PROGRESS USER GUIDE *DAILY PLAN WEB*



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Release 25.3 Last Updated: 21 April 2025



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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 Time sheet and Time center. The Weekly Time sheet and Time center solutions are covered in the Progress – Advanced User Guide. This Guide will cover the Daily Planning portion of InEight Progress.

1.1.1 INEIGHT PROGRESS DAILY PLANNING PHASES



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

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

In the Execution Phase, a project member takes the daily plan out in the field and references it throughout the day. As work is completed, the project member enters actual hours worked for employees and equipment. He or she also enters installed quantities, notes/issues and/or pictures to

document issues and reviews the overall productivity. By claiming installed quantities and entering actual hours worked, the project member can view productivity in real-time. Once all employees have reviewed their hours worked and signed out of the application, the daily plan is submitted for approval.

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

1.1.2 DAILY PLAN WORK FLOW

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



TIP

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

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

1.1.3 INEIGHT CONTROL INTEGRATION

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





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

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

1.1.4 DAILY PLANNING

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

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

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

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

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.



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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.

Add dally plan		
* Plan date	* Plan name	
	ti a	
Shift	Work plan/package ID - Name	Planner notes
FIRST SHIFT	• 4	5
Landian	•	•
Elocation		
	Hint type "123" or "Site"	
* Approvers (2 Required)		
No approvers added		
(+) Add approver		
* Executors (1 Required)		
No executors added		
+ Add executor		
Associated vendor		
Select vendor	•	

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

NOTEThis 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.

ōt		€ ² Links	Control	Quantity tracking		
Add project image		Organization	Manage budgets and forecasts	Build components and document		
Minimum of 540px x 360px Demo Project 09062021		Project	Launch	Launch		
Quantity forecasting		(+)				
quality forecasting		\bigcirc	Work packaging	(💥 Daily planning		
Engineering			Group work into plans and packages	Assign tasks for your crew		
Control			Launch	Launch		
Control Workspaces	- 1		Launch	Launch		
Control Workspaces Project library			Launch	Launch		
Control Workspaces Project library		📮 Project notes 🕑	Launch (6) Contracts	Eaunch (%) Supporting documents		
Control Workspaces Project library Plan		📮 Project notes 🕑	Gentracts Status Count	Caunch Supporting documents In approval Rejected Expiring		
Control Workspaces Project library Plan Quantity tracking		📮 Project notes 🛛 🕑	Gontracts Status Count Executed 0	Supporting documents In approval Rejected Expiring		
Control Workspaces Project library Plan Quantity tracking Work packaging		📮 Project notes 😰	Contracts Status Count Executed Non-executed O	Supporting documents In approval Rejected Expiring O O O O		
Control Workspaces Project library Plan Quantity tracking Work packaging Progress		Project notes 🕑	Launch	Image: second		
Control Workspaces Project library Plan Quantity tracking Work packaging Progress Daily planning	_	Project notes 2	Executed Non-executed Non-executed Non-executed Non-executed Non-executed O Rejected O	Supporting documents In approval Rejected Expiring O O O O S Bid packages		
Control Workspaces Project library Plan Quantity tracking Work packaging Drogres Daily planing Time center Weekly time keet	_	Project notes (2)	Executed 0 Non-executed 0 Rejected 0	Supporting documents In approval Rejected Expiring O O O O Bid packages Awarded Unawarded		

- 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.

Work Packages	Work	plans							
	Actions								
Planning Schedule		℅ Work package name	ID $-$	Description -	Schedule ID				
		∧ ▷ North		North					
		🎚 🗸 🔋 <u>CWP- North Area Ste</u>	90982	Work package for the struct					
		✓ □ South		South					
		🗀 Unassociated packages							

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

Work Packages	Work	packaging > North >	CWP- No	rth Area Steel Erection			
Work Publication					WORK PACKAGES	CONSTRUC PACKAGE	TION OVER
CWP- North Area Ste 90982	+	🗹 🛞 🕀					
Work package for the		Work package name	-	ID	Description	Schedule ID	
		IWP- Steel Erection - M	<u>1odule 0</u>	90984	Steel erection of Module 001.		
0%							

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

Work Packages	Work	packagin	g > North > CWP-	North Area St	eel Erection > IWP- Steel	Erection - Module 0		_
Horki dekages	*					OVERVIEW	WORKSPACE	CONSTRAINT MANAGEMENT
IWP- Steel Erection								
90984 Steel erection of Module 001.	Comp	onents					<	• • >
			Component ID	-	Description	Qua	ntity 👻 U	JoM
Manage workspace	Ŧ	1	Module 01 - A6 Connec	tion to Fou	Module 1 - A6 Connection t	o Foundation 1	E	a
Equipment	Ŧ	1	Module 01 - A7 Connec	tion to Fou	Module 1 - A7 Connection t	o Foundation 1	E	a
Budget	Ŧ	1	Module 03 - A6 Connec	tion to Fou	Module 3 - A6 Connection t	o Foundation 1	E	a
 Components Lessons learned 	Ŧ	1	Module 03 - A7 Connec	tion to Fou	Module 3 - A7 Connection t	o Foundation 1	E	a
Quality forms Work sequence	Ŧ	1	Module 05 - A6 Connec	tion to Fou	Module 5 - A6 Connection t	o Foundation 1	E	a
 Tools Temporary structures Labor 								

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

Work Packages	Work	packaging	g > North > CWP- North Area	Steel Erection >	IWP- Steel Erection - Module 0
Work Publicageo	<u>+</u>				OVERVIEW
IWP- Steel Erection 90984 Steel erection of Module 001.	Comp	onents			
Management			Component ID	- Description	
Manage workspace	Ŧ	1	Module 01 - A6 Connection to Fou.	Module 1 - A6 C	connection to Foundation
 Equipment Materials 	Ŧ	1	Module 01 - A7 Connection to Fou.	Module 1 - A7 C	connection to Foundation
 ✓ Budget ✓ Components 	Ŧ	1	Module 03 - A6 Connection to Fou.	Module 3 - A6 C	connection to Foundation

• 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.

	Ê				OVERVIEW	WORKSPA	CE CONSTRAINT	MANAGEMENT	DOCUMENTS				
P- Steel Erection	Com	onents				<>	Planning complete		Add compone	nts by WBS	:	Module 03 - A6 Connection to	Θ
l erection of Module 001.		(Component ID 👳	Description	- Quantity	👻 UoM	👻 WBS 1	· Percent co_	Estimated h	Discipline/Commodity -		Module 01 - A7 Connection to (Θ
je workspace		ff1	Aodule 01 - A6 Connectio	Module 1 - A6 Connection to	Foundat 1			0	0	Metals	⊖ *	Module 05 - A6 Connection to (Θ
Equipment	*	69	Aodule 01 - A7 Connectio	Module 1 - A7 Connection to	Foundat 1			0	0	Metals	-	Labor	
Materials	*	69	Aodule 03 - A6 Connectio	Module 3 - A6 Connection to	Foundat 1			0	0	Metals	Θ		
Components	X	69				Ea							
essons learned Quality forms	×.	69						0					
Vork sequence		ш										Equipment	
Save workspace as view	Work	sequence	•	_	_	<• >	Planning complete	_	① Add wori	(step		Torque Inspection New quality item 3	
		Work step	num Description	Attachments	Hold point	Man hours	,	Schedule start	Sched	ule finish			
	#	E 1	Off load steel	•				03/23/2020	03/23	/2020	⊗ ^	Safety	
		2	Install steel					03/23/2020	03/27	/2020	\otimes	Watch for falling objects	
	T	3	Bolt and torque	•	Yes			03/26/2020	03/27	/2020	\otimes		
	-		Quality inspection	•							\otimes		
	- - 	4		-0							\otimes	Environmental	
	- - - - - - - - -	ii 4 ii 5	Turnover	•									
	- - - - - -	4 5	Turnover										

- · 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.

Quality	
Torque Inspection	Θ
New quality item 3	Θ
Safety	
Watch for falling objects	Θ
Environmental	
Environmental	
	Neut
Clear	Next
1	NEIGHT

9. Enter your new daily plan details.



1 Plan details 2 Confirm	resource (3) Tool box talks	
* Plan date	• Plan name	
Shift	Work plan/package ID - Name	Planner notes
First Shift	♥ 90984 - IWP- Steel Erection - Module 001	
Location		
Approvers (1 Required)	Hint type "133" or "Site"	
No approvers added		
+ Add approver		
Executors (0 Required)		
No executors added		
+ Add executor		
		Capaci

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

\smile	Plan details 2 Confirm resource	3 Tool box talks		
Comp	ponent			
	Component ID	Description	Total MHRs	
\otimes	Module 03 - A6 Connection to Fou	Module 3 - A6 Connection to Foun	0	*
\otimes	Module 01 - A7 Connection to Fou	Module 1 - A7 Connection to Foun	0	-
Empl	oyee			
	Employee ID	Name	Trade	
		No employee topics added		^
Equip	ment			
	Equipment ID	Description	Category	
		No equipment topics added		-

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

Safet	у		
	Safety concern	Mitigation	
\otimes	Watch for falling objects		*
			-
Quali	ty		
	Quality concern	Mitigation	
\otimes	Torque Inspection		
\otimes	New quality item 3		•
Envir	onmental		
	Environmental concern	Mitigation	
	N	o environment topics added	A

 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.

	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.

E 🖓 Steel Stru	cture Training Job 105	091 / Progress / Dailypla	anning						0 ¢	80
aily Plans					MY DAILY PLANS	6 ALL PLANS				
🕀 🗹 😣	🕞 🕼 Edit n	nultiple More 🔻				0			\pm clear all filters $\mathcal{G}_{\mathcal{I}}$	000
Plan ID 😇 Pla	an date 👔 🐨	Plan name 😨	Shift	- Location	\Xi Work package ID		😇 Status (bar)	Revision #	👻 Quantities status 😇	Hours status
7 Eri	24 Jun 2022	06/24/2022 - Steel St	Day Shift	North Area	10	In Planning		0	Quantities not approved	Hours n

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.

O ⁺	🖉 Links	Control	Quantity tracking
Add project image	Organization	Manage budgets and forecasts	Build components and document quantities
Demo Project 09062021	Project	Launch	Launch
Plan 🔺	(+)	Work packaging	Daily planning
Quantity tracking	\smile	Crewn wordt inte niene end	Accian Accian for some and
Work packaging		packages	Assign tasks for your crew
Progress		Launch	Launch

2. Click on your daily plan's name.

				0	4 🛛 🕤
Daily Plans	MY DAILY PLANS	ALL PLANS			
📀 🖻 🛞 🗟 Edit multiple More 🗸				👳 clear all filters	Ø ⊜ Q
🗌 Plan ID 😇 Plan date 👔 🐨 Plan name 😇 Shift 🐨 Location	🐨 Work package ID	👻 Status 🗁 St	Status (bar) Revision #	👻 Quantities status	👻 Hours status
□ <u>7</u> Fri, 24 Jun 2022 <u>06/24/2022 - Steel St</u> Day Shift North Are	10	In Planning	0	Quantities not approved	Hours not

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.

DAILY PLAN 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.

												D	aily Plan	Rev	view											
ıke	Mallatt										My plan	s	A	ll pla	ans			<	THURSDA	Y - 22 SEF	2022 >			View: All		٠
	Resource ID	Ŧ	Resource Name					Resource Ty	pe	7	Craft Description	on		7	Planned		Ŧ	ST	Ŧ	от	7	DT	Ŧ	Total	Conflicts	
Þ	00369797		Mario Bedarte					Employee			Craftsman 1					1	0.00		8.00		2.00		0.00	10.00	🛞 Em	ployee hou
Þ	00167827		Urbano Torres Mar	tinez				Employee			Foreman					1	0.00		8.00		2.00		0.00	10.00	🛞 Em	ployee hou
4	00406023		Cesar Chavez Jass	0				Employee			Specialist					1	0.00		8.00		2.00		0.00	10.00	🛞 Em	ployee hou
	Plan ID 📼	Plan n	ame	Ŧ	Shift 🔫	Planned	$\overline{\tau}$	ST	Ŧ	от	~	DT	Ŧ	To	tal	s	tatus	7	Created by	Ŧ	Updated b	y $=$	Approver	1 Approver	1 Role	Appr
	2019045	IWP pr	ish to Progress		FIRST SHIFT		10.00		8.00		2.00		0.00			A 00.0	waitin	g Approval	Luke Malla	tt	Luke Mall	att	Luke Malla	att LukeTest	LevelZero	
4	189467		STOLTZ-SST18					Equipment									8.00		8.00		0.00		0.00	8.00	Nor	ve .
	Plan ID 👳	Plan n	ame	Ŧ	Shift 👻	Planned	Ŧ	ST		от	Ŧ	DT	Ŧ	To	tal	s	tatus	Ŧ	Created by	Ŧ	Updated b	y =	Approver	1 Approver	1 Role	Appr
	2019045	IWP pr	ish to Progress		FIRST SHIFT		8.00		8.00		0.00		0.00			8.00 A	waitin	g Approval	Luke Malla	tt	Luke Mail	att	Luke Malla	att LukeTest	LevelZero	
	4					-						-		-		_					-			-		-
*	189830		GENERAC-MLT6SM	D LE	D			Equipment									8.00		8.00		0.00		0.00	8.00	O Nor	e .
	191006		GENERAC-MLTGS	/D				Equipment									8.00		8.00		0.00		0.00	8.00	Nor	ie .

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.

		OVERVIEW	DETAILS	TIME SHI	ET QUANTITIES	NOTES / ISSUES	PRODUCTIVITY	
ā ()								Submit 🝙
							Cancel	Save
lan date		Approvers (1 Required)						
Fri,24 Jun 2022	ä			•	Engineer		•	•
lan name		(+) Add approver						
06/24/2022 - Steel Structure		0 million						
hift		Executors (1 Required)						
Day Shift	•			•	Foreman		•	•
ork plan/package ID - Name		(And executor						
on pure parage to - Harre		Location			Revision number	Associated vendor		
10 ×		North Area			0	Select vendor	•	,
int tune #100# or #Cite#								

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.

	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	Lets you enter daily plan notes in an easily accessible section.

						OVE	RVIEV	V DETAILS TIME SHEET	QUANTITIES NOTES	/ ISSUES	PRO	DUCTIVITY				
œ	0												Submit 😑			
Overvie	ew 🚺							Tool box talks		6						
Planne	ed tasks	Quantity		Time (M	IHRs)	Budget		Safety		e	٩	uality				
Task ID	Description	Planned	UoM	Planned	Budget	Planned G/L		Safety concern	Mitigation			Quality concern	Mitigation			
							^	× Crush points		^	1	x Torque inspection		Î		
								 Watch for falling objects 								
							÷									
Totals				0.00	0.00	,				-				-		
		_						Add safety topic				Add quality topic				
Planne	er notes	3						Environmental			G	eneral discussion				
First d	ay of steel e	rection.						Environmental concern	Mitigation		General discussion					
								No environment	al topics added	^	No general discussion topics added					
								4			€					
							-									
								O 111			~					

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.

	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.

			OVERVIEW	DETAILS	TIME SHEET
÷	Θ	1005 @ Erect Steel - Light	1		
Add tasks and resources	Clear hours	⇔:24 ≰: ≌ 5:8	Γ		
Darrel P. L. Iron Worker - Ir. 00240370 Σ:8	ewis $^{\otimes}$	ST: 8			
Donald Po Laborers - Lab. 00364112 Σ: 8	ole ®	ST: 8	0		
Nick J. Co Iron Worker - Ir. 00240641 Σ:8	le ⊗ -	ST: 8			
Grove-RT8	880E Cra	Operated: 8			

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** (1) 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.

						OVERVIEW	DET	AILS	TIME SHEET	QUANTITIES	NOTES /	ISSUES	PI
Œ O	€ ↓ [▲]												
(+)	+ Add maintenan	ce 1017 D1 - Ma mental (intain Enviro Controls	on	1020 CR - S1 ation -	- Soil Stabiliz 12" @ 6%	8	1022 D0 NC - Soil :		1000			
dd tasks and resources	Clear hours	⇔:2	% :	୪ ୦ନି:	⇔ :	*	୪ ୦ନି:	() :6	Employee hou	irs			
Alfred	o Manzo Jr	0							Task: 1017 - 1 Employee: 00	01 - Maintain Environ 457866 Alfredo Manz	mental Control o Jr - Specialty	s [,] Cr	
00457866 Σ: 4	6	見	2						Time calcu	ations	Planned	Actual	
Andrev Staff - St. 00443799 Σ: 4	w Flores ^{aff De} 5	●							ST		2	4	
Anton Specialty 0014376 Σ: 2	io Ramos ^{Craft} 7	❷							Total			~ 2	
Benjar Specialty 00478673 Σ: 0	min Chapman ^{Graft} 7	⊗							Apply hou employee Clear	rs to selected	Apply hours to employees for Cancel	all the task Done	

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 EQUIPMENT 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.

				OVE	RVIEW	DETAILS	TIME SHEET
te () 🗍							
(+)	Θ	1005 Erect Stee	I - Light	8			
Add tasks and resources	Clear hours	⊖:	* :	5-8:			
Darrel P. Li Iron Worker - Ir. 00240370 Σ: 0	ewis $^{\otimes}$						
Donald Po Laborers - Lab. 00364112 Σ: 0	ole 🛞						
Nick J. Col Iron Worker - Ir. 00240641 ∑:0	le 🛞						

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**.

	>
Labor Hours	
Task: 1005 - Erect Steel - Light Employee: 00364112 Donald Poole - Laborers - Labor	
Operate Equipment No premiums assigned No Equipment Assigned	8 B 8
•	Clear all hours
Total labor hours	8
	Cancel 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.

						OVERVIEW	DET	TAILS	TIME SHEET	Q	UANTITIES	NOTE	es / Issues
•	• ⊕ Remove unused resources Remove unused tasks		e Moves/Heavy	8	1068 IR - D1 - Water Truck Support		⊗ 2226 Dewat 1		tering - S1, S3, D		1945 S1 - Site	e Finish	8
Add tasks and resources	O Clear hours	⊕:	* :	% @:	⊕:14	% :	<mark>ଅ</mark> ଶ୍ଚି:	⊕:	% :	26 3:	⇔ :	* :	2 28:
Steve Specialty 00428594 Σ:7	Garrett ^{Craft} 4	0				7							
Benjar Specialty 00478677 Σ: 7	Min Chapman Craft 7	0				7							

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.

	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.

			OVERV	/IEW	DETAILS	TIME SHEET	QUANTITIES	NOTES / ISSUES	PRODUCTIVITY				
æ) 🕀										Submit	۰ .
Task		9		1	1005 - Erect Steel - Lig	ht				0			
1005		Erect Steel - Light	88	^	Module 01 - A	23: Cross Brace Asser	mbly Module 1 - A23	Cross Brace Asse		Ø		☆ (≠ ⊝ 1
Contra	~*			*									
72000	1000	Merrill Iron & Steel Inc.	Θ	^									
													-
				. T	Fask totals					0.15000 Ton	0.	00000	
•	Add ta	sk or contract			0.00000								

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

VIEW	DETAILS	TIME SHEET	QUANTITIE	S NOTES / ISSUES	PRODUCT	IVITY			
									Submit 🍙 🖕
05 - Erect	t Steel - Light								
- 7	Module 01 - A2	3: Cross Brace Asse	mbly Module 1 - A	23: Cross Brace Asse					☆ 🖽 ⊖
Pric	iority	Complete	Claim %	Step		Quantity	UoM	To date quantity	Planned quantity
	p		15	Shakeout /Transport		0.15000	Ton	0	0.15000
	p		45	Erect / Bolt Up		0.15000	Ton	0	0
			30	Final Torque		0.15000	Ton	0	0
	p		10	QC Verification		0.15000	Ton	0	0
				Component total		0 15000	Ton	0.00000	0.02250

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 to group them by a variety of topics such as quality, safety, environmental, and more.

	Title	Description
1	Toolbar	Use the icons in the top toolbar to add, edit, or delete notes or issues.
2	Timeline	This is where all notes for a daily plan display in a chronological order, with most recent at the top.
3	Notes/Issues Creation Area	This is where notes and issues are created.

OVERVIEW	DETAILS TIME SHEET	QUANTITIES NOTES / ISSUES PRODUCTI	VITY Submit © -
Timeline 2	3	Monday Mar 03 04:25 PM	
Monday Mar 03 04:25 PM Anchor rod damage Field fix required. Send issue	Issue name Anchor rod damage Description Field fix required. Edit	Issue start date 02/28/2025	Task 1005 Erect Steel - Light
Monday Mar 03 04:24 PM Parkland delivery rescheduled for 8:15 A.M. Contact Mark (555) 8:19-2939.	Tags: Delay X		
Monday Mar 03 04:23 PM	Add tags		
Allowance - Foreman for the day	Associations:		

2.3.6.3 NOTES

Notes can be added directly from the Notes/Issues tab or through the Time Sheet or Quantities tabs and are visible to all team members with access to the daily plan.

The following steps walk you through how to create a note from the Notes/Issues tab.

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.

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

		OVERVIEW	DETAILS	TIME SHEET	QUANTITIES	NOTES / ISSUES	PRODUCTIVITY
🖻 🛛 🗬	e 8						Submit 💿 🖕
Image: Control of the second secon		y Jun 23 10:58 AM					
Add	Issue					No data available.	⊙ Add note ⊙ Add issue

- 4. Enter a description in the text field.
- 5. To add a tag, click **Add tags**, and then select a tag in the slide-out panel. Click **Done** to close the slide-out panel.

NOTE

Tags are defined by your organization and project.

6. To add an association, click **Add associations**. From the slide-out panel, click the tabs at the top to choose a category. Select tasks, employees, equipment, components, maintenance orders, or vendors to include as an association. Click **Done** to close the slide-out panel.

Monday Mar 03 04:24 PM
Parkland delivery rescheduled for 8:15 A.M. Contact Mark (555) 819-2939. Edit
Tags: Production Notes × Add tags
Associations: 1005 Module 15 - E24: Beam Assembly × • Add associations
Photos: 1 of 20 photos added to plan.
Drag and drop photos here or
Drag and drop photos here or

- 7. To attach photos to the note, click **Browse Photos**, and then select an image file. You can also drag and drop an image into the field.
- 8. Click Done.
- NOTE When integrated with InEight Document, pictures uploaded to Daily Plan notes or issues can be automatically imported to the associated InEight Document project Gallery.

Notes can also be added from other tabs in a daily plan. To add a note from the Time Sheet tab, select a resource and click **Add note**.



To add a note from the Quantities tab, click the **Add notes** icon from the top right of a component.

1006 -	- Bolted Connections	
•	Module 15 - A6 Connection to Foundation Module 15 - A6 Connection to Foundation	☆ 🖵 🖯
►	Module 15 - A7 Connection to Foundation Module 15 - A7 Connection to Foundation	☆ 🖽 ⊖

NOTE Some actions are automatically recorded on the Notes/Issues tab, such as adding allowances, attendance notes, or modifying time sheet details on the Sign In/Sign Out tab.

2.3.6.4 ISSUES

An issue has the potential to become a change order and is indicated with an exclamation mark.

	۱	Timeline	
Monday Mar 03 (Anch Field	04:25 PM or rod damage fix required.		● Send issue

Adding an issue is like adding a note in a daily plan. Follow the steps below to create an issue from the Notes/Issues tab.

CREATE AN ISSUE 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 issue.



	OVERVIEW	DETAILS	TIME SHEET	QUANTITIES	NOTES / ISSUES	PRODUCTIVITY	
• • • • • • •	\otimes					Sut	omit 🍙 🖕
Add note	Timeline				Thursda	y Jun 23 10:58 AM	
Add issue					No data available.	⊙ Add note ⊙ Add issue	

- 4. Enter a name and start date for the issue, and then select the associated task from the Task drop-down menu.
- 5. Enter additional details in the text field.
- 6. To add a tag, click **Add tags**, and then select a tag in the slide-out panel. Click **Done** to close the slide-out panel.

NOTE

Tags are defined by your organization and project.

7. To add an association, click **Add associations**. From the slide-out panel, click the tabs at the top to choose a category. Select tasks, employees, equipment, components, maintenance orders, or vendors to include as an association. Click **Done** to close the slide-out panel.

	Monday Mar 03 04:25 PM	
Issue name Anchor rod damage Description Field fix required.	lssue start date 02/28/2025	Task 1005 Erect Steel - Light
Edit		
Delay X • Add tags		
Associations: 20100204 Bayhill Contracting. X		
Add associations		
Photos: 1 of 20 photos added to plan.		
Drag and drop photos here or		
Browse Photos		

- 8. To attach photos to the issue, click **Browse Photos**, and then select an image file. You can also drag and drop an image into the field.
- 9. Click Done.

2.3.6.5 SEND ISSUE TO INEIGHT CHANGE

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

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

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

					OVERVIEW	DETAILS	TIME SHEET	QUANTITIES	NOTES / ISSUES	PRODUC
Œ	U	+	ľ	\otimes						
				Timeline					Monday Ma	ar 03 04:25 PN
Monday	y Mar	03 04:25 Anchor rod Field fix red	PM damage quired.		€ Send issue	Issue name Anchor rod damag Description Field fix required. Edit	je		Issue start date 02/28/2025	
Monday Parkland	y Mar I delive	03 04:24 ry resched	PM uled for 8:	15 A.M. Contact Ma	ırk (555) 819-2939.	Tags:				

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 manhours.
- 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.

	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.

		OVERVIEW	DETAILS	TIME SHEET	QUANT	ITIES	NOTE	S / ISSUES	PRODUC	CTIVITY				
Œ	U											Submi		-
					Plan	ned			≓ MH	Rs per Qty	2	Planned G/L		
Task ID		Description					UoM	MHRs	Planned	Current Budg	et 3 🔻	Cost	MHRs	
1005		Erect Steel - Light		0		0.780	Ton	24.00	30.769		20.000	-4,15	8	-8.4
Totals								24.00				-4,15	8	-8.4

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.

Daily Plans > 05/11/2020 - Steel S 05/11/2020 (In Plan	ning) - Plan ID 94549										
		OVERVIEW DETAILS	TIME SHEET QU/	ANTITIES NO	TES / ISSUES	PRODUCTIVI	ТҮ				
										Submit	
				Planned			≓ MHRs p	er Qty	Planned	G/L	
ask ID	Description			QTY	UoM	MHRs	Planned	Current Budget	Cost	MHRs	
105	Erect Steel - Light			0.000	Tor	24.00	0.00	Ourrent Estimate		0	-2
								Current Budget			-
								Actuals			
								Goals			
ntals						24.00				0	-2
v.819											
p 2020 Inteight Inc. Privacy and Terms v 20.2 9hEEU										INE	IG

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.

ſ	Daily Plans										MY DAILY PLANS
0	•	()	×								
	Plan ID	-	Plan date 👃	Ŧ	Plan name	-	Shift	-	Location	-	Work package ID
	<u>94549</u>		Mon, 11 May 2020		<u>05/11/2020 -</u>	<u>Steel St</u>	First Shift		North Area		90984

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



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.

	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

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.

**	1234	
• Multiple days (starting with plan dat	e) Work plan/package ID - Name	Planner notes
1 Days	4	6
Exclude weekends		
Shift		
FIRST SHIFT	Hint type "122" or "Site"	
	Instruct the following	
Location		 Resource hours
	 Components 	Votes and tags
Associated vendor	Resources Extra pay	Toolbox talks Attachments
Select vendor	Extra pay	
* Approvers (1 Required)		
T	Superintendent	• •
+ Add approver		
* Executors (1 Required)		

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.

Daily Plans						MY DAILY PLANS
Plan ID	Plan date 1	Ŧ	Plan name -	Shift -	Location -	Work package ID
<u>94549</u>	Mon, 11 May 2020		05/11/2020 - Steel St	First Shift	North Area	90984

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

ſ	Daily Plans							MY DAILY PLANS
(•	6	<u>ج</u>					
	Plan ID	Ŧ	Plan date 👃	-	Plan name	Shift	Location -	Work package ID
	<u>94549</u>		Mon, 11 May 2020		05/11/2020 - Steel St	First Shift	North Area	90984

3. Rename your new plan.

Copy daily plan				
* Plan date		* Plan name		
Tue, 12 May 2020	Ċ	05/12/2020 - Steel Structure Erection	Module 01	
Shift		Work plan/package ID - Name	Planner notes	
First Shift	-		First day of steel erection.	

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.

* Plan date	* P	Plan name		
Tue, 12 May 2020	ii 0:	5/12/2020 - Steel Structure Erection	Module 01	
Shift	Wo	ork plan/package ID - Name	Planner notes	
First Shift	•		First day of steel erection.	
First Shift	g	90984 ×		

• 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

- When copying break and shifts, the resource hours are copied to the break and shift details in the new plan.
- 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.

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 VIDEO | Add Details to a New Daily Plan

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.

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

- Flan Gate		* Plan name		
Tue, 12 May 2020	Ċ	05/12/2020 - Steel Structure Erection N	Nodule 01	
Shift		Work plan/package ID - Name	Planner notes	
First Shift	•			
Location				
		Hint type "123" or "Site"		
* Approvers (1 Required)				
No approvers added				
+ Add approver				
* Executors (0 Required)				
No executors added				
No executors added Add executor				

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.

. Diam data	Dian anna		
* Plan date	- Plan name		
Shift	Work plan/package ID - Name	Planner notes	
FIRST SHIFT	· 4	5	
Location			
,	Hint type "123" or "Site"		
* Approvers (2 Required)			
No approvers added			
+ Add approver			
* Executors (1 Required)			
No executors added			
+ Add executor			
Associated vendor			
Select vendor	•		

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.

Ę	<u>)</u> 10)5091	(Steel Training Job)			gress 🔻	Daily planni	ng 🔻	
[Daily Plans								
0	•	0	3 [+						
	Plan ID	Ŧ	Plan date 👃	Ŧ	Plan name	Shift	-	Location	 Work package ID
	<u>94549</u>		Mon, 11 May 2020		05/11/2020 - Steel St	First Shift		North Area	90984

- 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.

Add daily plan				
Add daily plan				
* Plan date		* Plan name		
Tue, 12 May 2020	Ċ	05/12/2020 - Steel Structure Erection	Module 01	
Shift		Work plan/package ID - Name	Planner notes	_
First Shift	-		First day of steel erection.	
		00084 >		

• Leave the Work plan ID field blank

* Plan date		* Plan name	
Tue, 12 May 2020	Ċ	05/12/2020 - Steel Structure Erection N	Nodule 01
Shift		Work plan/package ID - Name	Planner notes
First Shift	•		
Location			
* Approvers (1 Required)		Hint type "123" or "Site"	
No approvers added			
+ Add approver			
* Executors (0 Required)			
No executors added			
+ Add executor			

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

* Plan date		* Plan name	
Tue, 12 May 2020	Ċ	05/12/2020 - Steel Structure Erection	Module 01
Shift		Work plan/package ID - Name	Planner notes
First Shift	•		First day of steel erection.
First Shift		90984 🗙	

5. Enter any notes in the Planner notes field.

* Plan date		* Plan name	
Tue, 12 May 2020	Ċ	05/12/2020 - Steel Structure Erection N	Nodule 01
Shift		Work plan/package ID - Name	Planner notes
First Shift	•		Second day of steel erection
Location			

- 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.

• Approvers (1 Dequired)		Hint type "123" or "Site"		
Vicky Pierce	•	Select approver role		• O
+ Add approver				
* Executors (0 Required)				
Vicky Pierce				
+ Add executor				
Skip planning			Cancel	Create plan
only promiting			Guilder	oreate plan

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.

	Attach files to daily plan								X
Overview									
Planned task	Add Se	👻 File name	😇 Source	ΨD	👻 Status	👻 Revision	👻 File Added By	👳 Date Added	$\overline{\nabla}$
Task ID Des				No Documents	Found				^
3615212 C P									
									-
	Displayed results: 0 Selected: 0								
									Close

- 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**.

Upload do	cument Link from	n InEight Document											
Discipline		Revision		Status		Туре	т	itle			ID		
All disciplin	nes 🔻	All revisions	•	All status	•	Specification							
												Clear all	pply
ID			Title					$\overline{\tau}$	Rev 3	Туре	From User		$\overline{\tau}$
	RATIONTESTAUG11-5	8267	Integra	tiontestAug11-50267					8	SPEC			
IMD-C	HECKP-65509		IWP-cl	eckp-65509					A	SPEC			
IMD-C	REATEDONSEP21-655	598	IWP-CI	eatedonSep21-65598					A	SPEC			
🗹 IWP-G	SDGSD3-65560		IWP-g	dgsdg-65560					A	SPEC			
IMP-L	UKEOCT5-69516		IWP-La	keOct5-69516					D	SPEC			
D IWP-L	UKEOCT5-69516		IWP-L	keOct5-69516					D	SPEC			

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.

Uplage discourse Link from httlight Discourse • Tile • Link Document • Link Document Inter / hundsdollaccop sharepoint com/ w://sites/technology/Shared1/	nks and attachments to daily plan		
• Trike • Link Document It hgs://haddollarcorg.sharepoint.com/wit/sites/itechnology/Shared%	Upload document Link from InEight Document Link Enternal URL		
• Lot U Test • Lok Document Intps://harddollar.cop sharepoint.com/.w///sites/rechnology/Shared\S	- Title		
* Lik Document It has doollar coop sharepoint.com/.wt//sites/technology/Shared\G	Test		
 Link Document Intps://harddollar.com/w/i/sites/itechnology/Shared%: 	1691		
https://harddollarcorg.shurepoint.com/.w//sites/itechnology/Shured%	Link Document		
	https://harddollarcorp.sharepoint.com/:w/r/sites/technology/Shared%2		

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.

\odot														
Title Delete	Filer	ame		Source			ID	Status	Revision	File Added By		Date Added		
	T		Т	-Select value	- V	т					Т		т	
Test	Test			External Url						Contraction Contraction		10/03/2023		*

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.

€	Return to daily plans	Attach files to daily p	lans					
444	Taalbay talka Safaty	Upload document	Link from	InEight Document]			
-	Toolbox talks - Salety	Discipline		Revision	-	Status		
0	Toolbox talks - Quality	All disciplines	•	All revisions	•	All sta	atus	•
٢	Toolbox talks - Environmental	Туре		Title		ID		
冎	Toolbox talks - General discussion	All types	•					
۲	Attach and link files					(Clear all Ap	ply
		ID	Tit	e	Rev Typ	pe	From user	
		#		No records	s found			
				Attach to selecte	ed daily plans >	At	ttach to all daily plans	>>

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**.

 Return to daily plans 	Manage safety topics			Select all Clear all			\$1 Sort
Toolbox talks - Safety Toolbox talks - Safety Toolbox talks - Quality Toolbox talks - Environmental Toolbox talks - Ceneral discussion Toolbox talks - General discussion Tatach and link files	Salvey Concern Enter salvey concern	0 / 1000 Milgation Enter milgation	0/1000	183481 - Piping Sun, 12 Sep 2021 No safety topics	×	183474 - Excavation Thu, 09 Sep 2021 No safety topics	3
0	0	Add to selected daily plans 2	dd to all daily plans 🚿	View daily plan Available 2 Solected: 0		Vien daly plan	

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.

€	Return to daily plans	Attach files to daily p	lans					
444	Taalbay talka Safatu	Upload document	Link fron	n InEight Document]			
-	TOOIDOX Laiks - Salety	Discipline		Revision	-	Status	Status	
Toolbox talks - Quality		All disciplines	 All revisions 		•	 All status 		•
٢	Toolbox talks - Environmental	Туре		Title		ID		
冎	Toolbox talks - General discussion	All types	*					
۲	Attach and link files					(Clear all Ap	ply
		ID	Tit	le	Rev Ty	pe	From user	
		8		No record:	s found			
				Attach to select	ed daily plans >	Attach to all daily plans »		>>

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
- Time sheet
- 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).

				OVER	RVIEW	DETAIL	S	TIME SHEET QUA	NTITIES	NOTES / ISSUES	PRC	DUCTIVITY SIGNOUT	
Overvi	ew						Тоо	box talks					Submit
Planned tasks		s Quantity Time ((MHR Budget		Safety			Qu	Quality			
Task ID	Description	Planned	UoM	Plann	Budget	Planne		Safety concern	Mitiga	tion		Quality concern	Mitigation
1005	Erect St	2.9916	Т	28	60	32	×	Crush points			Â	Torque Inspection	
1006	Bolted	0.4	Ea	4	0	-4	×	Watch for falling objects	6				
Totals				32	60		(†) A(ld safety topic			↓ (+) ▲	dd quality topic	
Plann	er notes						Env	vironmental			Ge	neral discussion	
								Environmental concern	Mitiga	tion		General discussion	
	No environmental topics added						-	No general discuss	sion topics added				
							(+) Add environmental tonic					dd general discussion topic	

5.2.4 TIME SHEET TAB

The Time sheet tab is identical to the Time sheet 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.

	OVERVIEW DET/	AILS TIME SHEET	QUANTITIES NOTES / ISS	UES PRODUCTIVITY	SIGNOUT	
J.A.						Submit
Add trash and resources Clear hours MH: 24 EQ: 8						
Darrel Lewis @ D02403TO MHX 8 8						
Donald Poole ® Cosset112 MMK 8 8 8						
Nick Cole						
Crove - RT880E ⊗ 137733 E0.8 Ø Operated 8 Other						
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.

[Daily Plans										MY DAILY PLANS
0	•	0	×								
	Plan ID	Ŧ	Plan date 👃	Ŧ	Plan name	-	Shift	-	Location	-	Work package ID
	<u>94549</u>		Mon, 11 May 2020		<u>05/11/2020 -</u>	Steel St	First Shift		North Area		90984

- A prompt appears stating that the plan is in the Execution Phase
- 2. Click on **Time sheet** tab.
- 3. Click on the Add tasks and resources button on the left.

105091	(Steel Training Job)	•	Progress 🔻	Daily planning 👻
Daily Plans > 05	5/11/2020 - Steel S (05/11/2020 (Execution) -	Plan ID 94549	
				OVERVIEW
ĻĄ				
+	Θ	1005 Erect Steel - Light	8	
Add tasks and resources	Clear hours	MH: 24	EQ: 8	
Darrel Lew	is 🛞			
MH: 8		8		
Donald Po	ole 🛞			
00364112 MH: 8	۲	8		

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

		OVERVIEW	DETAILS	TIME SHEET	QUANTITIES	NOTES / ISSU
↓2						
TASK EMPLOYEE EQUIPMENT				Search empl	oyee	۹. >
RECENT	~	ADD TO TIMESHE	ET			
ALL						
	^					
	Ŧ					

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

↓ <u>A</u>			
TASK	EMPLOYEE	EQUIPMENT	
< Back to	listing		
Temporary em	nployee ID		
Temporary em	nployee name		
Kurt Fleming			
			Cancel

- 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.

	OVEF	RVIEW	DETAILS	TIME SHEET	QUANTITIES	NOTES / ISSUES	PRODUCTIVITY	IGN IN/SIGN OUT			
⊕ ≬ ⊕				-							Submit 🐵 🖕 🕀
Task		10	058 - IR - S1 - Di	version Ditch							
1115 S1 - UG Elec Trench B	al contract of the second s	^	× S1A10 D	iversion Ditch S1A10	Diversion Ditch						☆ 🖽 ⊖ 1
1058 IR - S1 - Diversion Dite	ch		Priority	Complete	Claim %	Step	Quantity	UoM	To date quantity	Planned quantity	Installed quantity
			Ē) 🗆	100	Install	22,6	9 LF	0	1,000	0
						Component total	22,689.0	0 LF	0.000	1,000.000	0.000
Confusct 7300007215 Instrument Man	Alerbring Compa										
		. 1	ask totals	_		_	22,689.0	00 LF	0.00	0 1,000.000	0.000
Add task or contract		0	Add comp	onent for selected	task/contract						

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.

		OVERVI	IEW	V	DETAILS	TIME SHEET	QUANTITIE	S
(+)								
Task				1005 -	Erect Steel - Light			
1005	Erect Steel - Light		*	^	📕 1005 Erec	t Steel - Light		
					Priority	Complete	Claim %	Step
					피	V	100	Step 1
								Compoi

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.

		OVERVIEW	N	DETAILS	TIME SHEET	OLIANTITI		PRODUCTIVITY	SIGNOLIT				
		OTENTIE		DETRIES	TIME STILL	duniti	101237133023	rhobochini	51011001		-	Submit	-
•												Sobilit	0
112	Maul Material-Large Book (Above (Irade)		1769	Wining Conne	ctions (Terminatio	one & Continuity I	esting) - «=1KV (#8-#1 Cond	uctor Size) - Transmission					
18	Stk pile Mech/ Fice exc		~	12 12								- 2	
15	Embankment (Non-Scraper) Common - Site		~	36 36								12	
9	Silt From Detention Basin		~	55 55								\$7	
0	Excavator Excavation Load Only - Commo		~	56 56								4	
3	Haul Common - Articulated Truck (<2500		~	57 57								\$	
4	Above Ground Conduit - Rigid / GRC / I		~	58 58								\$	
2	Load at Stockpile - Common - Excavator		^	₹ 59 59									
5	Water Truck Support for Excavation, Ba			Priority	Complete	Claim %	Step	Quantity	UoM	To date quantity	Planned quantity	Installed quantity	
1	Subgrade Finish - Streets/Roads			a		10	Step 1	1	Ea	130	0		1
7	Structural Excavation - Common (Excava			B	0	20	Step 2	1	Ea	0	0		0
5	Mechanical and Electrical Trench Excav			a		10	Step 3	1	Ea	0	0		0
19	Mechanical and Electrical Excavation			a		20	Step 4	1	Ea	0	0		0
i3	Mechanical and Electrical Backfill - M			a		20	Step 5	1	Ea	0	0		0
9	Wiring Connections (Terminations & Con			p		20	Step 6	1	Ea	0	0		0
							Component total	1.000	Ea	0.000	0.000		0.100
			~	6 6									• •
			~	1.1									
			Task	totals				56.000	PK-Uo	0.000	0.000		0.100
Add t	ask		() A	dd compone	nt for selected t	task							

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.

TIME SHE	C 1	QUAP	(TITIES	NOTES / ISSUES	PRODUCT	IVITY	001110,01011,001	
							Submit	θ
15347A.011	1130 -	ONSITE TR	UCKING				7015347A.011130	×
7015	347A.I	011130 0	NSITE TRU	CKING			ONSITE TRUCKING	
Prior	ity	Compl	Claim %	Step	Quantity	UoM	Tire issue - 03/21/2022	Â
je	J		100	Step 1	0		Tires underinflated	
				Component total	0.00000		03/22/2022 03:00 PM	
								·
								 ·

5.2.6 NOTES/ISSUES TAB

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

(+) 💌 X	OVERVIEW	DETAILS	TIME SHEET	QUANTITIES	NOTES / ISSUES	PRODUCTIVITY	SIGNOUT	Submit	
Timeline					Tuesda	ay 10:02 AM			
Tuesday 10:02 AM Quality Notes			Quality Notes Edit						
Quality			Tags:						
			Quality X Add tags						
			Associations: 1006 Bolted Connec Add associations	ctions X					
			Photos:						

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.

													Submit	
		Planned			Actual			≓ MHR	per Qty		1	Planned G/L	Actual G	3/L
ask ID	Description	QTY	UoM	MHRs	QTY	UoM	MHRs	Planned	Actual	Goals	.	MHRs	MHRs	
05	Erect Steel - Light	200.000	Ton	24.00	0.00	0 Ton	24.00	0.120	0.000		0.080		-8.0	-2

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.

		OVERVIEW	DETAILS	TIME SH	EET	QUANTI	TIES	NOTES	ISSUES	PROD	UCTIVITY	SI	GN IN/SIG	N OUT				
(+															S	Submit		- 🐣
E	Employee	٢	_							John	Doe							
	John Doe						S	IGN IN		BREAKS		SIG	N OUT					
C	0000000	Ø	Shift s	tart 4/2021 06:00	AM	i 0	Shit	ft end 2/24/2021 0	5:00 AM	i (9			ST 0.00	0T 8.00	DT 0.00	Tot 8.0	tal)O
	Sign out all eligible Only signs out employee's with hours		This w	veek's ho	urs				_		_			hours	hours	hours	hou	irs
Ū	* Client sign off		ST OT DT	ON 0.00 0.00 0.00	ST OT DT	UE 0.00 0.00 0.00	ST OT DT	0.00 8.00 0.00	ST OT DT	HU 0.00 0.00 0.00	ST OT DT	RI 0.00 0.00 0.00	S ST DT DT	AT 0.00 0.00 0.00	SUN ST OT DT	0.00 0.00 0.00	ST OT DT	0.00 8.00 0.00
			Sign o I have b Yes I have n Yes CLEJ Sign o CAN	ut questi een authoria No ot been hur No AR	ONS zed and p t today. NO EXC SIGN (DEPTIONS	o take th	Done	for my rest	t periods in a	accordan	ce with co	ompany po	blicies and W	'age Order	16		

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.

	aily Plans					_	MY DAILY PLANS
+) 🗹 (× [+					
P	Plan ID 👘	Plan date 👃	Ŧ	Plan name =	Shift	Location	 Work package ID
<u> </u>	94549	Mon, 11 May 2020		<u>05/11/2020 - Steel St</u>	First Shift	North Area	90984

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

Kurt Fleming	8	
Nick Cole 00240641 MH: 8	8	8
Grove - RT880E	\otimes	Operated 8 Other

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

	Darrell	્ X
ADD TO TIMESHEET		

- 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.

Da	aily Plans	6						MY DAILY PLANS
	Plan ID	- -	Plan date Į	 Plan name	Shift -	Location	Ŧ	Work package ID
)	<u>94549</u>		Mon, 11 May 2020	<u>05/11/2020 - Steel St</u>	First Shift	North Area		90984

2. Click on the **Time sheet tab**.

Total box talks Plannet Quantity Time (MHRs) Budget Safety concern Mitigation 1005 Erect Steel 0 Ton 102 0 -12 Task ID Erect Steel Ton Ton<th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th>														
Planned isks Quantity Time (MHRs) Budget Safety Task ID Description Planned VoM Planned Budget Planned G/L Image: Safety concern Mitigation 1005 Erect Steel O Ton 102 O -12 Image: Safety concern Mitigation 1074 Erect Steel O Ton A O -12 Image: Safety concern Image: Safety concern Mitigation			٢S	ox talk	Tool								W)vervie
Task ID Description Planned U.o. Planned Budget Planned G/L Safety concern Mitigation 1005 Erect Steel O Ton A12 O -12 * Safety concern 1 Mitigation 1074 Erect Steel O Ton A4 O -4 * * Safety concern 1 *				y	Safe		Budget	HRs)	ime (M		y	Quantity	d tasks	Planne
1005 Erect Steel 0 Ton 12 0 12 * Safety concern 1 1074 Erect Steel 0 Ton 4 0 4 4	igation	Mitiga	concern	Safety			Planned G/L	Budget	anned	UoM		Planned	Description	Task ID
1074 Erect Steel 0 Ton 4 04			concern 1	Safety	×	*	-12	0	12	Ton	0		Erect Steel	1005
							-4	0	4	Ton	0		Erect Steel	1074
v						Ŧ								

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

				OVERVIEW
12				
) 1005 Erect	; Steel - Light	\otimes	
Add tasks and Clear h	ours MH: 2	24	EQ: 8	
Darrel Lewis	8 1			
Donald Poole	× Ø	8		
Kurt Fleming 0000000 MH: 0	\otimes			
Nick Cole 00240641 MH: 8	\otimes	8		
Grove - RT880E	8 10 10 10 10 10 10 10 10 10 10 10 10 10	Operated 8 Other		

- 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.

	Daily Plans								MY DAILY PLANS
6	• 🗹	6	I+						
	Plan ID	-	Plan date 👃	Ŧ	Plan name	Shift	Location	-	Work package ID
	<u>94549</u>		Mon, 11 May 2020		<u>05/11/2020 - Steel St</u>	First Shift	North Area		90984

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

		OVERVIEW	1	DETAILS	TIME SHEET	QUANTITIE	S NOTES / ISSUES	PRODUCTIVITY	SIGNOUT				
۲												Submit	۲
Task			1005 -	Erect Steel - Light									
1005	Erect Steel - Light	*	^	1005 Erect Ste	el - Light							Ģ	l⊖ ^
				Priority	Complete	Claim %	Step	Quantity	UoM	To date quantity	Planned quantity	Installed quantity	
				a		100	Step 1	200		0	20	0	0
							Component total	200.000	Ton	0.000	200.00	0	0.000
													_

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

V	DETAILS	TIME SHEET	QUANTITIE	S NOTES / ISSUES	PRODUCTIVITY	S
1005 -	Erect Steel - Light	t				
^	1005 Erect Ste	eel - Light				
	Priority	Complete	Claim %	Step	Quantity	
			100	Step 1	200	
				Component total	200.000	

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

1 D	DETAILS	TIME SHEET	QUANTITIE	S NOTES / ISSUES PRO	DUCTIVITY S	IGNOUT				
									Submit	۲
1005 - E	rect Steel - Light 1005 Erect Ste	el - Light							ţ.	Θ
	Priority	Complete	Claim %	Step	Quantity	UoM	To date quantity	Planned quantity	Installed quantity	
	q		100	Step 1	200		0	200		0
				Component total	200.000	Ton	0.000	200.000	(0.000

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

D	ETAILS	TIME SHEET	QUANTITIE	S NOTES / ISSUES PR	ODUCTIVITY	SIGNOUT			
									Submit 🗧
- Er	rect Steel - Light	t ct Steel - Light							F —
	Priority	Complete	Claim %	Step	Quantity	UoM	To date quantity	Planned quantity	Installed quantity
		×	100	Step 1	200		0	200	20
				Component total	200.000	Ton	0.000	200.000	200.00

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.

Work package ID
work package ID 90984
rea 90984

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.

	OVERVIEW	DETAILS	TIME SHEET	QUANTITIES	NOTES / ISSUES	PRODUCTIVITY	SIGNOUT	
								Submit
Timeline					Wednes	day 09:33 AM		
								Remaining characters:
			Delayed work by 1	hour due to lat arriv	al of steel			Remaining characters:
			Delayed work by 1	hour due to lat arriv	al of steel			Remaining characters
			Delayed work by 1	hour due to lat arriv	al of steel			Remaining chara

5. Click on the Add tags button.

W	ednesday 09:33 AM
	Remaining characters:3
Delayed work by 1 hour due to lat arrival of steel	
	Cancel
_	
lags:	
+ Add tags	

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

LS	TIME SHEET	QUANTITIES	NOTES / ISSUES	PRODUCTIVITY SIGNOUT	
				Su	omit 🐣
				Frid 🖉 🏷	>
Delaye	ed work by 1 hour	due to late arrival o	f steel	Delay	
				Enviromental	
				Extra Work/Change	>
				Production Notes	
				Quality	

- 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)

	OVERVIEW	DETAILS	TIME SHEET	QL	IANTITIES	NO	TES / IS	SUES	PRODU	JCTIVITY	SIGNOUT			
												s	ubmit	۲
			Planned			Actual			≓ N	/HRs per Qty	r	Planned G/L	Actual G/L	
Task ID	Description		QTY	UoM	MHRs	QTY	UoM	MHRs	Plann	Actual	÷	MHRs	MHRs	
1006	Bolted Connections		0.900	Ea	32.00	0.900	Ea	34.00	35.5	37.778	0.800	-31.3	-	33.3

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.

	OVERVIEW	DETAILS	TIME SHEET	QUANTITIES	S NOTES /	ISSUES	PRODU	JCTIVITY	SIG	SN IN/SIGI	N OUT				
E 3 Employee	e)					John D	Doe				S	ubmit	۵.	۲
John Doe				2	SIGN IN		BREAKS		SIGN	IOUT					
Cise out all divide	۲	Shift 02/	start /24/2021 06:00 AM	Ö	Shift end 02/24/2021 06	5:00 AM	i C)			ST 0.00 hours	OT 8.00 hours	DT 0.00 hours	Total 8.00 hours	4
Only signs out employee's with hours		This	week's hours	TUF	WED	т	HU	FR	1	SA	AT	SUN		Total	
Client sign off		ST OT DT	0.00 ST 0.00 OT 0.00 DT	0.00 0.00 0.00	ST 0.00 OT 8.00 DT 0.00	ST OT DT	0.00 0.00 0.00	ST OT DT	0.00 0.00 0.00	ST OT DT	0.00 0.00 0.00	ST (OT (DT (0.00 0.00 0.00	ST 0 OT 8 DT 0	.00 .00 .00
		Sign I have Vet Vet Vet CLI	out questions been authorized and No not been hurt today. No EAR NO EX OUT	I permitted to ta	ke the time off f	or my rest	periods in a	ccordanc	e with co	mpany po	licies and W	age Order	16		

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.

	OVERVIEW	DETAILS TIME SHEET	QUANTITIES NOTES / ISSUES	PRODUCTIVITY	SIGN IN/SIGN OUT				
E							Submit		- 🐣
Employee	۲			John Doe					
John Doe			SIGN IN	BREAKS	SIGN OUT				
00000000	Ø	Shift start 02/24/2021 06:00 AM	. •						
Sign out all eligible Only signs out employee's with hours		Planned Tasks							
Client sign off		Task: 00000000 Removal				ST 0.00 hours	OT 8.00 hours	DT 0.00 hours	Total 8.00 hours
		Sign in questions	ooltalks and understand my tasks for tod	ay.					
		CLEAR NO EX	CEPTIONS Done						
		Sign in CANCEL SIGN	4 IN						

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.

		OVERVIEW	DETAILS TIME SHEE	T QUANTIT	TES NOTES / ISSUE	S PRODUCTIVITY	SIGN IN/SIGN	DUT				
F									Su	bmit		۲
=	Employee	٢				John Doe						
	John Doe				SIGN IN	BREAKS	SIGN OUT					
G	0000000		Shift start	. 8	Shift end	4		ST 0.00	ОТ 8.00	DT 0.00	Total 8.00	
	Sign out all eligible Only signs out employee's with hours		Breaks Break 1		02/24/2021 06:00 AM			hours	hours	hours	hours	
	* Client sign off		Break I start time		Select one							
			Break 2 Break 2 start time		Break 2 length							
			G		Select one							
			Break 3 Break 3 start time		Break 3 length							
			G		Select one							

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.

1								116-1-14-	
	Етрюуее	U						Alfredo Man	zo jr
	Alfredo Manzo Jr Specialty Craft - Journeyman							\times	
	00457866		Shift star	Estas such such					Shift hours
		⊘	08/01/2	Enter crew hours				0	7.00
				Adjust time för all crew men member sign-out.	nders. Individua	al crew member time can be edit	ed on crew		hours
	Antonio Ramos			Shift start		Shift end			
•	Specialty Craft - Craftsman 1 00142767		Breaks	08/01/2022 10:00 AM	80	08/01/2022 05:00 PM			
	00145767	o 🖪	Break 1 Break 1 atc	Crew break details				1	
			03:52 PM	Break 1 start time		Length			
	Sign out all eligible		00.0211	03:55 PM	Ŀ	25 minutes	•		
	Only signs out employee's with hours	2	Break 2						
		D O	Break 2 sta	Break 2 start time	P	Length	-		
			04:55 PM	04.55 PM	G	15 minutes	•		
	Client signed off		Break 2	Break 3 start time		Length			
	thank you	O.	Break 3 sta	02:11 PM	Ŀ	10 minutes	•		
	Aug 8, 2022		02:11 PM						
		C 📀		Total time: 7 HR 0 min		Cancel			

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.

			BREAKS	SIGN OUT					
Shift start		Shift end		Shift hours	Break hours	Timesheet h	ours		
08/01/2022 10:00) AM	B (S) 08/01/2022 05:00 PM		© 7.00 hours	1.00 hours	ST 10.00 hours	OT 0.00 hours	DT 0.00 hours	Total 10.00 hours
Breaks Break 1 Break 1 start time		Break 1 length							
03:52 PM	٩	10 minutes 🔹 👻							
Break 2 Break 2 start time		Break 2 length							
04:55 PM	٩	30 minutes 🔹 🔻							
Break 3 Break 3 start time		Break 3 length							

5.4.3.1 SHIFT START/END TIME

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



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

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.

		OVERVIEW	DETAILS TIME SHI	EET QUANTITIE	S NOTES /	SSUES P	RODUCTIVIT	Y SIG	N IN/SIGN OU	Т			
à											Submi	t	۽ ۽ 🖲
	Employee	٩					John Doe						
	0000000	Ø	Shift start 02/24/2021 06:00	am 🛱 🕓	Shift end 02/24/2021 06:	DO AM É	- C	31014		ST 0.00 hours	OT 8.00 hours	DT 0.00 hours	Total 8.00 hours
	Sign out all eligible Only signs out employee's with hours		This week's hou	ITS	WED	тни	, in the second s	BI	SAT		SUN		Total
-	 Client sign off 		ST 0.00 OT 0.00 DT 0.00	ST 0.00 OT 0.00 DT 0.00	ST 0.00 OT 8.00 DT 0.00	ST 0.00 OT 0.00 DT 0.00) ST O OT D DT	0.00 0.00 0.00	ST 0.0 OT 0.0 DT 0.0	00	ST 0.00 OT 0.00 DT 0.00	S1 01 D1	0.00 8.00 0.00
			Sign out question I have been authoriz Yes No I have not been hurt Yes No	ed and permitted to t	ake the time off fo	r my rest period	ds in accorda	nce with cor	npany policies	and Wag	e Order 16		

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 TIME SHEET SUMMARY

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

(+			
		Employee	Ð
	Greenwood, B.		

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 Time sheet 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.

(<u>+</u>)	
Employee	Ф
Greenwood, B .	Employee time overview

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.

[Daily Plans			MY DAILY PLANS					
0	•	0							
	Plan ID	-	Plan date 👃	Ŧ	Plan name	Shift 👘	Location	Ŧ	Work package ID
	<u>94549</u>		Mon, 11 May 2020		<u>05/11/2020 - Steel St</u>	First Shift	North Area		90984
	<u>94549</u>		Mon, 11 May 2020		<u>05/11/2020 - Steel St</u>	First Shift	North Area		90984

- 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.

		OVERVIEW	DETAILS	TIME SHEET	QUANTITIES
(+					
=	Employee	Ð			
	Nichols, E Labourer - Skilled		Employee time o	verview	
\sim	444431		Shift start		Shift end
			08/04/2020 12:0	0 AM 🛱	(b) 08/04/20
۲	Paterson, J Leadhand - Crew				
	302091		Today		

- 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**.

Employee ove	rride		
Darrel Lewis			
Signed out on beha	alf of Executor		
	Clear	Canaal	Dana
	Clear	Cancer	Done

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



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.

E ☆ 104978 NA* Daily Plans > P1 - 10	VFAC Portsmouth Dry Do /17/2023 (Awaiting Appre	ck P-3 / Progr wal) - Plan ID 27	ress / Daily 56105	ly planning								23.1	O QA	ф 4 ⁸	8 🕞 🗄
					OVERVIEW	DETAILS	TIME SHEET	QUANTITIES	NOTES / ISSUES	PRODUCTIVITY	SIGN IN/SIGN OUT				
œ 0												Approved: Hours Quantities	* -	° - C	Θ
Overview						Tool box tal	ks								
Planned tasks	Quantity	Tim	ne (MHRs	s)	Budget	Safety					Quality				
Task ID Description	Planned	UoM Plann	ned Bu	udget	Planned G/L	Safe	ty concern		Mitigation		Quality conce	m Mitigation			
						A		No safety topics a	added	^		No quality topics added			
Totals			0.00	0.00		• Add safety to	oic				 Add quality topic 				
Dianner notes						Environmen	tol				Constal discussion				
Flatifier flotes						Environmen	onmental concern		Mitigation		General discussion	Ission			
								No environmental top	iics added			No general discussion topics added			
						 Add environm 	ental topic				 Add general discussion 	n topic			

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.

	OVERVIEW	DETAILS	TIME S	HEET	QUANTITIES	NOTES / ISSUES	PRODUCTIV	ITY SIGNOUT				
									Approved: Mours Quantities	* •	"ວ -	۲
Employee							Darrel L	.ewis				
Darrel Lewis 00240370	Employee Today	time overview										
Donald Poole 00364112	1 M 20	N S 1 : 20	8	от 0	0							
Kurt Fleming (Zero Hours)	Week			Total	hours - 8							
Nick Cole 00240641												

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

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

							MY DAILY PLANS
\otimes) [+						
Ŧ	Plan date 👃	Ŧ	Plan name	Shift	Location	-	Work package ID
	Mon, 11 May 2020		<u>05/11/2020 - Steel St</u>	First Shift	North Area		90984
	[I-	Plan date Mon, 11 May 2020	Plan date i T	Plan date Plan name Mon, 11 May 2020 05/11/2020 - Steel St	Image: Plan date in the plan name Image: Plan name Image: Shift Mon, 11 May 2020 05/11/2020 - Steel St First Shift	Plan date Plan name Shift Location Mon, 11 May 2020 05/11/2020 - Steel St First Shift North Area	Image: Plan date i Image: Plan name Image: Shift Image: Location Mon, 11 May 2020 05/11/2020 - Steel St First Shift North Area

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.

SIGNOUT			
	Approved: 🔵 Hours 🔵 Quantities	• · C ·	۲

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.

	Daily Plans				MY DAILY PLANS									
((+) (*) (*) (*) (*) □ Plan ID □ Plan date ↓ □ Plan name □ Shift □ Location □ Work package ID													
	<u>94549</u>	-	Mon, 11 May 2020	-	<u>05/11/2020 - Steel St</u>	First Shift	North Area	-	90984					

- 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.

		OVERVIEW	DETAILS	TIME SHEET	QUANTITIES	NOTES / ISSUES	PRODUCTIVITY	SIGNOUT			
									Approved: Hours Quantities	· - 'D -	۲
Employee							Darrel Lewis			Reject Plan	
Darrel Lewis 00240370	۲	Employee ti Today	me overview								
Donald Poole		11 MAY	4 S	т от : 0	DT 0						

- You should get a pop-up window asking for a reason for rejection
- 4. Enter a reason for rejection and click **Done**.

Reject Daily Plan Plan rejected. Reason is required - Adjust hours for DL	
Plan rejected. Reason is required - Adjust hours for DL	eject Daily Plan
	n rejected. Reason is required - Adjust hours for DL
Cancel Done	Cancel Done

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

+	(+) Add mainten	ance	1006 Bolted Connections	8
Add tasks and resources	Clear hours		MH: 42	EQ: 8
Kenne 0001223 MH: 8	th Moore) () () ()	8	
Troy B 0034254 MH: 8	rown ¹⁶) () () ()	8	
Josep 0038663 MH: 8	h Kelly	⊗ ℃	8	ຽ
		\otimes		

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

	\times
Employee hours	
Task: 1006 - Bolted Connections Employee: 00386639 Joseph Kelly EQ ID:	
Time calculations	Planned Actual
ST	8 8
от	2
DT	
	~
Total	10
Clear	ancel Done

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

Employee	
Darrel Lewis 00240370	Ø
Donald Poole 00364112	Ø
Kurt Fleming (Zero Hours)	Ø
Nick Cole 00240641	Ø

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

	?	8
SIGNOUT		
Approved: 🔵 Hours 🔵 Quantities 🗸 🗸	"ວ -	۲
Signout As employee On behalf of employee		
Enter employee pin		

12. Answer the signout questions.

PRODUCTIVITY	SIGNOUT		
	Approved: 🔵 Hours 🔵 Quantities	* •	່ວ - 🐣
Were you	injured while working	Yes	No

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 by selecting the plan name.

Daily Plans						MY DAILY PLANS		ALL PLANS	
• 🗹 😣 [Edit multiple	v • D •							
Plan ID	Plan ID Plan date Plan name Shift		Shift	hift Location		Work package ID		Status	Status (bar)
÷ T	B 🝸	T	Т	-	brewer 🝸 🏋		Т	Awaiting Approval 🛛 🔻	
✓ <u>1773222</u>	Thu, 23 Dec 2021	Brewer Borings Progr	FIRST SHIFT		Brewer Site			Awaiting Approval	

NOTE You can also select the check box and click on the **Approve** button located in the tool bar.

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

S	IGNOUT			
	Approved: Hours	Quantities	• C • •	۲
Quali	ity		Quantity Hours	
Quan	Quality concern	Mitigation	Quantity and hours	
ĸ	Torque Inspection			-

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

6.4.1 BULK PLAN APPROVAL

When a plan is in the *Awaiting Approval* status, you can select up to 100 plans at the same time to approve, or you can select up to 10 plans to reject, and then click the **Approve** or **Reject** buttons located in the daily planning toolbar. The existing approver permissions are applicable for bulk approval and rejections. Bulk approval is only allowed for reason code-based projects to allow expediting of data into Time Center.

	Daily Plans									MY DAILY PLANS		ALL PLANS	
⊕													
	Plan ID		Plan date 👃	Plan name	Shift		Location			Work package ID		Status	Status (bar)
		÷T		T		T	brewer	т	Ŷ		T	Awaiting Approval 🛛 🔻	
	<u>1773222</u>		Thu, 23 Dec 2021	Brewer Borings Progr	FIRST SHIFT		Brewer Si	te				Awaiting Approval	
	<u>1773218</u>		Wed, 22 Dec 2021	Brewer Borings Progr	FIRST SHIFT		Brewer Si	te				Awaiting Approval	
	<u>1773216</u>		Tue, 21 Dec 2021	Brewer Borings Progr	FIRST SHIFT		Brewer Si	te				Awaiting Approval	
	<u>1773209</u>		Mon, 20 Dec 2021	Brewer Borings Progr	FIRST SHIFT		Brewer Si	te				Awaiting Approval	
	_												