talks - Safety
   - Toolbox talks - Quality
   - Toolbox talks - Environmental
   - Toolbox talks - General discussion
   - Attach and link files
2. The center panel lets you add toolbox talks or attachments to daily plans in the right panel.
3. The right panel lists the available daily plans to add toolbox talks or attachments to out of the

plans that you select from the Daily planning home page.

NOTE Only plans that can be edited are shown in the right panel.

4.1.1 Add a Toolbox Talk in the Management Console

The following Step by Step shows you how to add a toolbox talk for safety to multiple daily plans at the same time.

4.1 Step by Step 1 — Add a Safety Toolbox Talk in the Management Console

1. From the Daily planning home page, select at least one daily plan, and then click **Edit multiple**.
2. In the left panel of the Management console, click **Toolbox talks - Safety**.
3. In the center panel, fill out the **Safety Concern** and **Mitigation** fields, and then click **Add to all daily plans**.

TIP You can also add multiple toolbox talks at the same time. Click the **Add** icon under the toolbox talk to add another.

TIP You can also select specific plans in the right panel, and then click **Add to selected daily plans**.

4.1.2 Attach a File in the Management Console

The following Step by Step shows you how to attach files from your machine using the Management console to all selected daily plans.

4.1 Step by Step 2 — Attach a File in the Management Console

1. From the Daily planning home page, select at least one daily plan, and then click **Edit multiple**.
2. Click **Attach and link files** in the left panel of the Management console.
3. In the center panel, click **SELECT FILES**, and then select a file from your device.

TIP You can also drag and drop files into the Management console.

4. Click **Add to all daily plans**.

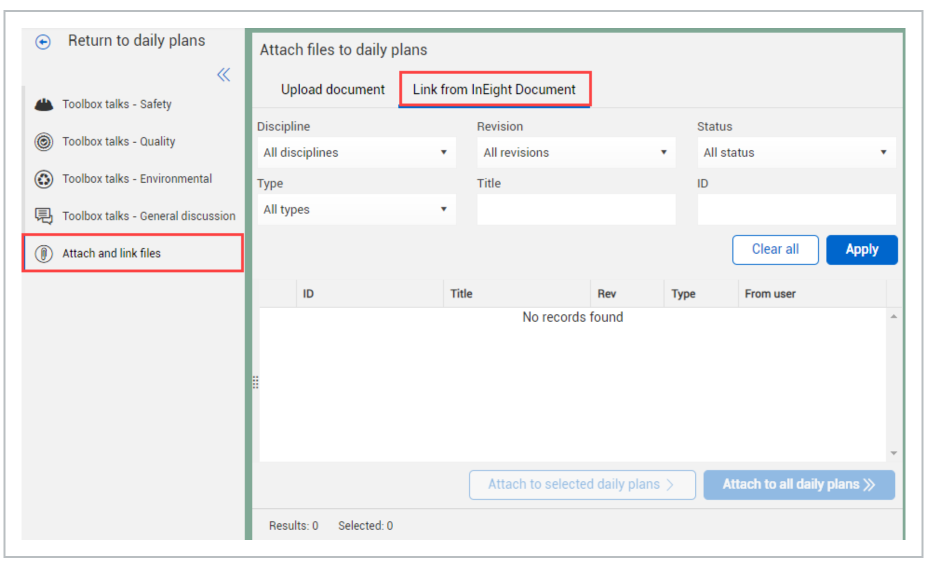
TIP You can also select specific plans in the right panel, and then click **Add to selected daily plans**.

To remove an attachment from a daily plan, click the **Delete** icon next to the attachment in the right panel.

The following Step by Step shows you how to attach files from InEight Document using the Management console to all selected daily plans.

4.1 Step by Step 3 — Attach a Document File in the Management Console

1. From the Daily planning home page, select at least one daily plan, and then click **Edit multiple**.
2. Click **Attach and link files** in the left panel of the Management console.
3. In the center panel, click **Link from InEight Document**. You can set filter criteria to narrow the list of records from Document.
4. After you set filter criteria, click **Apply**. Related Document records are shown in the table.

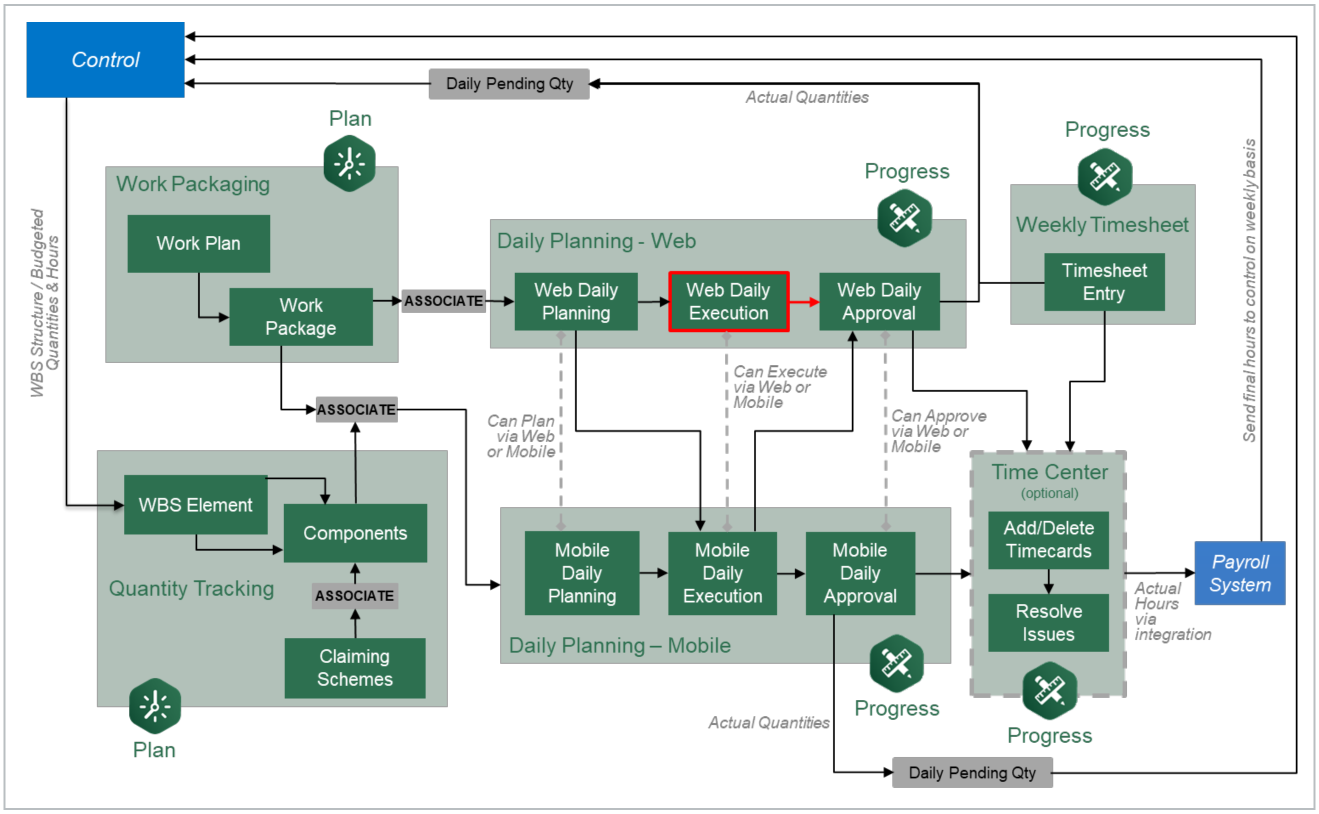


5. Select one or more records, and then click **Attach to all daily plans**.

TIP You can also select specific plans in the right panel, and then click **Attach to selected daily plans**.

To remove an attachment from a daily plan, click the **Delete** icon next to the attachment in the right panel.

5.1 INEIGHT PLAN WORKFLOW - DAILY PLAN EXECUTION WEB



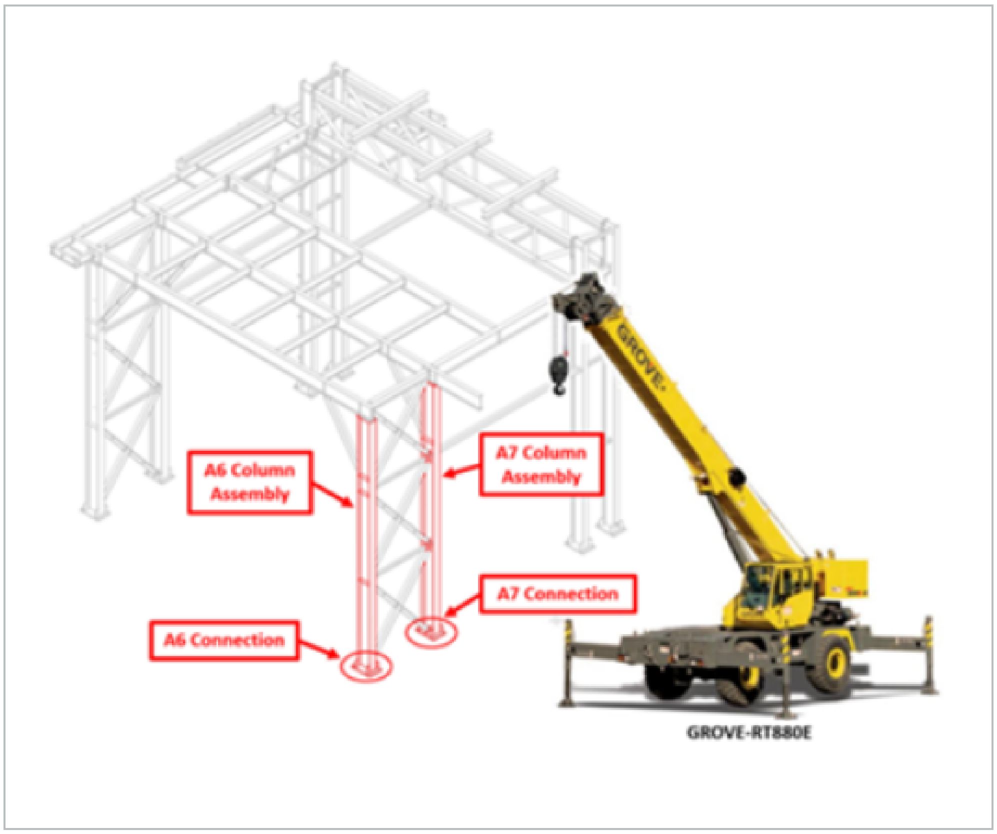
5.2 DAILY PLAN EXECUTION

Scenario

> You are a field engineer working on a project that includes the erection of steel members for a steel support structure. Your daily plan is to erect A7 connections to foundation with a Grove -

RT880E crane. Your foreman is absent for the day. With him being out, it is your responsibility to handle the Execution Phase of his daily plan. The Execution Phase includes reviewing the plan at the start of the day for any mistakes, entering all actual hours and quantities at the end of the day, and finally signing out all employees so the daily plan can be submitted for approval. You do not have an iPad; therefore, you will have to execute the daily plan in the InEight Plan application on the web.

- Randy Kielly - Ironworker Foreman
- Kenneth Moore - Carpenter
- Troy Brown - Ironworker
- Joseph Kelly - Ironworker
- John Walsh Jr - Ironworker



In this topic, you will review a daily plan in the Execution Phase in detail and make changes to the plan throughout the day to reflect what actually occurred.

NOTE	To follow the scenarios or Step by Steps in this phase, you must submit your daily plan.

5.2.1 Daily Plan Execution

In the Execution Phase, a daily plan has the following tabs:

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

TIP In the Execution Phase of a daily plan, you will notice all system accents change to green and in the breadcrumbs area next to the plan name, it will now say Execution.

It is a best practice for the plan executor to review a daily plan to examine each tab and verify understanding of all task, notes, tool box talks and planned quantities before executing the work. If any information is confusing, incorrect or missing, they should consult the planner or supervisor and modify or add to the daily plan as needed.

The following sections walk you through what has changed on each tab from the Planning Phase to the Execution Phase, as well as provide some information on how to add or edit information during the Execution Phase.

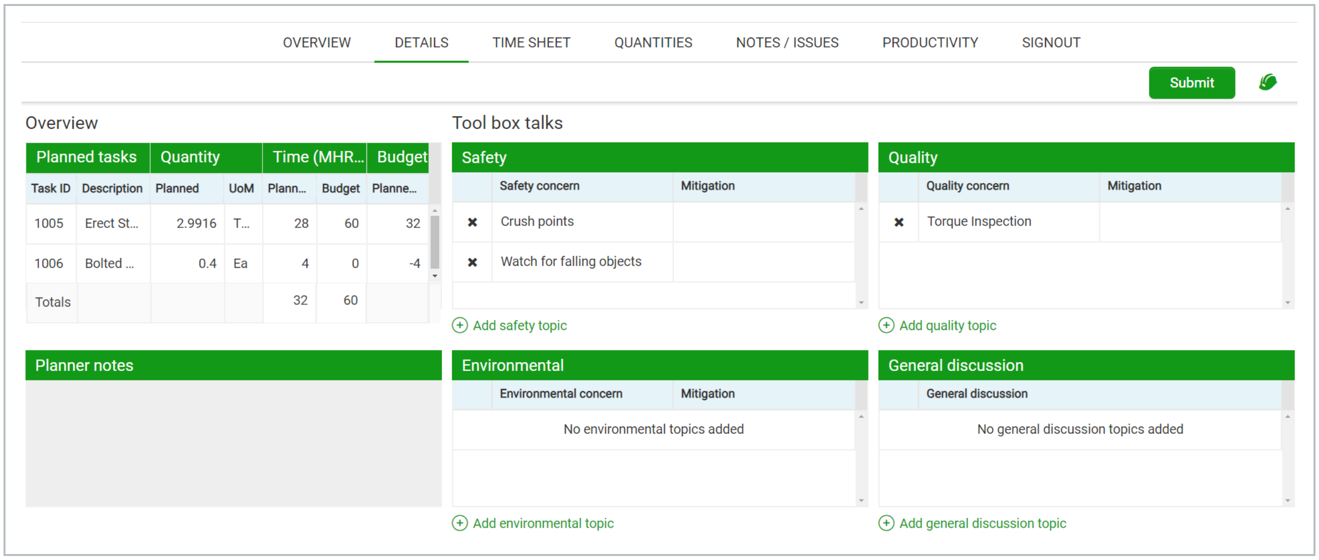
5.2.2 Overview Tab

The Overview tab maintains the same information from the Planning to Execution phase.

5.2.3 Details Tab

The Details tab is almost identical to the Details tab in the Planning Phase. The only difference is you can no longer edit the Planner Notes field and it contains all the notes made during the Planning Phase.

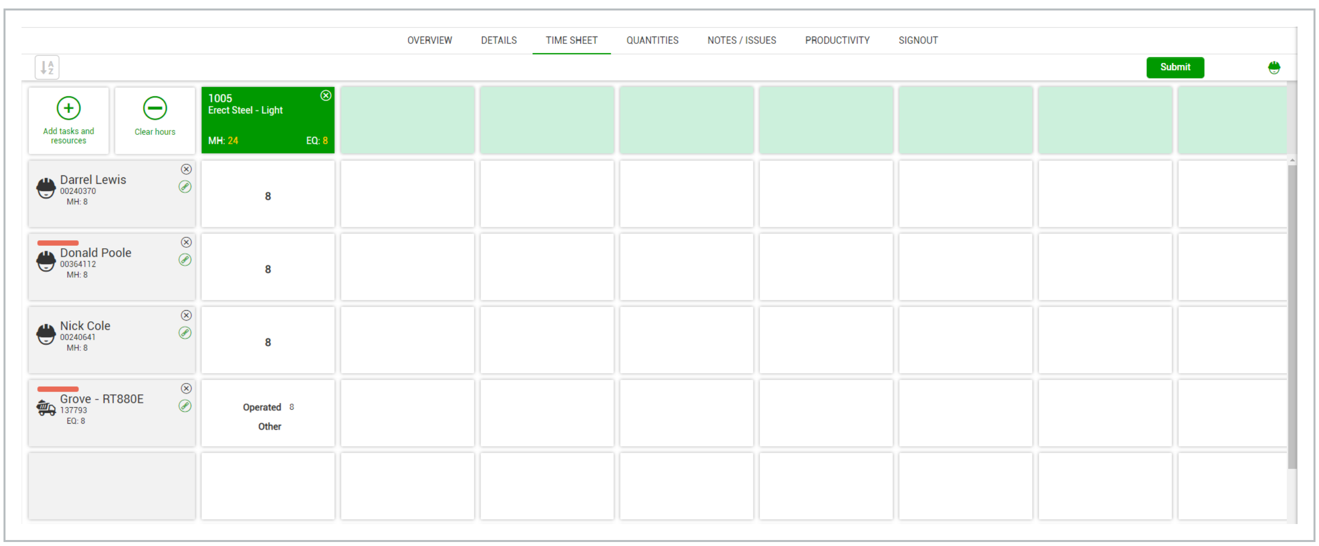
Like the Planning Phase, under the Tool box talks section, you can add, edit and delete items for each of the four different areas (Safety, Quality, Environmental, and General discussion).



5.2.4 Timesheet Tab

The Timesheet tab is identical to the Timesheet tab in the Planning Phase, the only difference being that it shows all hours assigned to each resource/task in the Planning Phase. You can edit, delete, or add tasks, labor, and equipment to reflect the employees/equipment and task completed over the course of the day.

This is where you input actual hours, which will be covered in detail in the next topic of this lesson.



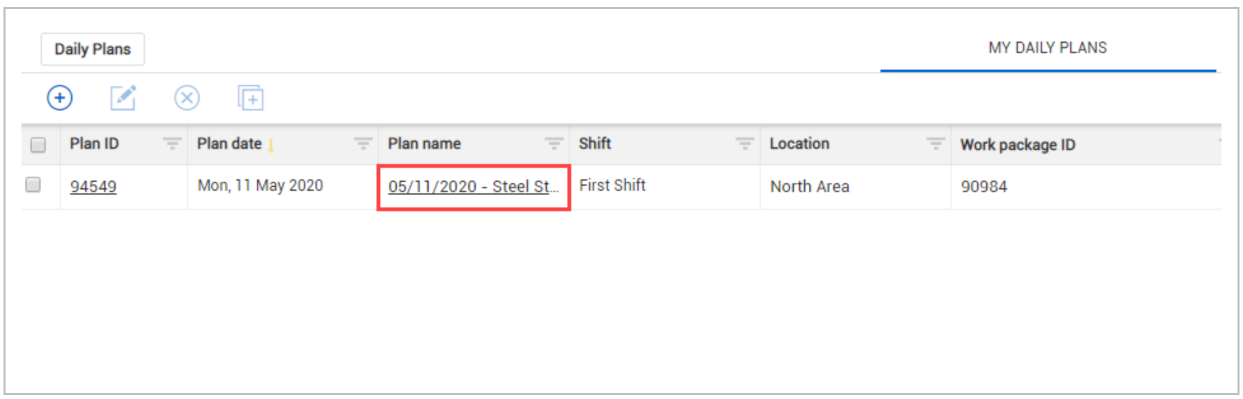
5.2.4.1 Temporary Resources

Going back to the scenario at the start of the lesson, while reviewing your daily plan, you notice that Kurt Fleming has not been included in the plan during the Planning Phase. This is because today is his first day and he is not in the payroll system yet, but you would still like to be able to include him in the plan for the day. Within the Progress web application, you can do this by creating a temporary labor resource for Kurt and then swapping him out with his actual resource once it has been created in payroll.

The following Step by Step walks you through how to add a temporary labor resource.

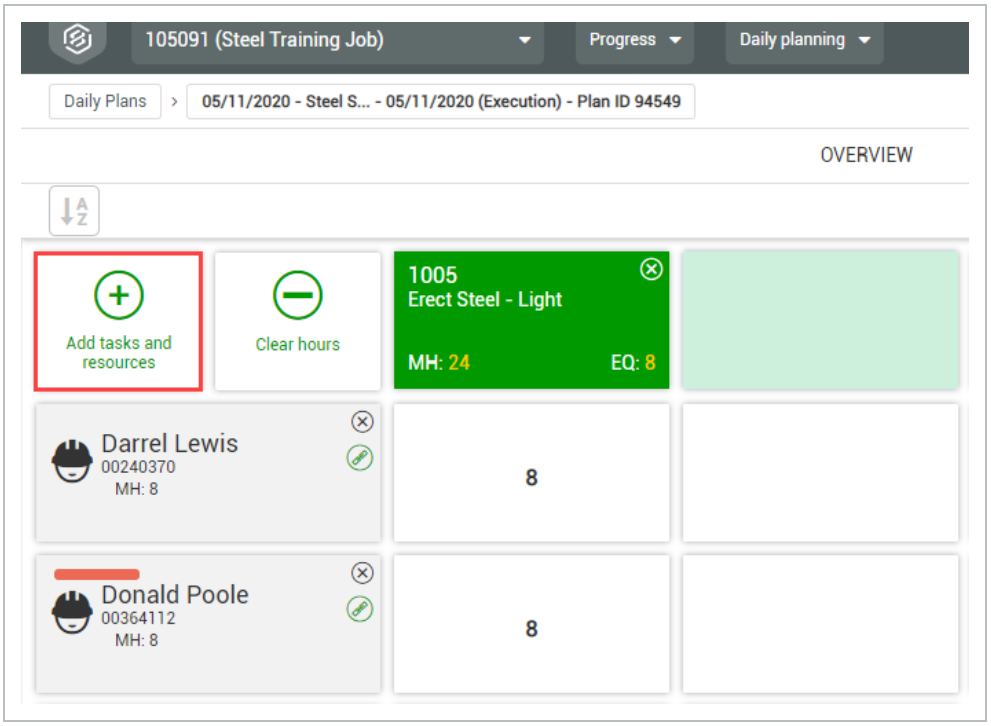
Add a Temporary Resource

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

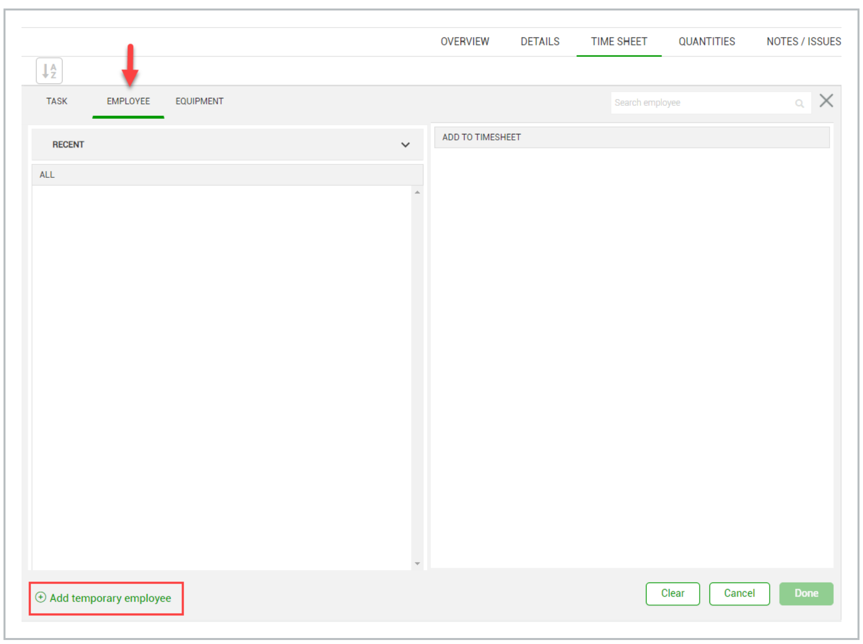


   - A prompt appears stating that the plan is in the Execution Phase

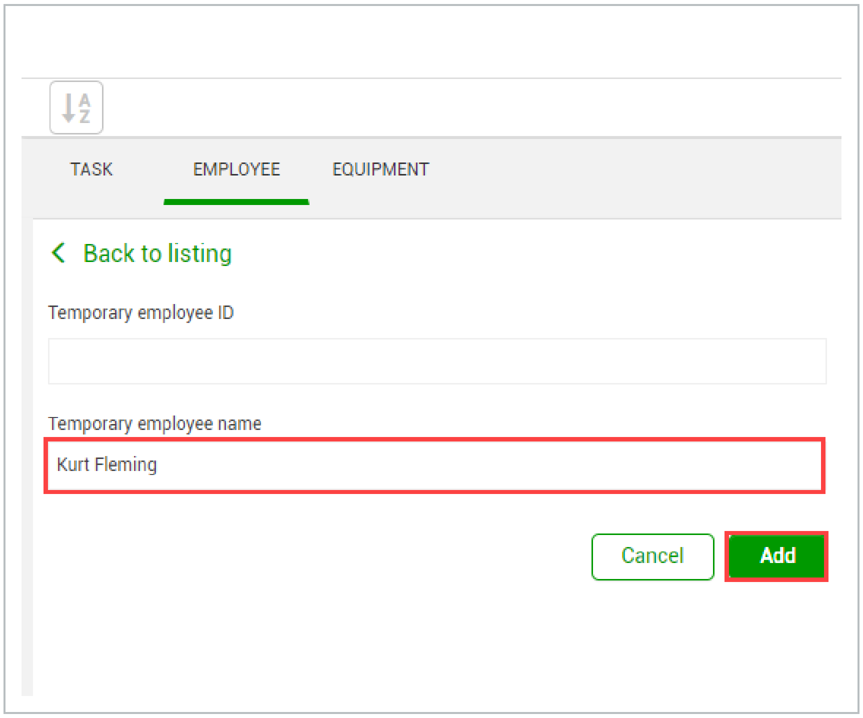
2. Click on **Timesheet** tab.
3. Click on the **Add tasks and resources** button on the left.



4. On the resulting slide out panel, click on the **Employee** tab.
5. Click on **Add temporary employee** at the bottom of the screen.



6. In the Temporary employee name field, enter a temporary employee's name.



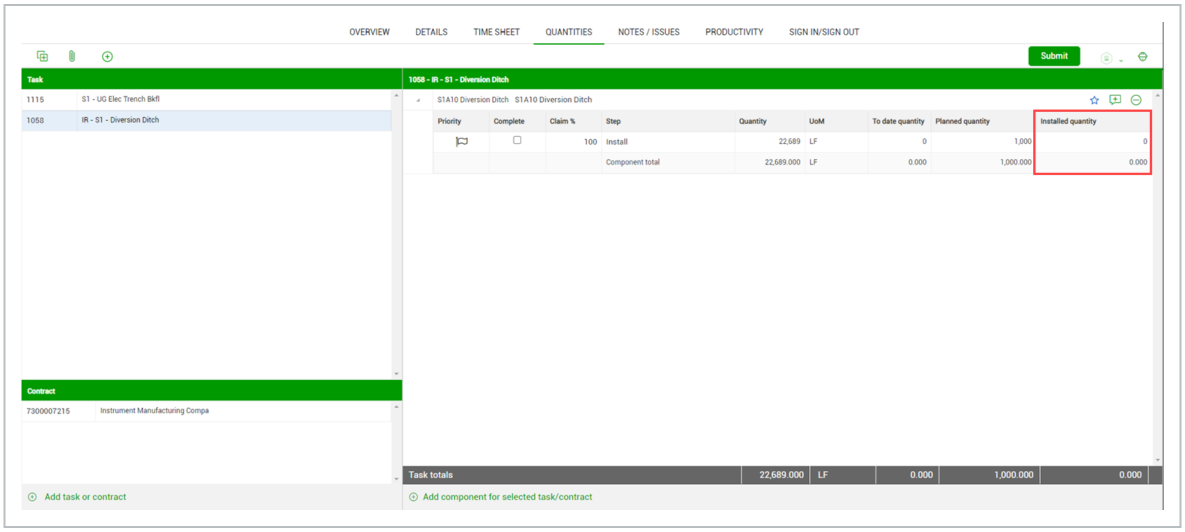
7. Click **Add**.
8. Click **Done** to close the slide out panel.
    - The temporary resource is added to the time sheet

5.2.5 Quantities Tab

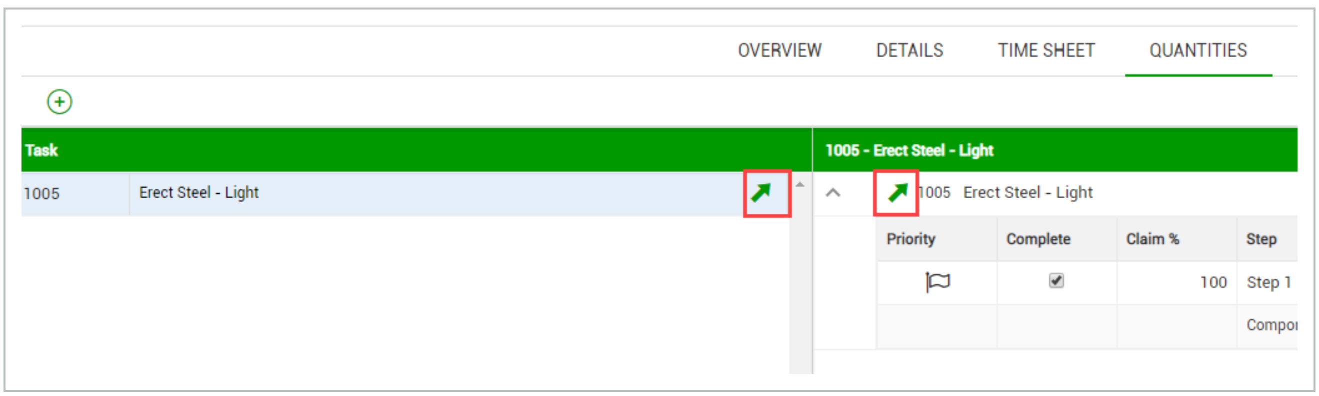
The Quantities tab is identical to the Quantities tab in the Planning Phase. However, when viewing the claiming schemes of the components in the daily plan, instead of the *Planned quantity* field being the only editable field, now the only editable field is the *Installed quantity* field.

Installed quantities will be entered in the next topic of this lesson.

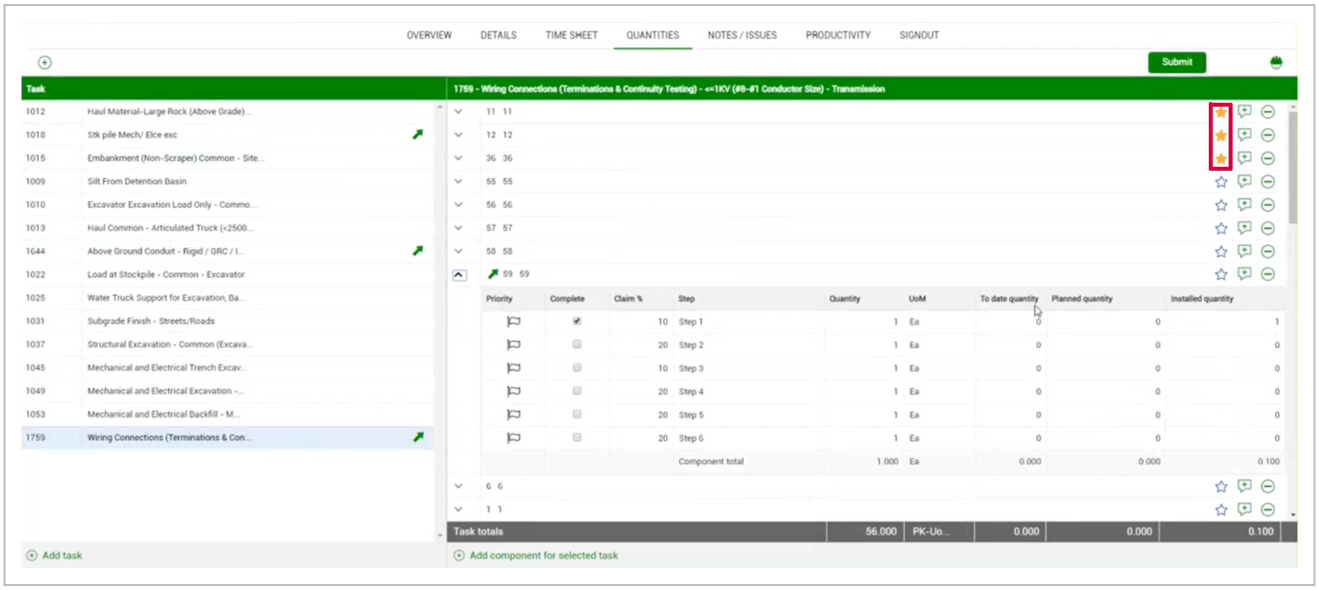
At this point, tasks and contracts can only be added, not deleted; components can still be added or deleted as needed.



Arrow-shaped visual indicators show which items have been claimed against in the Task, Contract, and Components lists. Green arrows indicate the tasks, contracts, and components that have been claimed with a positive installed quantity. A red arrow indicates a negative quantity has been claimed. No arrow indicates nothing has been claimed yet for that task, contract, or component.

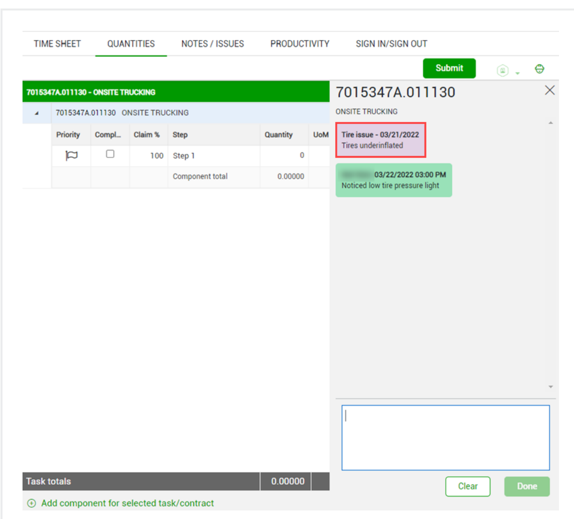


You can also favorite certain components that you know you will be using frequently by clicking on the star-shaped icon next to the corresponding component. When selected, these components move to the top of the list eliminating the need to scroll through a long list of items.



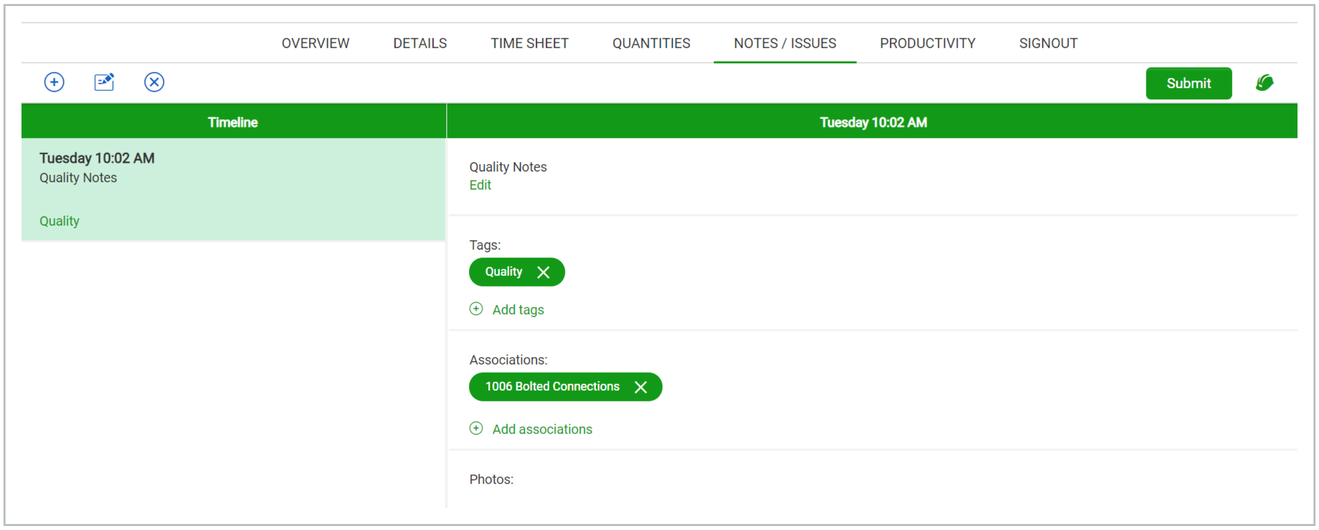
TIP You can delete tasks in the Time sheet tab if needed.

You can also view and add notes and issues to components. If there are notes or issues associated with a component, you can see them on the Quantities tab when you click the **Add notes** icon next to the component. Notes and issues are shown in the side panel in green and purple, respectively, to distinguish them from each other.



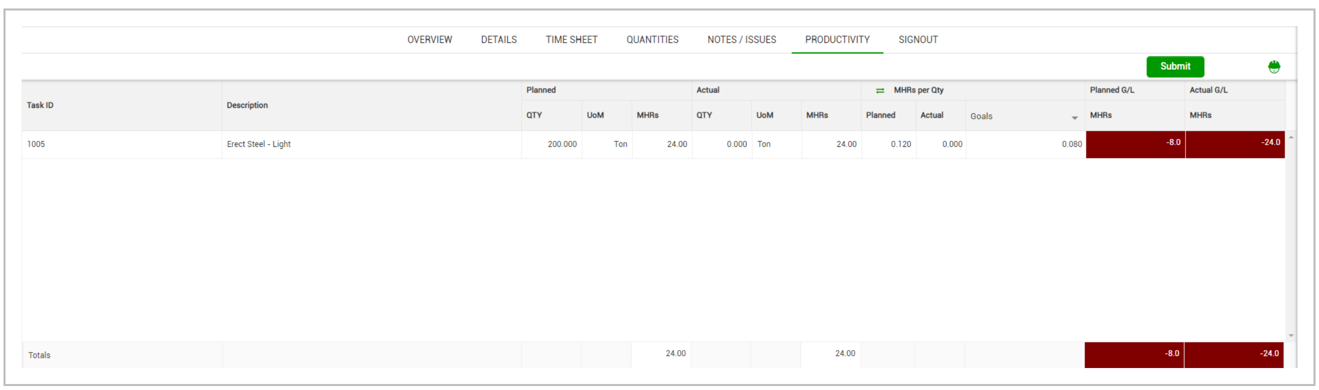
5.2.6 Notes/Issues Tab

The Notes/Issues tab is identical to the Notes/Issues tab in the Planning Phase.



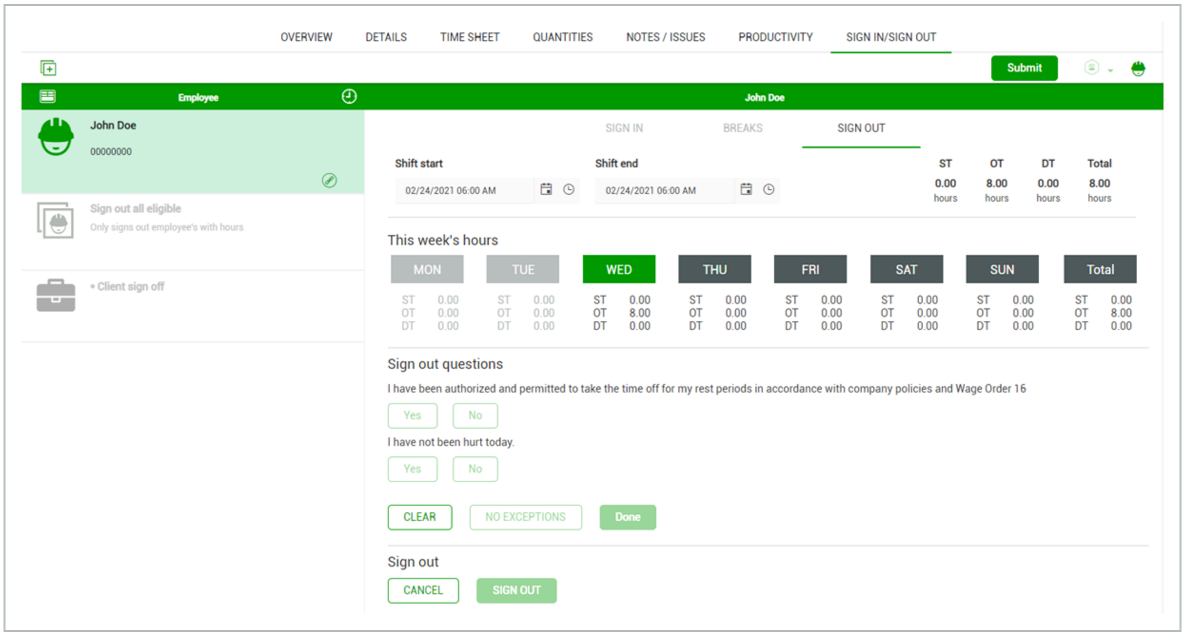
5.2.7 Productivity Tab

The Productivity tab is identical to the Productivity tab in the Planning Phase. The only difference from the planning stage is that the Productivity tab now contains Actual G/L section that reflects the actuals input in the Time Sheet and Quantities tabs, which will be discussed in further detail in the next topic of this lesson.



5.2.8 Sign In/Sign Out Tab

The Sign In/Sign Out tab is the only new tab for the Execution Phase. It allows crewmembers to sign in at the beginning of the day, enter breaks, and sign off on the actual hours input into the system at the end of the day. In addition, at sign-out, it lets a short questionnaire be answered which helps to ensure all labor rules are being upheld. This section is covered in detail in the final topic of this lesson.



5.3 ACTUALS

In this topic, you will input actual hours, notes, and quantities into a daily plan as part of the Execution Phase of the daily plan.

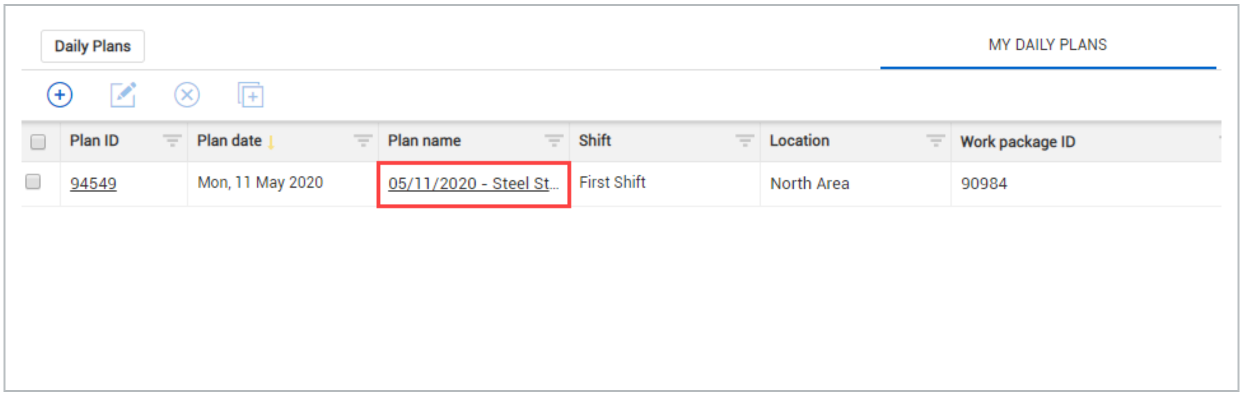
5.3.1 Input Actual Hours

As the workday progresses, you can input the actual hours for the day in the Time Sheet tab of the daily plan. The process is like that of entering the planned hours in the Planning Phase of the daily plan. You can also assign an employee to the temporary resource you created earlier during this phase, although the daily plan can be approved with just the temporary resource if you do not yet have an employee to assign.

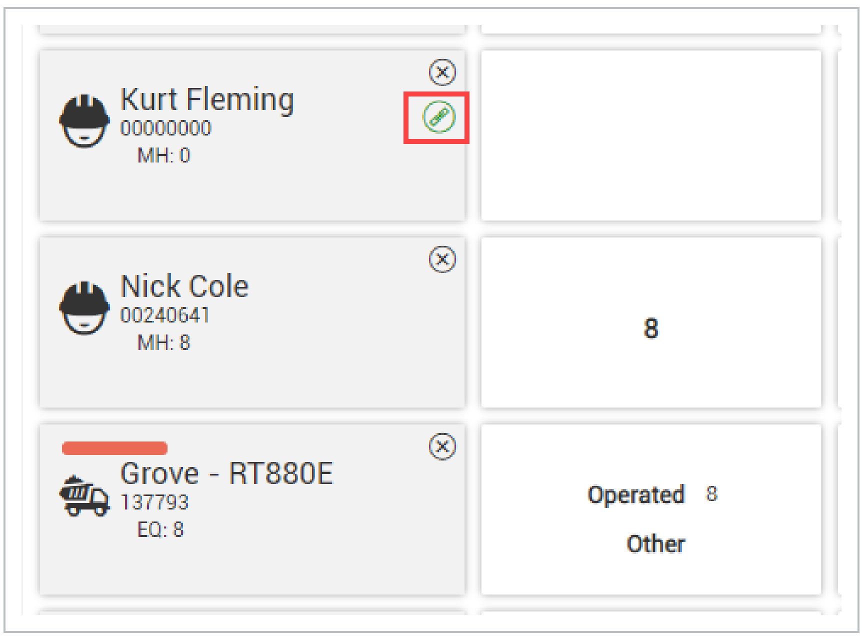
The following Step by Step walks you through how to assign an employee to the newly created temporary resource.

Assign an Employee Resource to a Temporary Resource

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



2. Click on the **Timesheet** tab.
3. Click on the **chain link** icon next to a temporary labor resource.



4. Type another employee's name into the Search bar.

5. Select an employee.
6. Click **Done**.

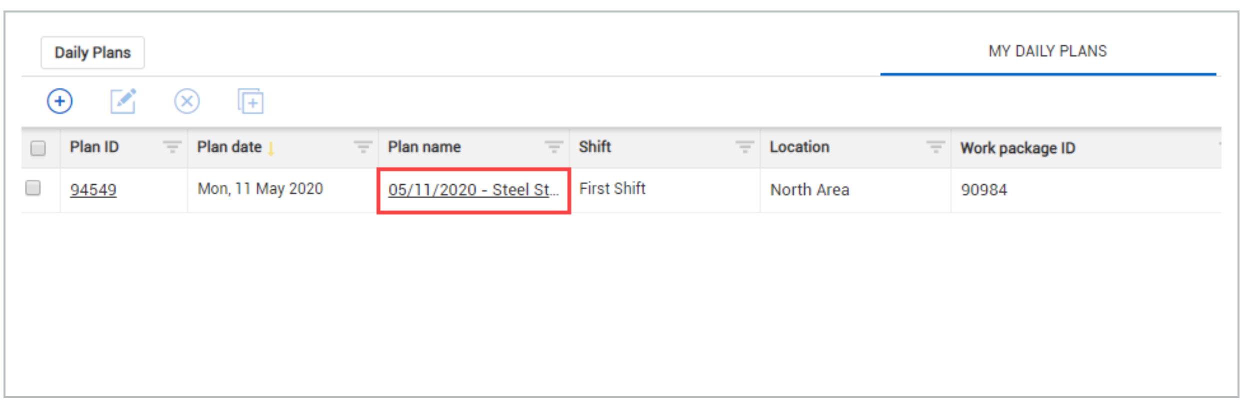
Now that you have assigned a resource to the newly created employee, the next step is to enter the actual hours for all labor and equipment.

> **NOTE** Temporary Resources can remain on daily plans in the execution phase in order to track and submit employee hours who may not yet exist in the system. A daily plan can not be approved in the approval stage until all temporary employees are assigned a system recognized employee

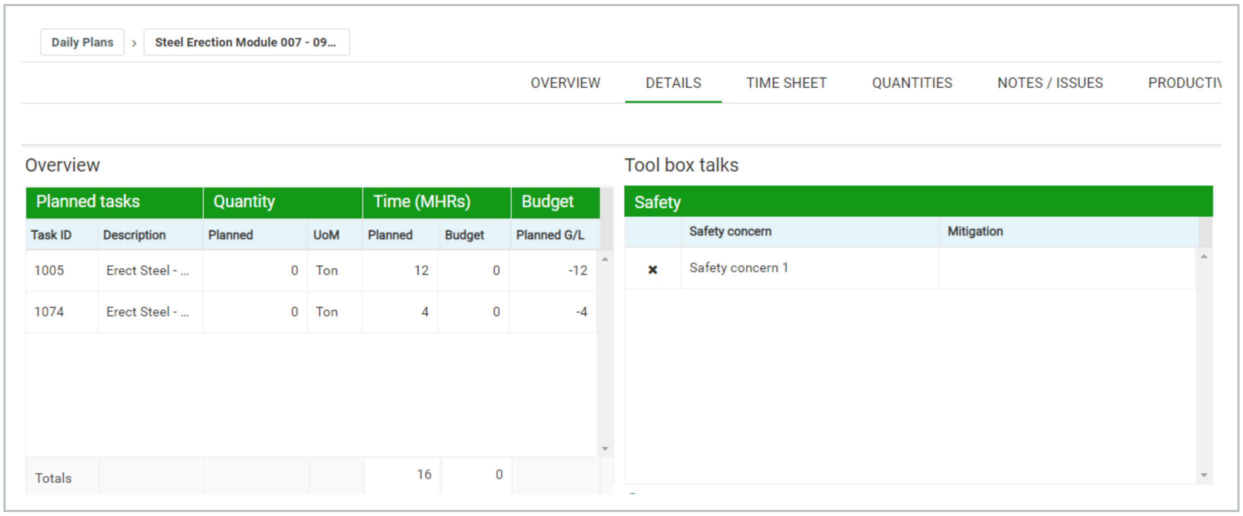
The following Step by Step walks you through how to input actual hours worked into a daily plan.

Input Actual Hours Worked into a Daily Plan

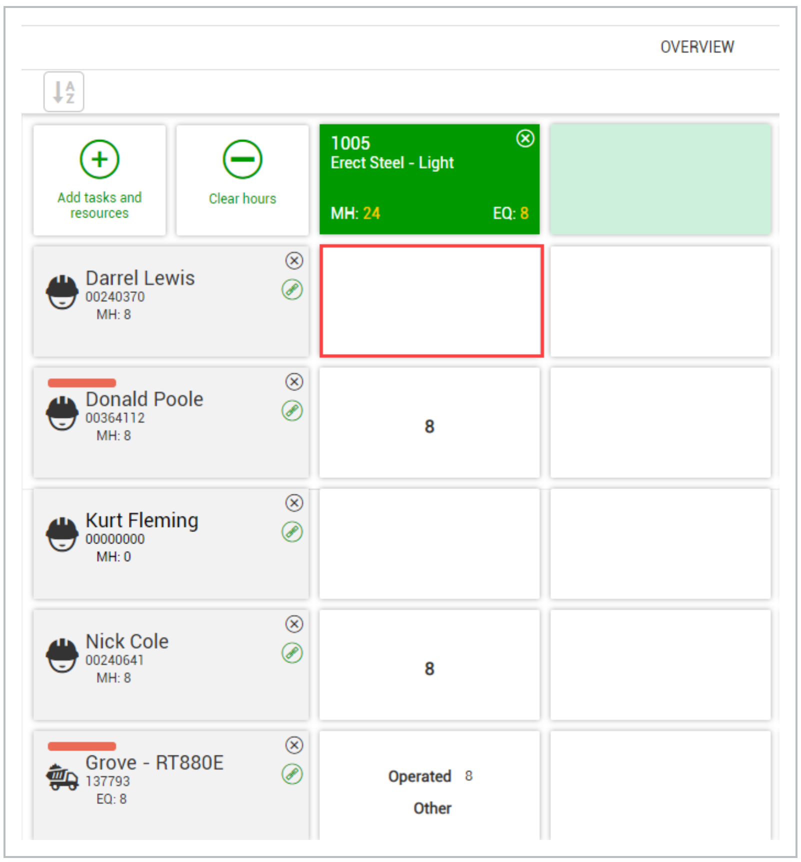
1. From the Daily Plans page, open your daily plan.



2. Click on the **Timesheet tab**.



3. Select the cell next to an employee's name (under the correct task column).



4. Enter their hours worked in the Actual ST field.
5. Click **Done**.

6. Review the hours of your other employees and equipment on the time sheet.
7. Enter the hours worked for your temporary employee.
8. Click **Done**.

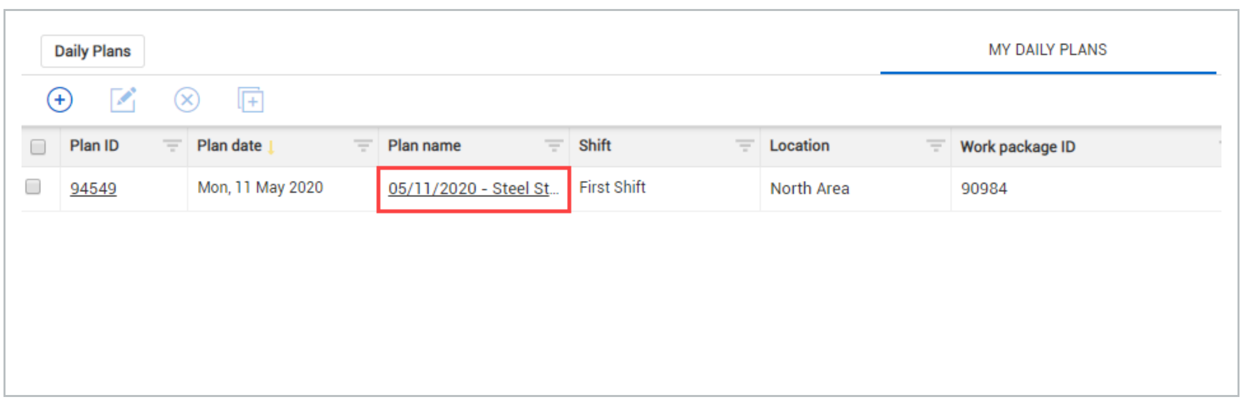
5.3.2 Input Actual Quantities

Once you have entered actual hours, the next step to completing the Execution Phase of a daily plan is to enter the actual quantities installed. You complete this step in the Quantities tab of the daily plan. The process is like that of entering the planned quantities in the Planning Phase. During the execution phase you will see the planned quantity column is populated for those components you were expected to complete.

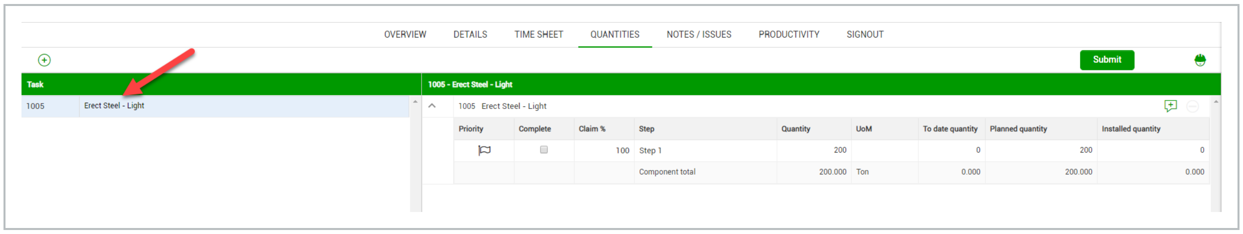
The following Step by Step walks you through how to input the actual quantities installed into a daily plan.

Input Actual Quantities Installed into a Daily Plan

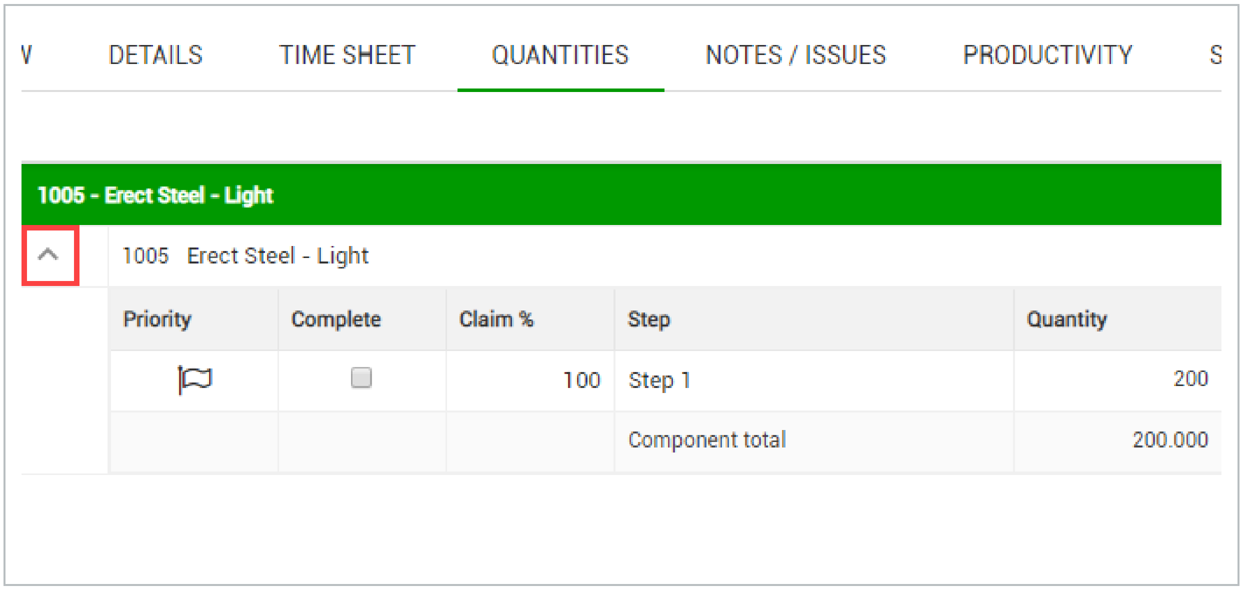
1. From the Daily Plans page, open your daily plan.



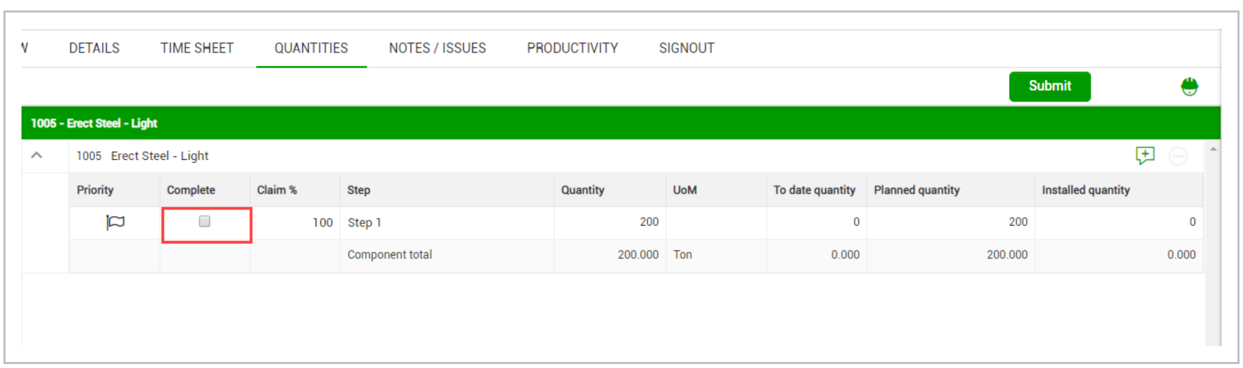
2. Click on the **Quantities tab**.
3. On the left side, click on a component to highlight it.



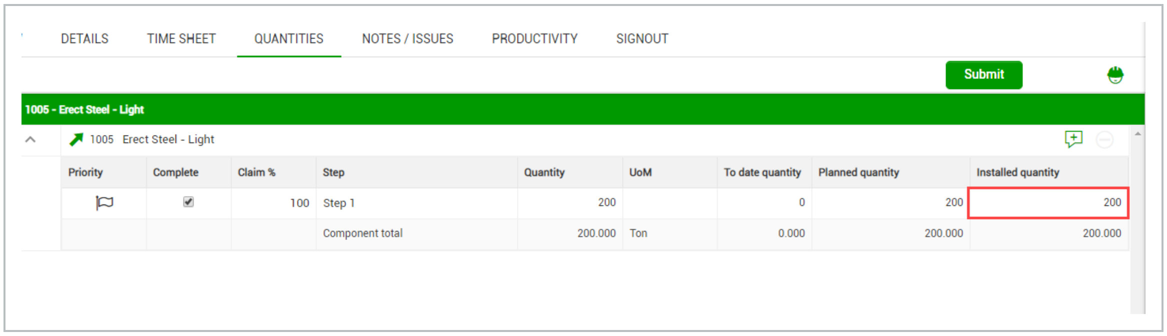
4. On the right side, click on the **downward pointing arrow** next to the component to expand it and reveal the claiming scheme.



5. Check the box under the **Complete column** for each step.



- Notice that by checking the Complete column box, the Installed quantity column will autofill to the amount in the Quantity column



NOTE You can enter the Installed quantity directly. If the amount entered for the Installed quantity is the same as the total quantity, the complete box is automatically checked

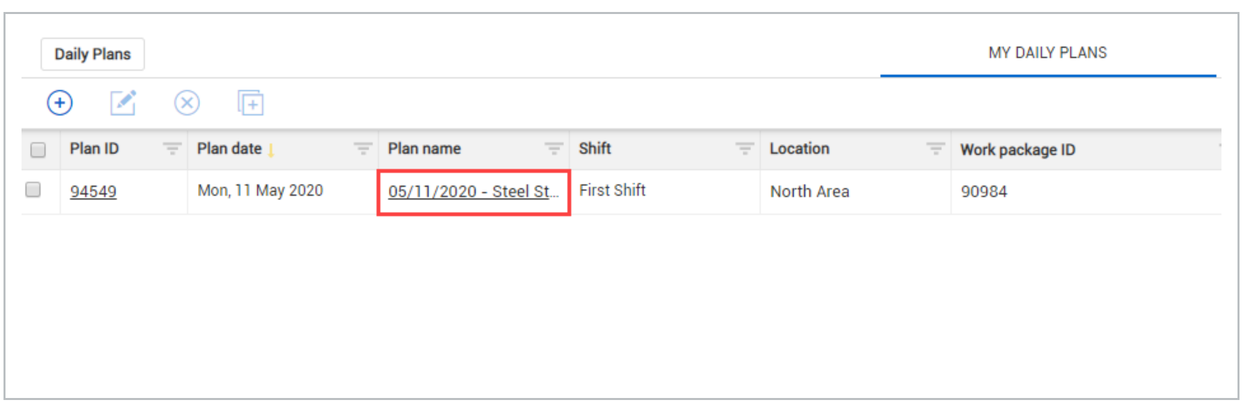
5.3.3 Add Notes/Issues

While completing the Execution Phase of a daily plan, it is important to enter notes about factors that may have affected the execution of the work. This process is identical to the Planning Phase and allows for the assigning of tags and associations. You can also record issues and they will sync to InEight Change automatically for tracking.

The following Step by Step walks you through adding a note in the Execution Phase of a daily plan.

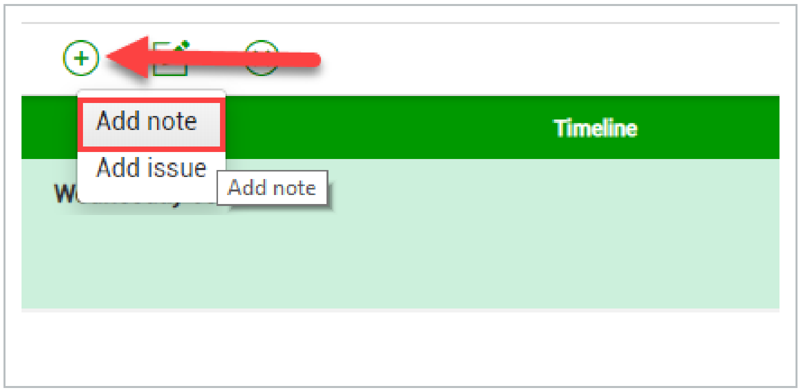
Add a Note to the Execution Phase of a Daily Plan

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

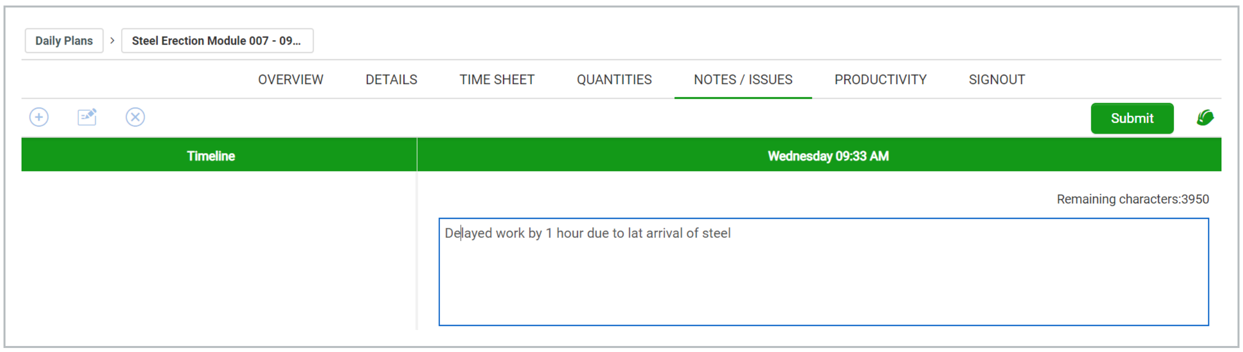


2. Click on the **Notes/Issues tab**.

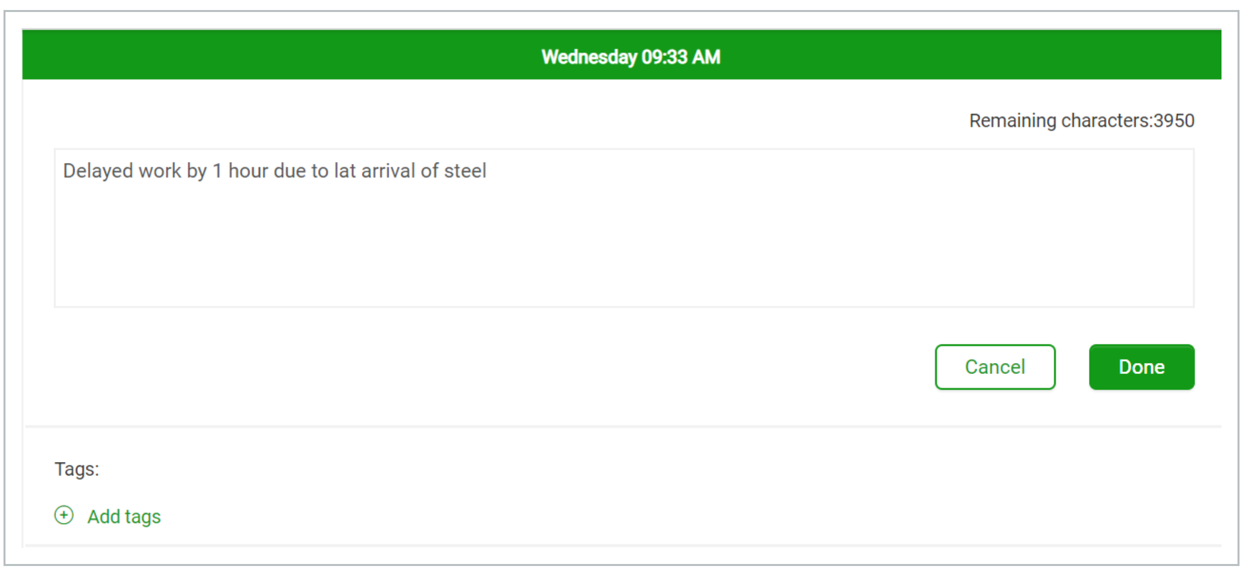
3. Click on the **Add icon** and select **Add Note**.



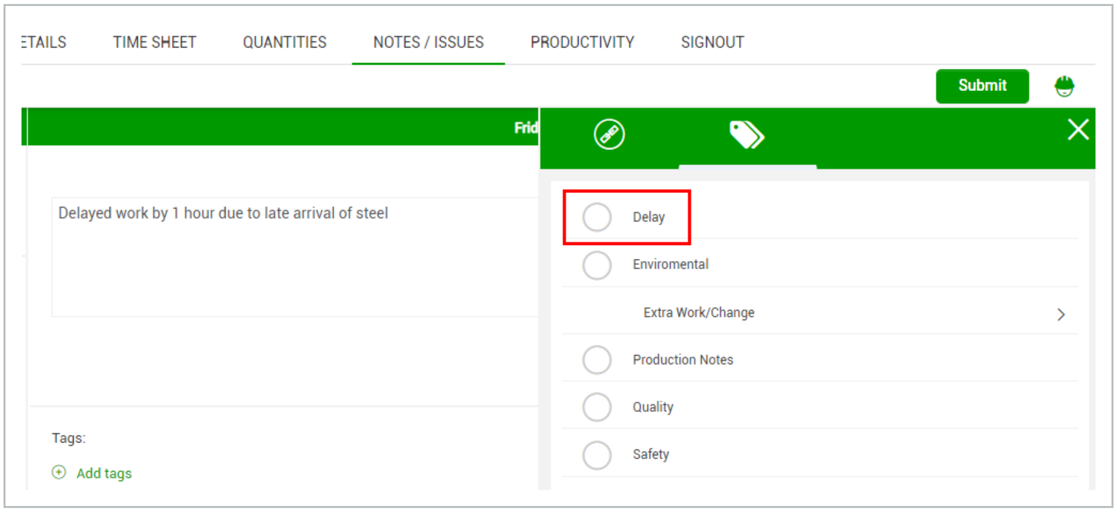
4. Enter a helpful note into the free text field at the top of the page.



5. Click on the **Add tags button**.



6. On the resulting slide out panel, you can select a tag that supports your note/issue.



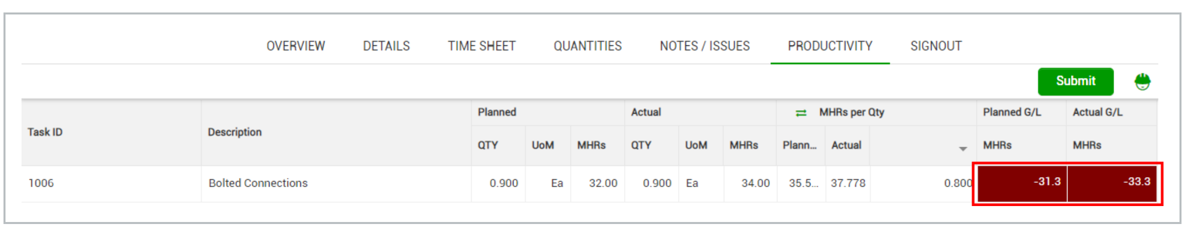
7. Click **Done** to close the slide out panel.
8. Click **Done**.

5.3.4 Productivity

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.

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

- Actual Cost G/L = (Sum of (Total actual quantity for the WBS * CE/CB/Forecast/Goal final unit cost) - (Actual total cost of labor + Actual total cost of equipment))
- *Actual total cost of labor = Sum of Total number of hours worked by the employee * Hourly rate of the employee*
- *Actual total cost of equipment = Sum of (Total number of equipment hours operated * Hourly Unit rate of the equipment)*

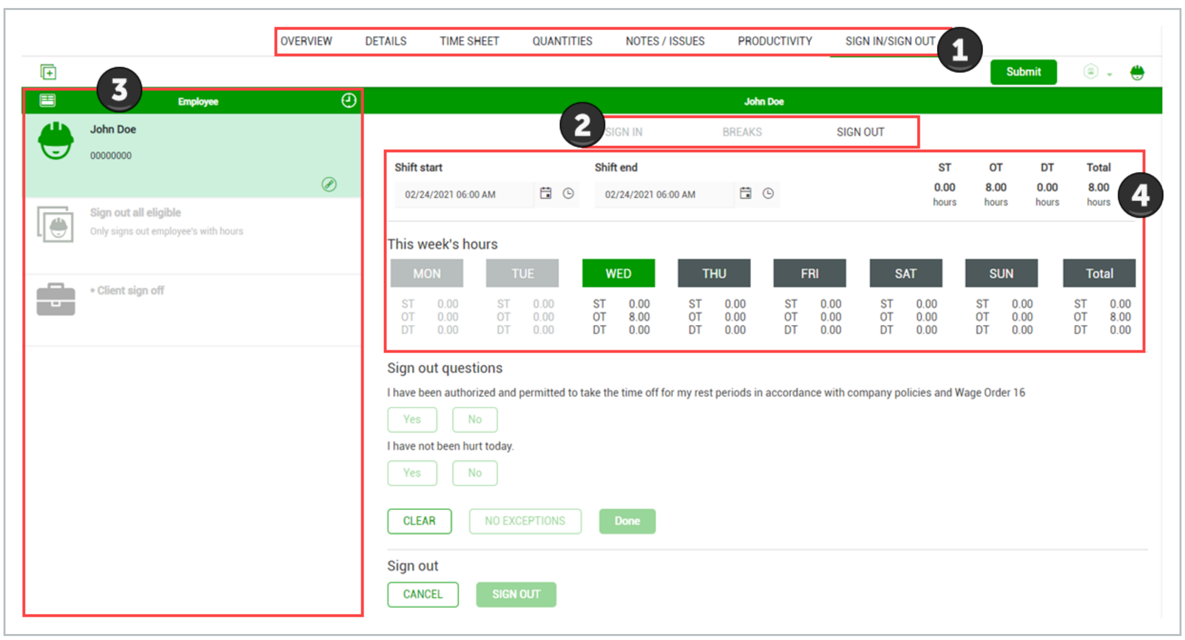


5.4 SIGN IN/SIGN OUT

In this topic, you learn how to sign in, enter breaks, and sign out on a daily plan.

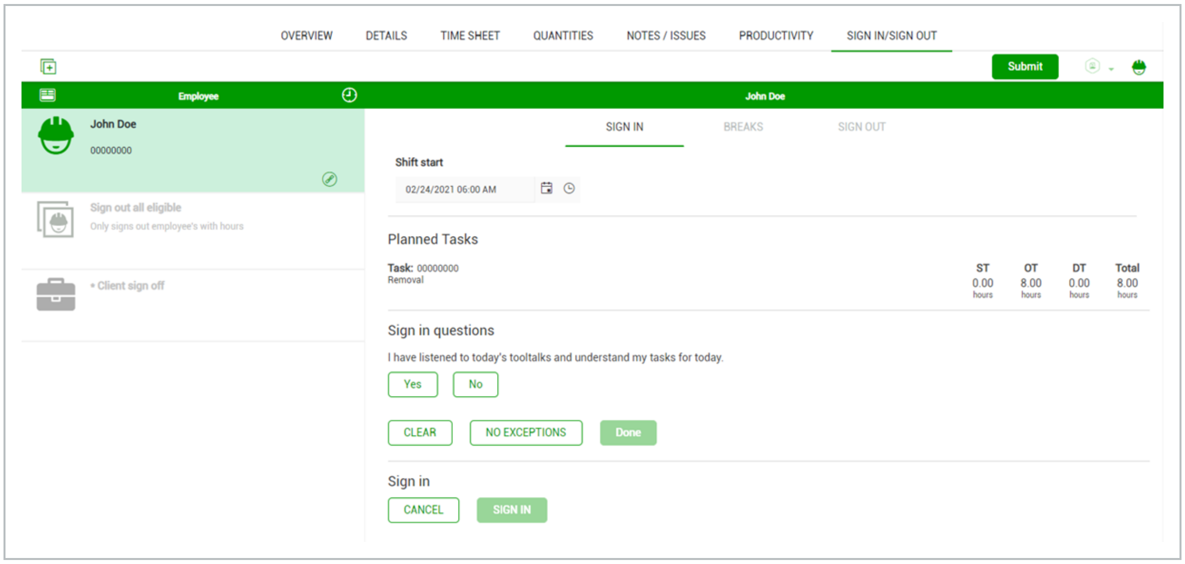
Overview – Sign In/Sign Out Tab

Title		Description
1	Tabs	These are still available on the Sign In/Sign Out tab, so you can review the resources, tasks, and quantities on the daily plan.
2	Subtabs	The Sign In/Sign Out tab includes the Sign In, Breaks, and Sign Out subtabs.
3	Employee List	Provides a list of all employees assigned to the current plan, with their trade, craft and employee ID.
4	Hours Breakdown	Provides a detailed breakdown of the hours worked for both the current day and week and the shift start and end times. This area differs slightly between subtabs.



5.4.1 Sign In Subtab

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



Depending on settings and permissions, you can also sign in on behalf of all active employees.

Shift Start Time

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

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

Employee Sign-in

To sign in as an employee, select your name. Each employee must enter a PIN (personal information number) to sign in, 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 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 signature or PIN.

Questions

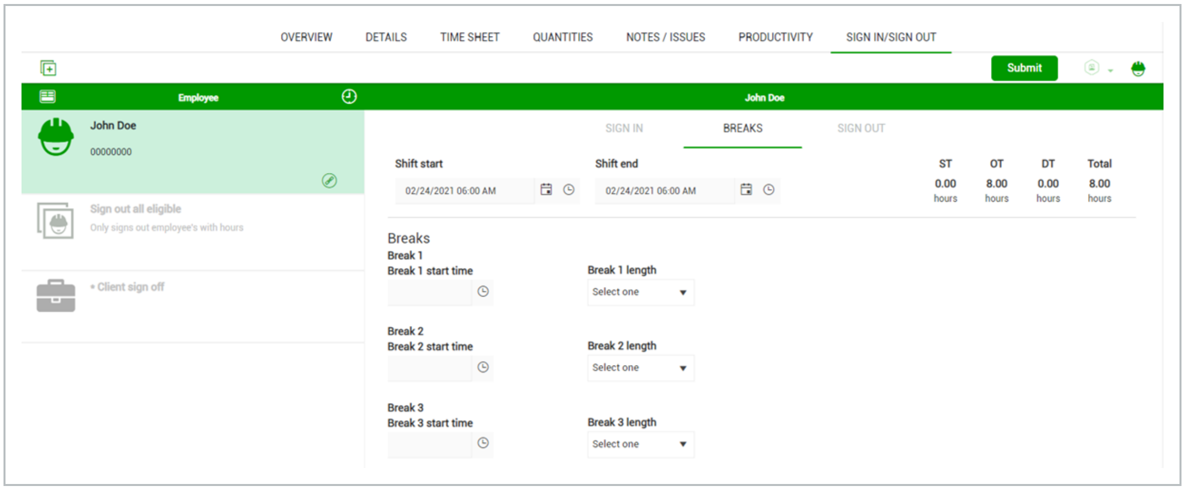
When you sign in, you or your crewmember might be asked a set of questions related to the work to be done that day. These questions are determined by management and set up for the job in the project settings by an administrator.

- For each question, you can answer Yes or No
- If you give a non-compliant answer, a dialog box lets you put a note as to why you chose that answer
- You can tap **No Exceptions** if all answers are in compliance

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

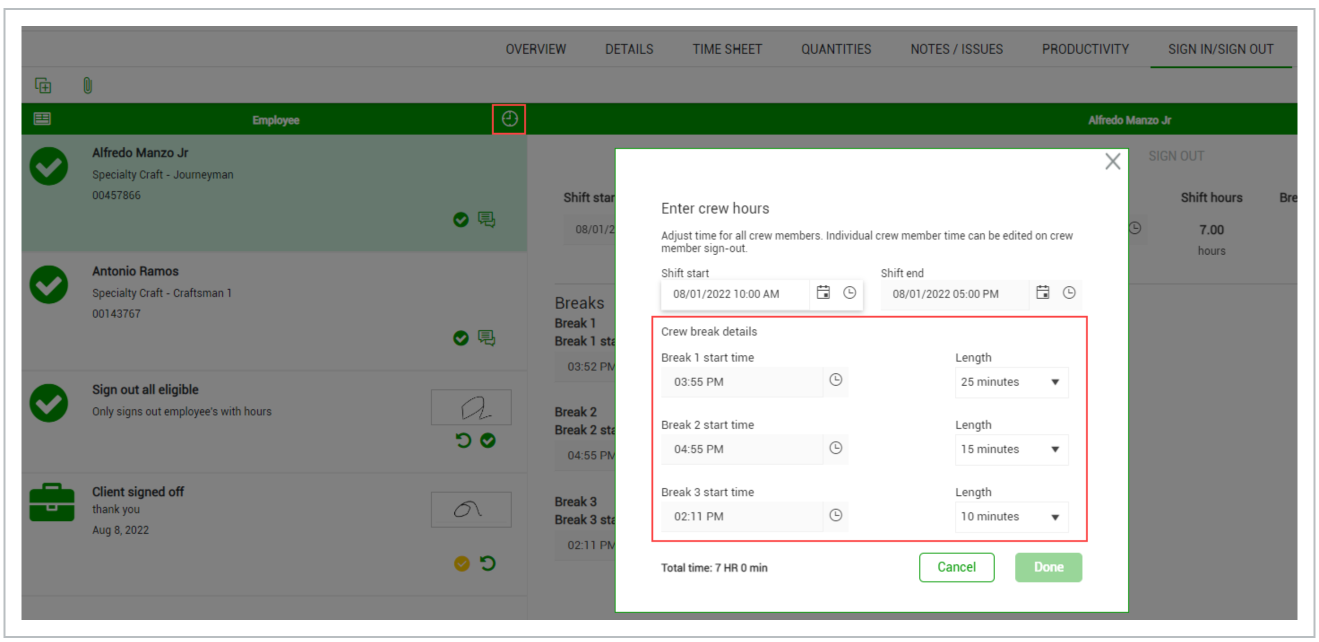
5.4.2 Breaks Subtab

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



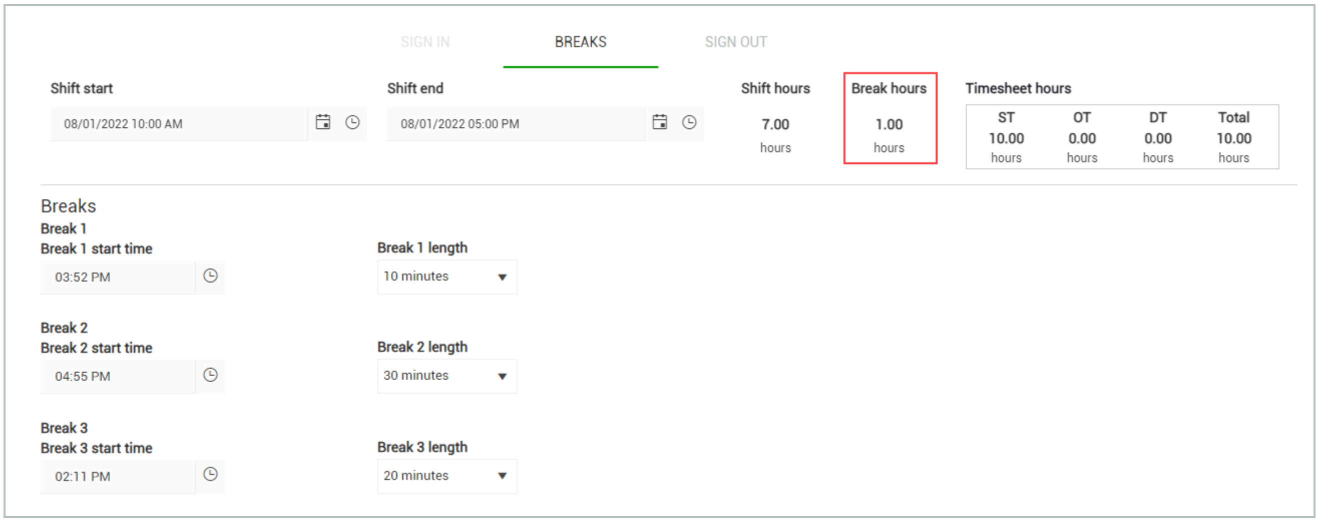
5.4.3 Crew Break Hours

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.



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.



5.4.3.1 Shift Start/End Time

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

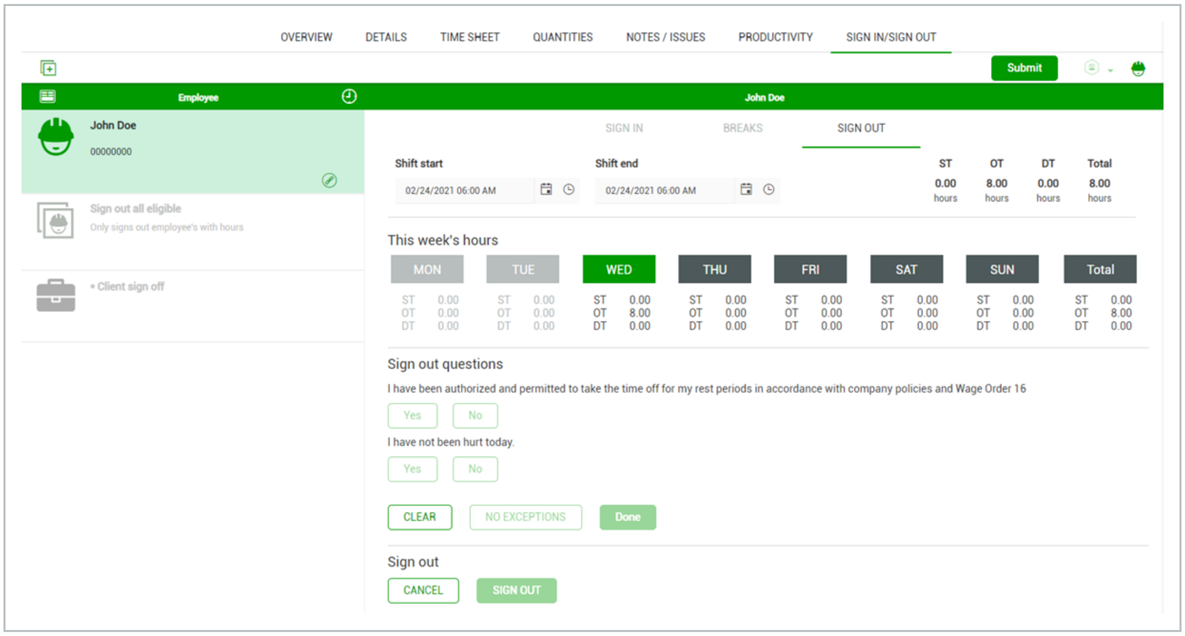
NOTE If you change the shift start and end times, the Sign In and Sign Out subtabs change to match the new times.

5.4.4 Sign Out Subtab

The Sign Out subtab lets you sign out your hours and answer questions at the end of the day. After you have entered all actuals into the daily plan, the final step before submitting the daily plan for approval is to sign out all employees on the plan. This is a crucial step because it allows the employees to verify and approve their hours worked.

Depending on settings and permissions, you can also sign out on behalf of eligible employees.

NOTE After an employee signs out, a daily plan can no longer be deleted.



5.4.4.2 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 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.

5.4.4.3 Employee Sign-out

To sign out as an employee, select your name, and then review the hours entered by the foreman. You can then sign the card and either agree or disagree with the hours or negotiate them hours before signing out. To sign out, you must enter a PIN, which can be your birth date or a number that the IT personnel has assigned. If a PIN has not been configured, sign out with a signature is required.

5.4.4.4 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 either a signature or PIN.

5.4.4.5 Client Sign-out

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

NOTE The Client sign off does not become available until all employees are signed out.

5.4.4.6 Questions

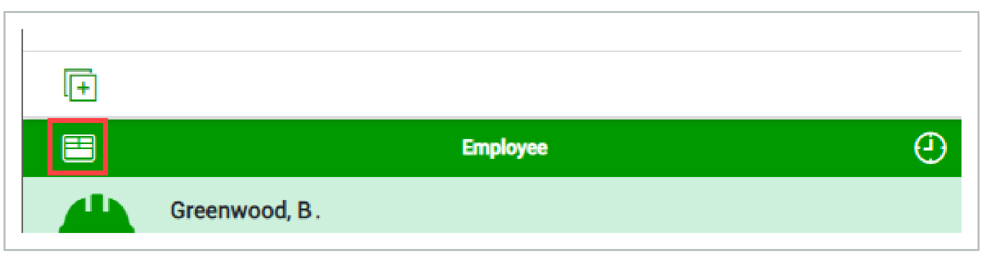
When you sign out, you or your crewmember might be asked a set of questions related to the work done that day. These questions are determined by management and set up for the job in the project settings by an administrator.

- 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 select **No Exceptions** if all answers are in compliance

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

5.4.5 Timesheet Summary

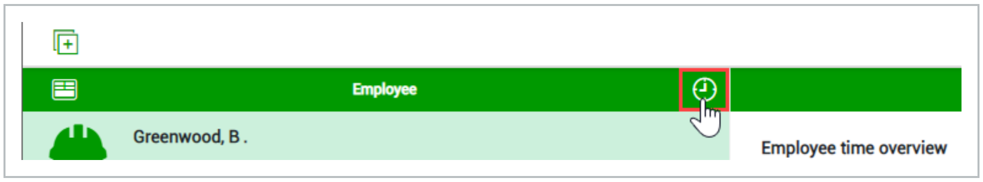
As a foreman, you can review the Extra pay (allowances) allocated to each employee by selecting the **Timesheet summary** icon in the upper-left of the page for all subtabs. This opens a Timesheet summary dialog box that lists each employee and which of the available allowances they have for their timesheet.



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

5.4.6 Crew Hours

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 for all subtabs.

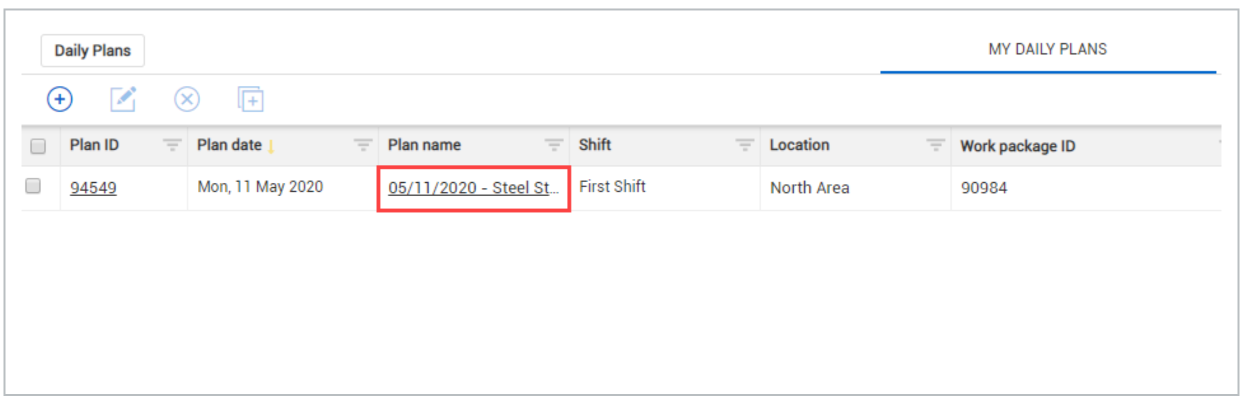


In the Enter crew hours dialog box, you can adjust the Shift start and Shift end values to reflect the hours worked by the crew. You can either save these changes after you have finished or cancel the operation.

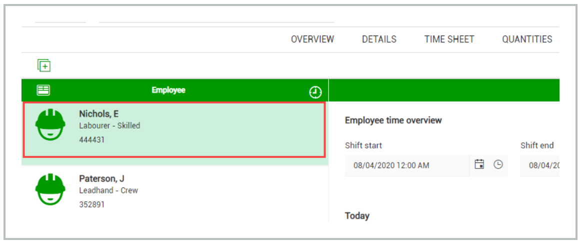
The following Step by Step walks you through how to sign out an employee using PIN on a daily plan and submit the plan for approval. You can also sign out using a signature.

Sign Out an Employee on a Daily Plan

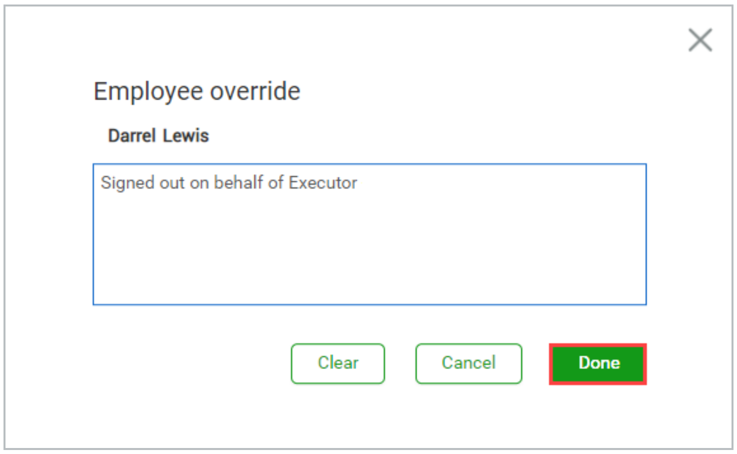
1. From the Daily Plans home page, open your daily plan.



2. Click on the **Sign In/Sign Out** tab, and then click the **Sign Out** subtab.
3. Select an employee from the Employee section on the left.



4. Click on **On behalf of employee** in the sign-out area.
5. Enter the employee PIN in the sign-out area.
6. Select **No** for the first question: I was injured while working today.
7. Click **Done**.
8. In the **Employee Override** dialog box, enter your initials, and then click **Done**.



9. Repeat steps 3-8 for all remaining employees.
10. Click **Submit** in the upper right.
11. Click **Yes.**

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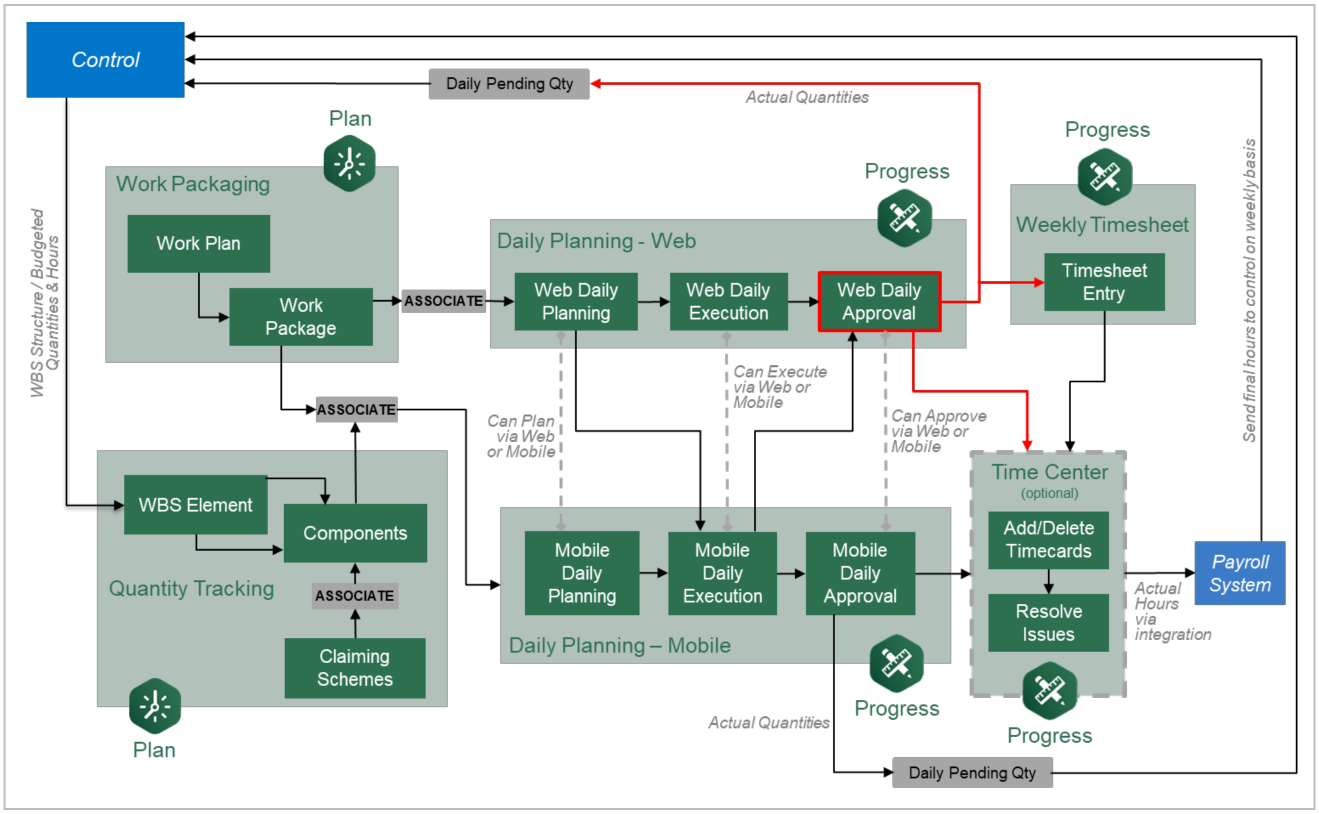
6.1 INEIGHT PLAN/PROGRESS WORKFLOW - DAILY PLAN APPROVAL



6.2 REVIEW ACTUALS

Scenario

> You are a field engineer and you are responsible for approving all daily plans that your foreman executes. Before approving the plans, you need to review them to verify that all the employee

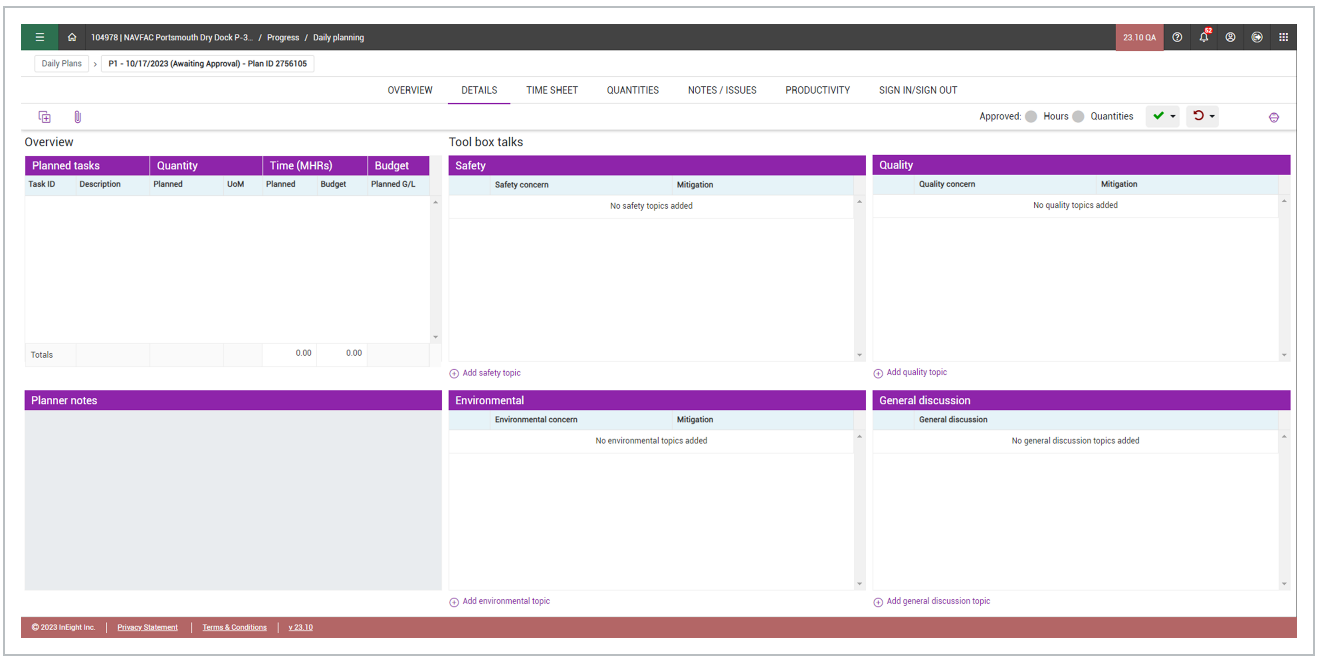
> hours and installed quantities are accurate.

In this topic, you will review the actuals of an already executed daily plan submitted for approval, utilizing the Progress web application.

6.2.1 Why Review Executed Daily Plans?

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

TIP	In InEight Progress, once submitted for approval, the daily plan's status in the Breadcrumbs will change to Awaiting Approval and the color accents will change from green to purple.



In the Awaiting Approval Phase, a daily plan has seven tabs (same as the Execution Phase):

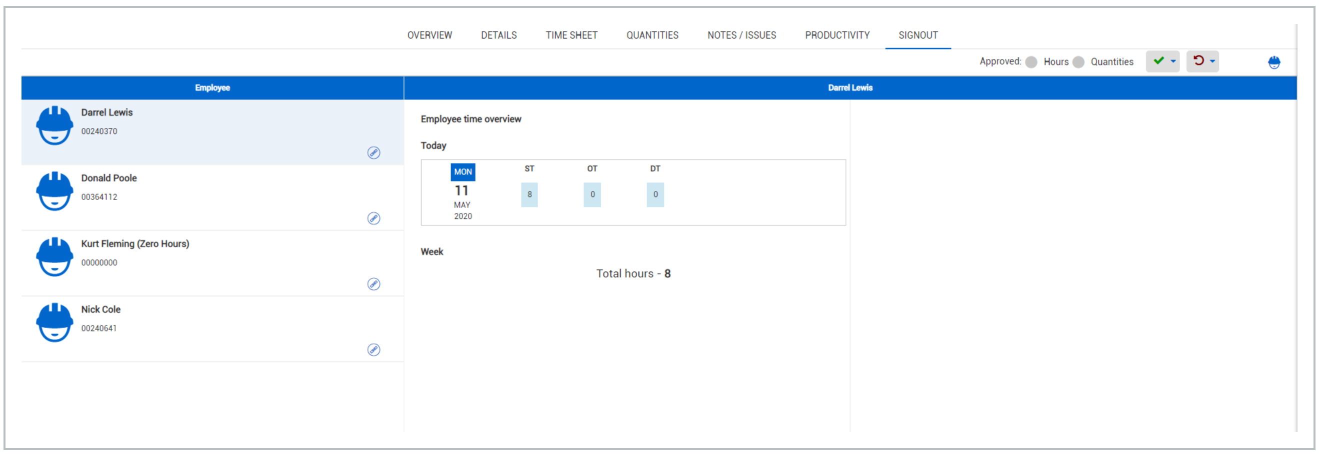
- Overview
- Details
- Time Sheet
- Quantities
- Notes/Issues

- Productivity
- Signout

It is best practice when reviewing actuals to examine each tab in detail and verify that all information is correct. If any information is incorrect or missing, now is the last opportunity to correct it.

The Overview, Details, Time Sheet, Quantities, Notes/Issues and Productivity tabs 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 as the Execution Phase does for all the previously mentioned tabs.

While six of the seven tabs are identical to the Execution Phase, one tab has changed slightly. On the Signout tab, instead of the signout area only displaying the employee pin section, now the questions answered after entering their pin display as well. In addition, there is now an option to reject an employee's signout.



6.3 EMPLOYEE REGISTER

In this topic, you will review the Employee Register using InEight Progress.

6.3.1 What is the Employee Register?

The Employee Register is a log of every employee assigned to a daily plan. The register provides a breakdown of which plan each employee is assigned to for a given date, as well as the planned and actual hours for each of those plans. However, when opened you will only be able to see the employees for the daily plans that you are assigned to as either an engineer or a superintendent.

6.3.2 Why use the Employee Register?

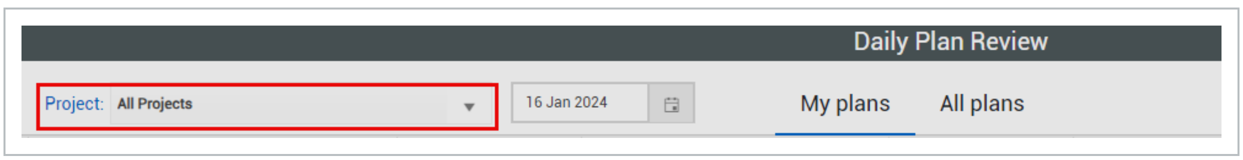
In addition to tracking which projects each employee is assigned to and the planned and actual hours for those plans, the Employee Register also looks for conflicts. For example:

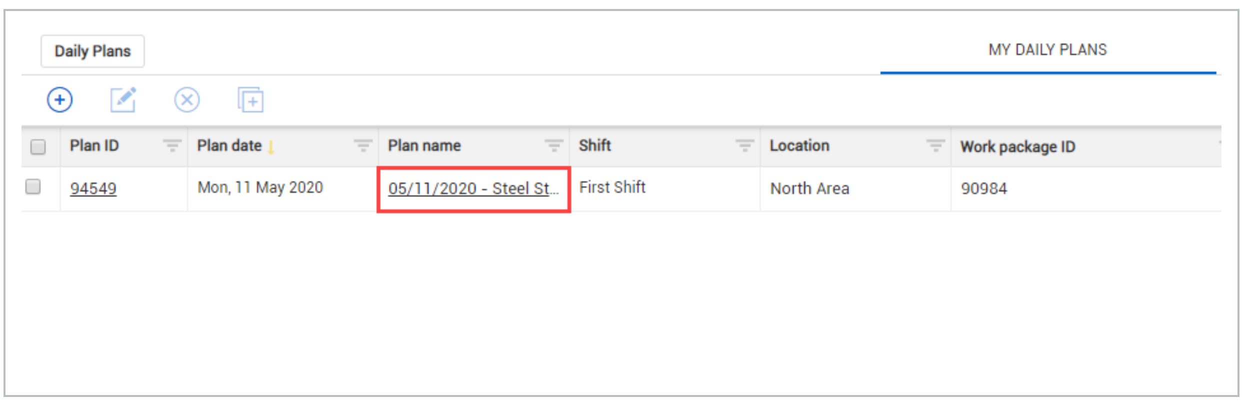
- If an employee is assigned to multiple daily plans for a single day, the register flags that employee by highlighting it yellow
- If an employee's total actual or planned hours exceeds the project's maximum threshold for hours worked in a single day, the resister will flag that employee by highlighting it red
- If an employee is highlighted in green, then there are no conflicts identified

The following Step by Step walks you through how to access the employee register.

Open the Employee Register

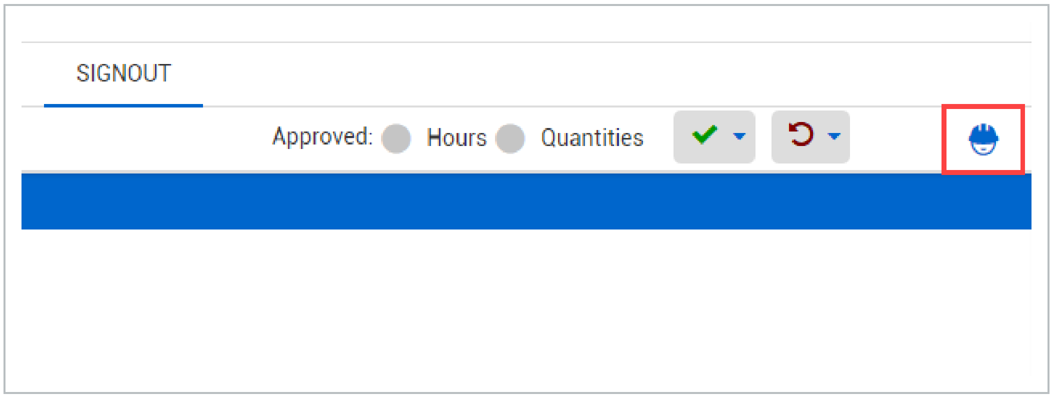
1. From the Daily Plans home page, open your daily plan.



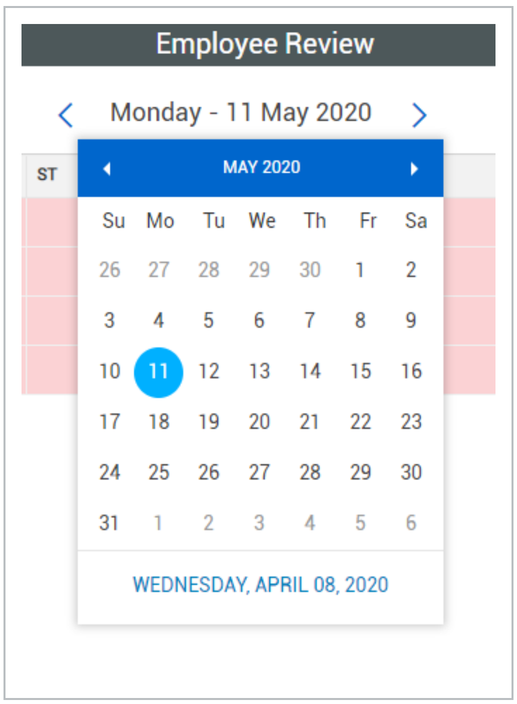


NOTE The All Projects option in the Projects drop-down list lets you review multiple projects in Daily Plan Review.

2. Click on the **Employee Register** icon in the upper right corner of the page.



3. Click on the **date** near the top of the page. Select the date assigned to your daily plan from the drop-down calendar.

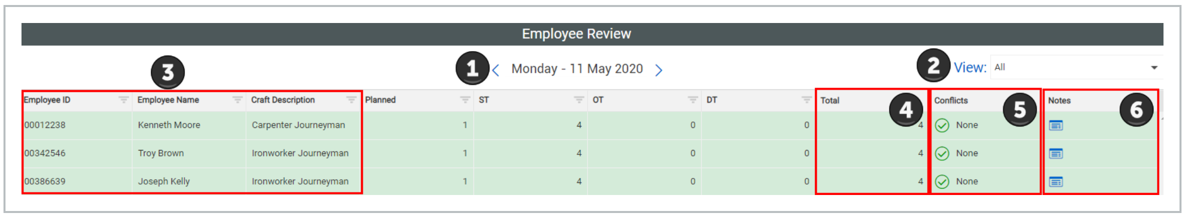


Overview – Employee Register

Title		Description
1	Date	Where you can change the date to view employees for different days.
2	View Menu	Drop-down where you can change the viewset to view either all employees or just those with conflicts.
3	Employee	Contains all information for the employee as far as ID, Name and Craft

Overview – Employee Register (continued)

	Title	Description
	Information	Description.
4	Employee Hours	Contains all planned and actual hours (including ST, OT, and DT).
5	Conflicts	Notes any conflicts for any given employee.
6	Notes	If any notes are associated to an employee, you view them here.



6.3.3 Edit Submitted Daily Plan

Scenario

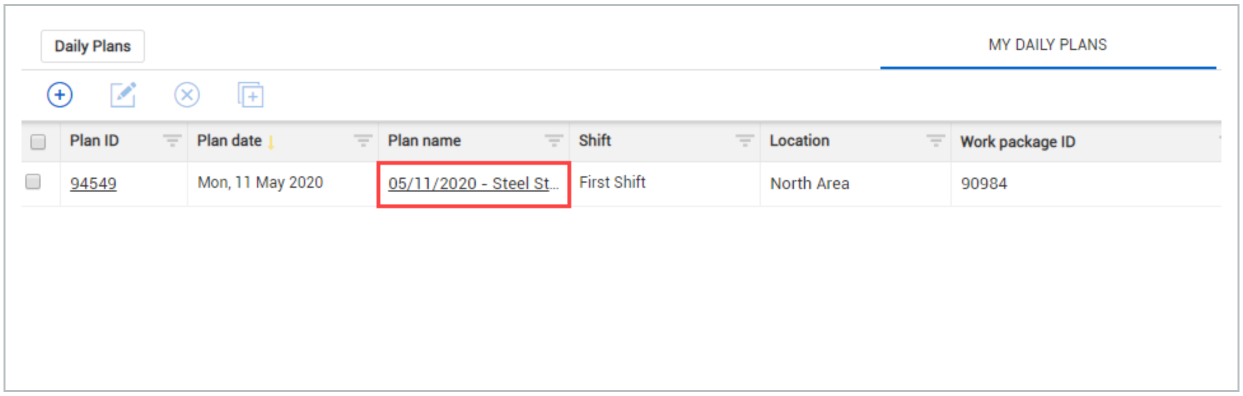
> Upon review of the employee register, it appears that your employee, Joseph Kelly, has had his time entered into two separate daily plans. You now need to go back into your daily plan and zero out his hours to avoid him receiving double pay.

In a scenario like the one described above, a simple mistake becomes a prime example of why the reviewing of the Employee Register is an integral step before approving a daily plan.

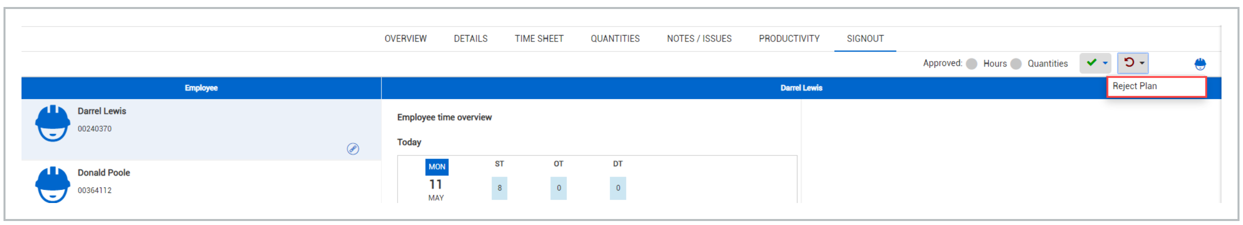
The following Step by Step walks you through how to reject an employee’s signout, modify their actual hours, and re-sign them out on their behalf.

Adjust the Hours of a Signed Out Employee

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

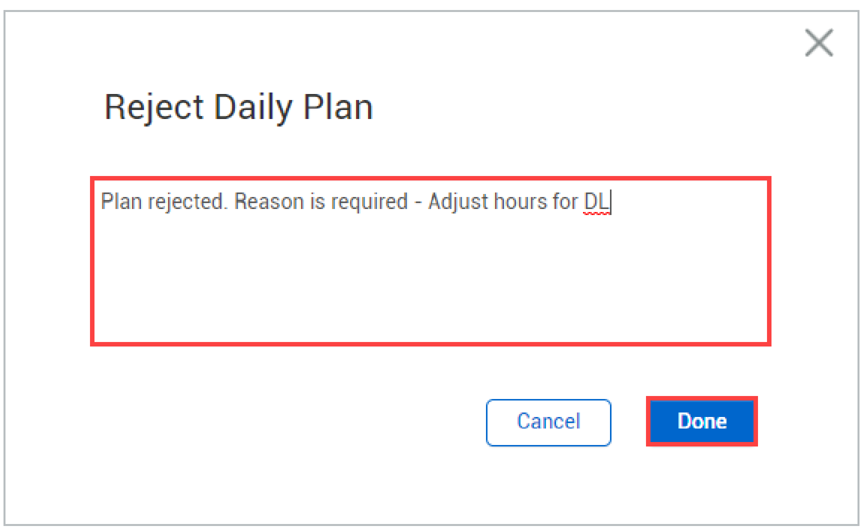


2. Click on the **Signout tab**.
3. Select the employee whose hours you want to adjust, then click on the **Reject icon** on the right.

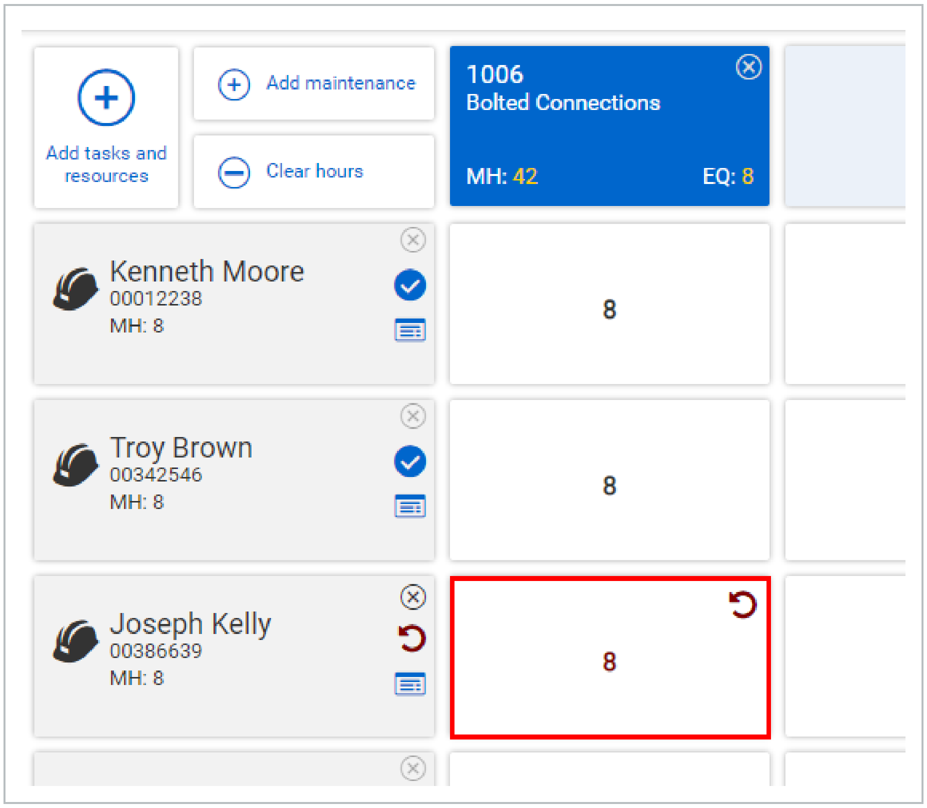


- You should get a pop-up window asking for a reason for rejection

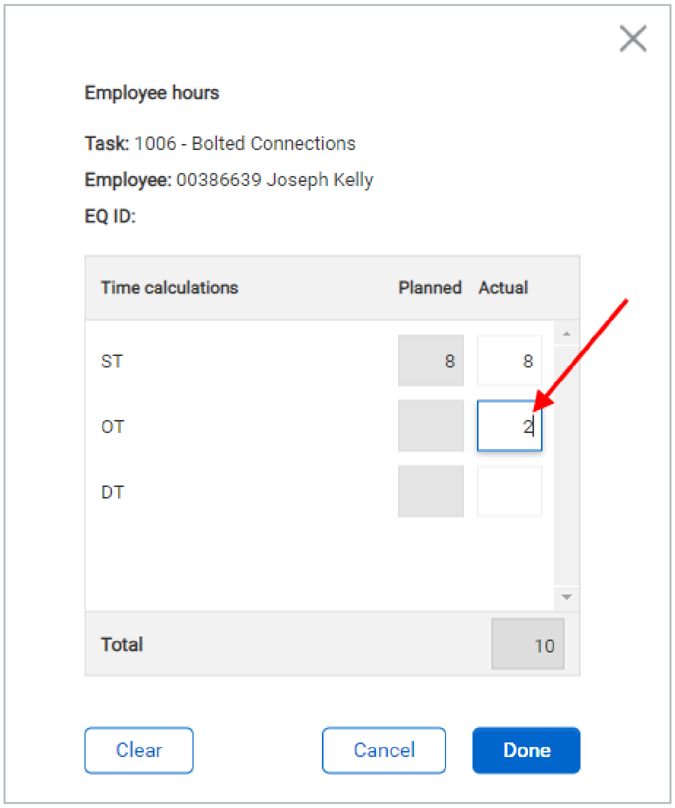
4. Enter a reason for rejection and click **Done**.



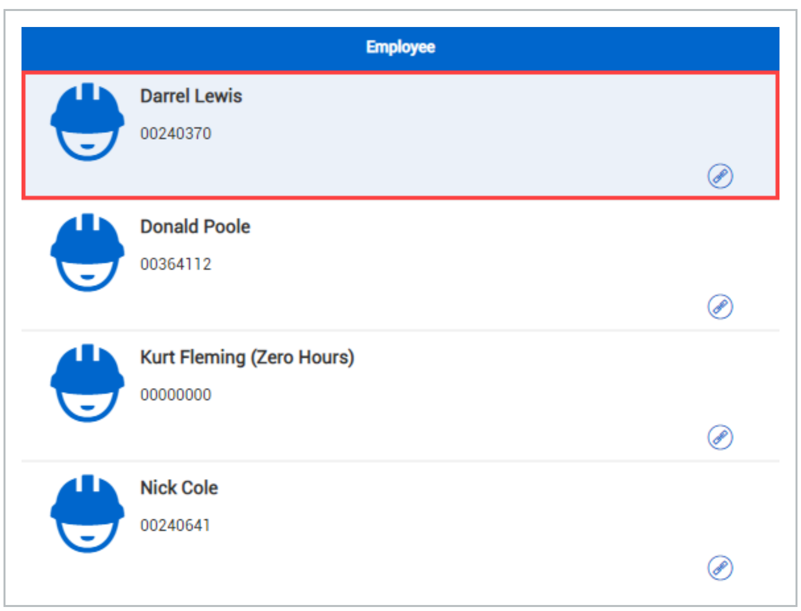
5. Click **Yes**.
6. Select the **Timesheet tab**.
7. Click in the entry cell for the worker whose hours you want to adjust.



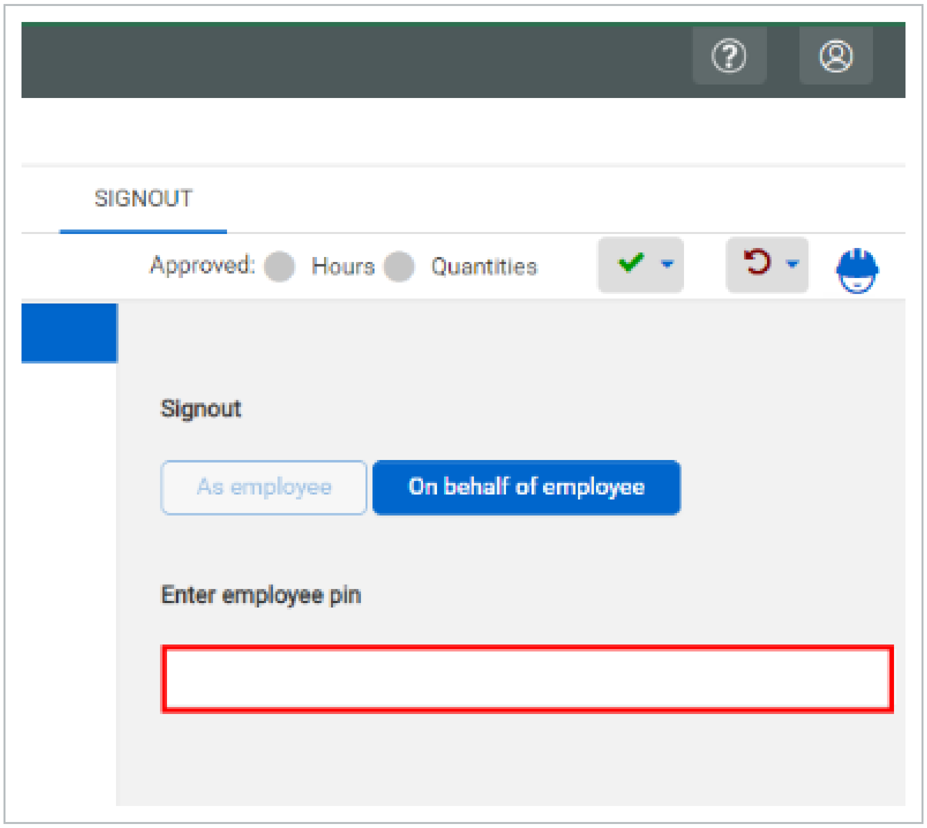
8. Adjust their hours and click **Done**.



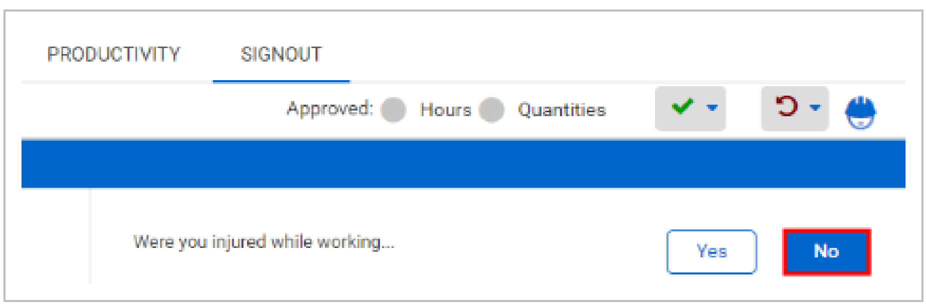
9. Select the **Signout tab**.
10. Select the employee whose hours you've adjusted from the employee list on the left.



11. Enter the appropriate pin in the **Enter employee pin field**.



12. Answer the signout questions.



13. Click **Done**.

6.4 APPROVE DAILY PLANS

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

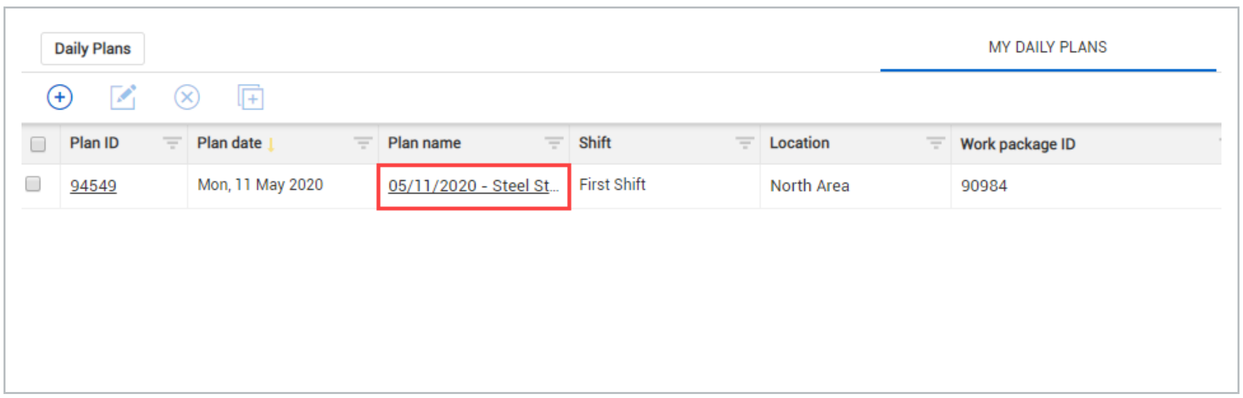
Once a daily plan has been fully executed, you have reviewed actuals, and the Employee Register, the plan is now ready for approval. When approving daily plans there are three options:

- Quantity
- Hours
- Quantity and Hours

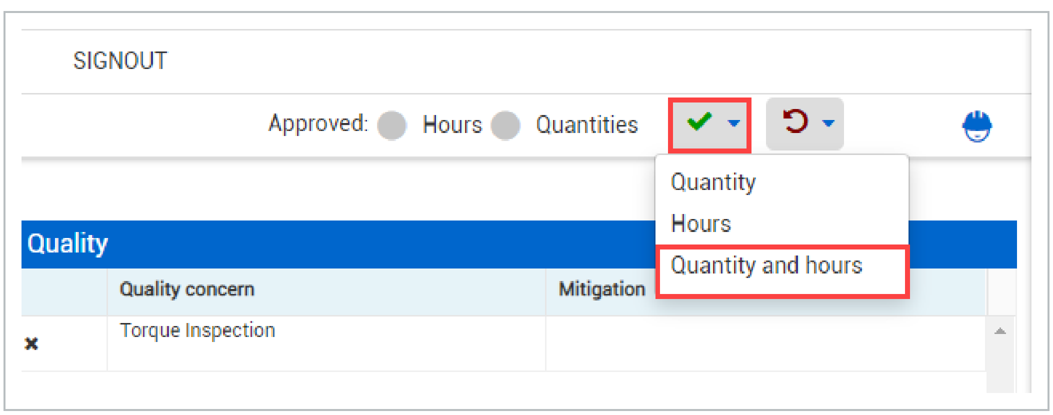
Each option means exactly what it denotes. If you select quantity, only the quantities for the daily plan will be approved and the hours will still need to be approved separately. Similarly, if you select hours only, the hours for the daily plan will be approved and the quantities will still need to be approved separately. Finally, selecting quantity and hours will approve both at once.

Approve a Daily Plan

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



2. Click on the **Approve** button in the upper right corner.
3. Select **Quantity and hours** from the drop-down list.



   - You should get a pop-up window asking if you are sure you want to submit

4. Click **Yes.**