# PROGRESS USER GUIDE

## Progress Web

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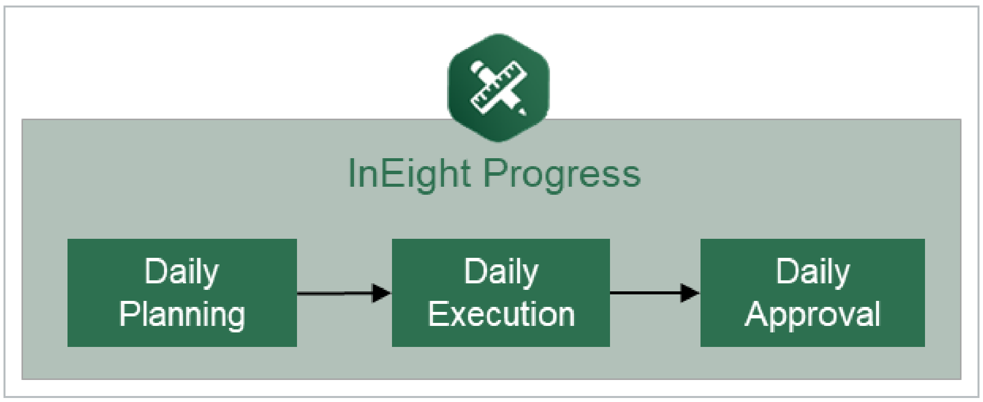
# CHAPTER 1 – DAILY PLANNING

# 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.



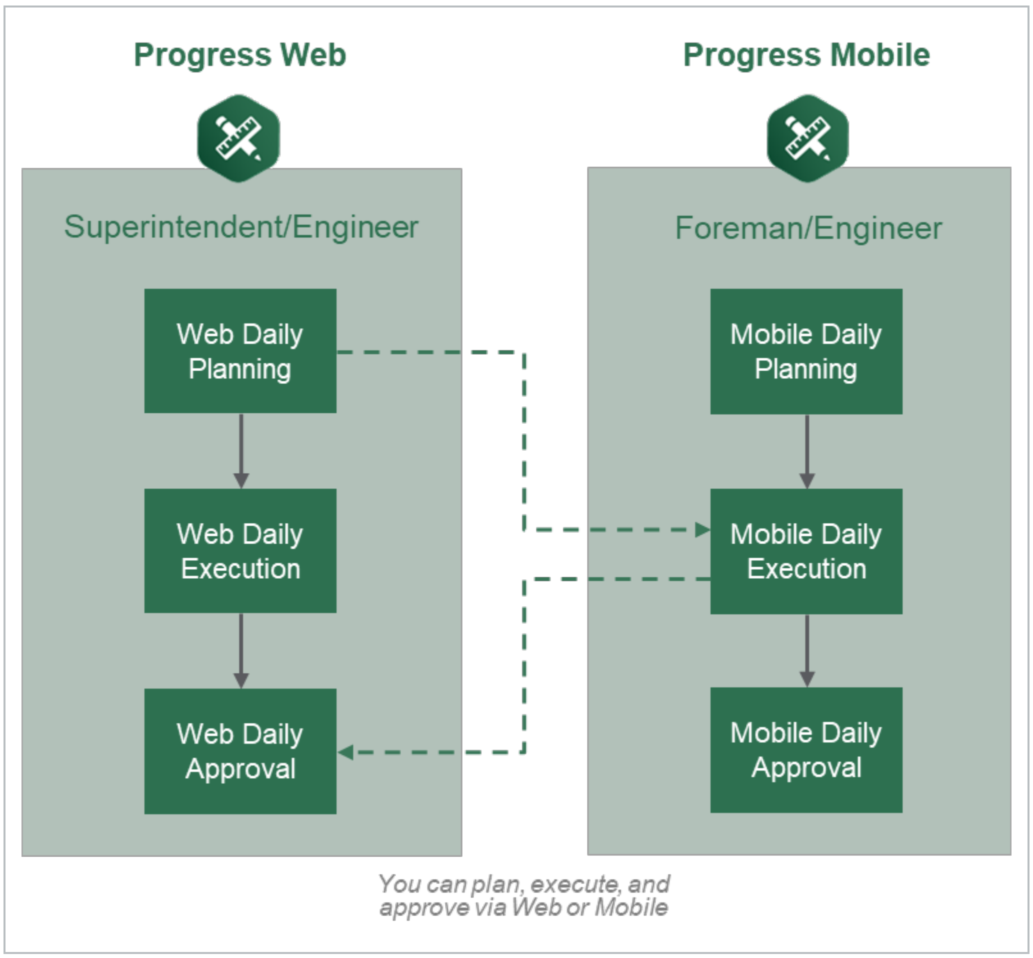

A daily plan is created by a project member to specify the tasks to be completed by a given crew, and to ensure productivity targets are met. Budget, quantity, safety, quality and other details are entered during the Planning phase to provide streamlined communication from the office to the field. Once 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:

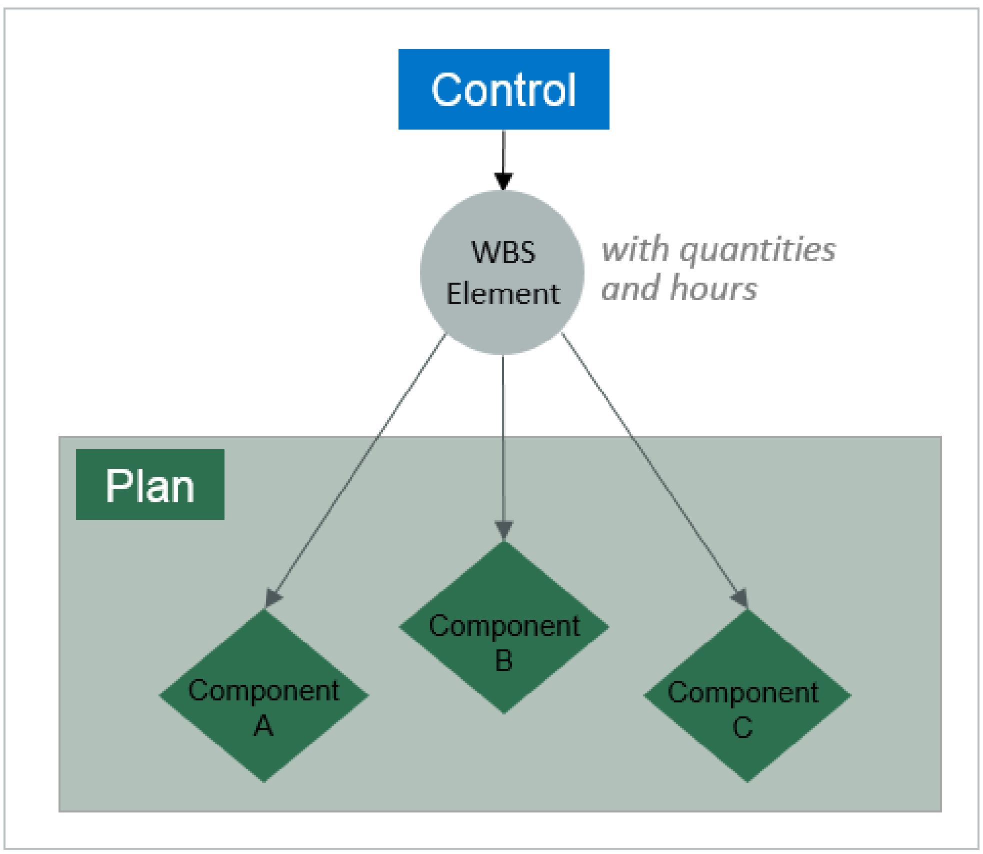



A daily plan can be accessed in either program in any of the phases of daily planning. The program used for a phase may vary from project to project and depends largely on the roles of the project members involved. For example, it may be preferable to have a staff member such as a superintendent or engineer 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.

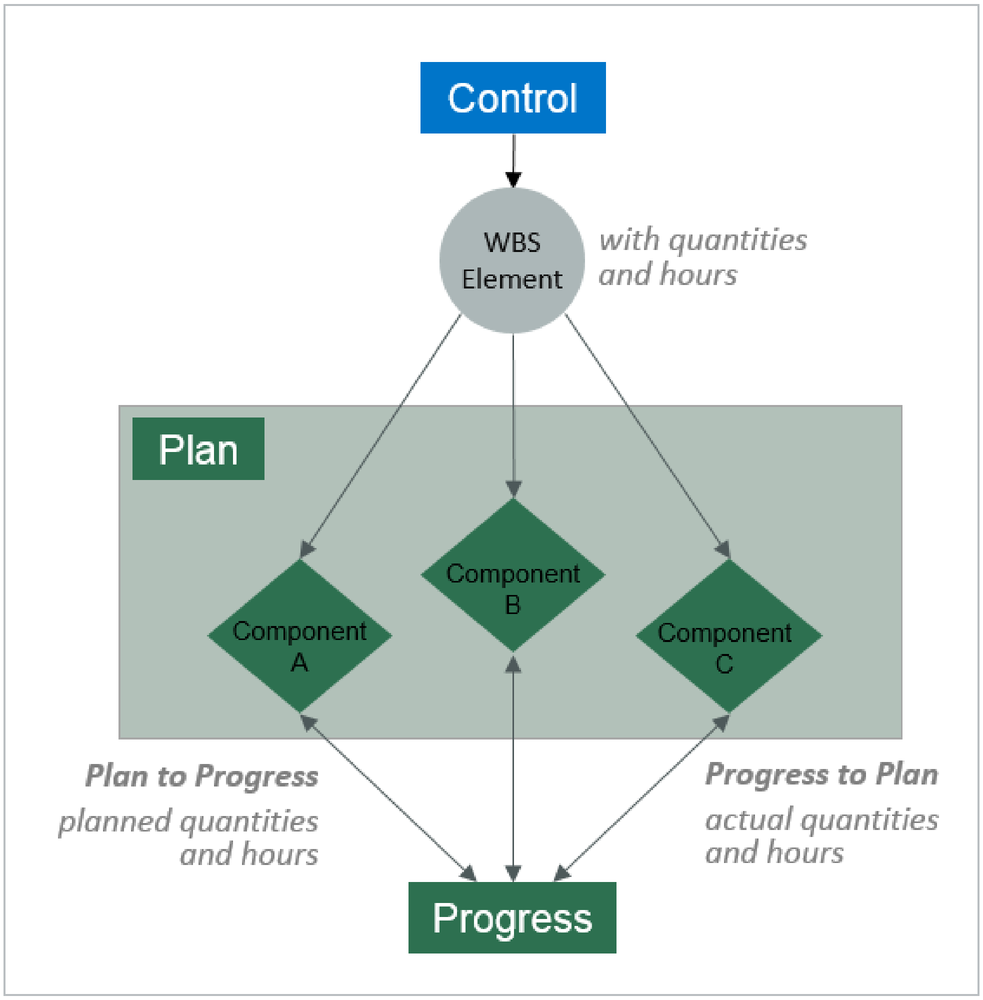
> Mobile Daily Planning has all the same functionality as Web Daily Planning for InEight Progress, but is available as a mobile-only application.

## 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

> 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

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

## 1.1.7 Work Flow Beyond InEight Progress

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

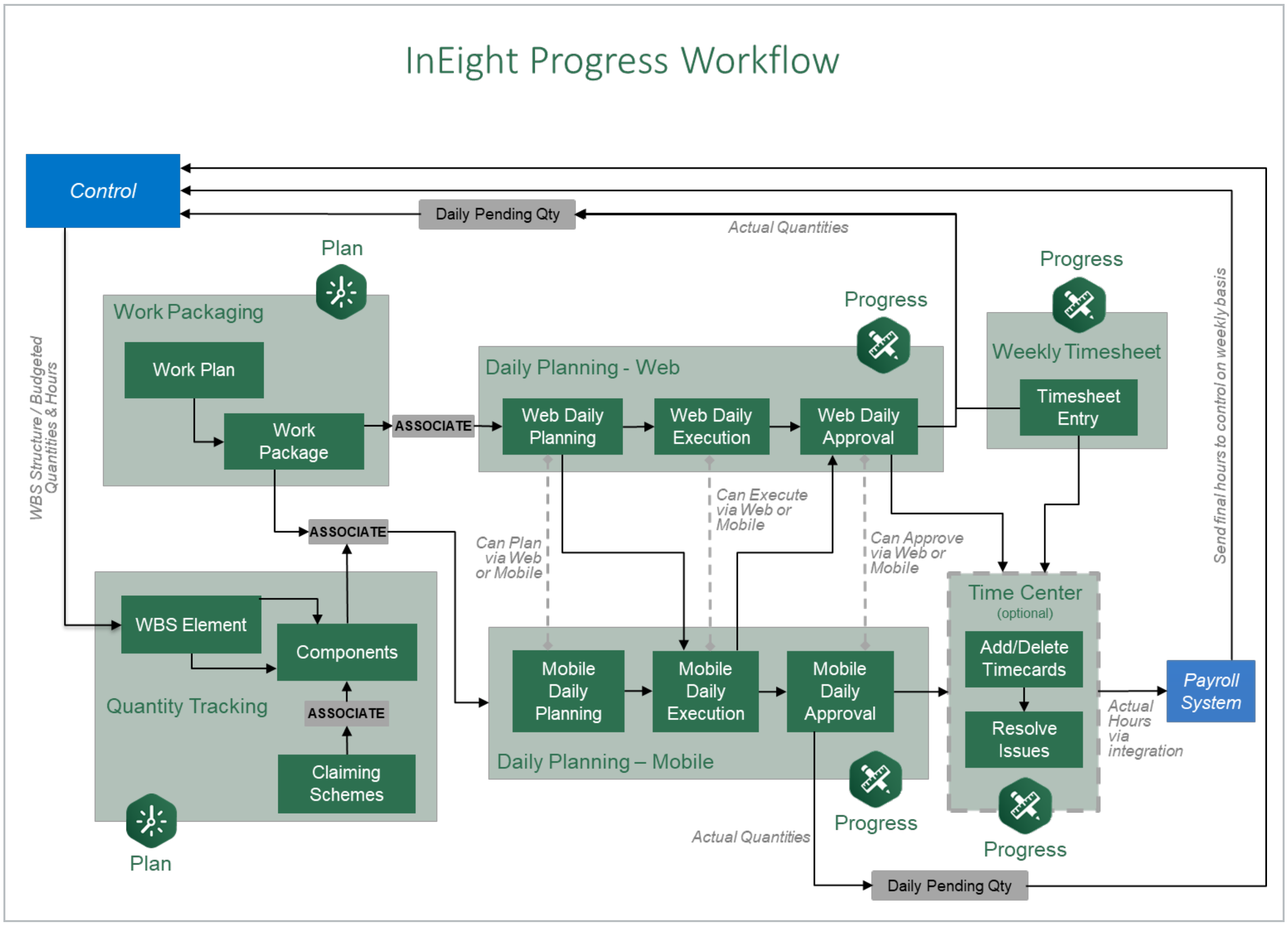
### 1.1.7.1 Hours

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

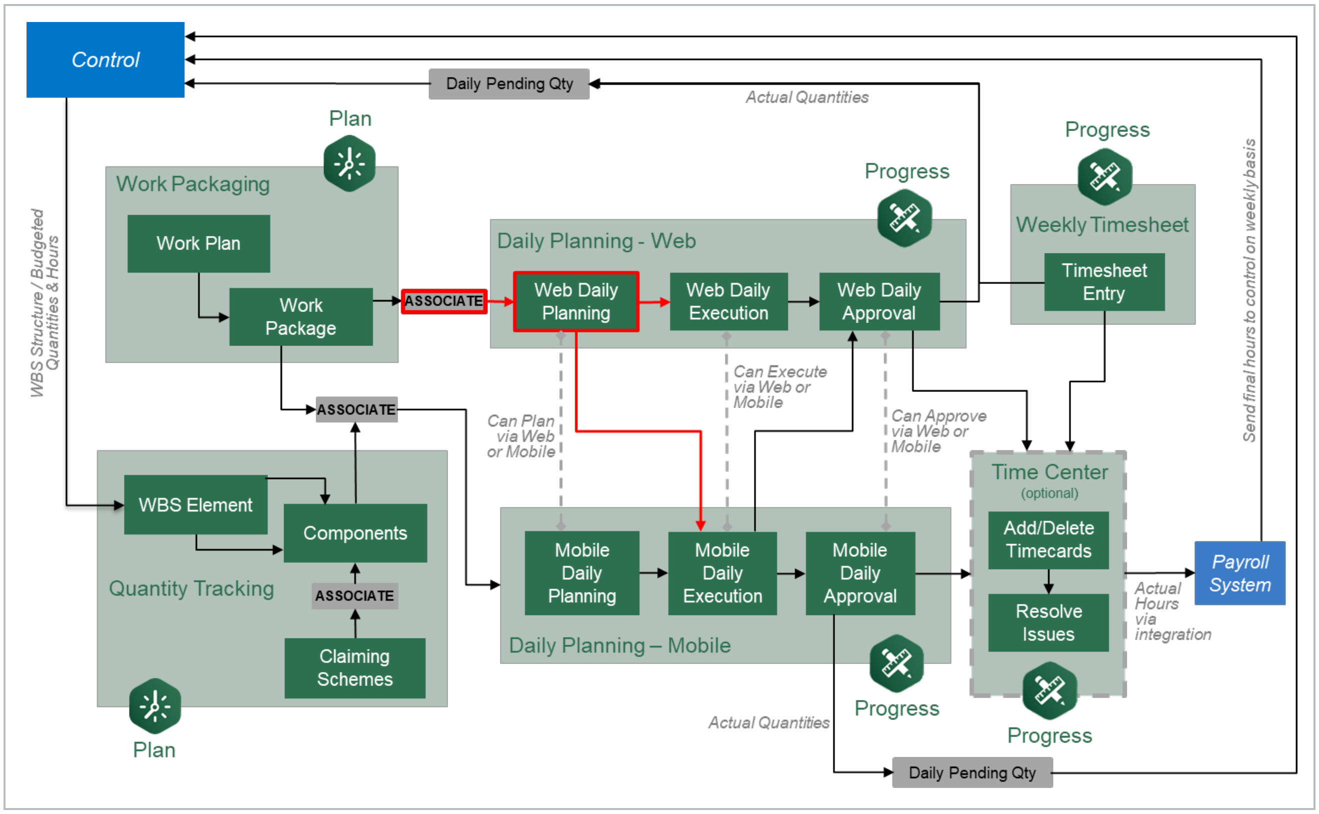
### 1.1.7.2 Quantities and Costs

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

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


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

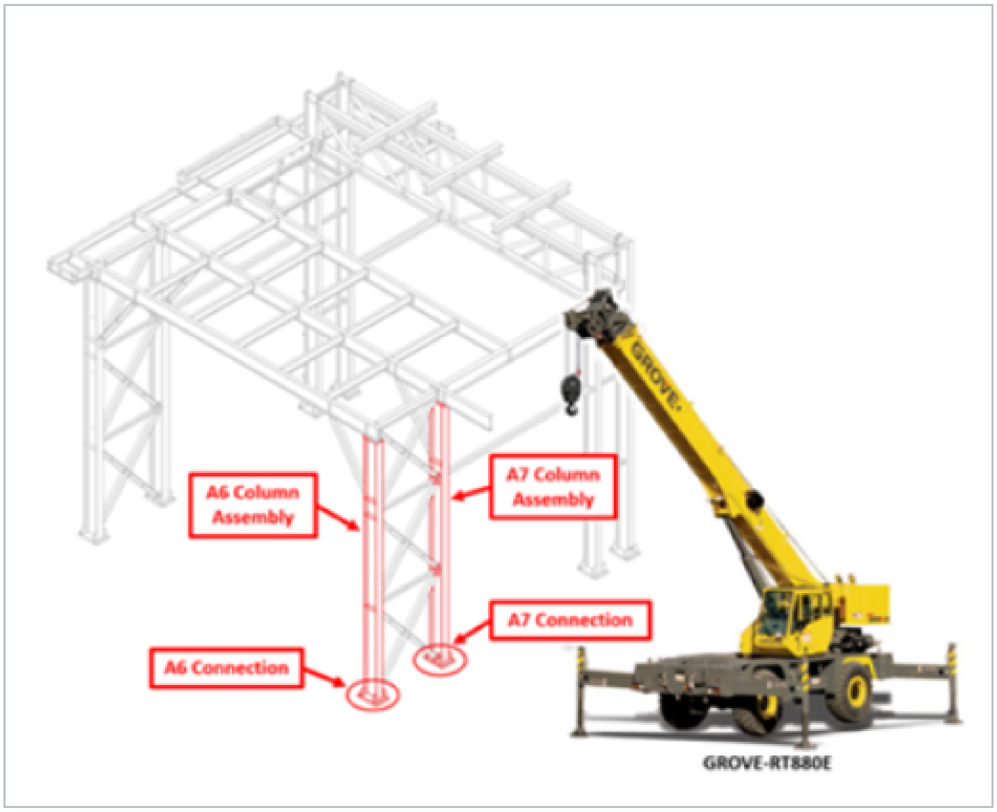
# 1.2 DAILY PLAN CREATION



# 1.3 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.

## 1.3.1 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)

## 1.3.2 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.

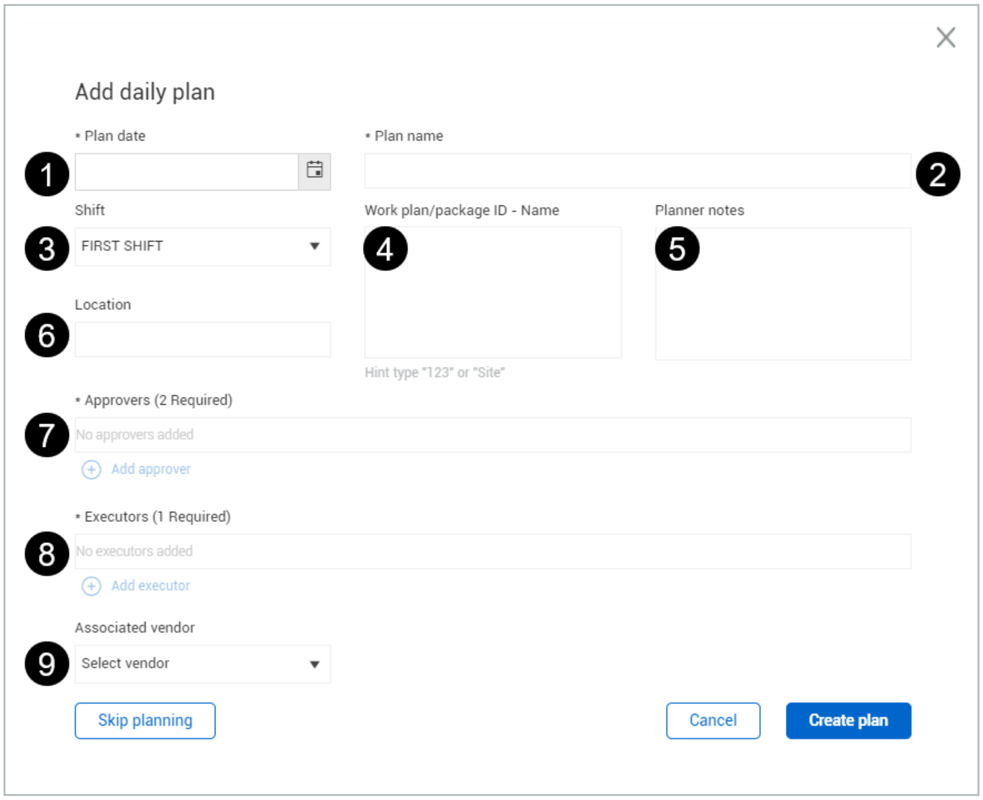
You access the Daily Plan Wizard from Plan Work packaging module.

### 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. |

## Overview - Daily Plan Wizard (continued)

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

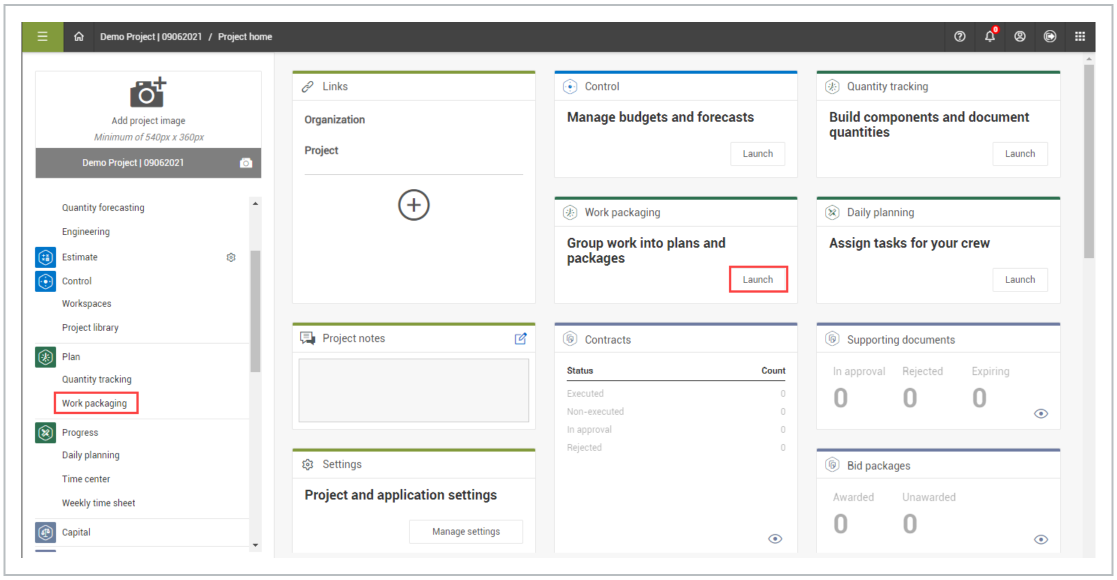



The following Step by Step walks you through how to use the Daily Plan Wizard.

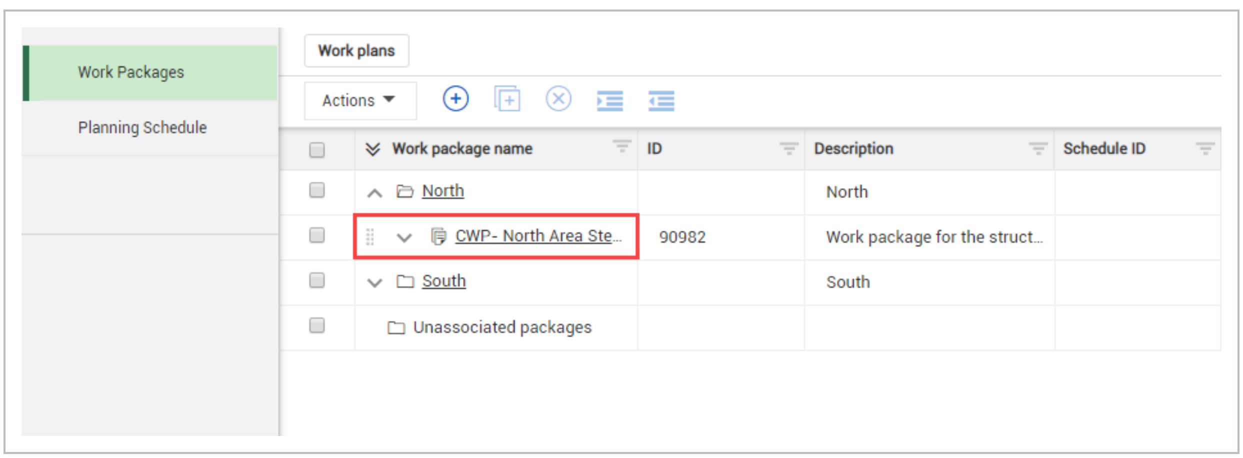
> This Step by Step assumes you already have a work package (CWP or IWP) created containing work package details (e.g., labor, equipment, components, safety). See Work Package Creation for details on setting up work packages.

# Create a Daily Plan Using the Daily Plan Wizard

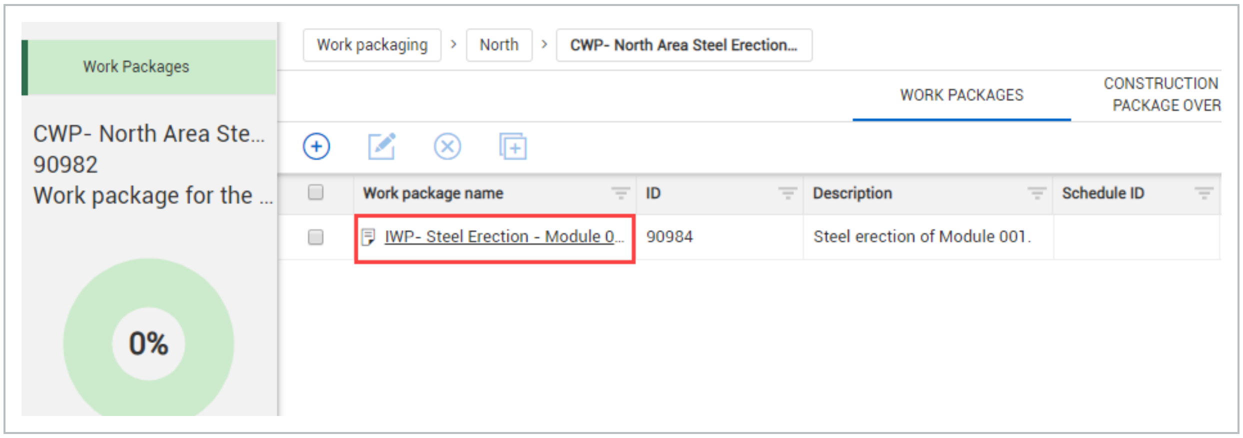
1. From your project home page, navigate to Plan > **Work packaging**.



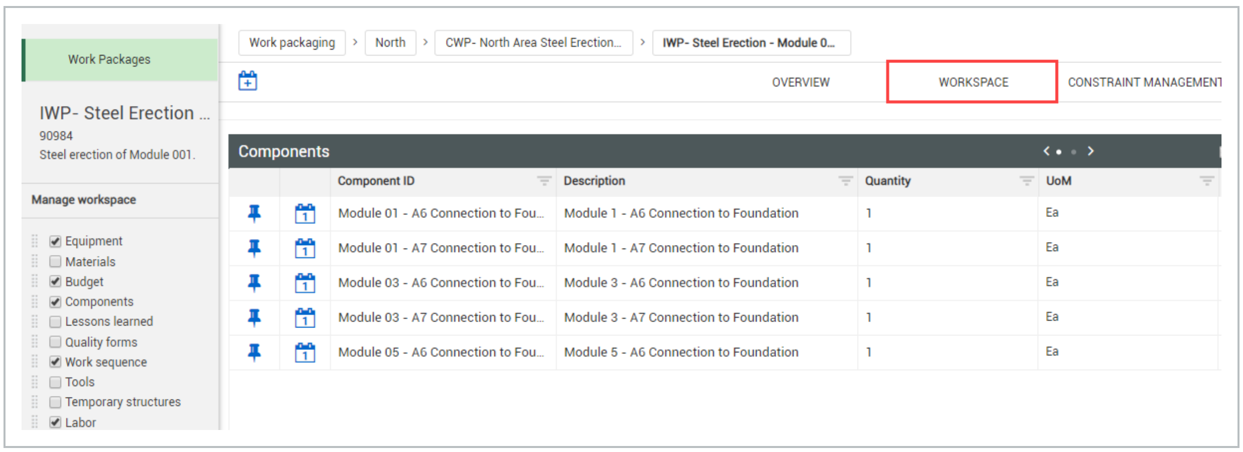

2. From the Work Packages tab, open a Construction Work Area (CWA) and click on the **arrow** in the ID column of your Construction Work Plan (CWP) to extend the work package below.
3. Select a Construction Work Package (CWP) by clicking on its **hyperlink ID**.



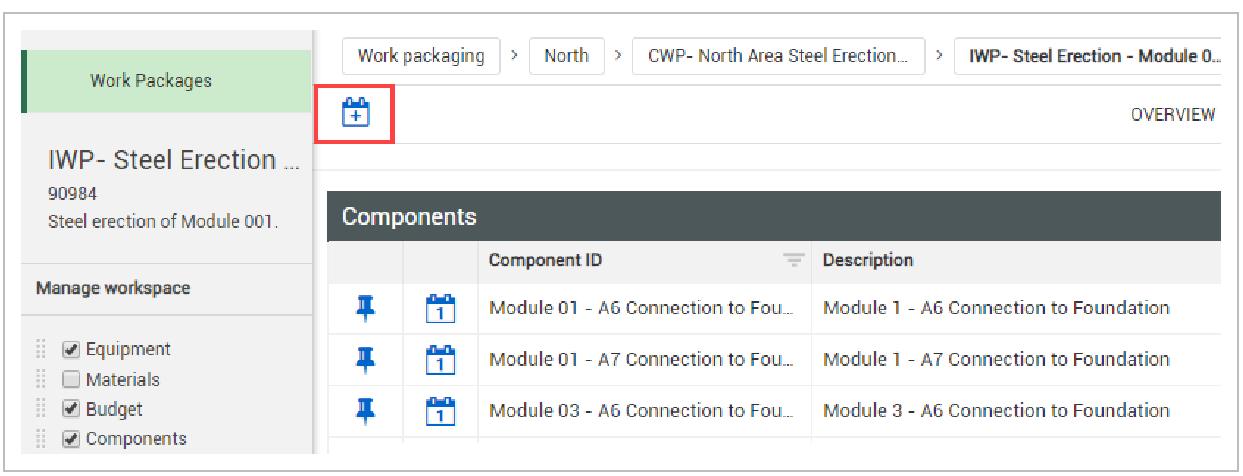

4. Open your Installation Work Package (IWP) by clicking on its **hyperlink ID**.




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

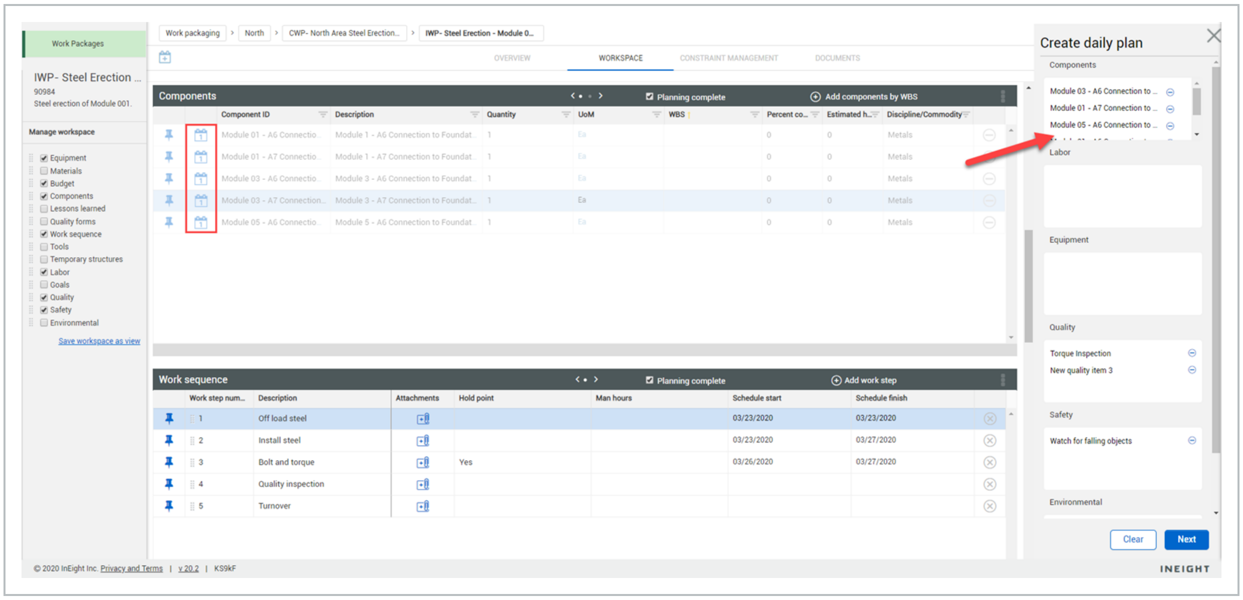



6. Click on the **Daily Plan** icon.




- This opens the Daily Plan Wizard slide-out panel

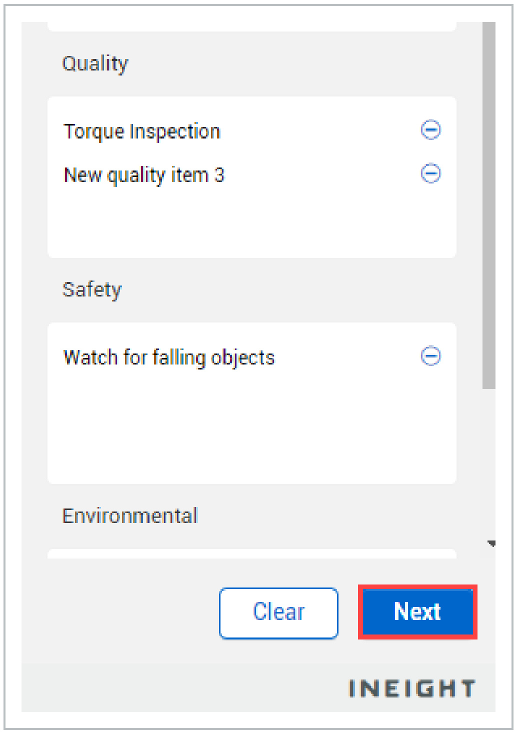
7. With the Daily Plan Wizard open, select the components, resources, etc. that you want to copy by clicking on the calendar icon from your data blocks.




- Your selections are shown in the Wizard

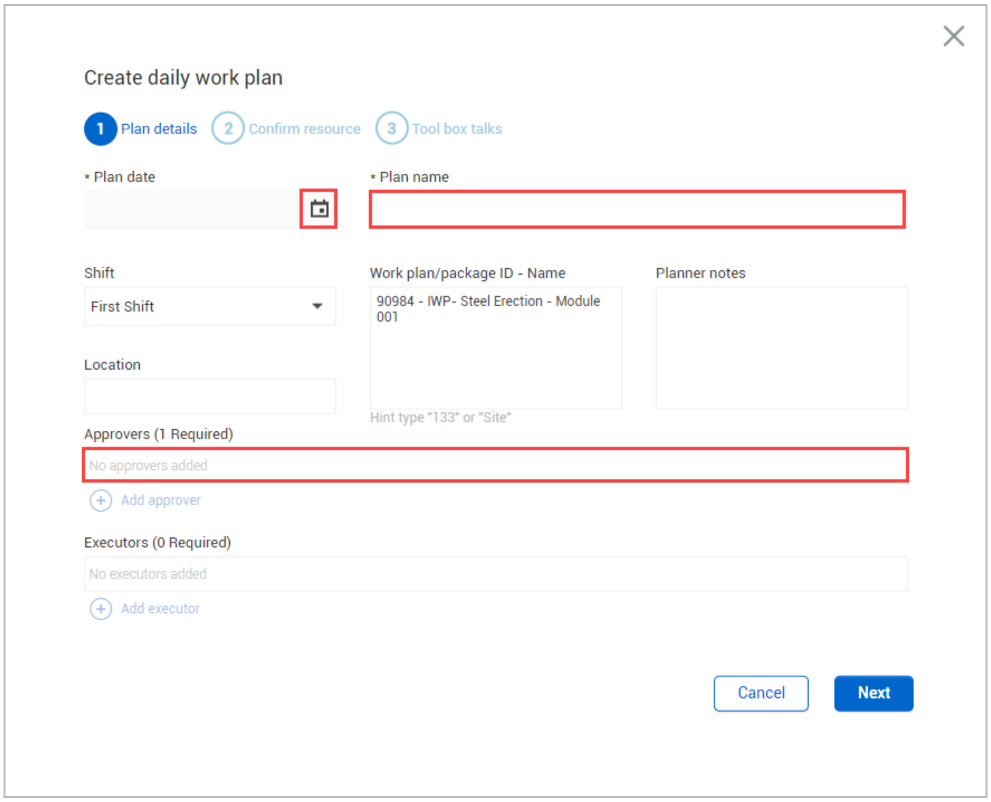
> Not all data blocks can be copied. If no calendar icon is shown, that data block is not available to be populated in daily planning. Activity components can only be used if they can be claimed in Plan Quantity tracking. Labor and equipment can only be used if they are active in the project date range.

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

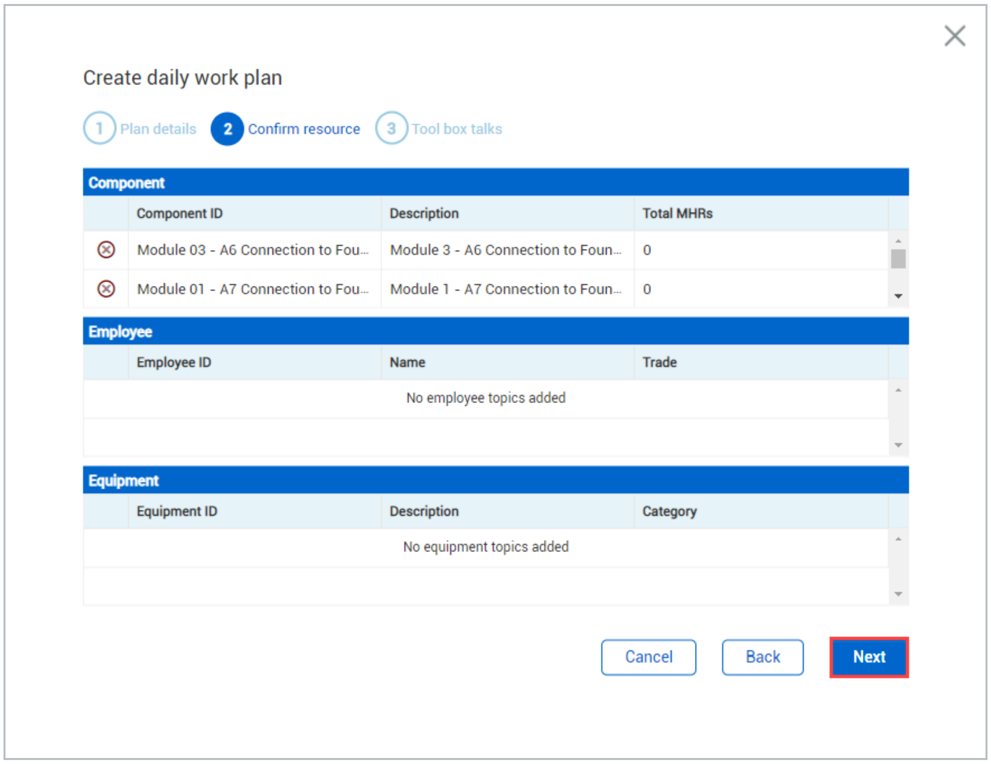



9. Enter your new daily plan details.

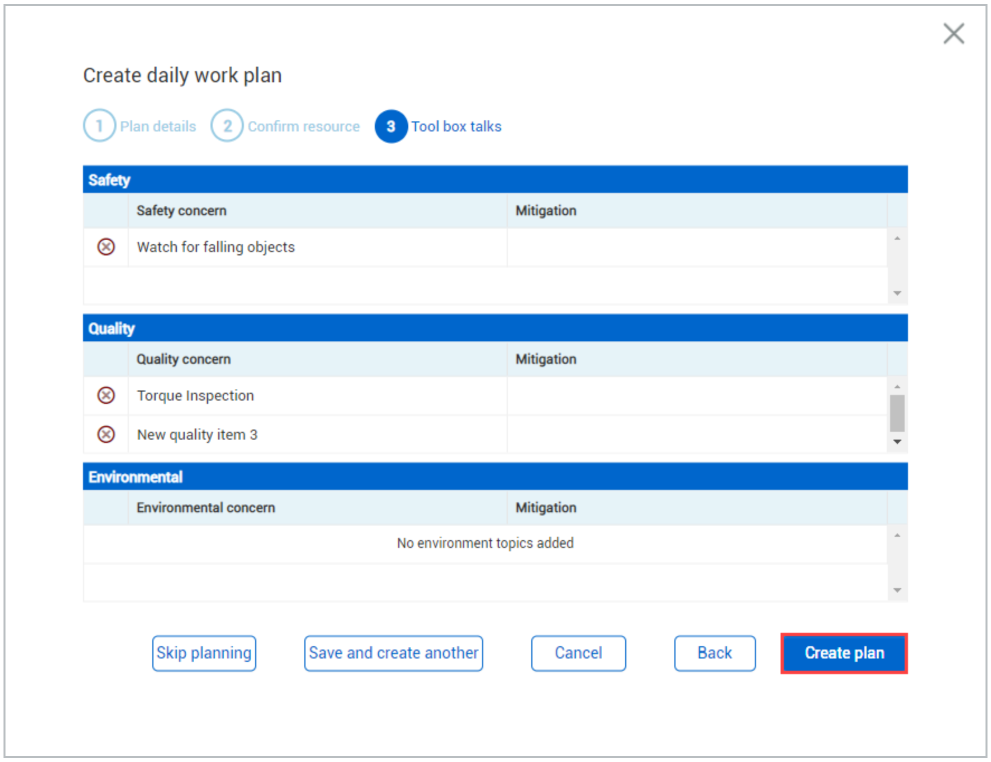
> You can complete and edit these daily plan details at any point. Notice that only some fields are required to create a new daily plan.




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




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




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

# 1.4 DAILY PLAN FROM COPY

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

## 1.4.1 Copy a Daily Plan

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

1. Create one daily plan using the Daily Plan Wizard.

2. Create a copy of that daily plan.

3. Make changes as necessary for each subsequent day.

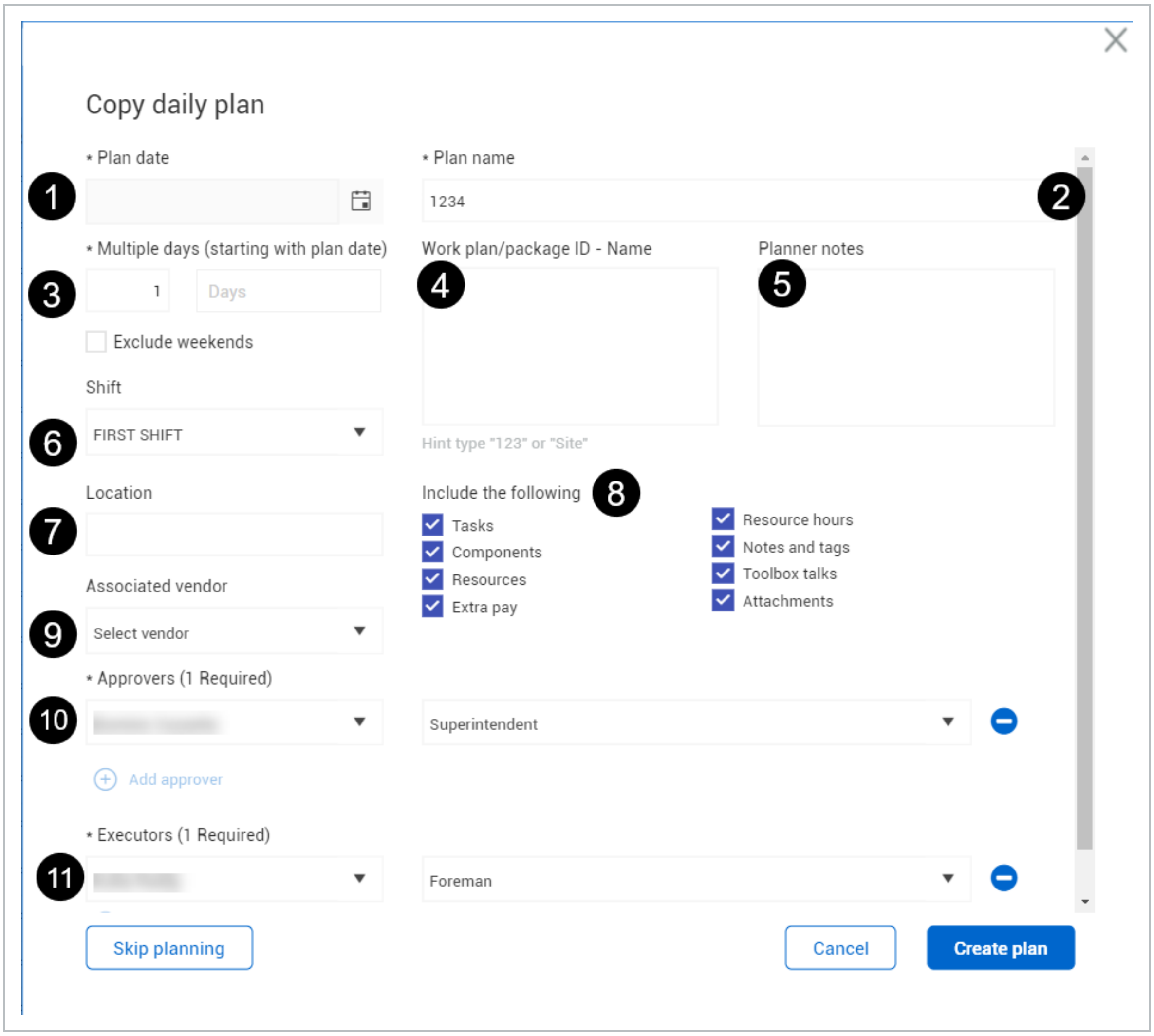
The process to create a copy of an already existing daily plan is like that of using the Daily Plan Wizard. You will need to fill out a window similar to the wizard; however, this window will give the option to copy over all the information you entered in the Planning Phase.

### Overview – Copy Daily Plan Window

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

Overview - Copy Daily Plan Window (continued)

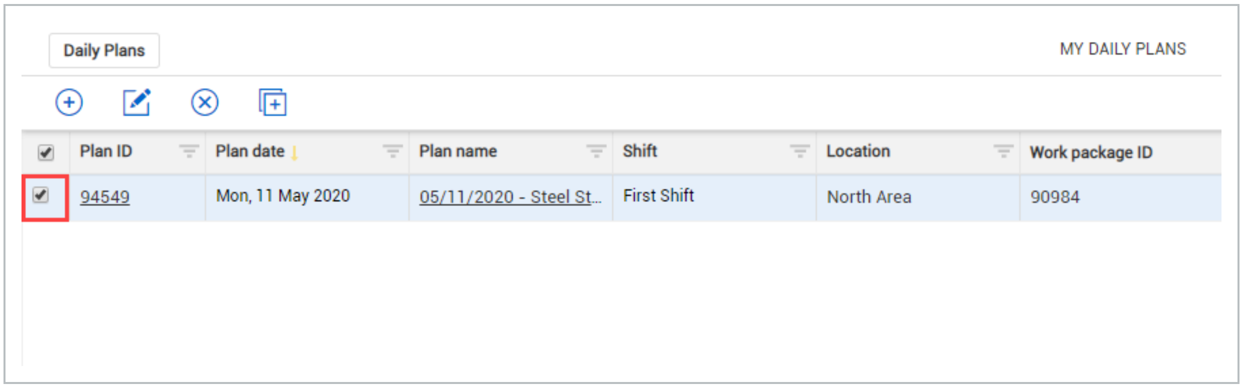
| Title | | Description |
|---|---|---|
| | | Shift. |
| 7 | Location | A free text field where the location of where the work will be performed can be entered. |
| 8 | Include the following check boxes | Allows users to select which attributes from the plan that is being copied will be populated in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



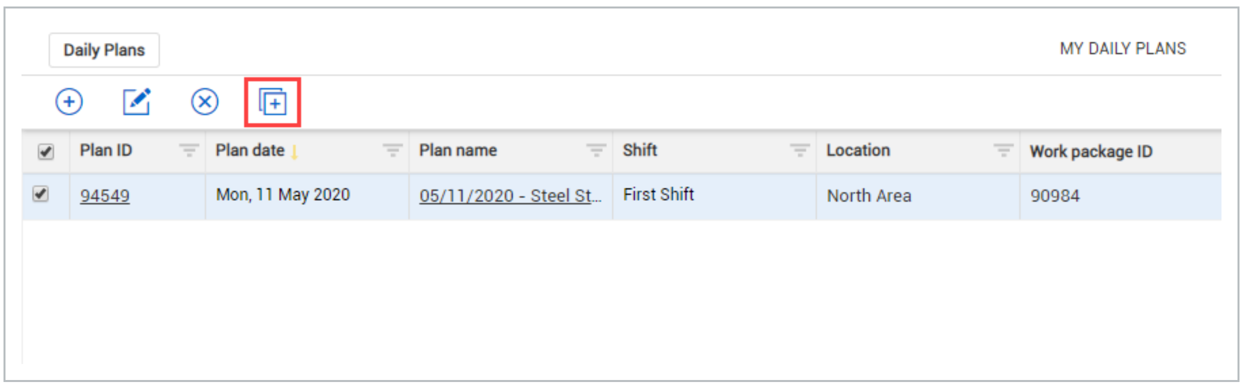

The following Step by Step walks you through how to create a copy of a daily plan.

# Create a Daily Plan by Copying an Existing Daily Plan

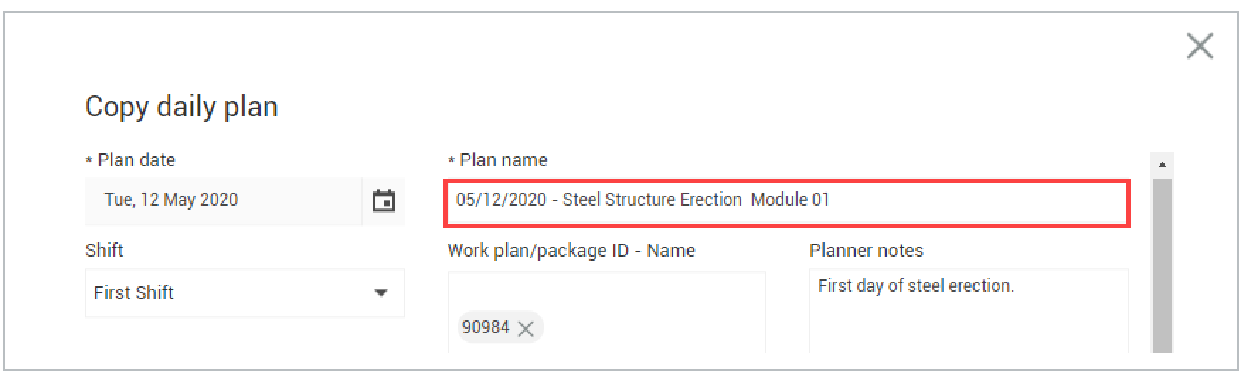
1. From the Daily Plans page, check the box in the far-left column of your daily plan to select it.



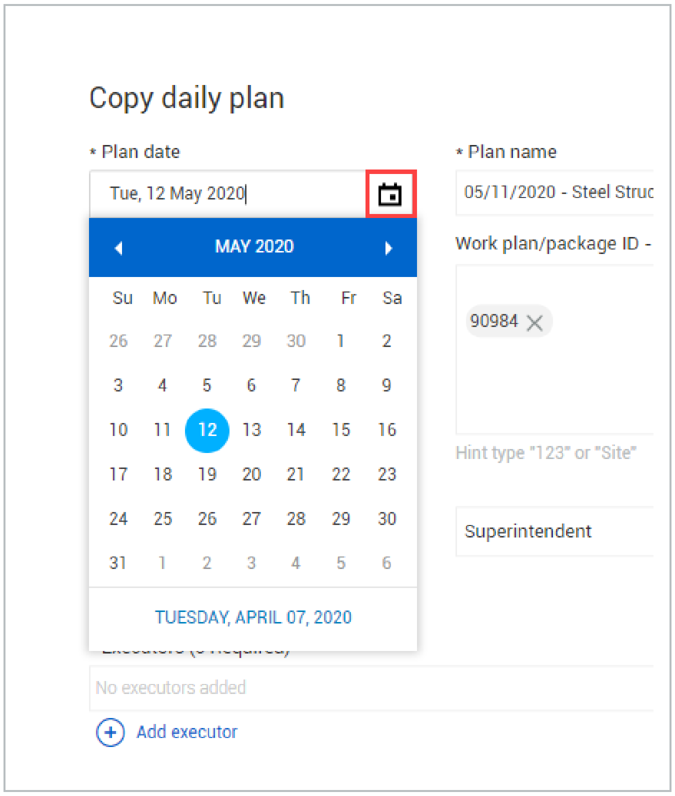

2. Click on the **Copy** icon on the toolbar.
   - This will open the Copy Daily Plan pop up window



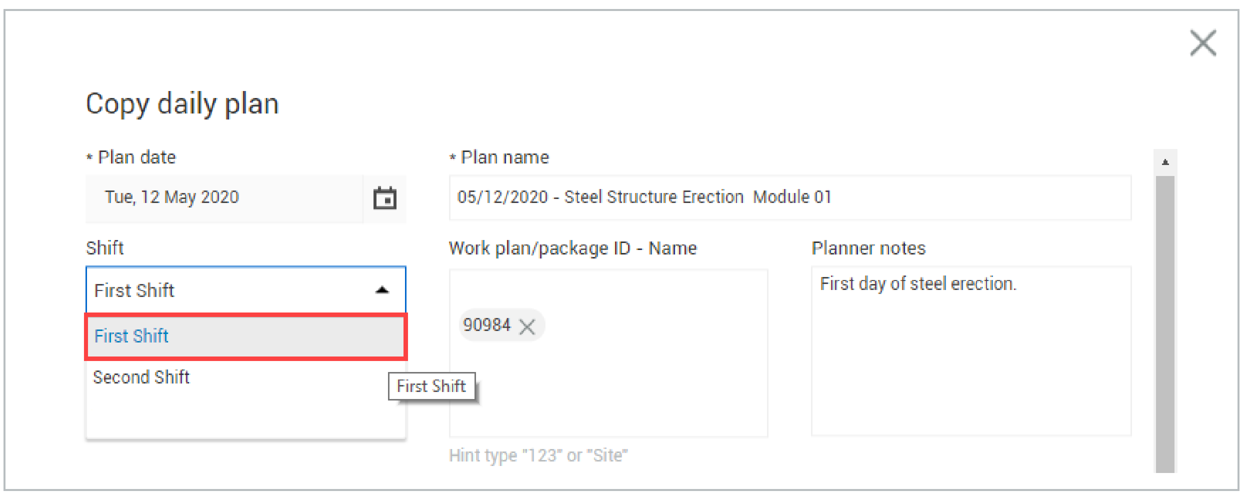

3. Rename your new plan.



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




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




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

- 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.

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

8. Click **Create Plan**.

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

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

# 1.5 DAILY PLAN FROM SCRATCH

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

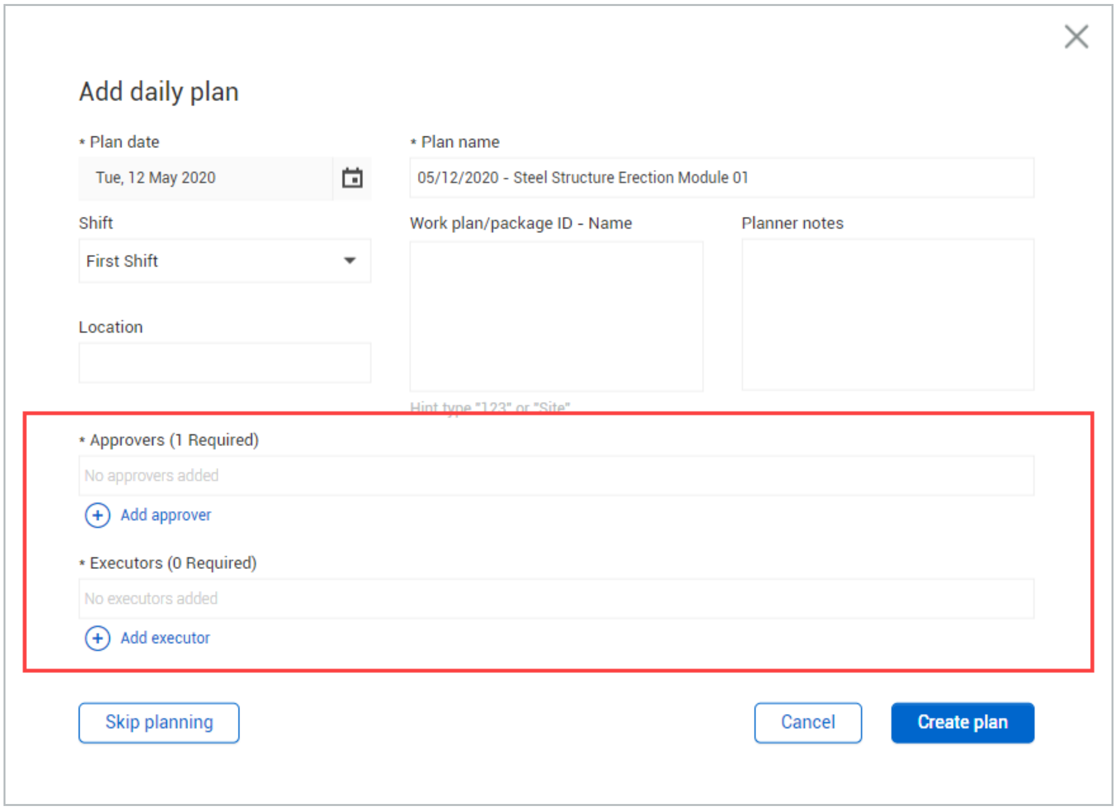
## 1.5.1 Daily Plan from Scratch

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.

### 1.5.1.1 Approver and Executor Roles

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




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

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

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

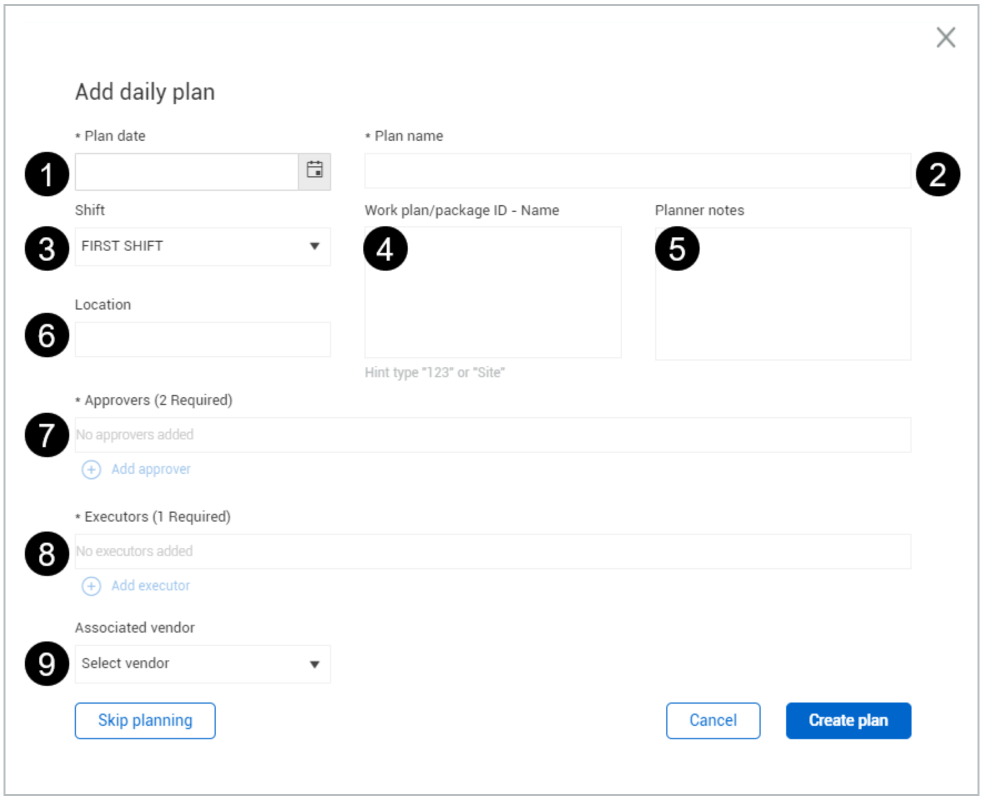
### 1.5.1.2 Vendor association

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

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

### Overview - Add Daily Plan Window

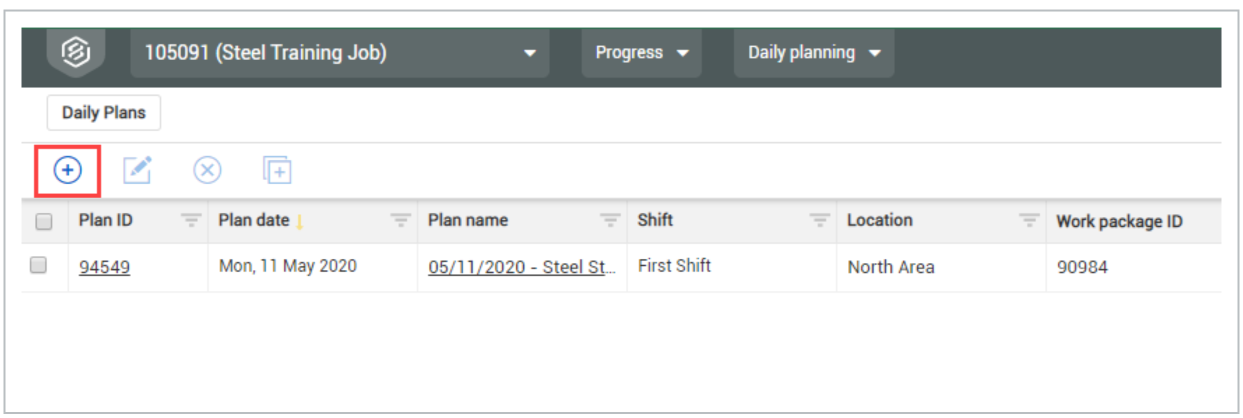
| Title | | Description |
|---|---|---|
| 1 | Plan date | The date that the plan will be executed. |
| 2 | Plan name | Unique name for the daily plan. |
| 3 | Shift | A drop-down field where you can select either First, Second or Third Shift. |
| 4 | Work plan/package ID-Name | You can enter a work plan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




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

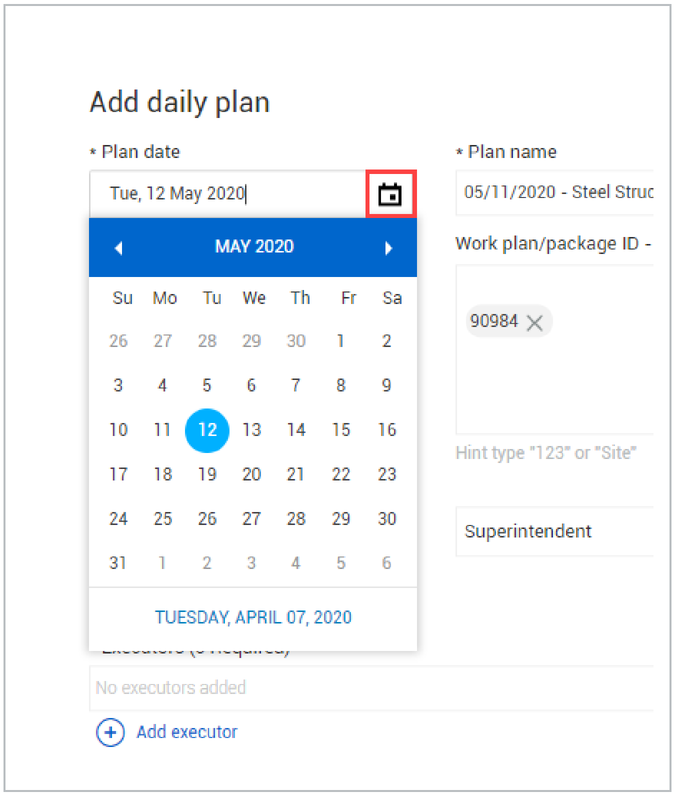
## Create a Daily Plan from Scratch

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

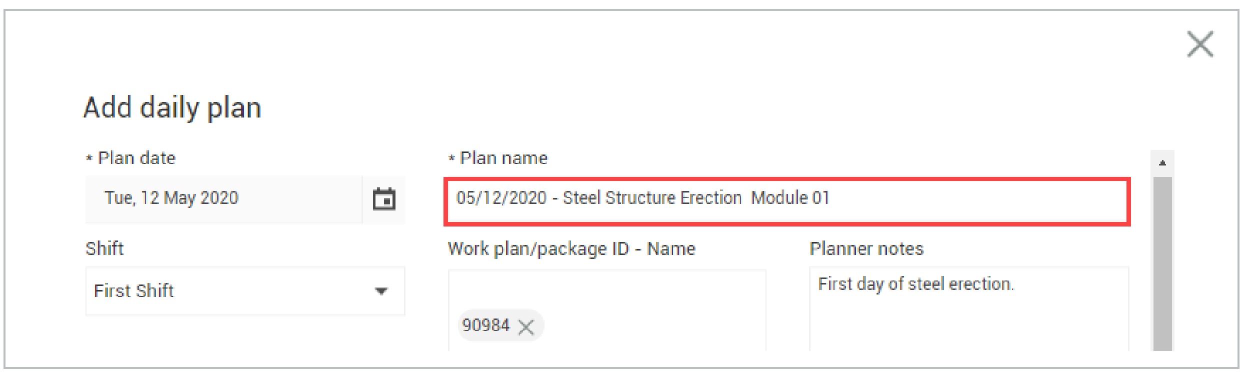



   - This opens the Add daily plan window

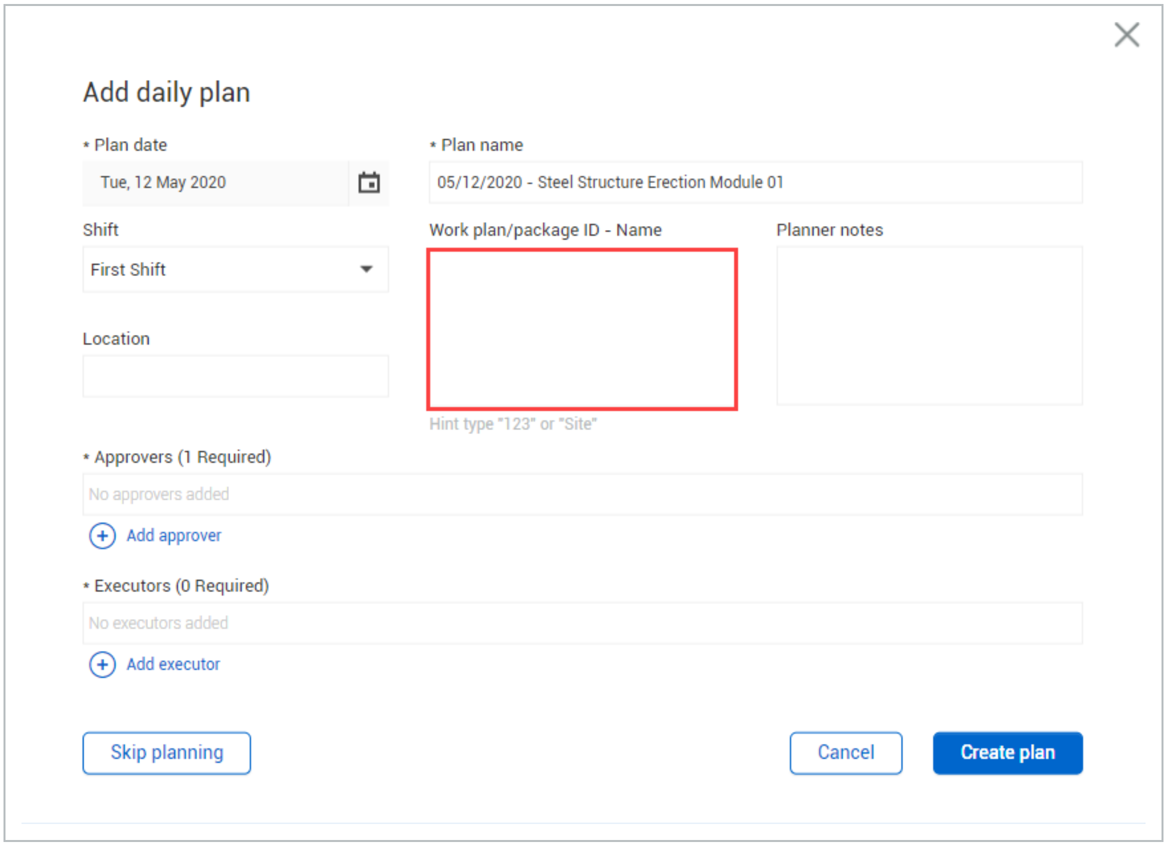
2. Click on the **Calendar** icon in the Plan Date field and select a date.



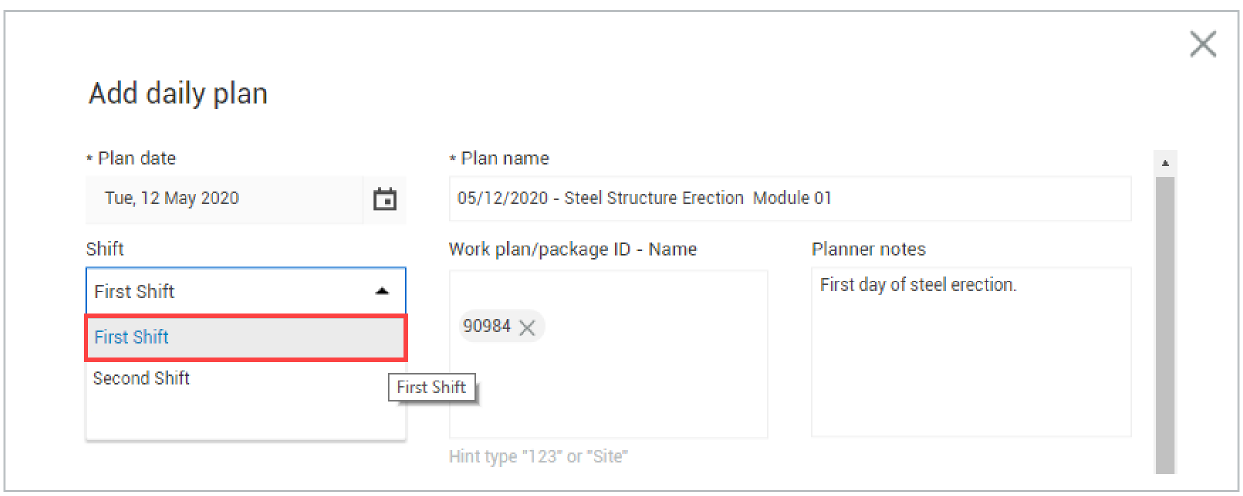

3. Name your daily plan.



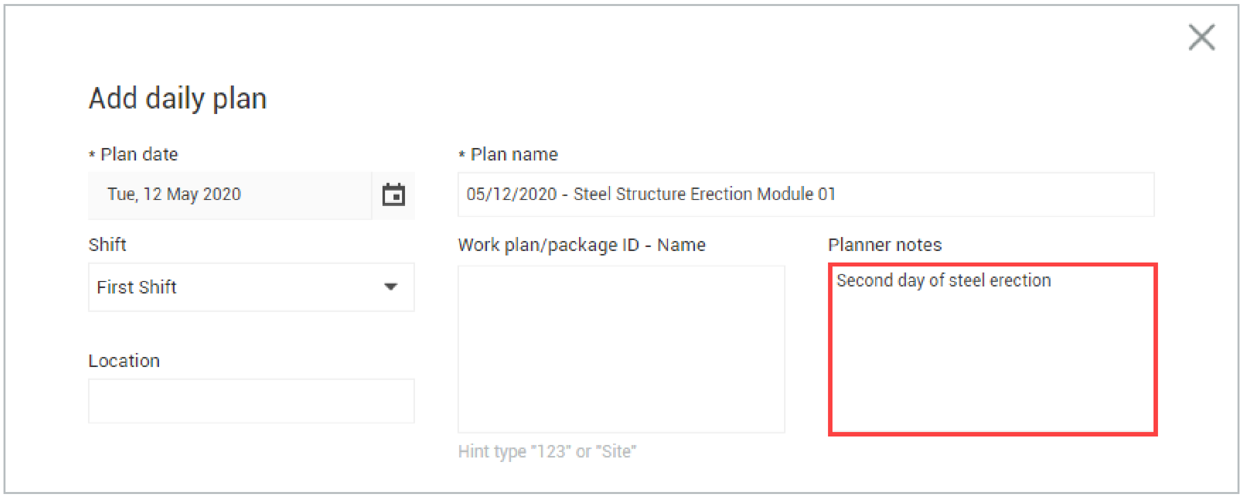
- Leave the Work plan ID field blank



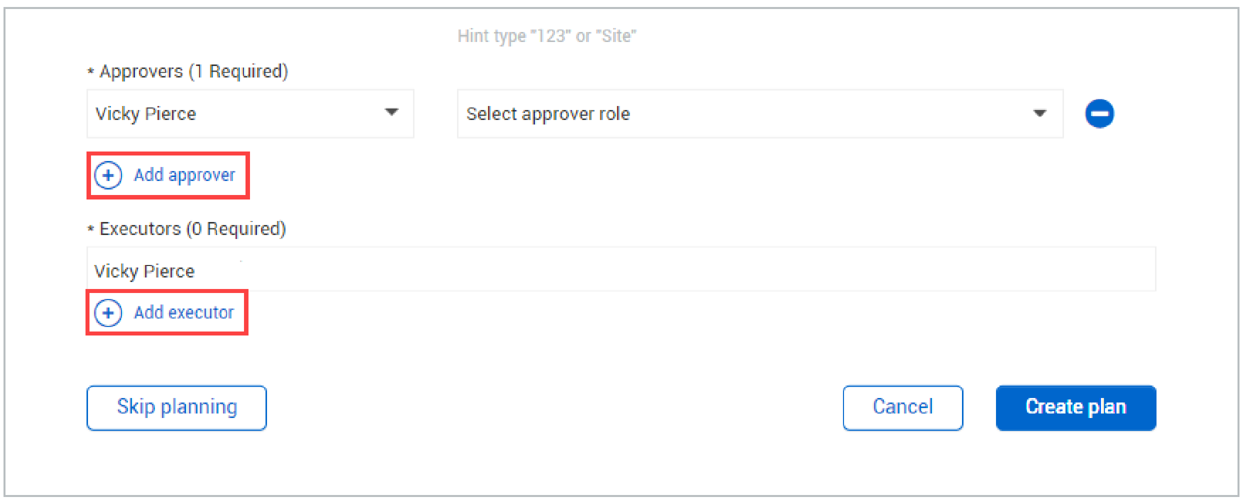

4. Select a shift from the drop-down menu of the Shift field.




5. Enter any notes in the Planner notes field.




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




8. Click **Create Plan**.

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

# 1.6 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.

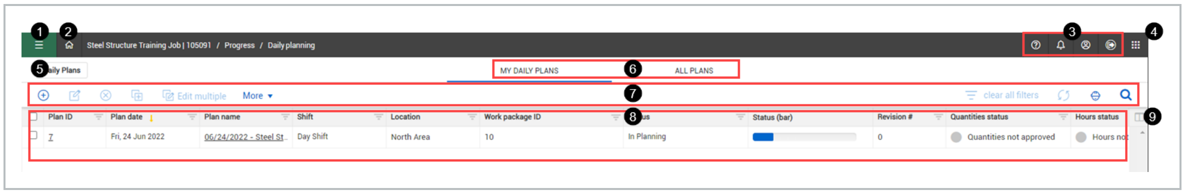
Once you finish creating your daily plan via the Daily Plan Wizard, the next step is to assign specifics to your plan. In other words, even though you already populated the basic information via the Daily Plan Wizard you are still missing some important information required to execute the intended work. 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. |

(continued)

| Title | | Description |
|---|---|---|
| 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. |

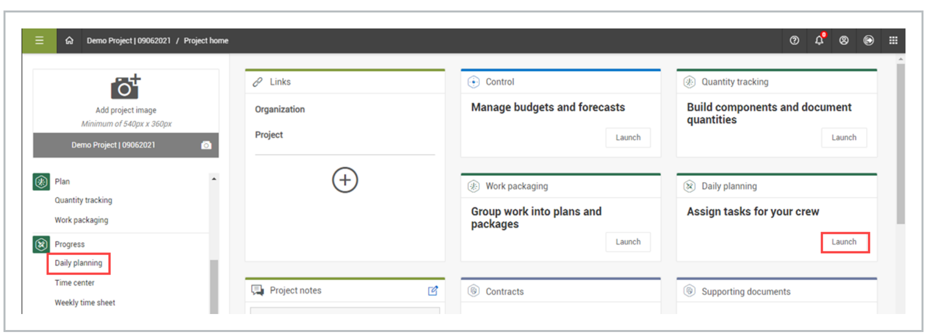



## 1.6.1 Daily Plans Page

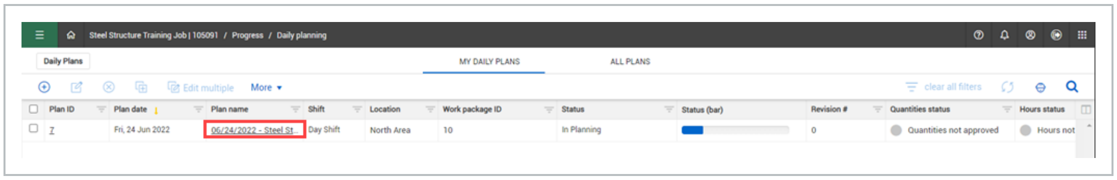
To begin the Planning Phase of a daily plan, you must first open a daily plan. In the following Step by Step, you will navigate to the Daily Plans page and then open a daily plan.

### Open a Daily Plan

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



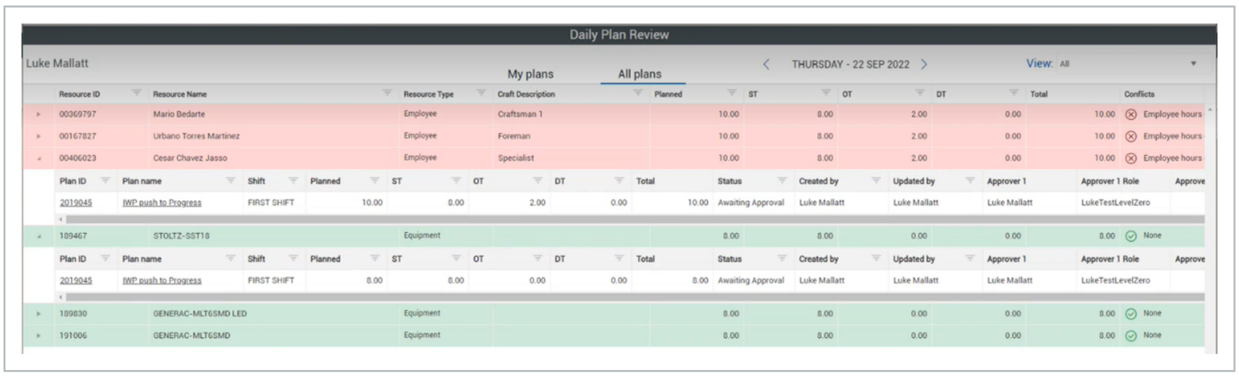

2. Click on your daily plan's name.




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

## Daily Plan review

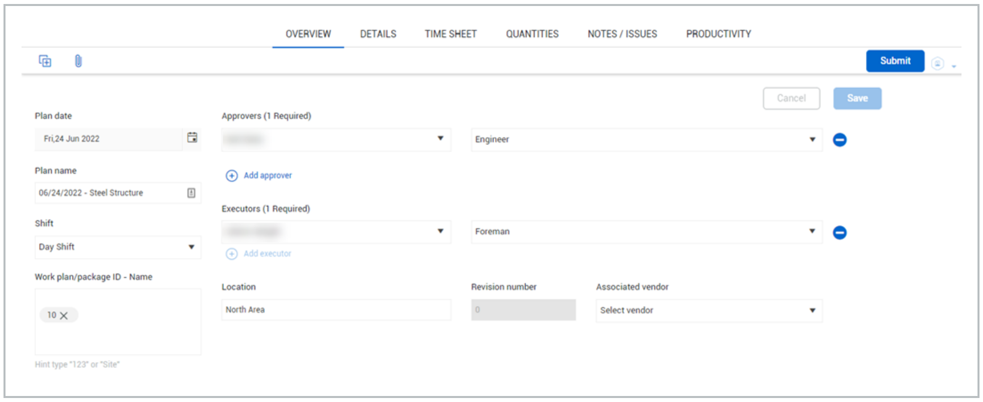
In Daily Plan Review, you can select employees or equipment and filter by date. A live report shows all resources that are being used. You can make adjustments by clicking the plan name.




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.

# 1.6.2 Overview Tab

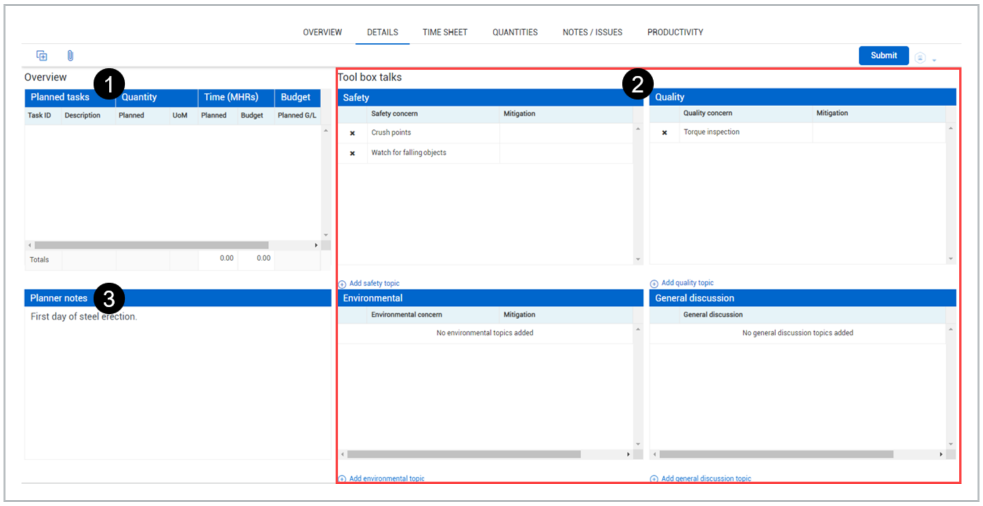
The **Overview** tab provides a summary level of all information related to the current daily work plan. The fields on this tab lets you modify basic daily plan information, approvers, executors, and associated work plans and vendors.




## 1.6.3 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.

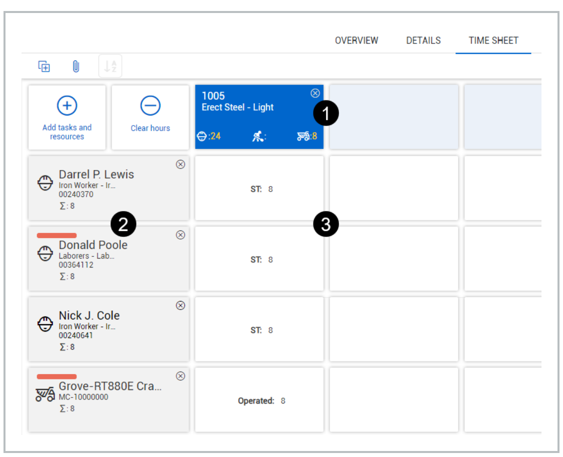
| Title | | Description |
|---|---|---|
| 1 | Overview data block | Shows the tasks, employees, hours, and quantity you are planning on having or completing the next day. This is a useful tool for the foreman to review with their crew as a morning meeting. |
| 2 | Tool box talks data blocks | Provides 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. |




## 1.6.4 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. |

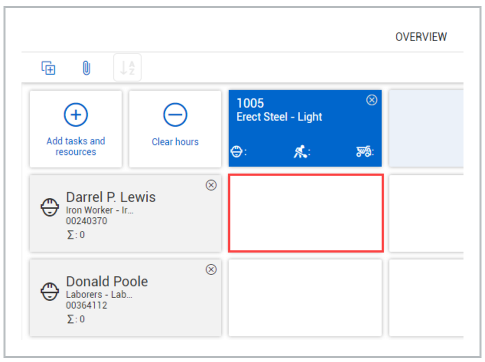


The following steps walk you through entering planned employee hours into a daily work plan. You must have added an employee and a task to the time sheet.

> 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.



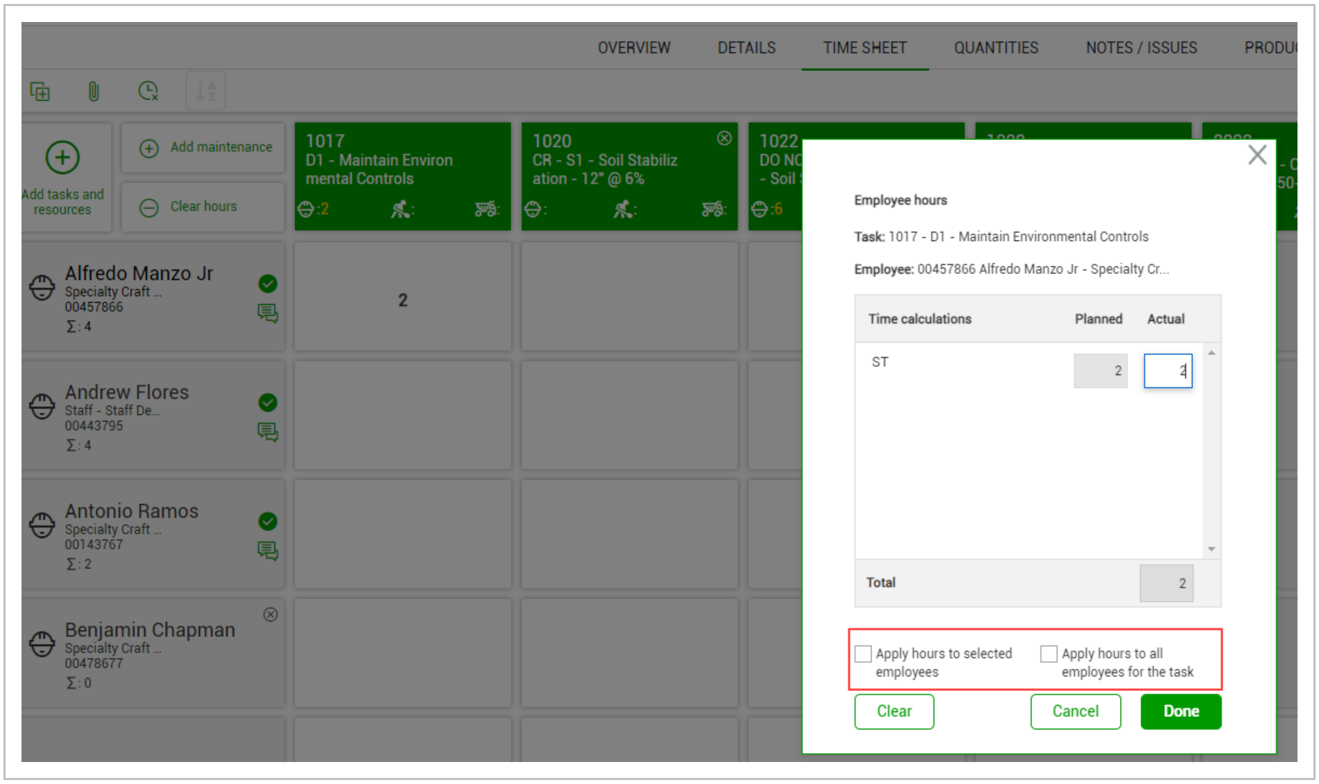

4. Click the **Add** icon, and then select a reason code.
5. Enter the number of hours you expect the employee to work in the blank field, and then click **Done**.

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

### 1.6.4.1 Apply hours to multiple employees

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

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



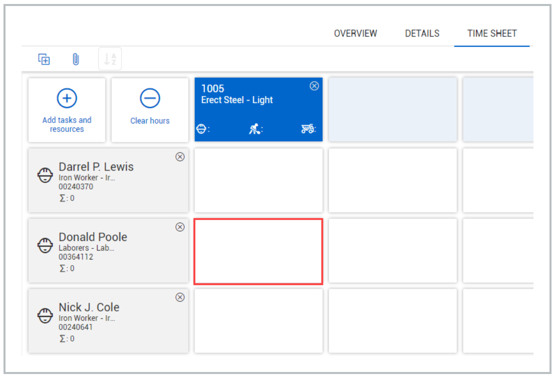

The following steps walk you through entering planned equipment hours and operator hours for an employee into a daily plan. You must have added an employee, a piece of equipment, and a task to the time sheet.

> 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.

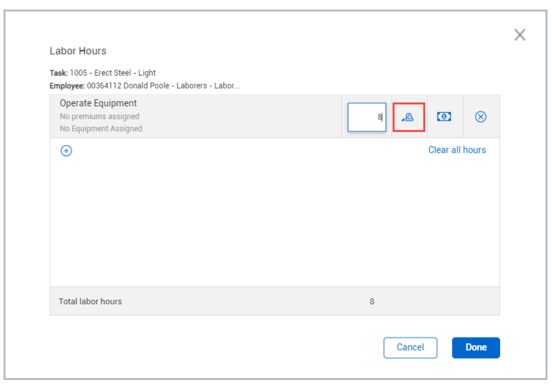
3. Click in the hours entry cell for your first listed worker. The Labor Hours dialog box opens.




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

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

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



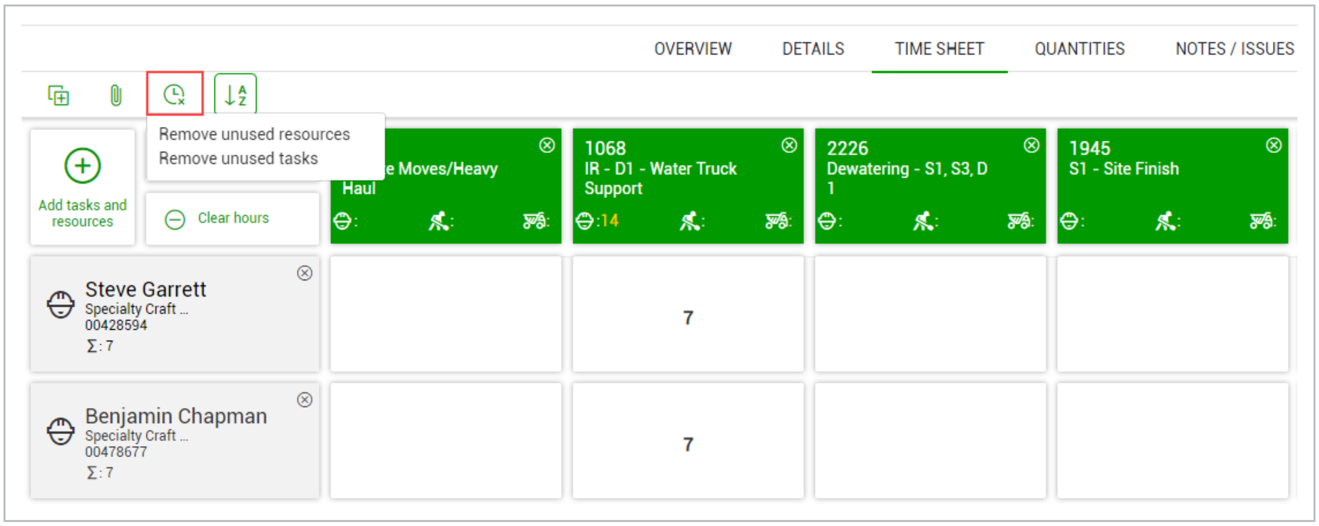

Click **Done**.

> 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.

### 1.6.4.2 Remove unused tasks and resources

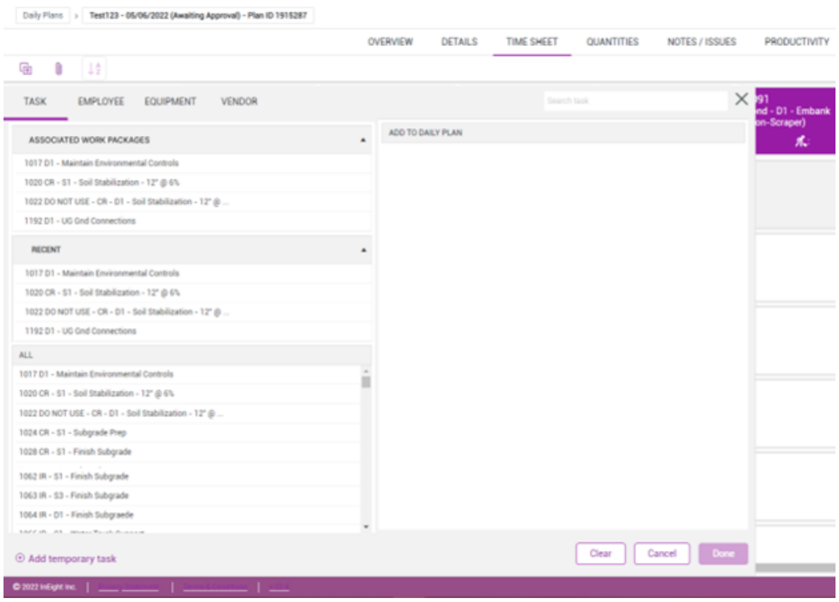
You can remove all unused tasks or resources from a daily plan at the same time. At the top of the Time Sheet tab, click the **Remove unused tasks and resources** icon, and then select one of the following options:

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




## Resources Association

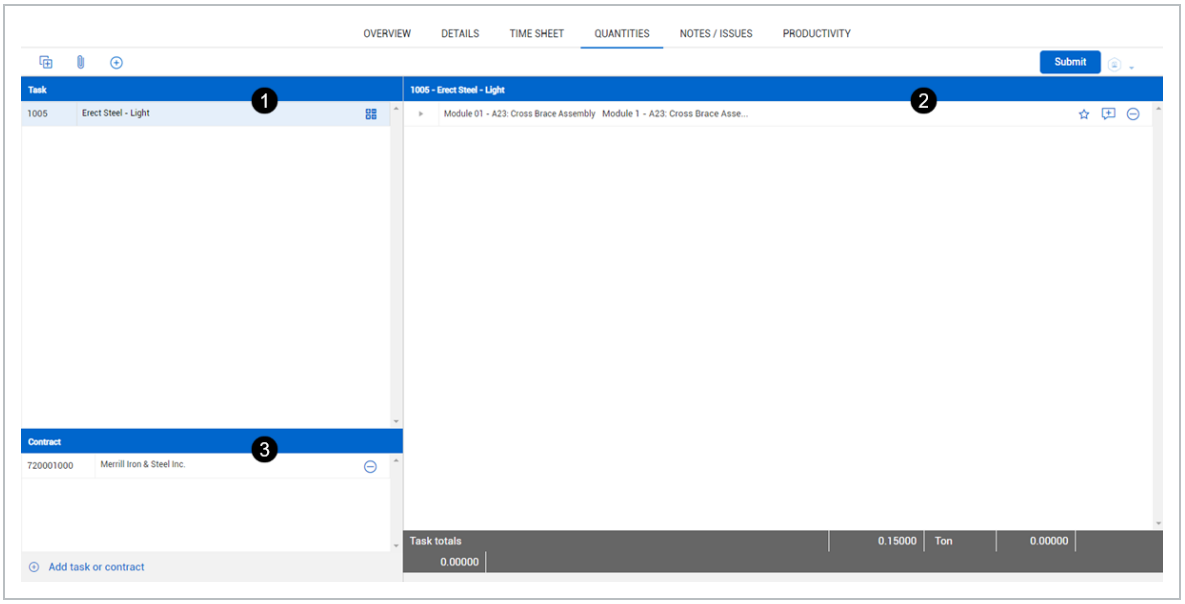
When adding resources in time sheets, you can access associated work packages. When selected and added to the plan, the associated work packages will no longer show. A work package in IWP must have resources, equipment, labor, or components with tasks or WSB associations, to bring values into the relevant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




## 1.6.5 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. |

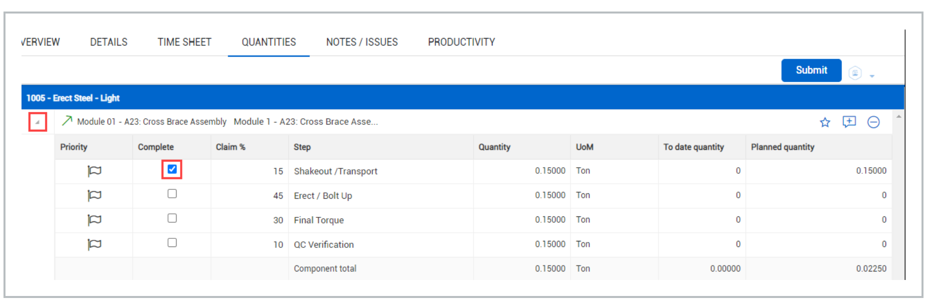



The following steps walk you through how to input the planned quantity for components into a daily plan.

## 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.

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

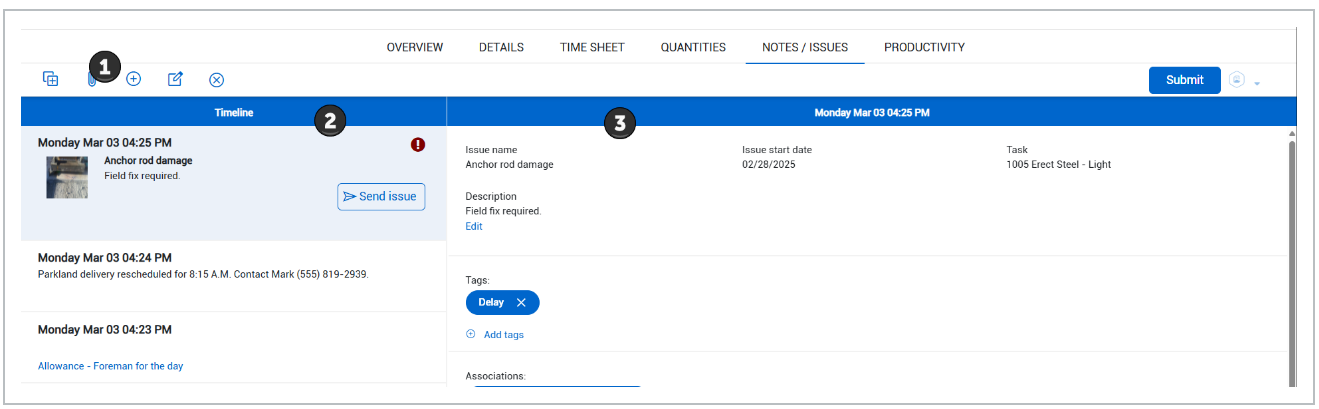


To calculate a breakdown of the cost and component quantities of a selected task, select the **slide-out panel** icon 

## 1.6.6 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. |




### 1.6.6.3 Notes

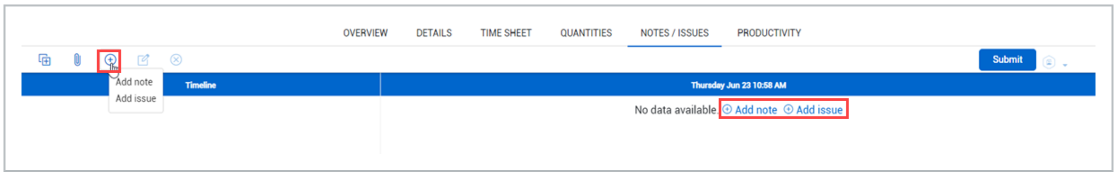
Notes can be added directly from the Notes/Issues tab or through the Time Sheet or Quantities tabs and are visible to all team members with access to the daily plan.

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**.

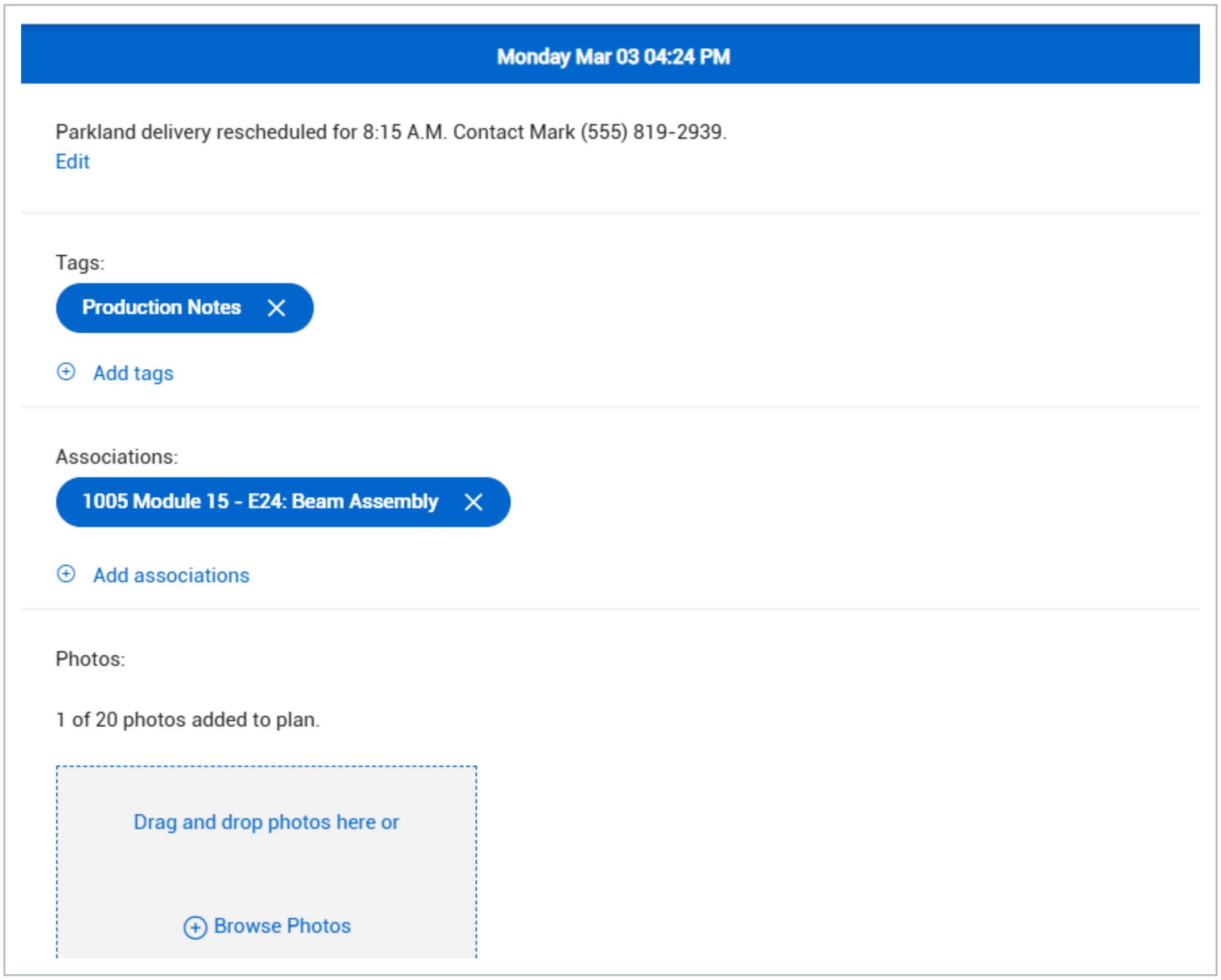
> If there are no existing notes, you can also click **Add note** in the creation area on the right.




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.

> Tags are defined by your organization and project.

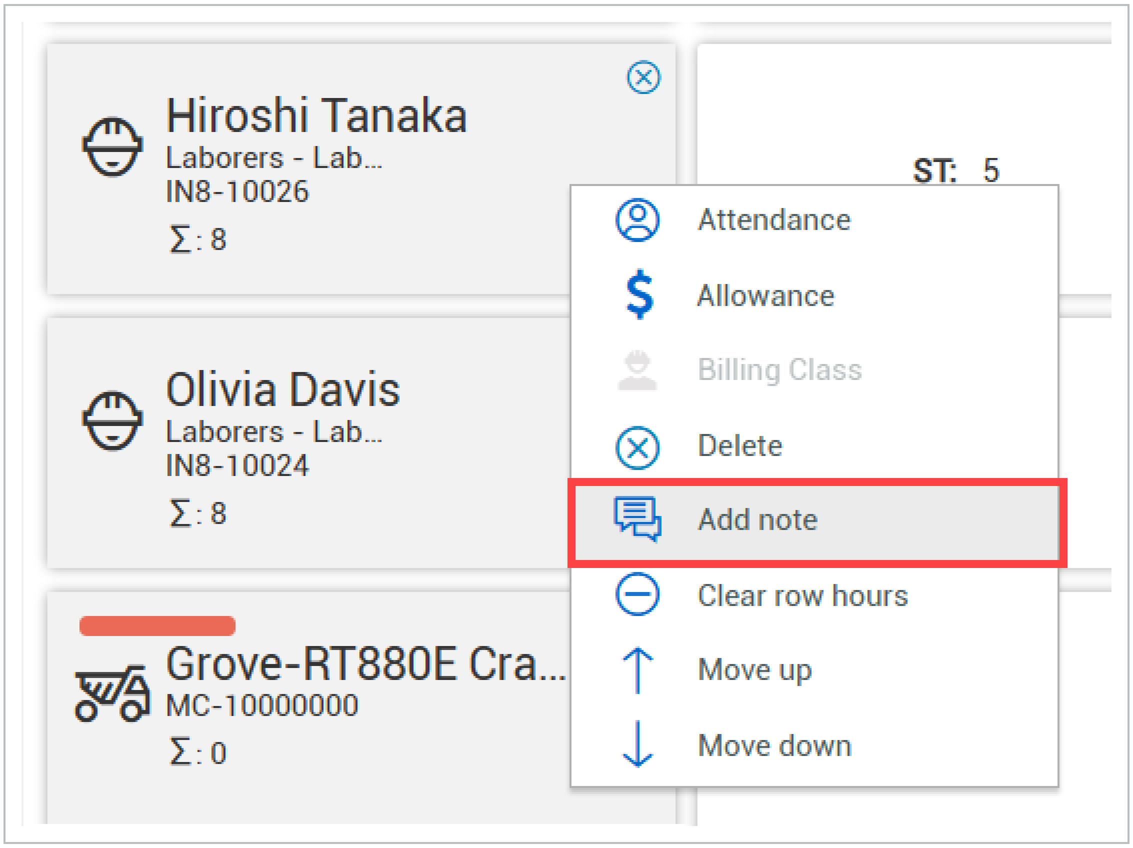
6. To add an association, click **Add associations**. From the slide-out panel, click the tabs at the top to choose a category. Select tasks, employees, equipment, components, maintenance orders, or vendors to include as an association. Click **Done** to close the slide-out panel.



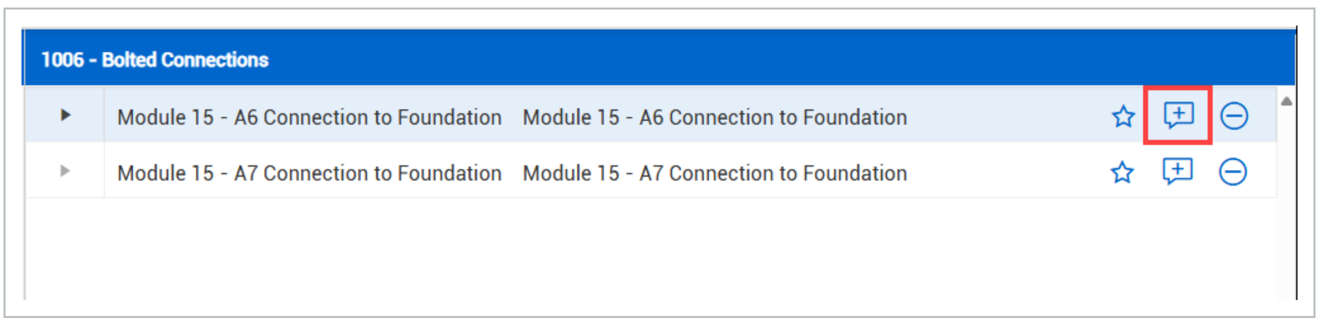

7. To attach photos to the note, click **Browse Photos**, and then select an image file. You can also drag and drop an image into the field.
8. Click **Done**.

> 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**.



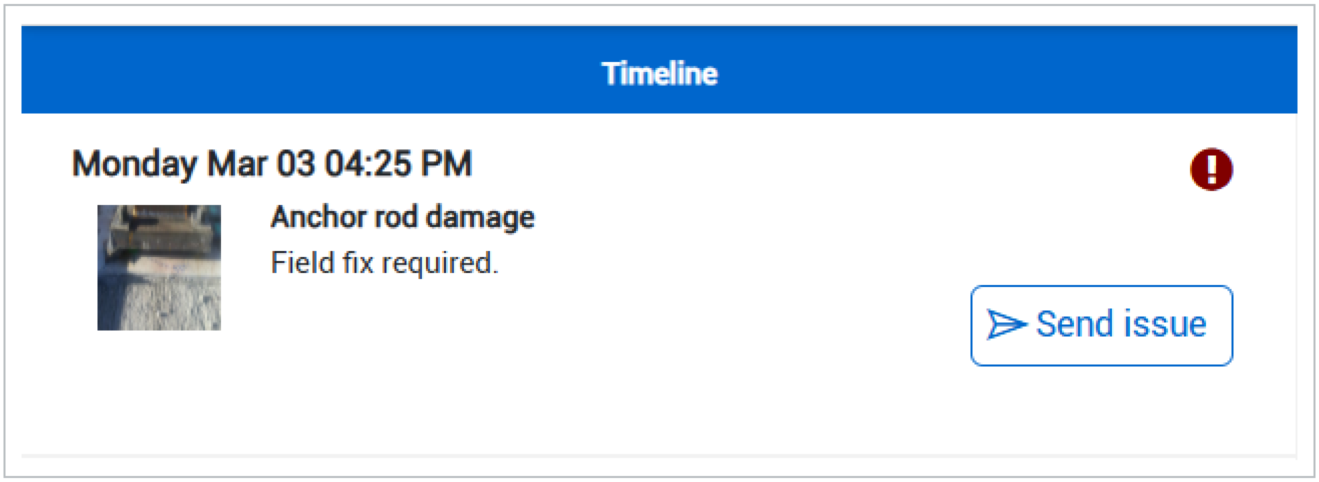

To add a note from the Quantities tab, click the **Add notes** icon from the top right of a component.




> 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.

### 1.6.6.4 Issues

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

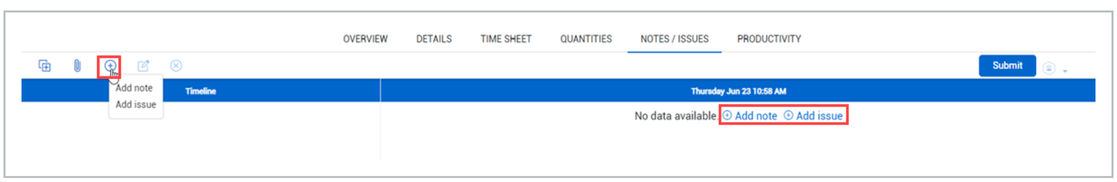



Adding an issue is like adding a note in a daily plan. Follow the steps below to create an issue from the Notes/Issues tab.

## 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**.

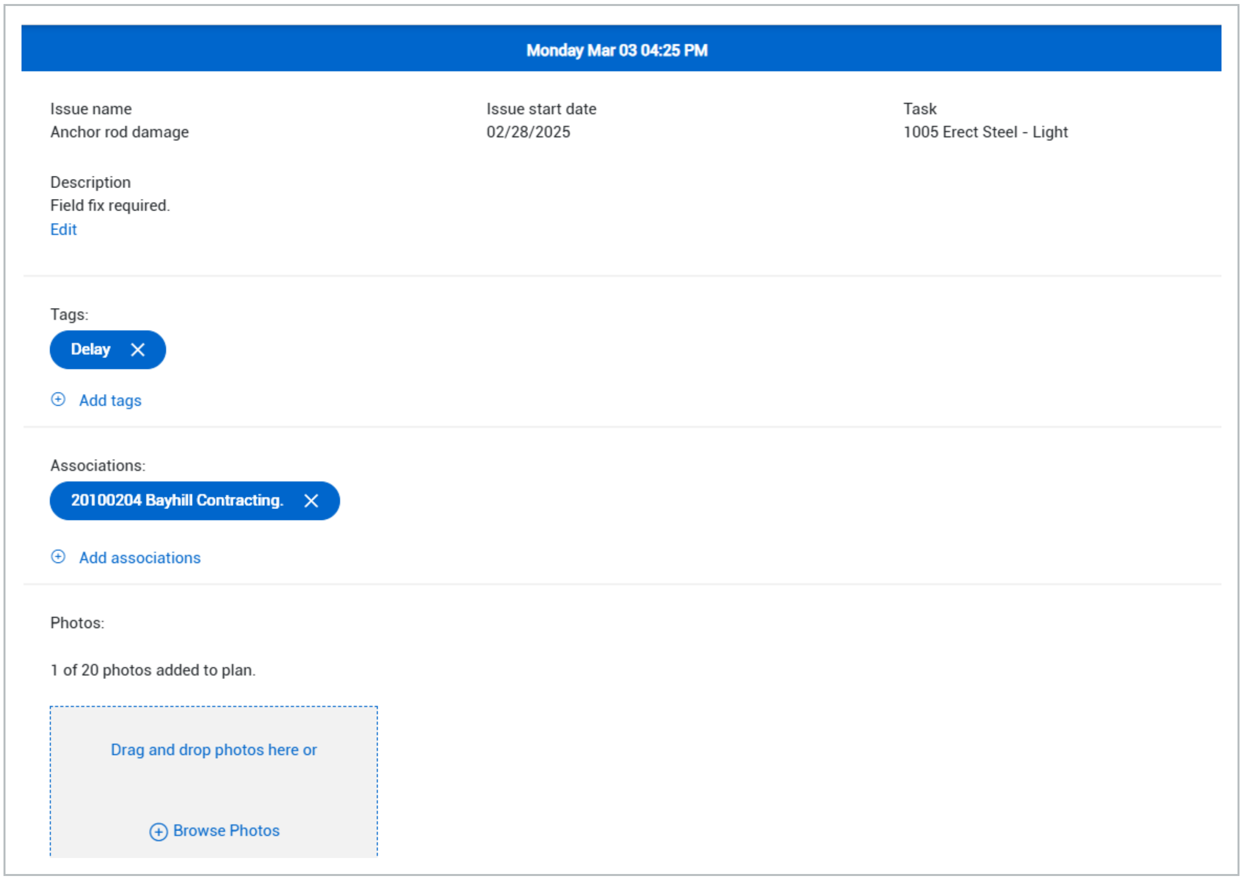
> If there are no existing notes, you can also click **Add issue** in the creation area on the right.




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.

> 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.



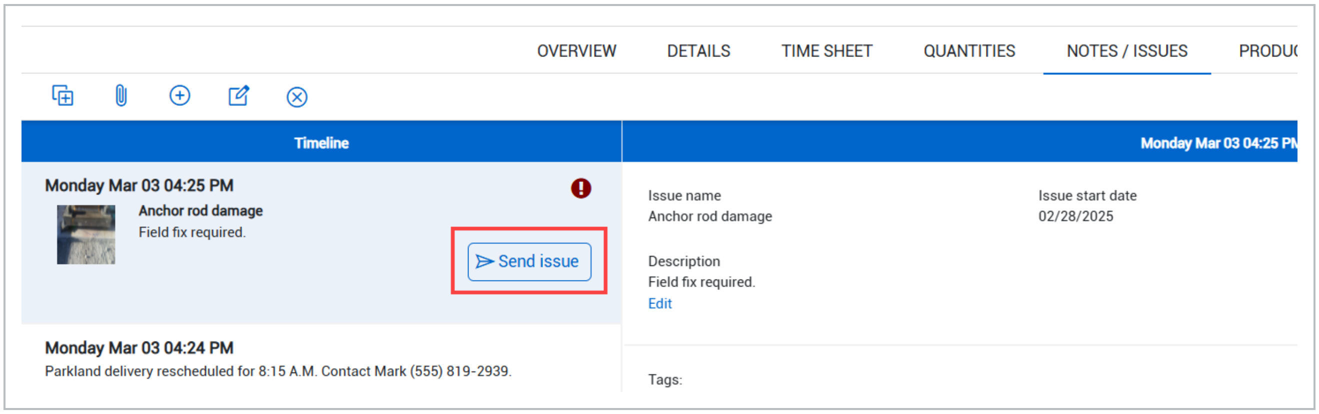

8. To attach photos to the issue, click **Browse Photos**, and then select an image file. You can also drag and drop an image into the field.
9. Click **Done**.

## 1.6.6.5 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.




## 1.6.7 Productivity Tab

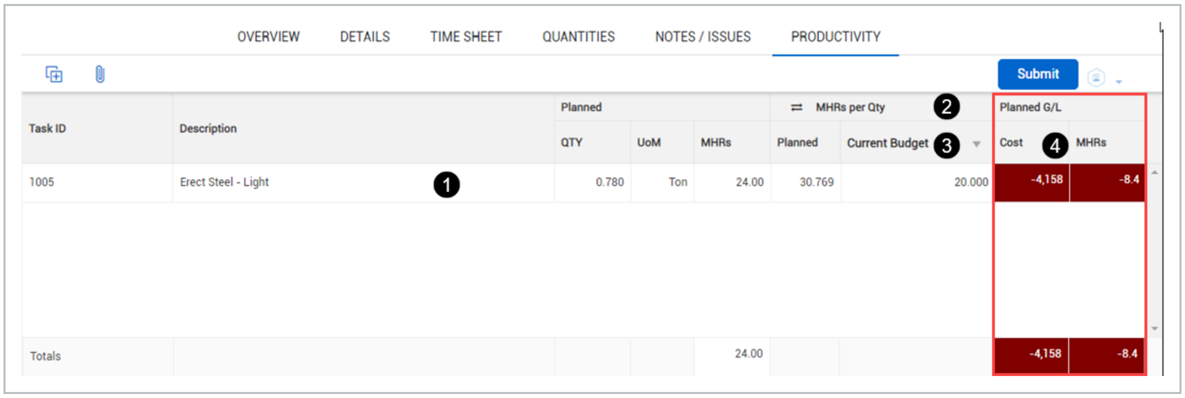
On the **Productivity** tab, you can:

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

| 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. |

(continued)

| Title | Description |
|---|---|
| 4 Planned G/L calculator | Contains comparison formulas for the costs and man hours of your plan and your budget. |



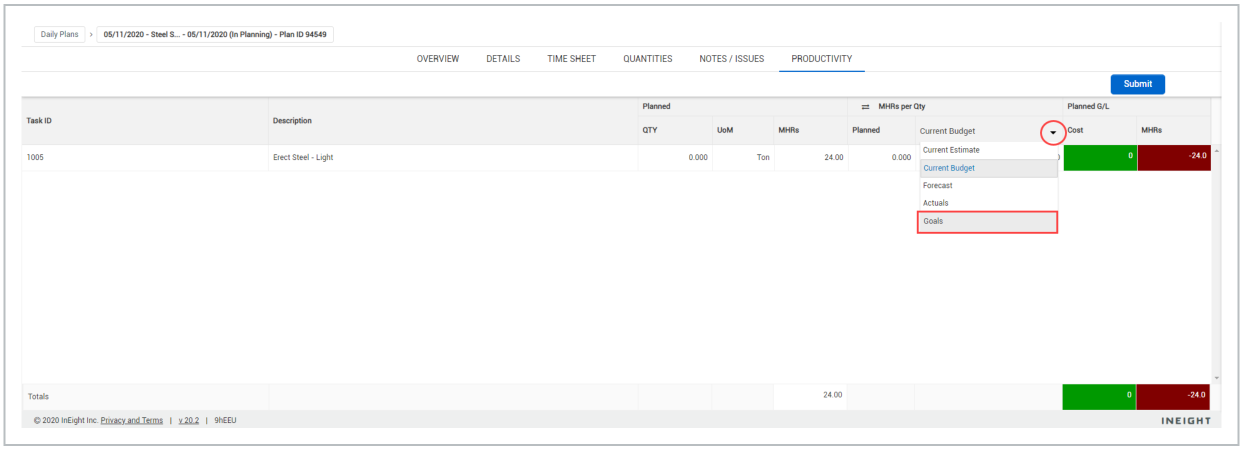

The Planned G/L compares the cost and man-hours of your daily plan to the costs and man-hours budgeted in InEight Control for the planned scope of work using the following equations:

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

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

## Enter a Goal Productivity Factor for a Daily Plan

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




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

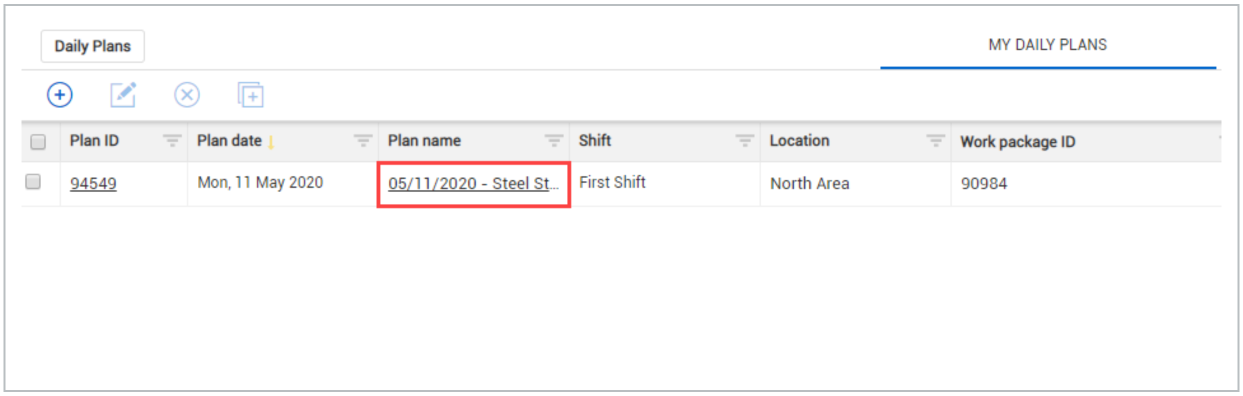
## 1.6.8 Submit a Daily Plan to Execution

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

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

## Submit a Daily Plan to Execution

1. Open your daily plan.




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

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

3. Click **Yes**.

# 1.7 VENDOR USE OF DAILY PLANS

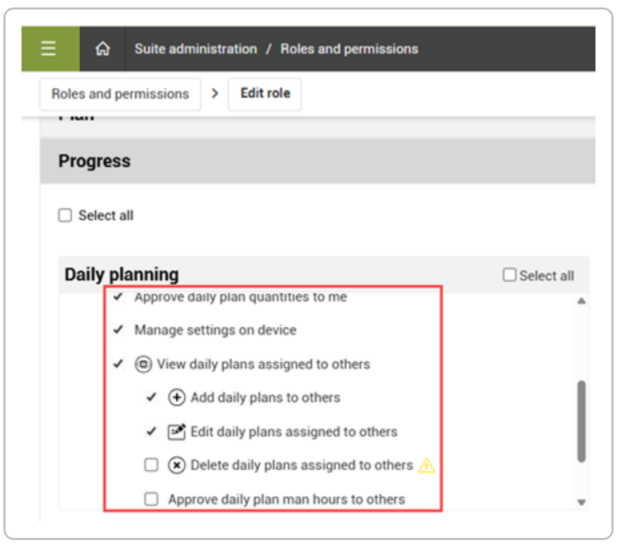
It might make sense for vendors to have access to track their own work on daily plans in Progress. To limit vendor access to only the tasks and resources that pertain to them, InEight applications must be configured as indicated below.

## 1.7.0.1 User and Project access

The vendor must be assigned to the user that will be accessing Progress, and to the applicable project.

You can control what level of daily plan access the vendor has through the role assigned to them. For example, as the contractor you might have the vendor submit time to one of your employees for approval, so you limit their role to not have permissions to approve daily plans. In other cases, it might make sense for the vendor to approve their own daily plans, so you enable the Approve daily plan permissions for the vendor role.

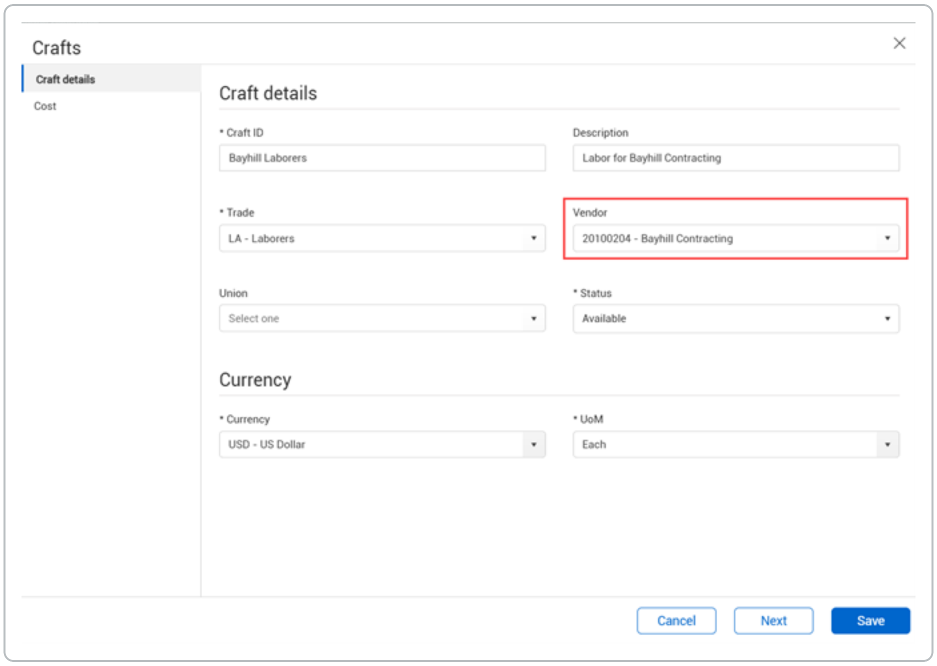
You can edit permissions for the vendor’s role under Suite administration > Roles and permissions > **Edit role**. Under the Progress menu, you can enable and disable permissions to add, edit, delete, or approve daily plans, either assigned to the user or others.



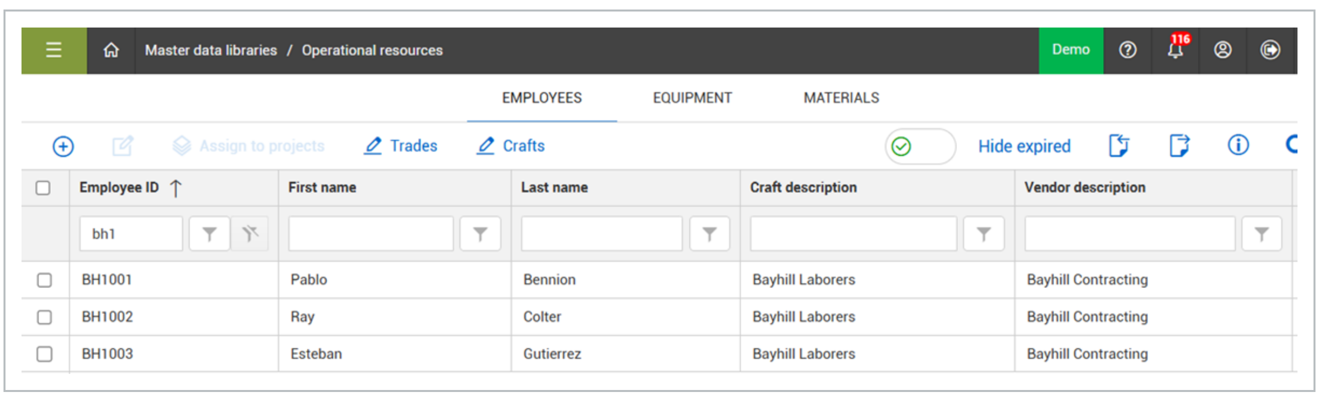

Note that daily plans require both a foremen and superintendent assignment when adding a daily plan. The applicable users with these roles must be assigned to the vendor and the project for the vendor to access them when adding daily plans.

### 1.7.0.2 Resources

The vendor only has access to the operational resources (employees, equipment) they are assigned to. Under Master data libraries > Operational resources > **Employees**, crafts must be created as needed for the vendor, and with the vendor assigned.




All employees assigned to that craft inherit that vendor assignment.

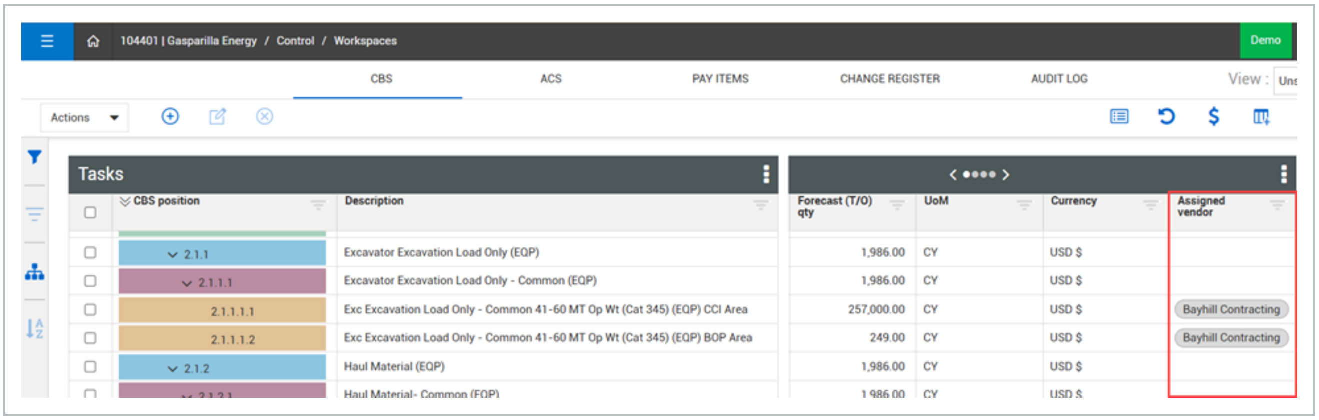



Similarly, under the Equipment tab, models and types must be created for the vendor and with the applicable vendor assigned.

## 1.7.0.3 Task

The tasks available to select on a daily plan come from the WBS phase code and related cost item in Control. The vendor can only view the WBS/cost items they are assigned to in the Control application.

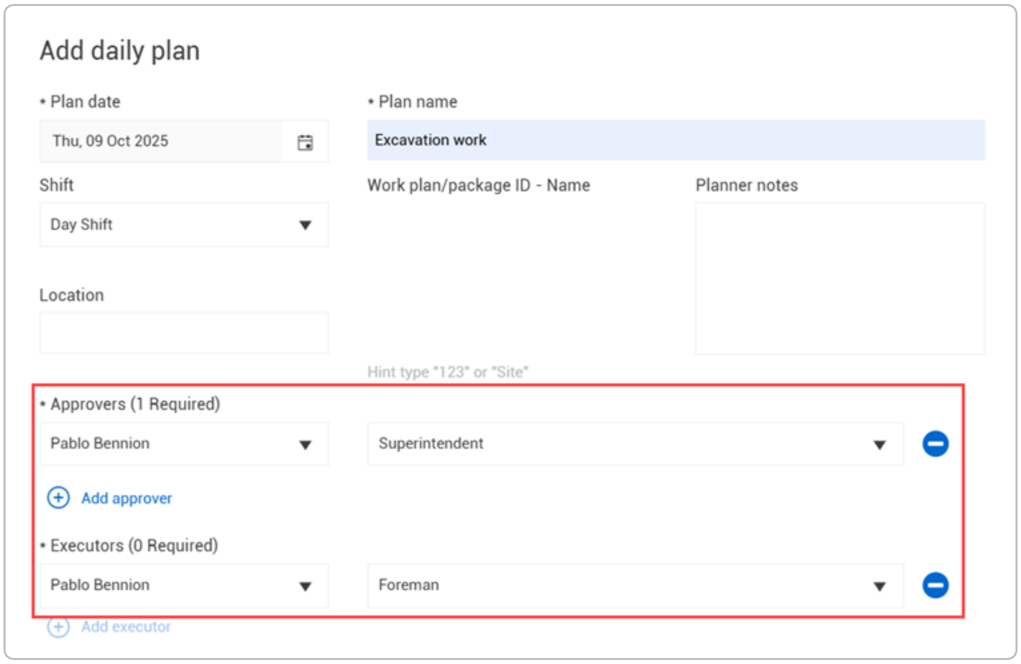
On the Control > Workspaces > **CBS tab**, the Assigned vendor column can be added to a data block and the vendor assigned to the items they need access to on a daily plan.



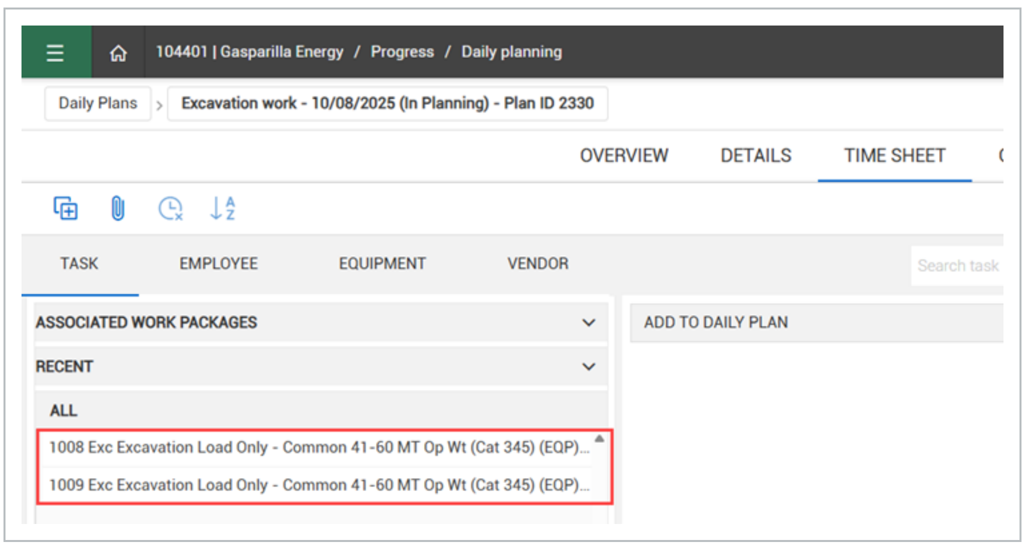

## 1.7.0.4 Vendor use of daily plans

With the above configurations in place, when the vendor logs in and creates a daily plan, they can only view the tasks and resources assigned to them, and are limited in their ability to plan, execute and approve daily plans based on the permissions assigned to their role.

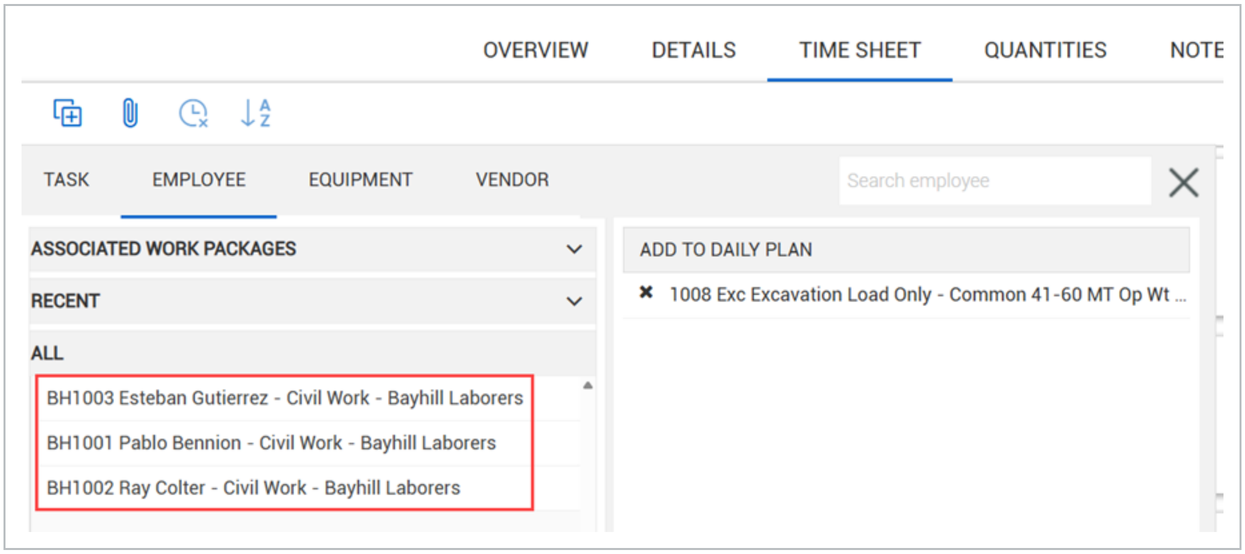
When adding a daily plan, the vendor assigns the applicable superintendent and foreman to the daily plan.




On the Time Sheet tab, when the vendor selects Add tasks and resources, they can only view the tasks that were assigned to them in Control.




Under the Employee and Equipment tabs, vendors can only view the resources assigned to them in the Operational resources master data library.

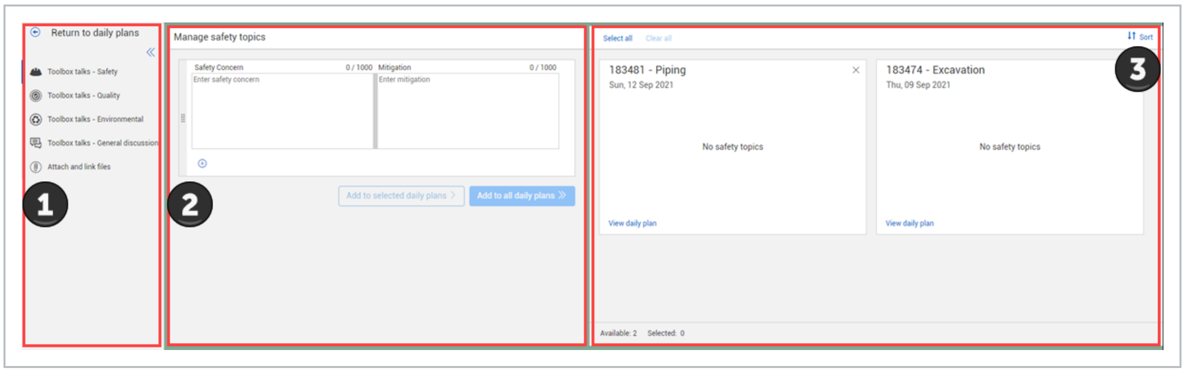



The vendor can execute and approve daily plans according to the agreed upon work flow for the project.

# 1.8 MANAGEMENT CONSOLE

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

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




The Management console has three panels:

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

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

## 1.8.1 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.

### 1.8 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**.

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

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

## 1.8.2 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.

### 1.8 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.

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

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

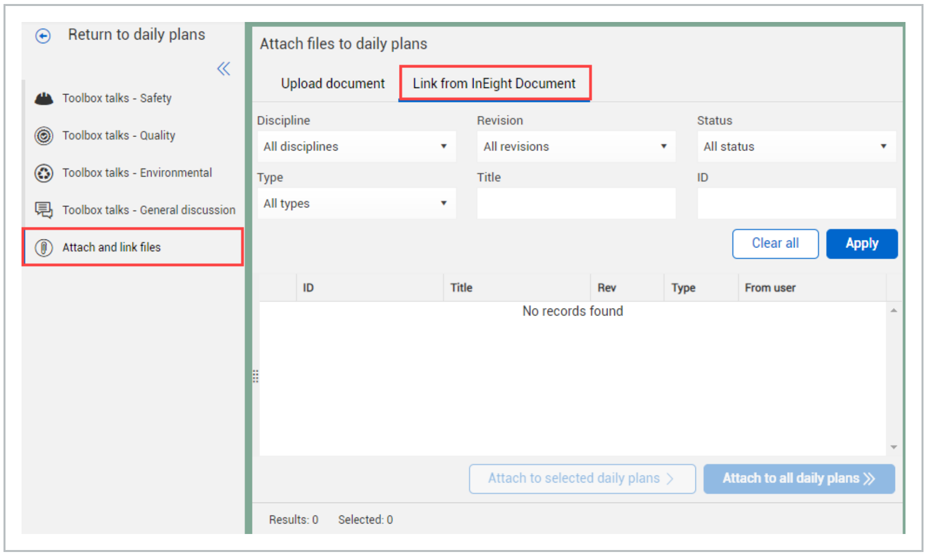
> You can also select specific plans in the right panel, and then click **Add to selected daily plans**.

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.

## 1.8 Step by Step 3 – Attach a Document File in the Management Console

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

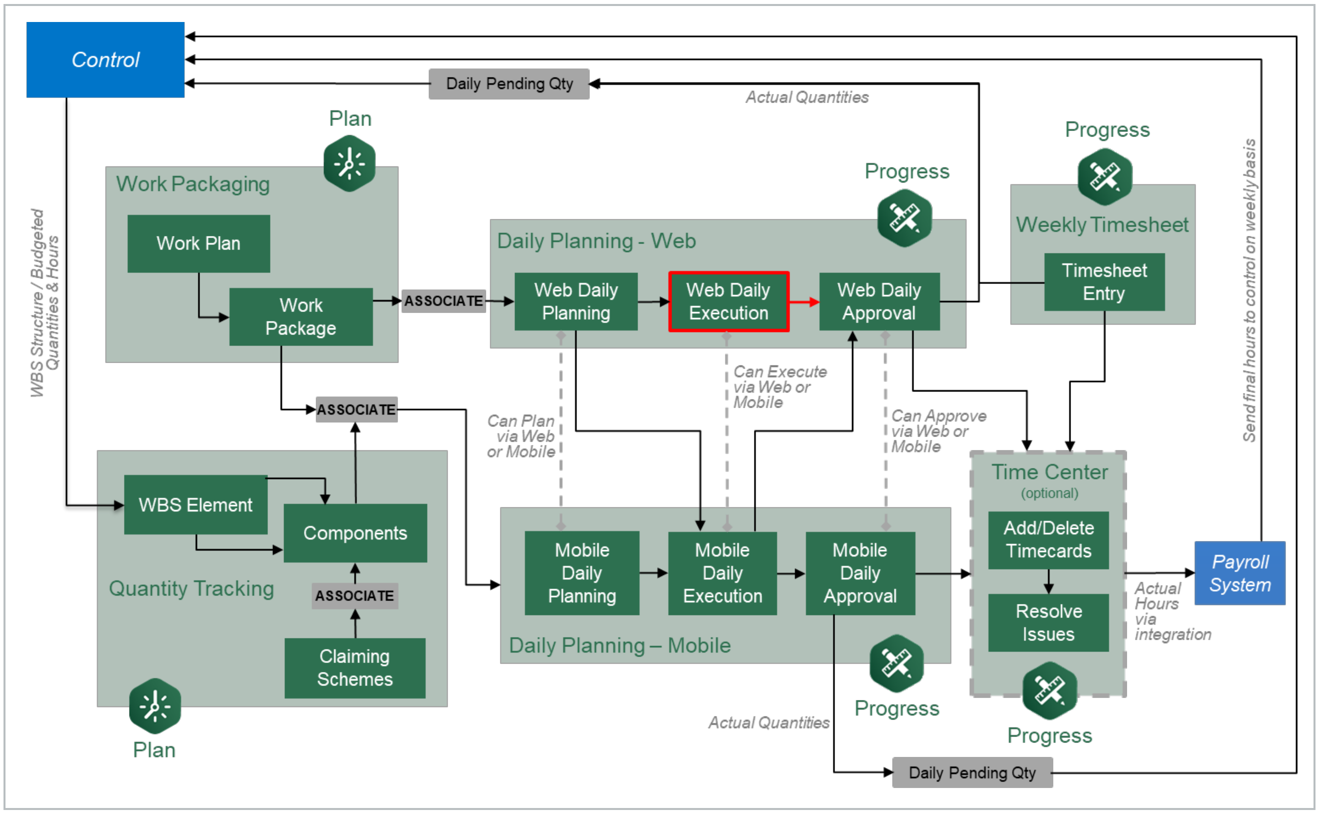



5. Select one or more records, and then click **Attach to all daily plans**.

> 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.

# 1.9 DAILY PLAN EXECUTION

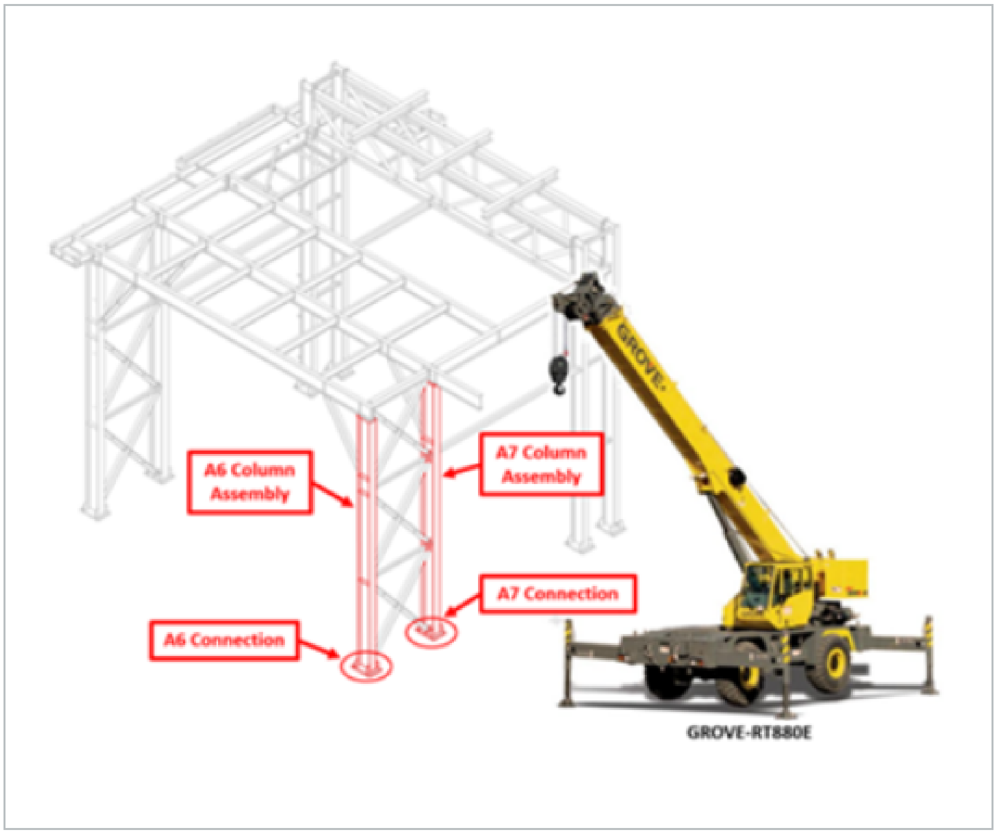


# 1.10 DAILY PLAN EXECUTION

## 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.

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

## 1.10.1 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

> 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.

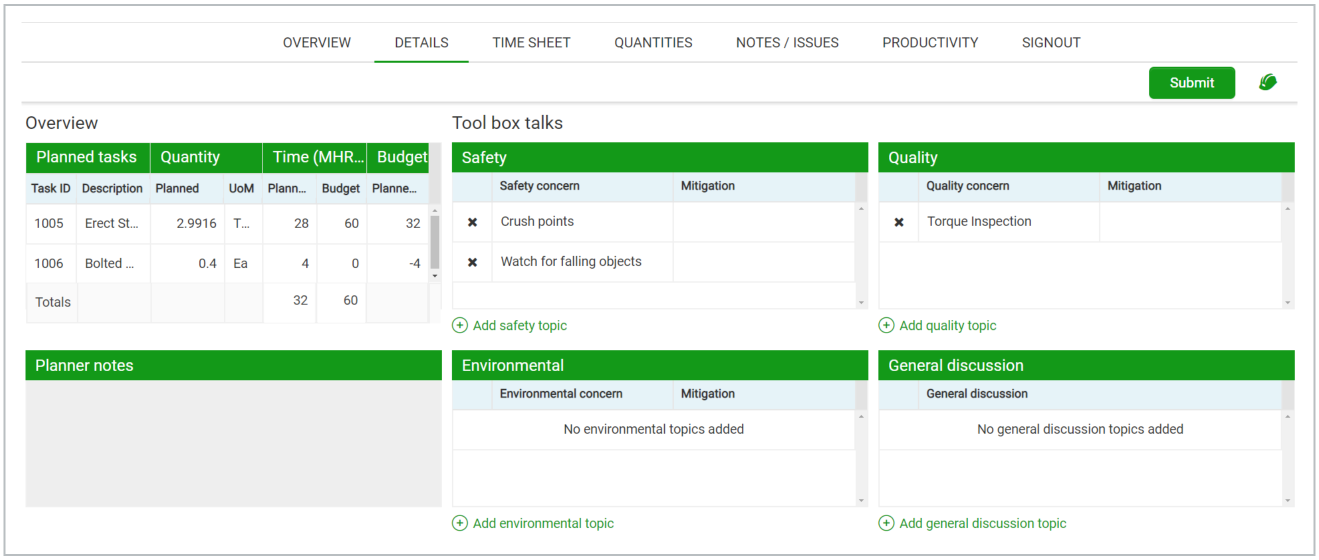
## 1.10.2 Overview Tab

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

## 1.10.3 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.

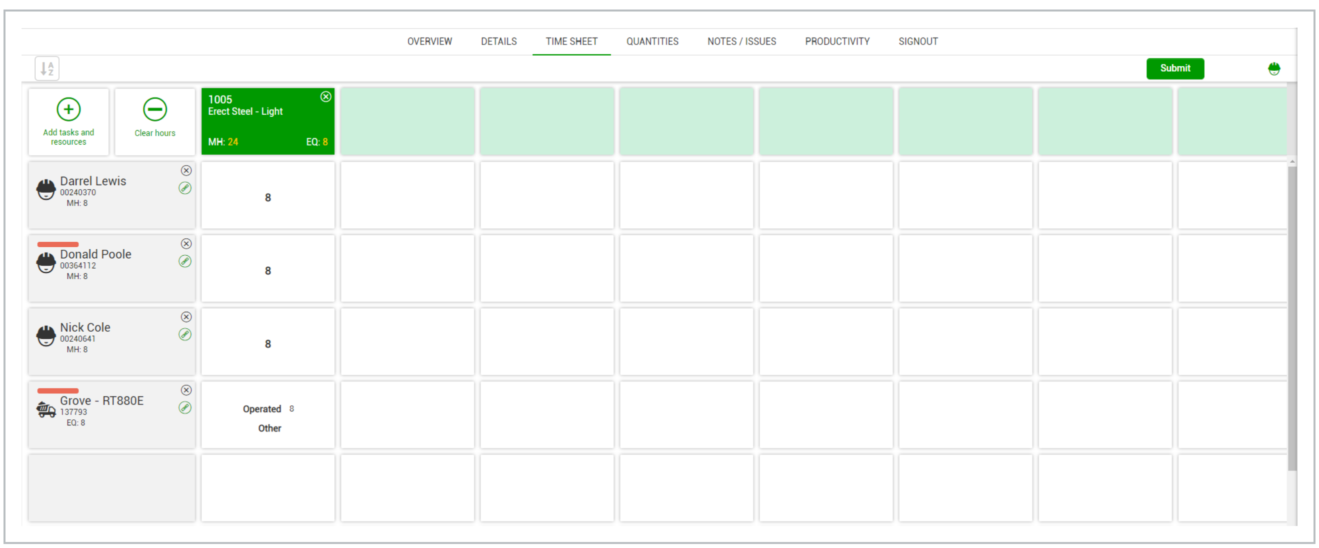
Like the Planning Phase, under the Tool box talks section, you can add, edit and delete items for each of the four different areas (Safety, Quality, Environmental, and General discussion).




## 1.10.4 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.



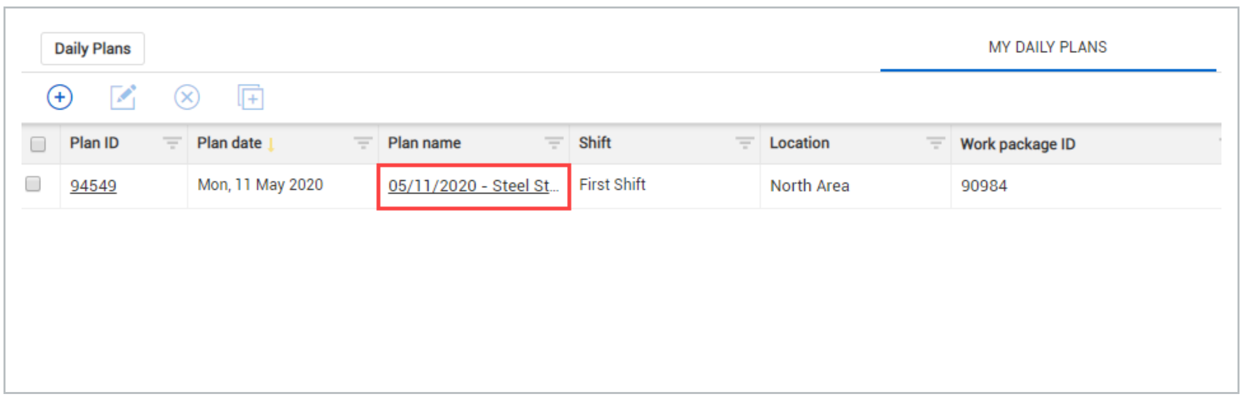
### 1.10.4.1 Temporary Resources

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

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

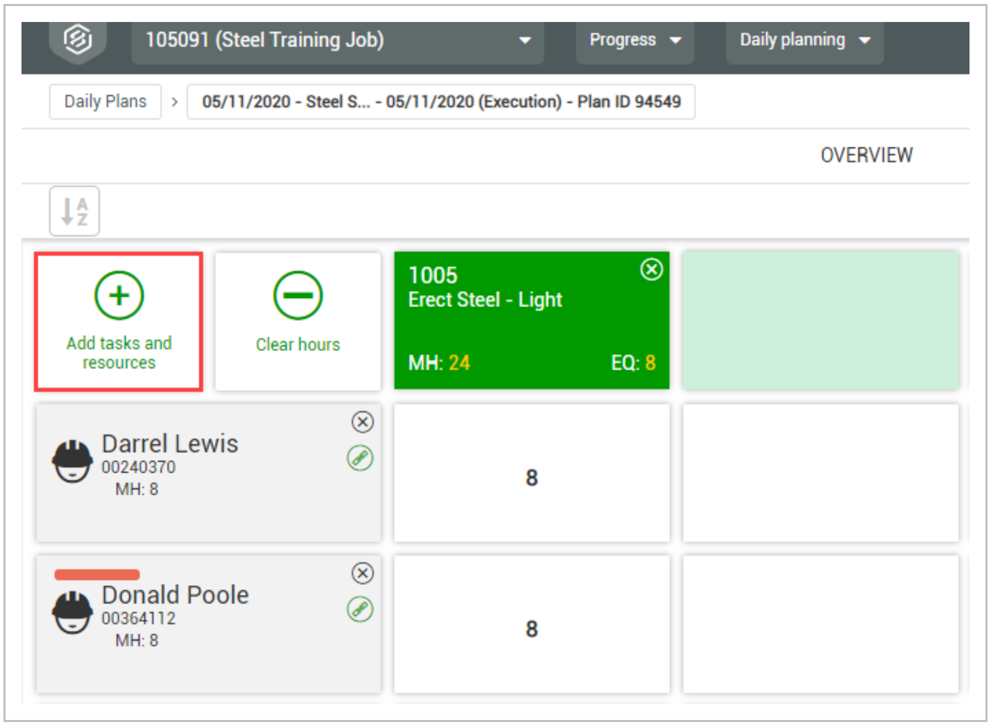
## Add a Temporary Resource

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

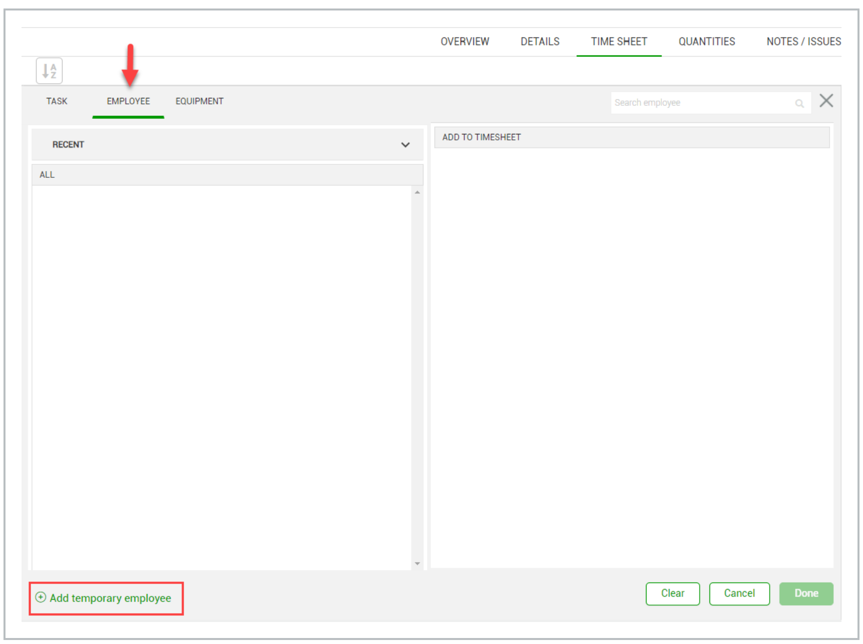



- A prompt appears stating that the plan is in the Execution Phase

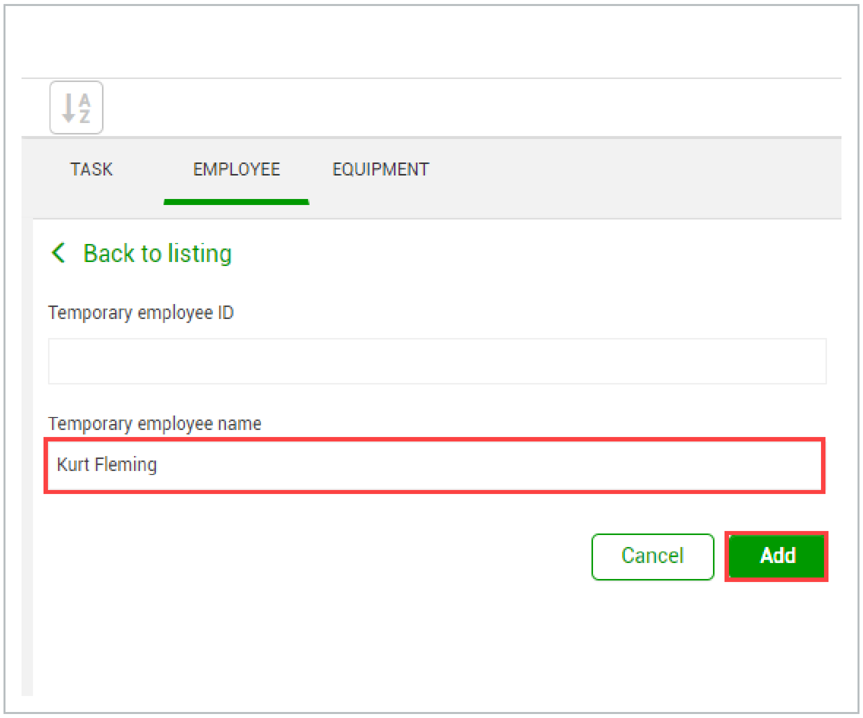
2. Click on **Time sheet** tab.
3. Click on the **Add tasks and resources** button on the left.




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




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



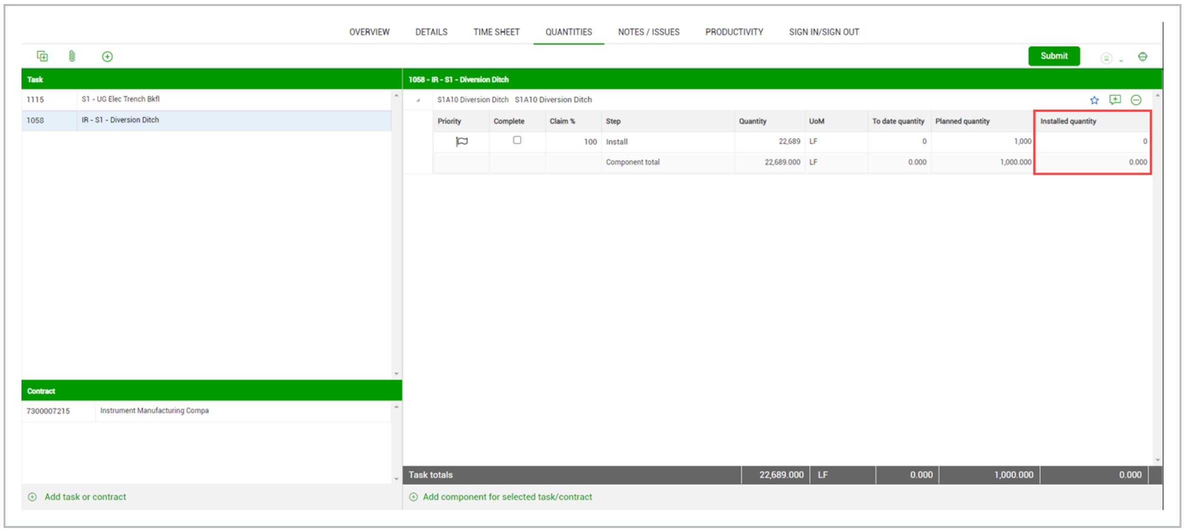

7. Click **Add**.
8. Click **Done** to close the slide out panel.
    - The temporary resource is added to the time sheet

## 1.10.5 Quantities Tab

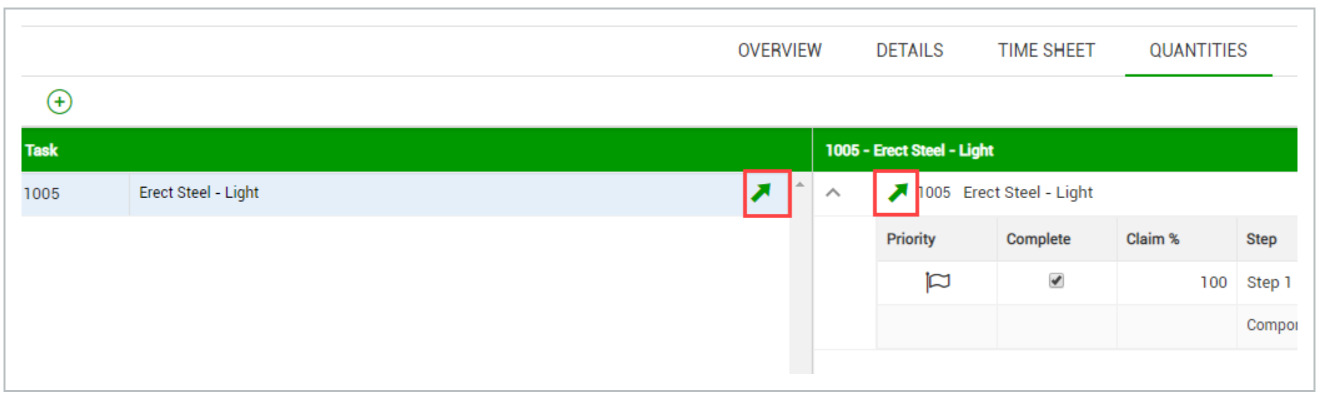
The Quantities tab is identical to the Quantities tab in the Planning Phase. However, when viewing the claiming schemes of the components in the daily plan, instead of the *Planned quantity* field being the only editable field, now the only editable field is the *Installed quantity* field.

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

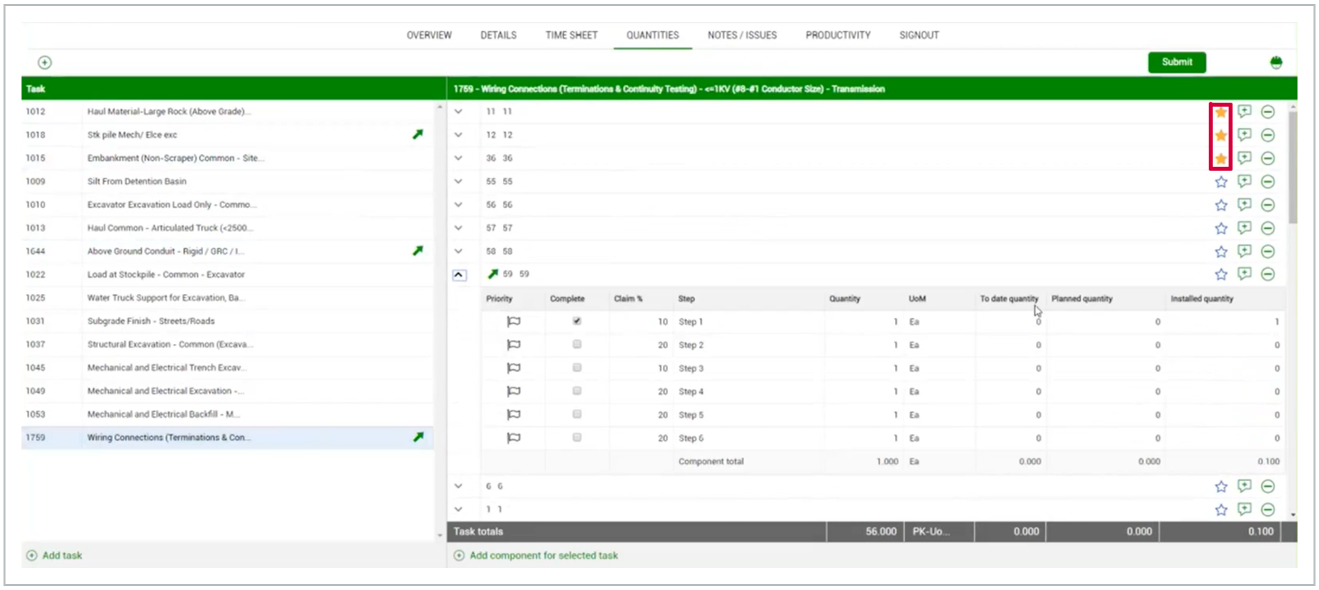
At this point, tasks and contracts can only be added, not deleted; components can still be added or deleted as needed.



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

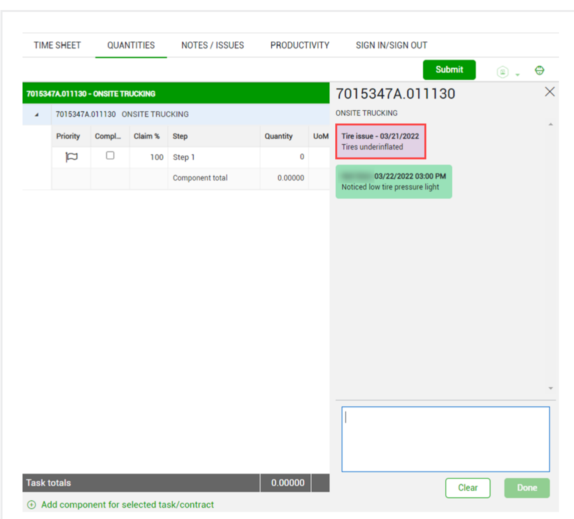



You can also favorite certain components that you know you will be using frequently by clicking on the star-shaped icon next to the corresponding component. When selected, these components move to the top of the list eliminating the need to scroll through a long list of items.



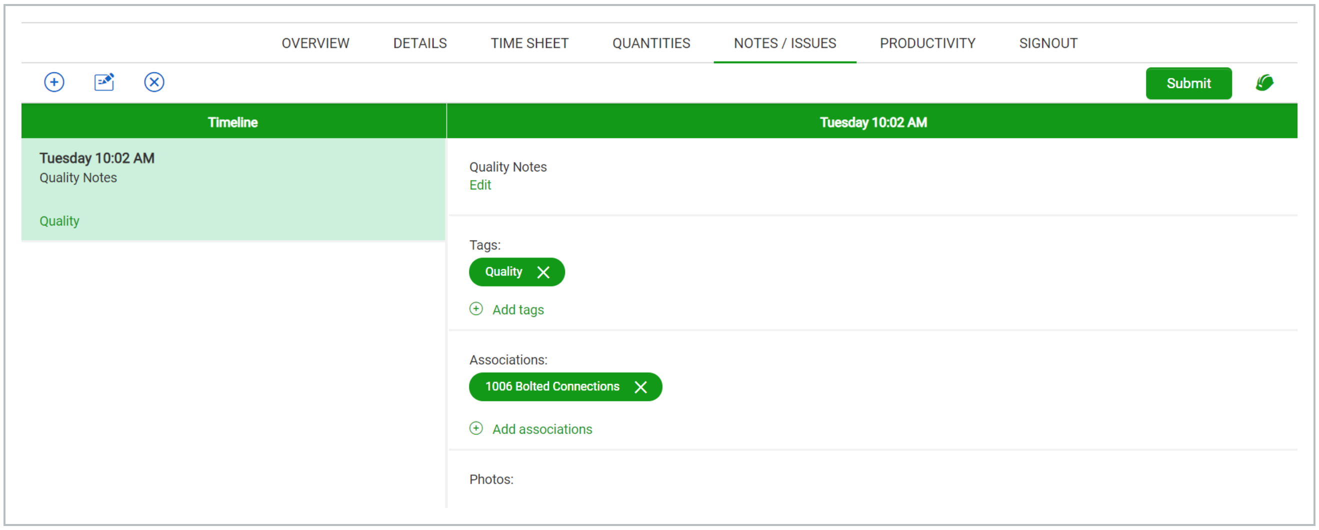

You can delete tasks in the Time sheet tab if needed.

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.



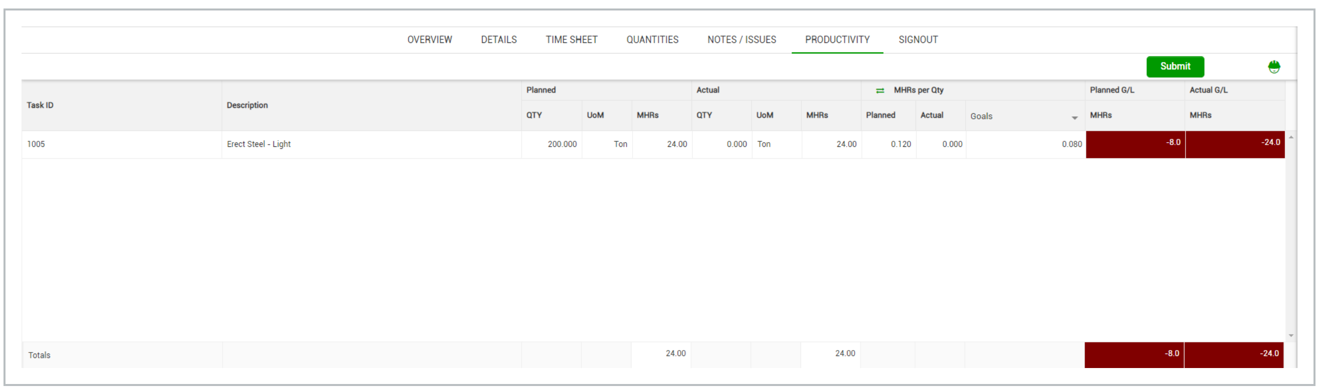

## 1.10.6 Notes/Issues Tab

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



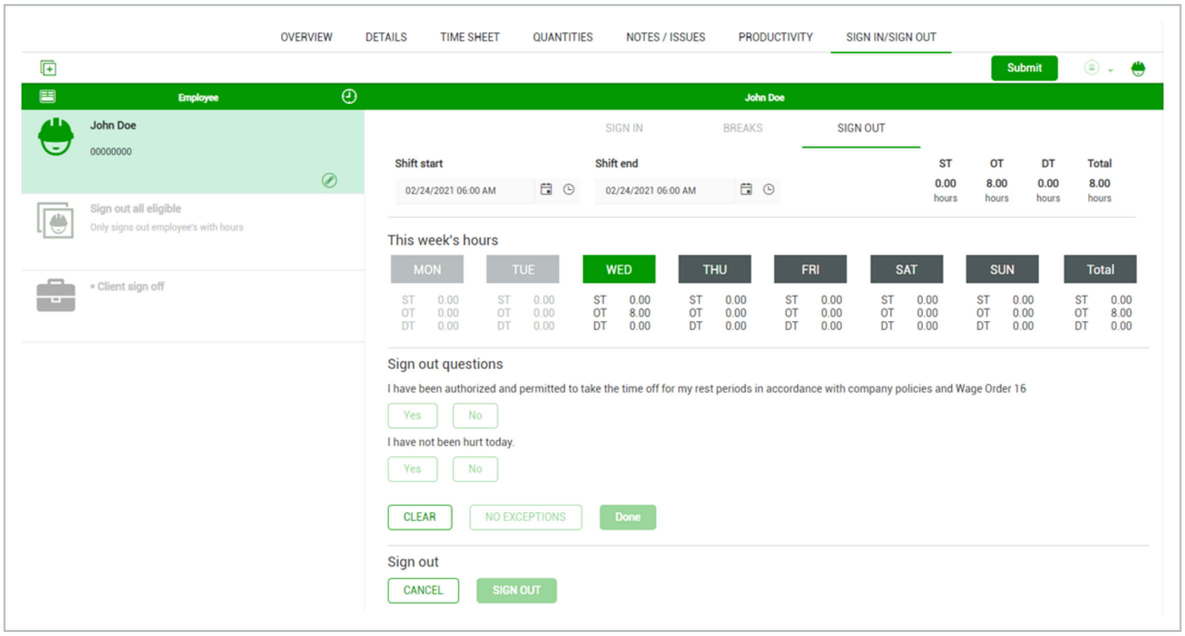

## 1.10.7 Productivity Tab

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.




## 1.10.8 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 SHEET
QUANTITIES
NOTES / ISSUES
PRODUCTIVITY
SIGN IN/SIGN OUT
Submit
Employee
John Doe
John Doe
00000000
Sign out all eligible
Only signs out employee's with hours
+ Client sign off
SIGN IN
BREAKS
SIGN OUT
Shift start
02/24/2021 06:00 AM
Shift end
02/24/2021 06:00 AM
ST 0.00 hours
OT 8.00 hours
DT 0.00 hours
Total 8.00 hours
This week's hours
MON ST 0.00 OT 0.00 DT 0.00
TUE ST 0.00 OT 0.00 DT 0.00
WED ST 0.00 OT 8.00 DT 0.00
THU ST 0.00 OT 0.00 DT 0.00
FRI ST 0.00 OT 0.00 DT 0.00
SAT ST 0.00 OT 0.00 DT 0.00
SUN ST 0.00 OT 0.00 DT 0.00
Total ST 0.00 OT 8.00 DT 0.00
Sign out questions
I have been authorized and permitted to take the time off for my rest periods in accordance with company policies and Wage Order 16
Yes
No
I have not been hurt today.
Yes
No
CLEAR
NO EXCEPTIONS
Done
Sign out
CANCEL
SIGN OUT

# 1.11 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.

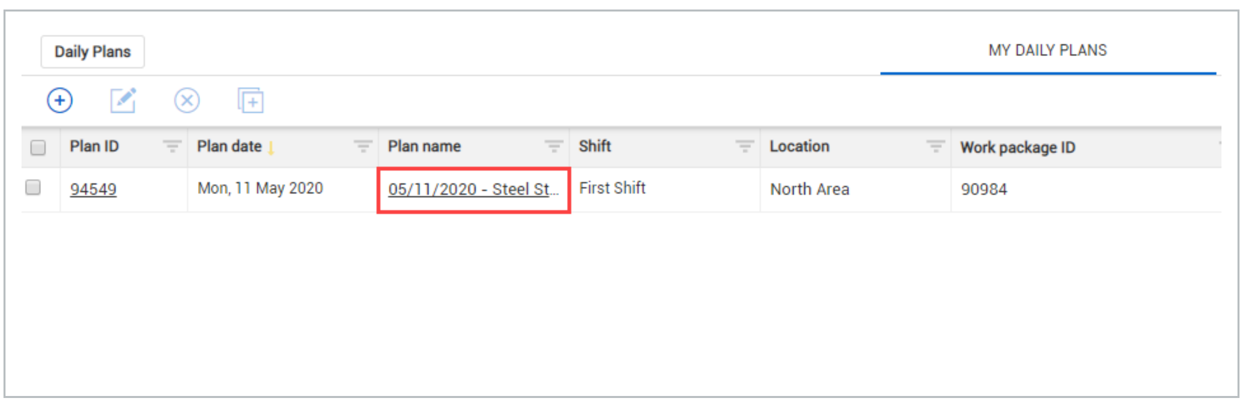
## 1.11.1 Input Actual Hours

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

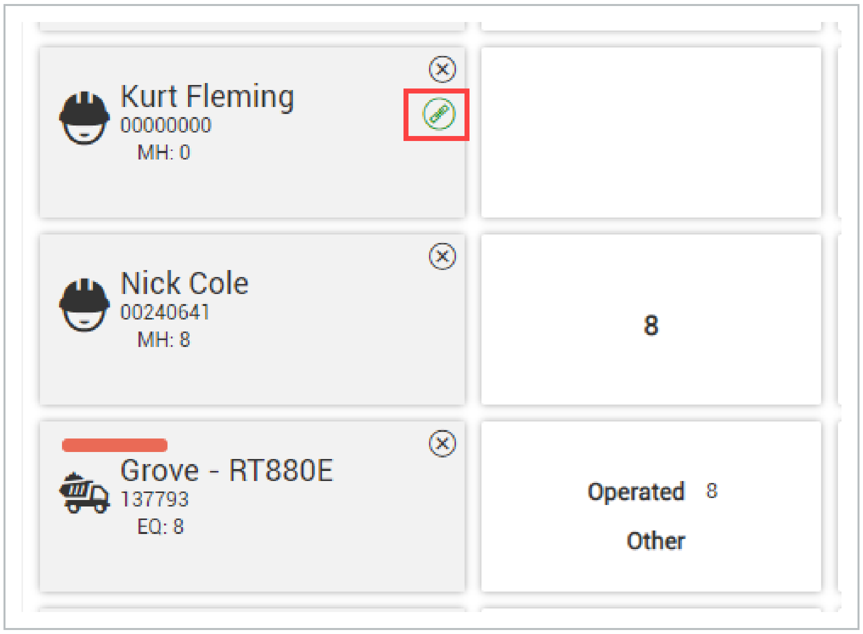
The following Step by Step walks you through how to assign an employee to the newly created temporary resource.

### Assign an Employee Resource to a Temporary Resource

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




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




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


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

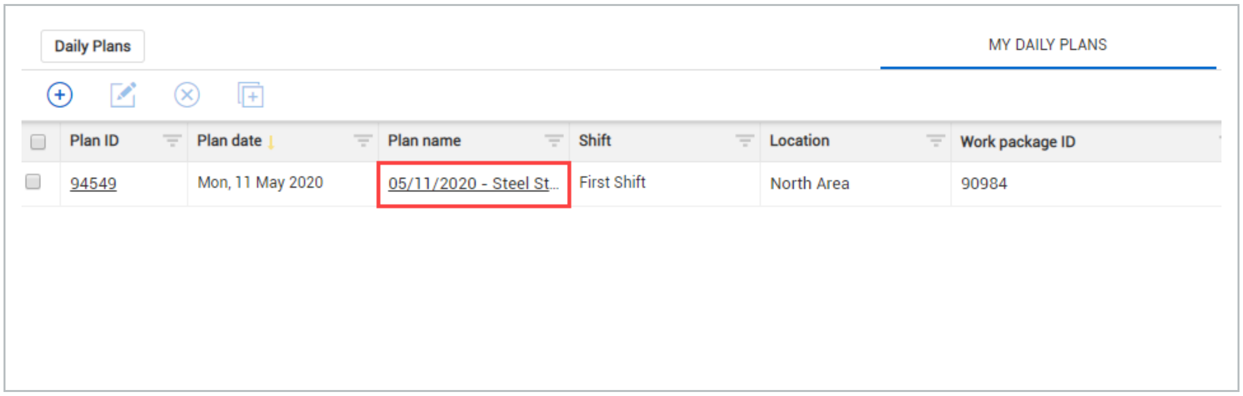
Now that you have assigned a resource to the newly created employee, the next step is to enter the actual hours for all labor and equipment.

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

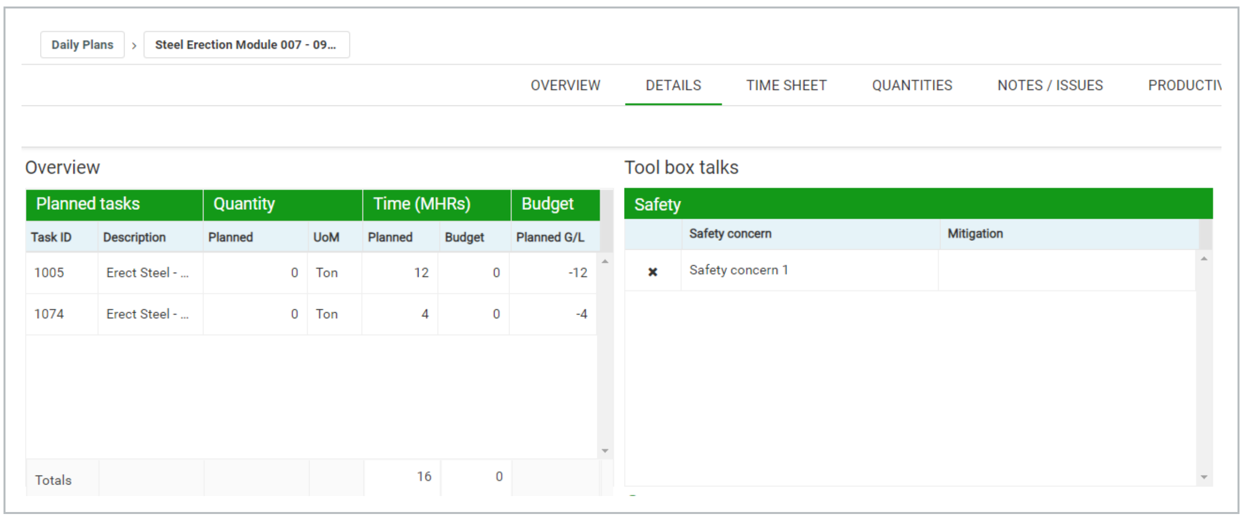
The following Step by Step walks you through how to input actual hours worked into a daily plan.

# Input Actual Hours Worked into a Daily Plan

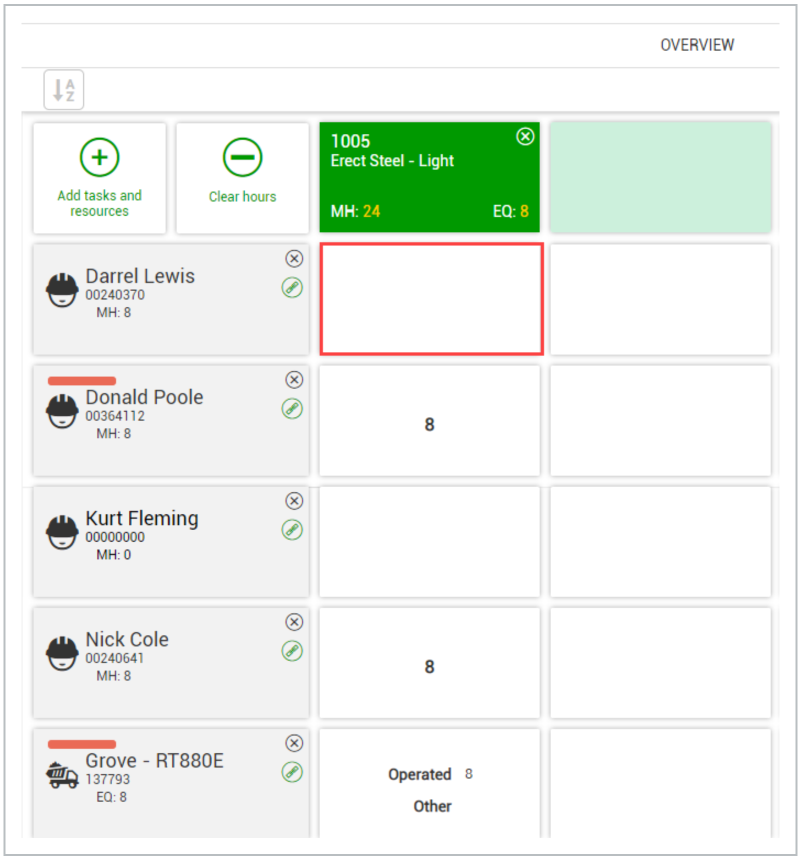
1. From the Daily Plans page, open your daily plan.




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




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




4. Enter their hours worked in the Actual ST field.
5. Click **Done**.
6. Review the hours of your other employees and equipment on the time sheet.
7. Enter the hours worked for your temporary employee.
8. Click **Done**.

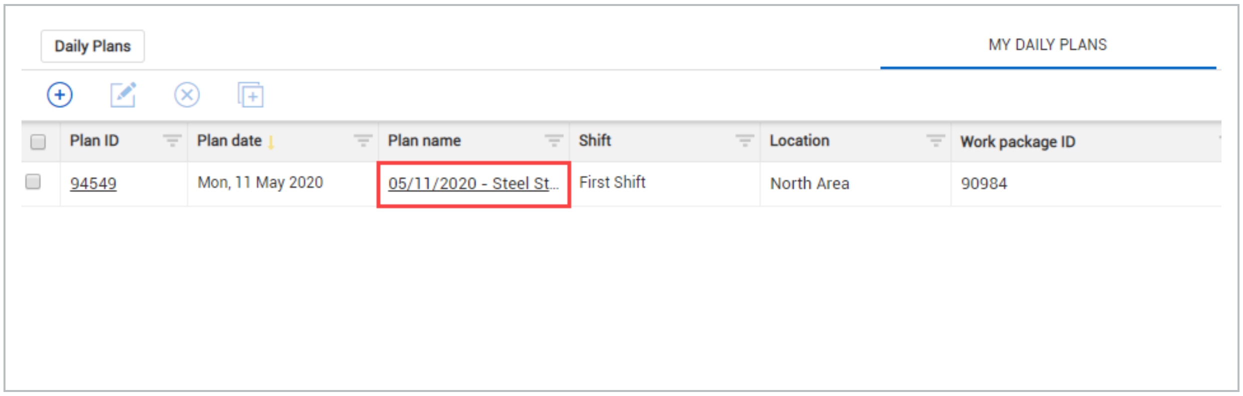
## 1.11.2 Input Actual Quantities

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

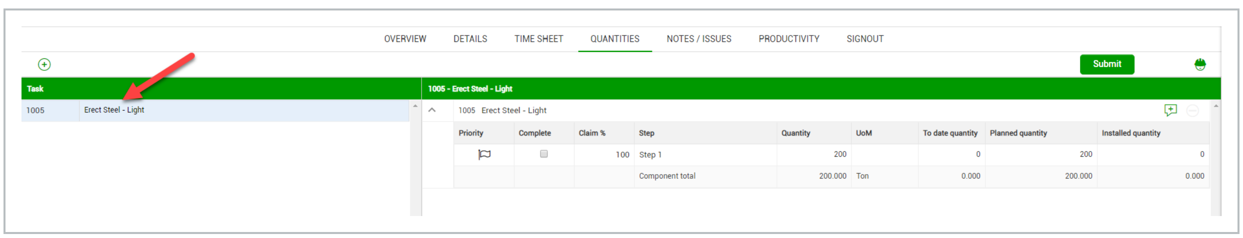
The following Step by Step walks you through how to input the actual quantities installed into a daily plan.

## Input Actual Quantities Installed into a Daily Plan

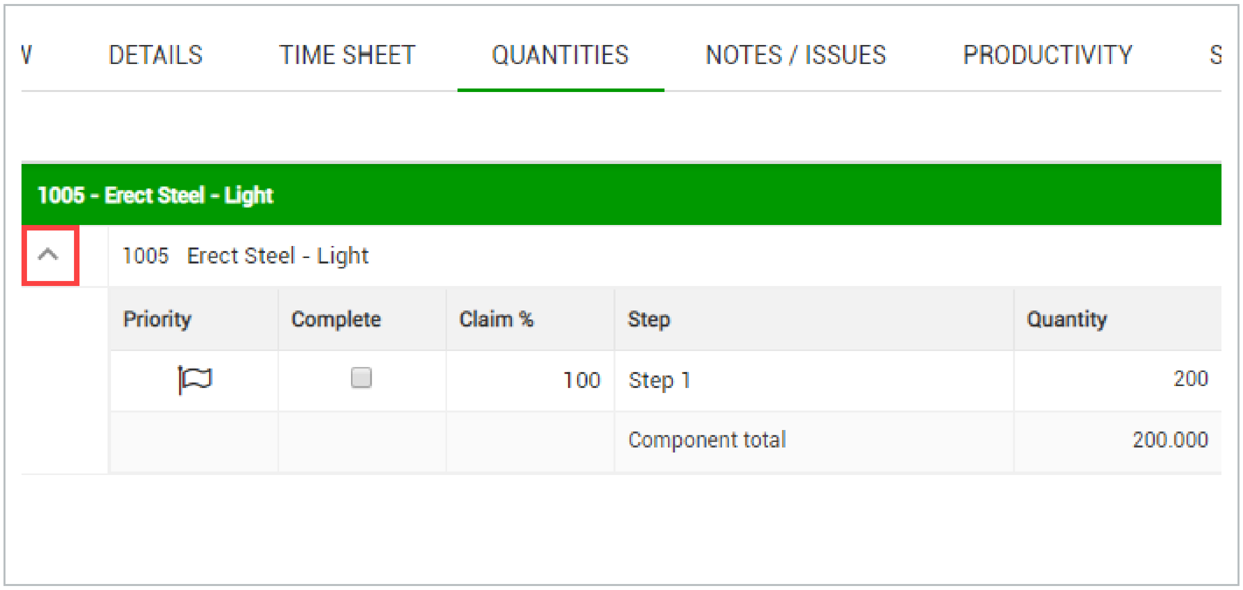
1. From the Daily Plans page, open your daily plan.



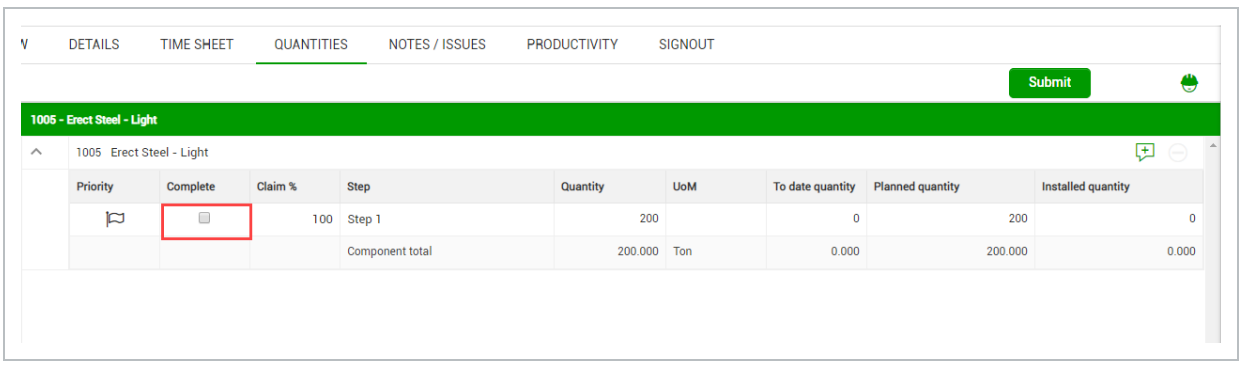

2. Click on the **Quantities tab**.
3. On the left side, click on a component to highlight it.



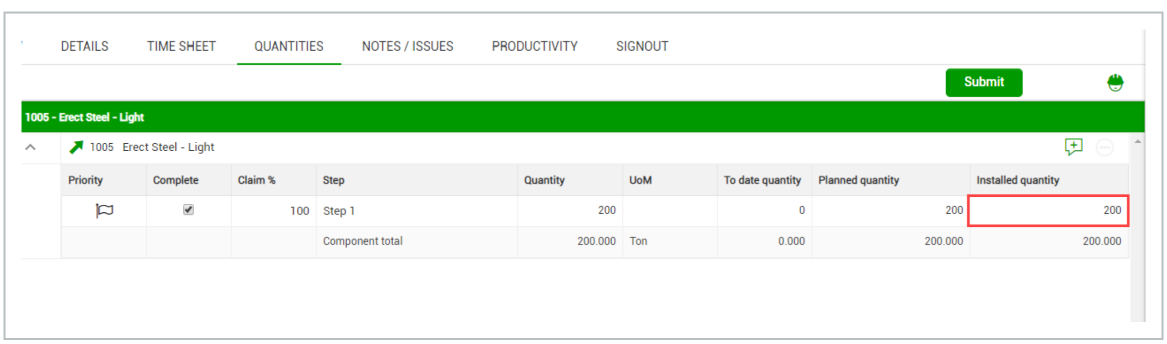

4. On the right side, click on the **downward pointing arrow** next to the component to expand it and reveal the claiming scheme.




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




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



> 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

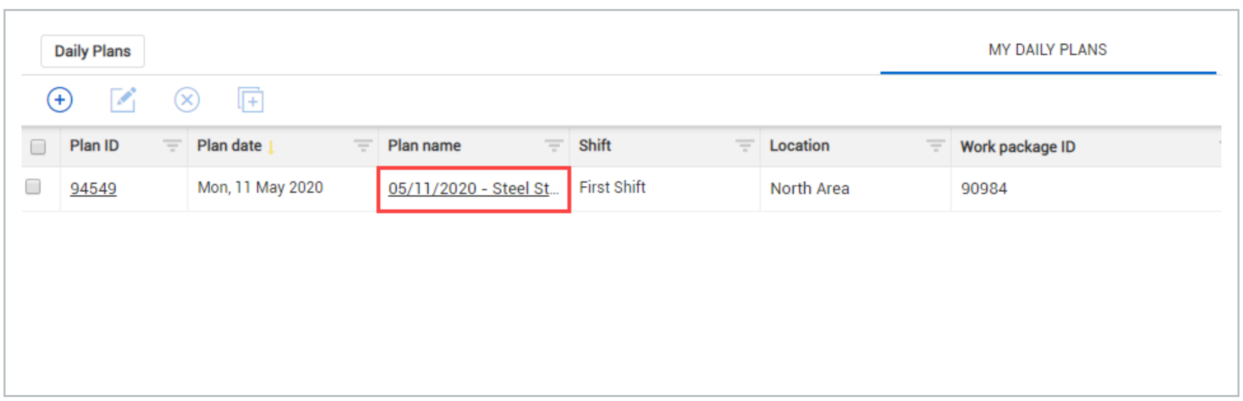
## 1.11.3 Add Notes/Issues

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

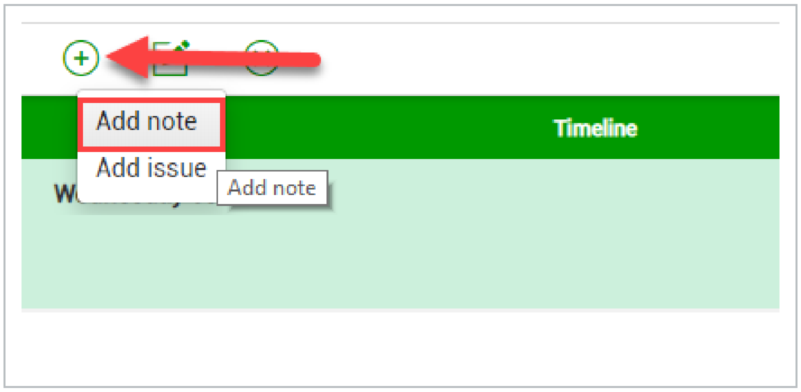
The following Step by Step walks you through adding a note in the Execution Phase of a daily plan.

### Add a Note to the Execution Phase of a Daily Plan

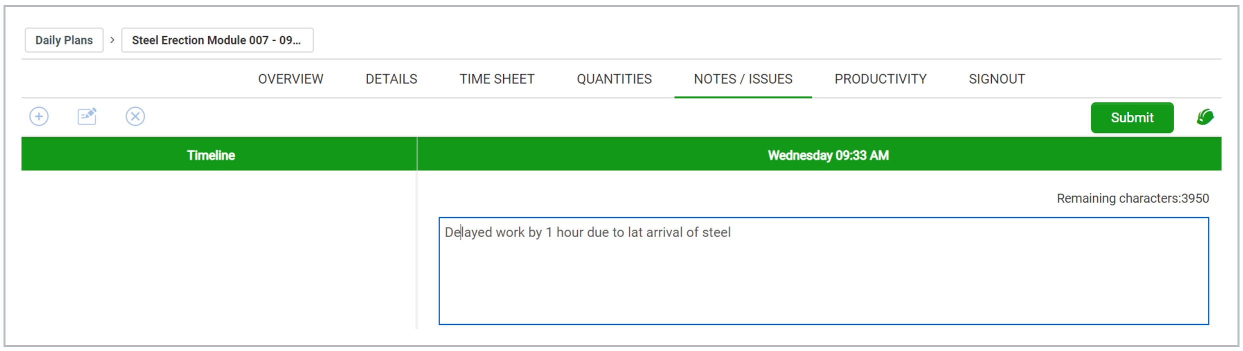
1. From the Daily Plans page, open your daily plan.



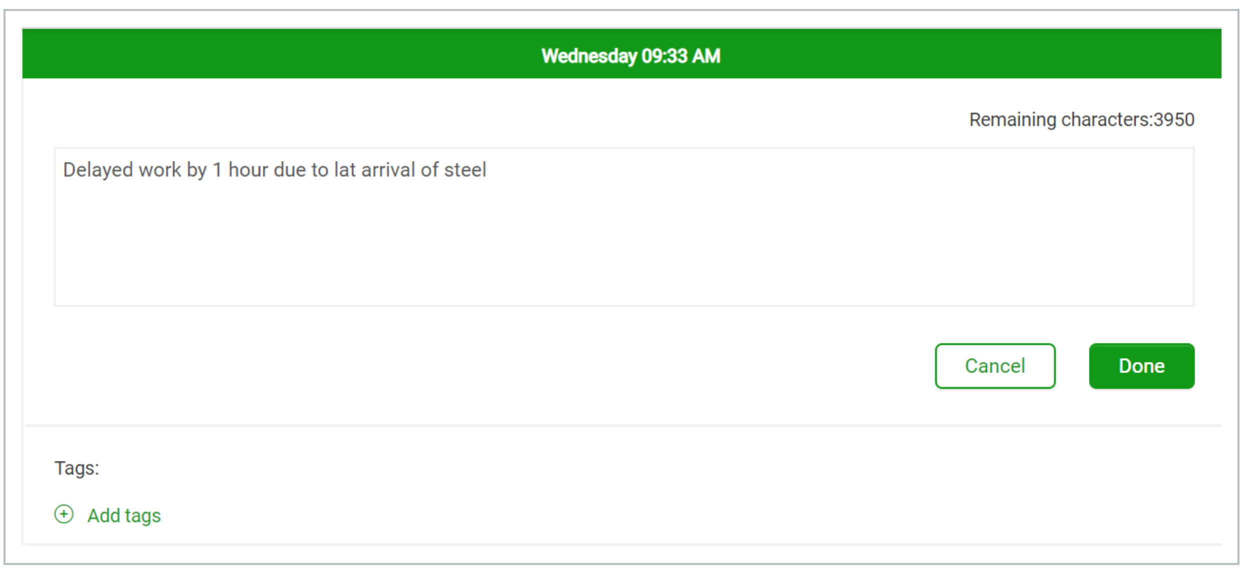

2. Click on the **Notes/Issues tab**.
3. Click on the **Add icon** and select **Add Note**.



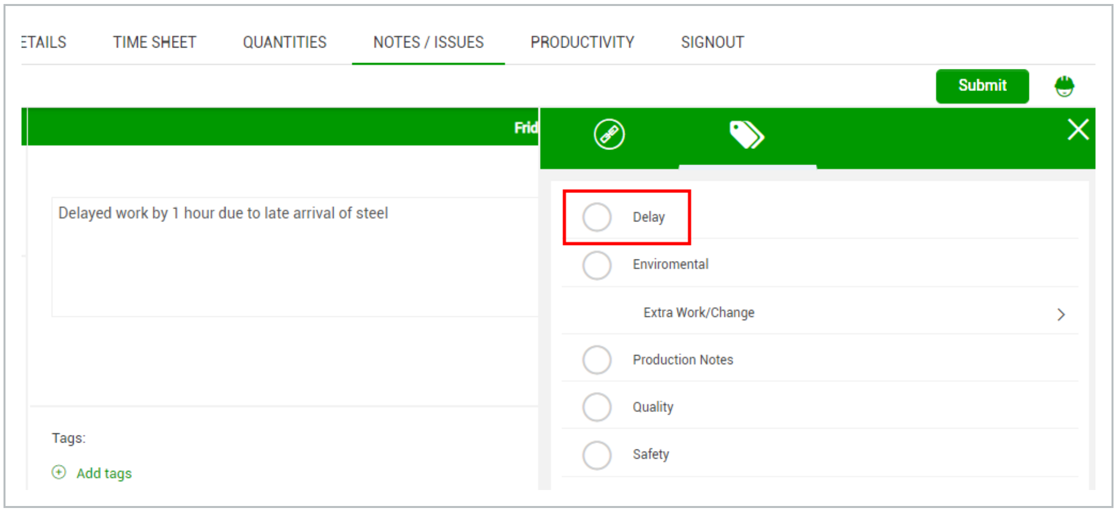

4. Enter a helpful note into the free text field at the top of the page.




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




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



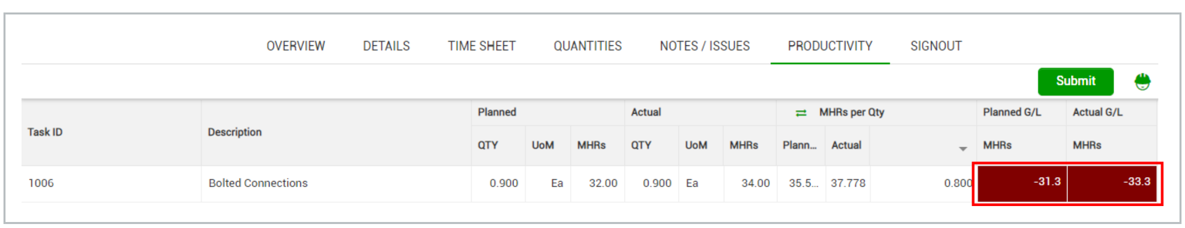

7. Click **Done** to close the slide out panel.
8. Click **Done**.

## 1.11.4 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)*



# 1.12 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.

## 1.12.1 Attach a File in a Daily Plan

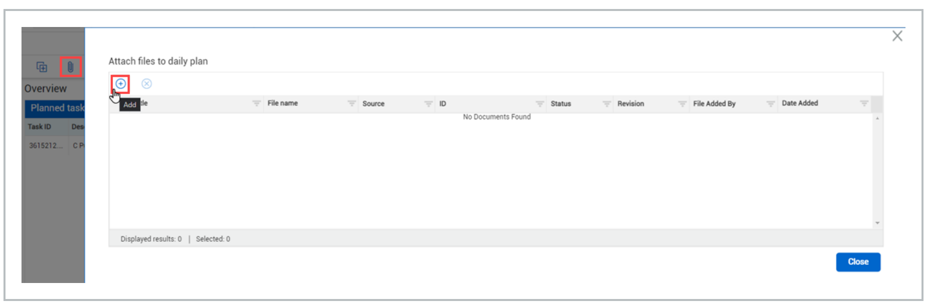
You can attach files from inside an individual daily plan.

> 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.

### 1.12 Step by Step 1 – Attach a File in a Daily Plan

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




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

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

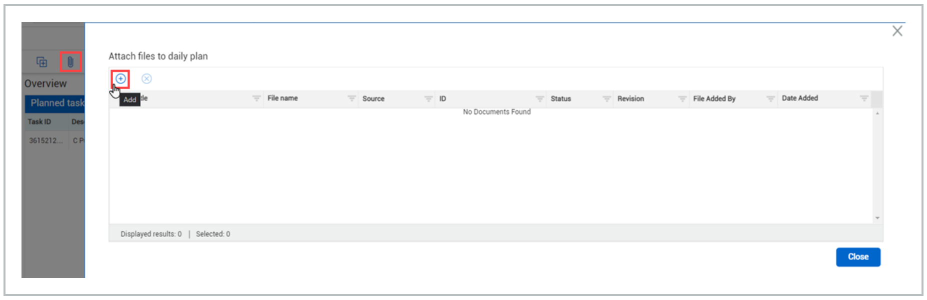
You can attach files from InEight Document inside an individual daily plan.

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

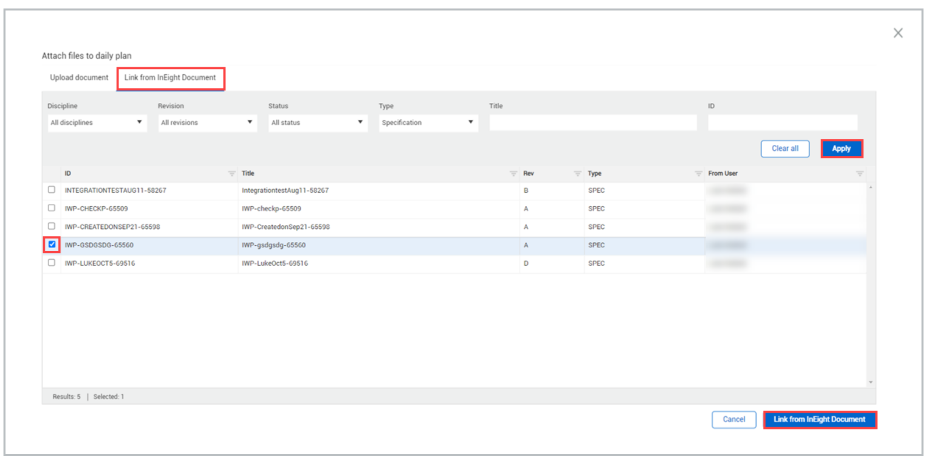
The following Step by Step shows you how to attach a file from InEight Document to a daily plan.

## 1.12 Step by Step 2 – Attach a Document File in a Daily Plan

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




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

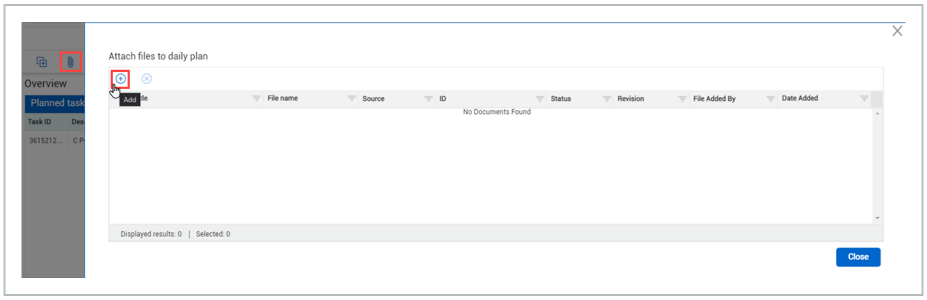



To view a Document attachment, click a file name in the Attach files to daily plan dialog box to open Document in a new window.

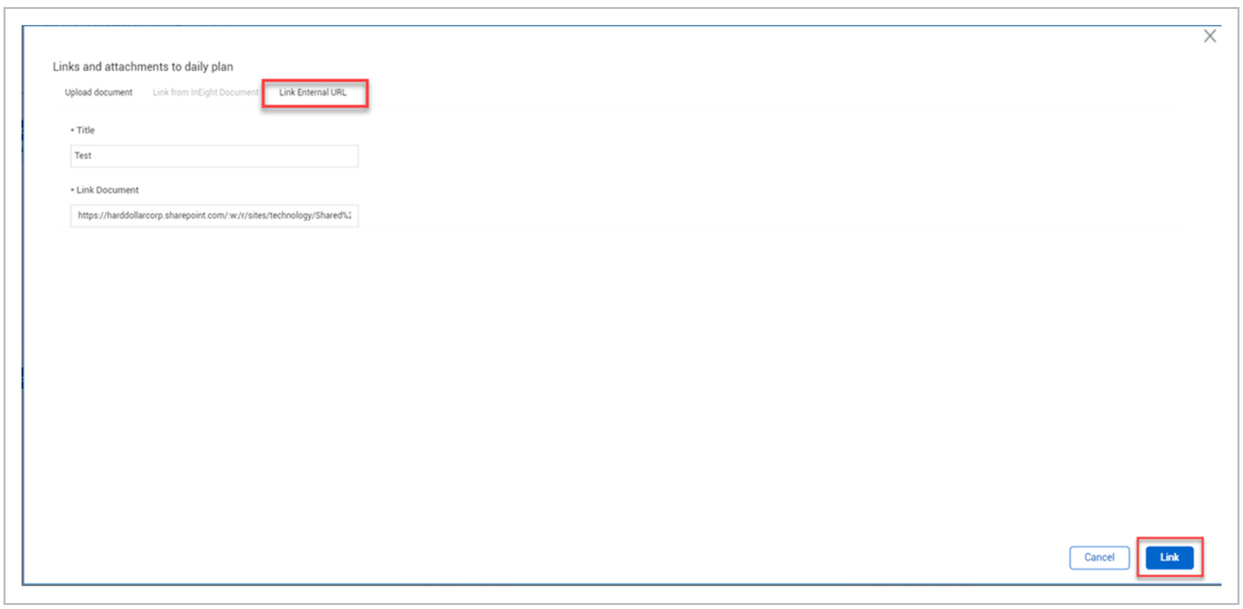
The following Step by Step shows you how to attach a file from an external URL link to a daily plan.

## 1.12 Step by Step 3 – Attach an External URL Link in a Daily Plan

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

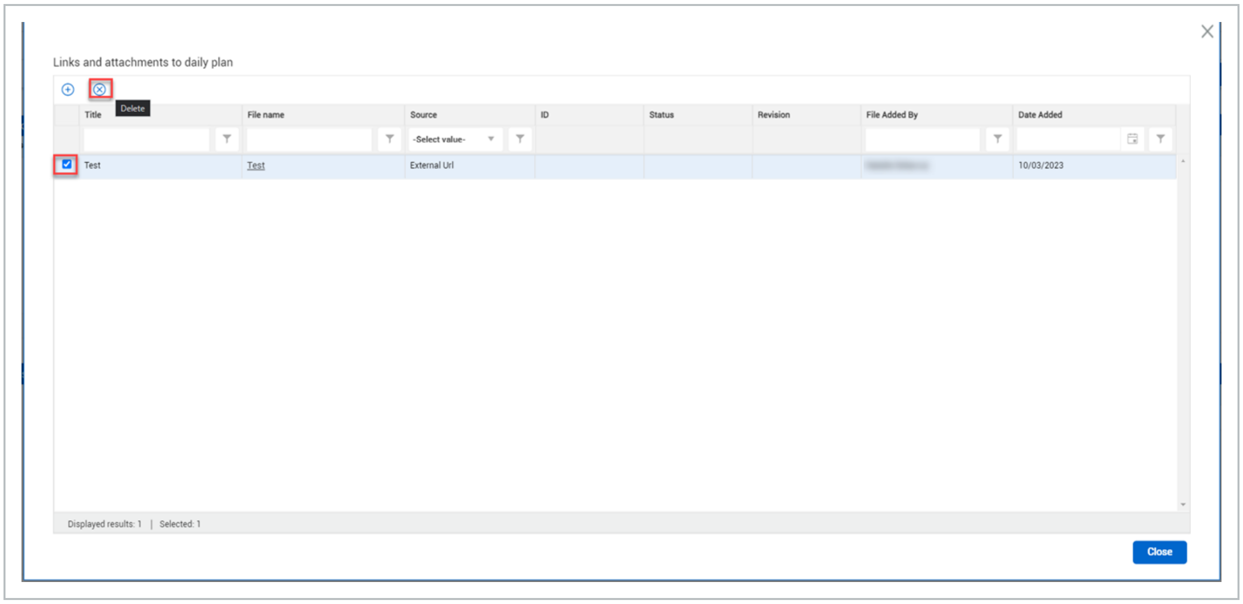



3. Select the **Link External URL** tab.




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

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




## 1.12.2 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.

## 1.12 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.

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

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

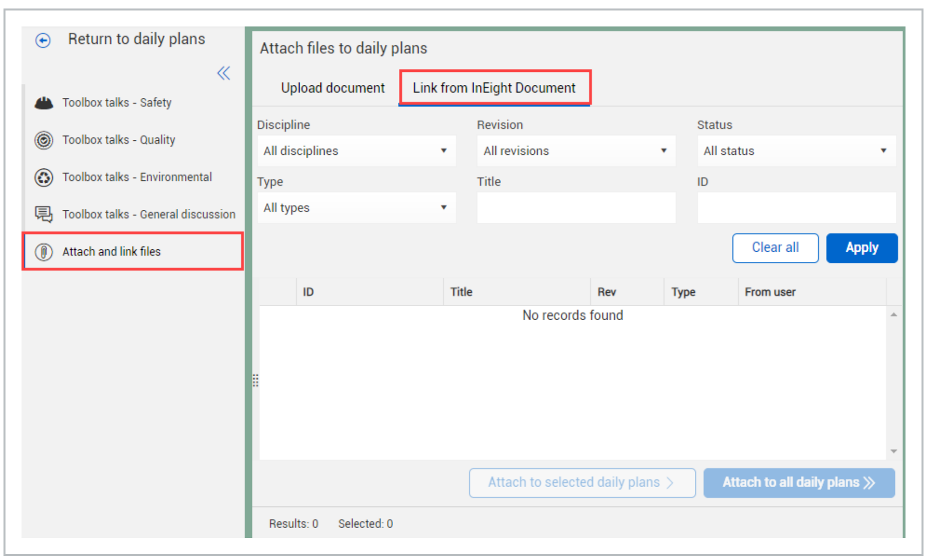
You can also select specific plans in the right panel, and then click **Add to selected daily plans**.

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.

## 1.12 Step by Step 5 – Attach a Document File in the Management Console

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




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

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

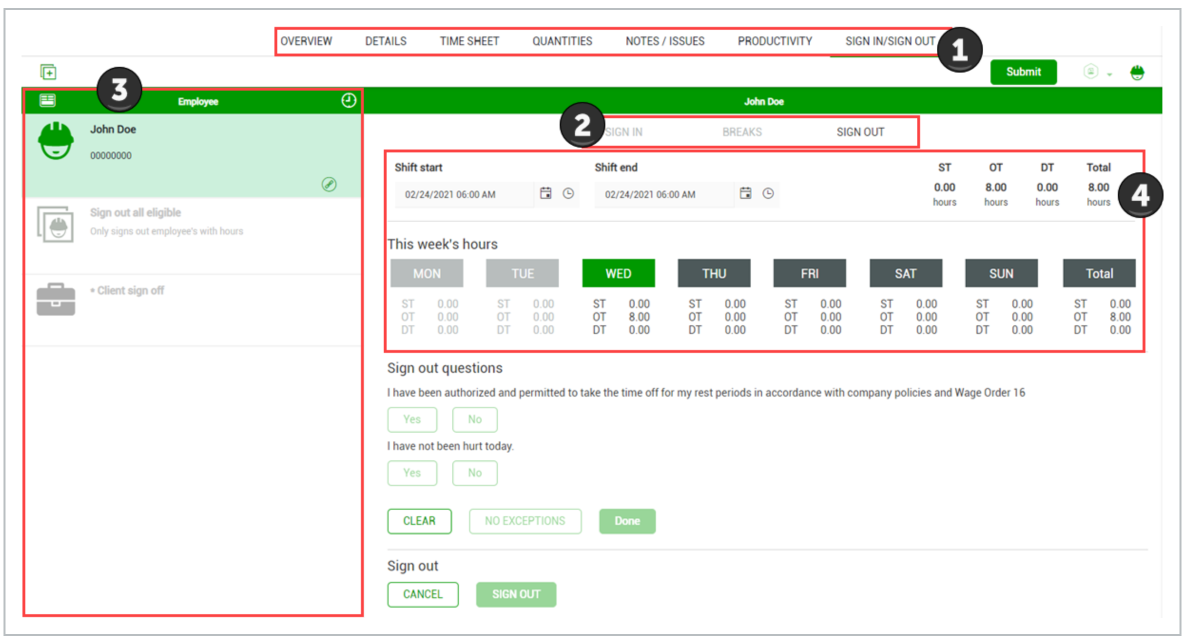
To remove an attachment from a daily plan, click the **Delete** icon next to the attachment in the right panel.

# 1.13 SIGN IN/SIGN OUT

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

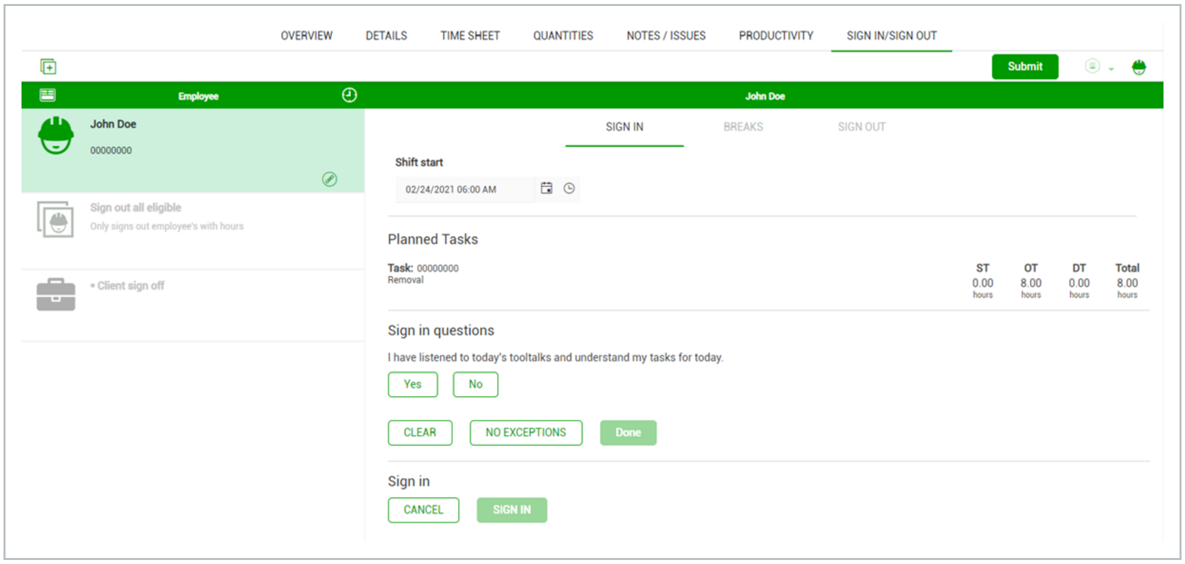
## Overview - Sign In/Sign Out Tab

| 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. |



# 1.13.1 Sign In Subtab

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




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

## Shift Start Time

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

> 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

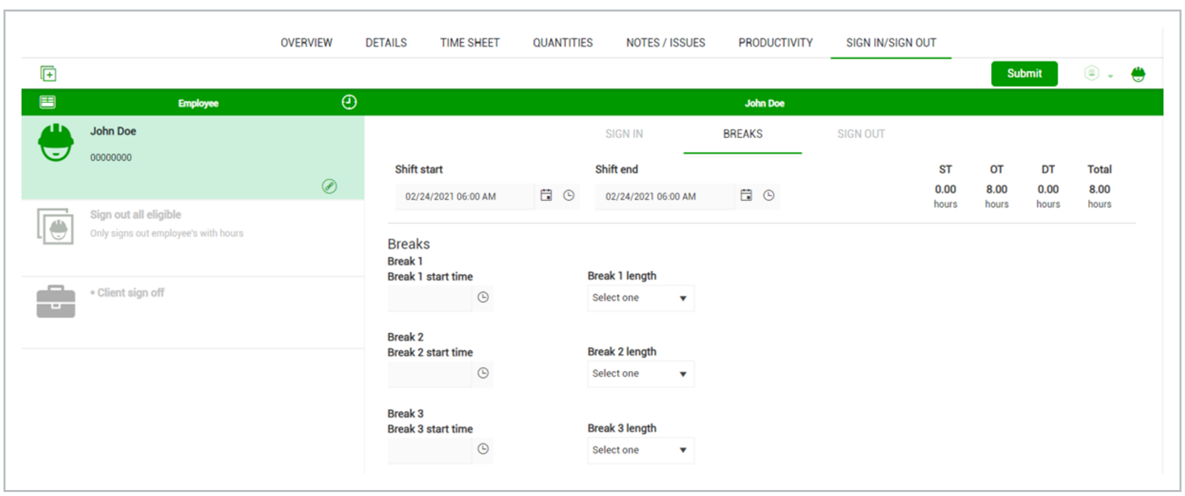
When you sign in, you or your crewmember might be asked a set of questions related to the work to be done that day. These questions are determined by management and set up for the job in the project settings by an administrator.

- 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

> 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.

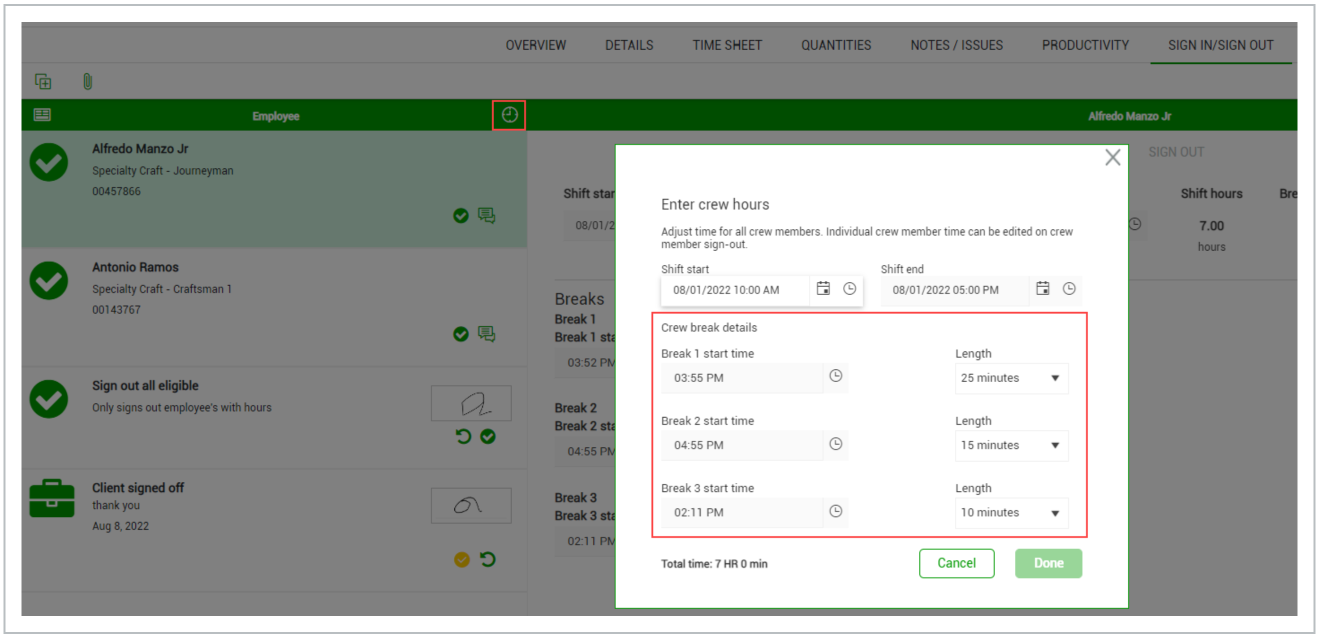
## 1.13.2 Breaks Subtab

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.



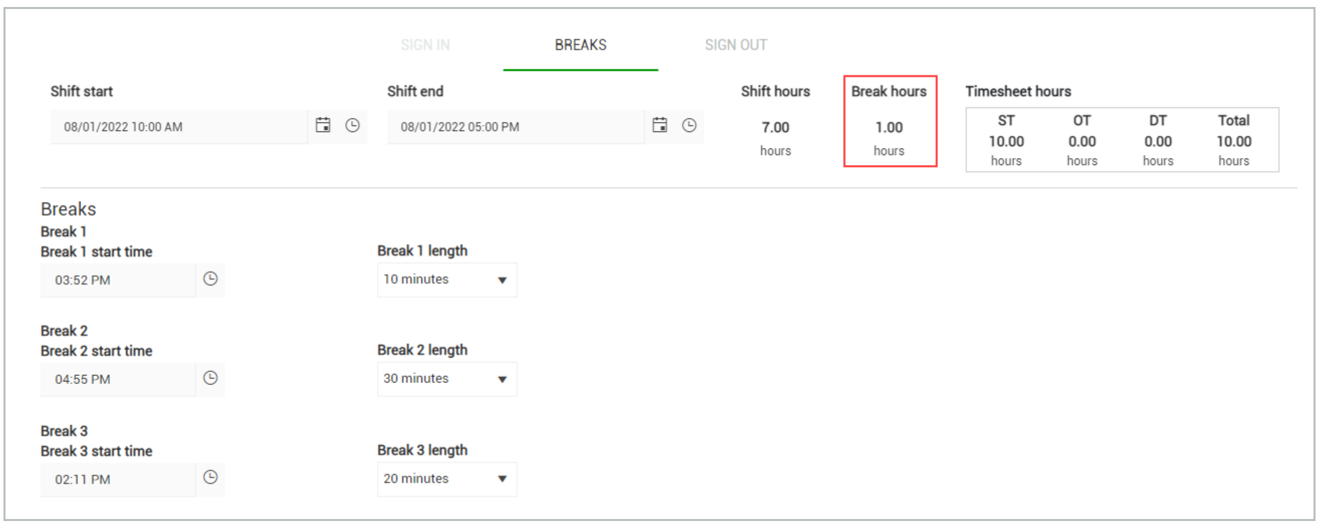

## 1.13.3 Crew Break Hours

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




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

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




## 1.13.3.1 Shift Start/End Time

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

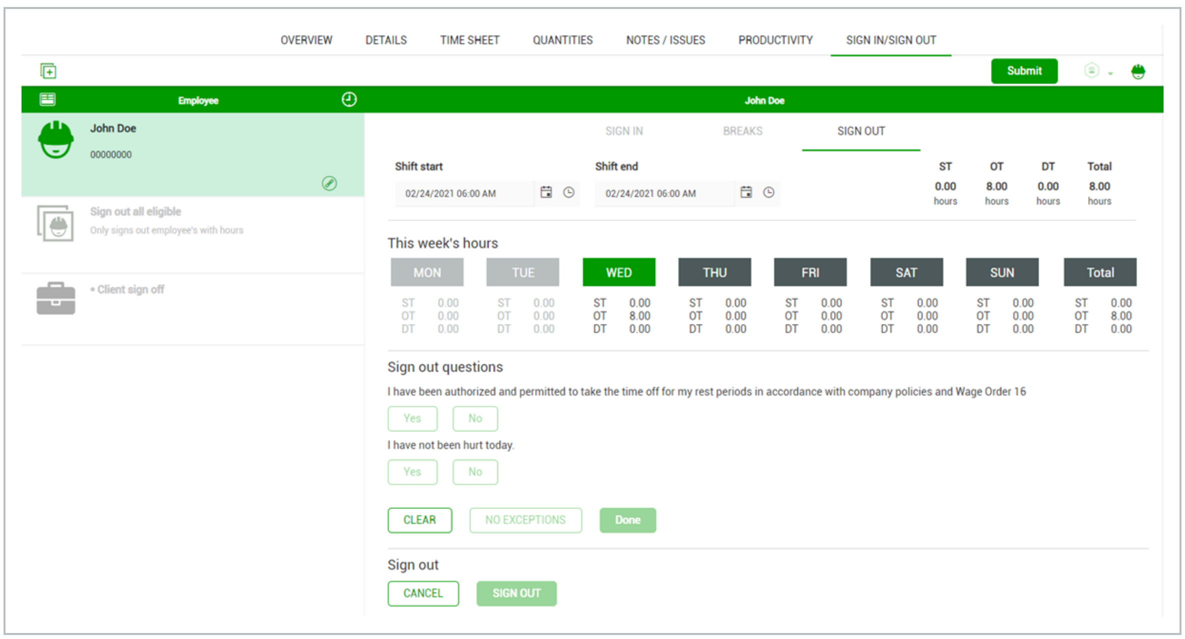
> If you change the shift start and end times, the Sign In and Sign Out subtabs change to match the new times.

## 1.13.4 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.

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




### 1.13.4.2 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.

### 1.13.4.3 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.

### 1.13.4.4 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.

### 1.13.4.5 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.

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

### 1.13.4.6 Questions

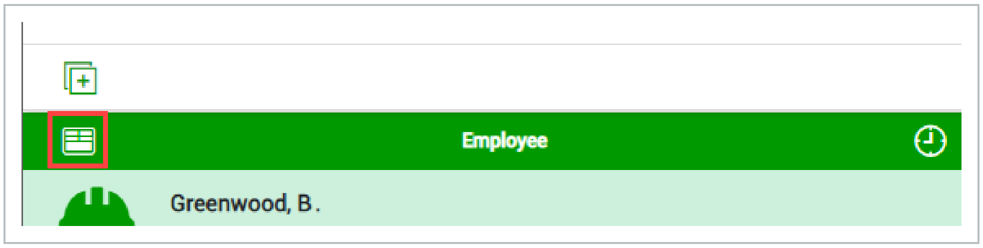
When you sign out, you or your crewmember might be asked a set of questions related to the work done that day. These questions are determined by management and set up for the job in the project settings by an administrator.

- 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

> 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.

## 1.13.5 Time sheet Summary

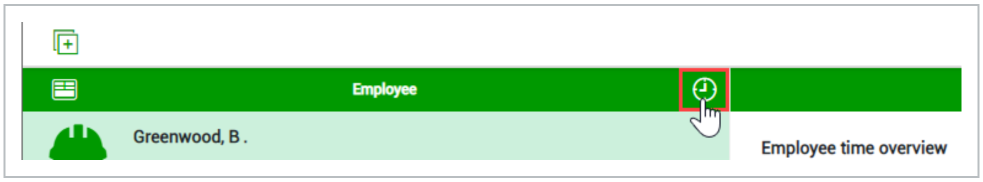
As a foreman, you can review the Extra pay (allowances) allocated to each employee by selecting the **Time sheet summary** icon in the upper-left of the page for all subtabs. This opens a Time sheet summary dialog box that lists each employee and which of the available allowances they have for their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




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.

## 1.13.6 Crew Hours

To enter the hours worked for an entire crew, select the clock icon at the top of the list of crew members on the left side of the page for all subtabs.

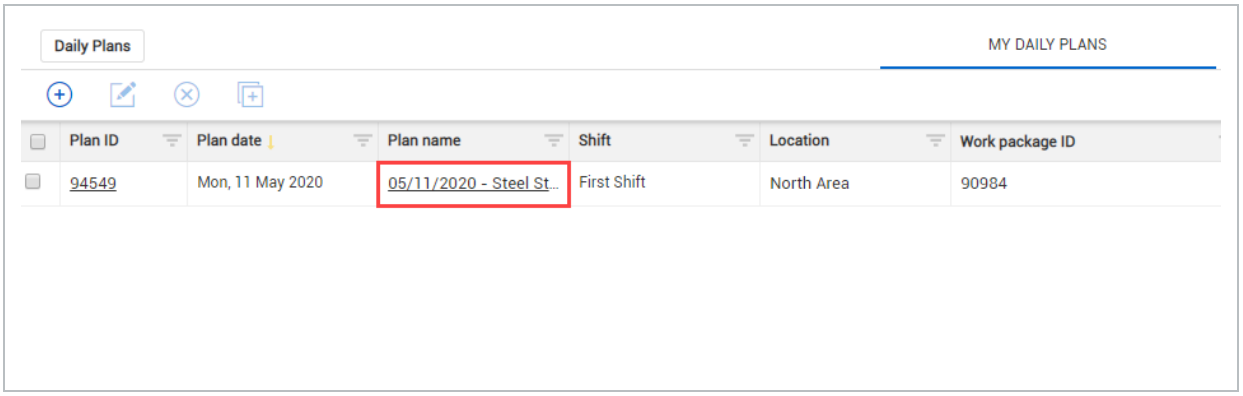



In the Enter crew hours dialog box, you can adjust the Shift start and Shift end values to reflect the hours worked by the crew. You can either save these changes after you have finished or cancel the operation.

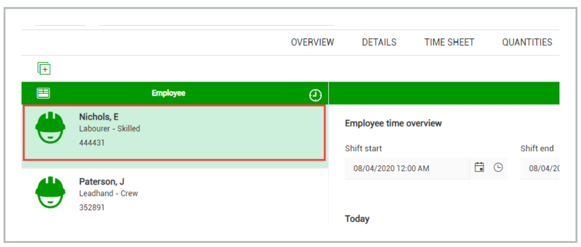
The following Step by Step walks you through how to sign out an employee using PIN on a daily plan and submit the plan for approval. You can also sign out using a signature.

# Sign Out an Employee on a Daily Plan

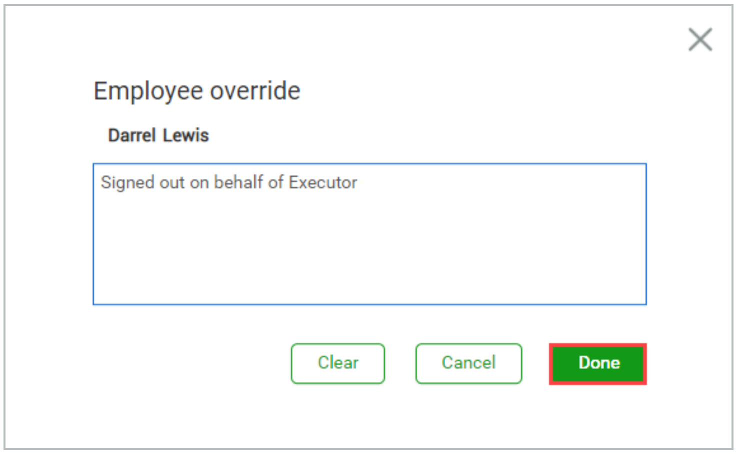
1. From the Daily Plans home page, open your daily plan.




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

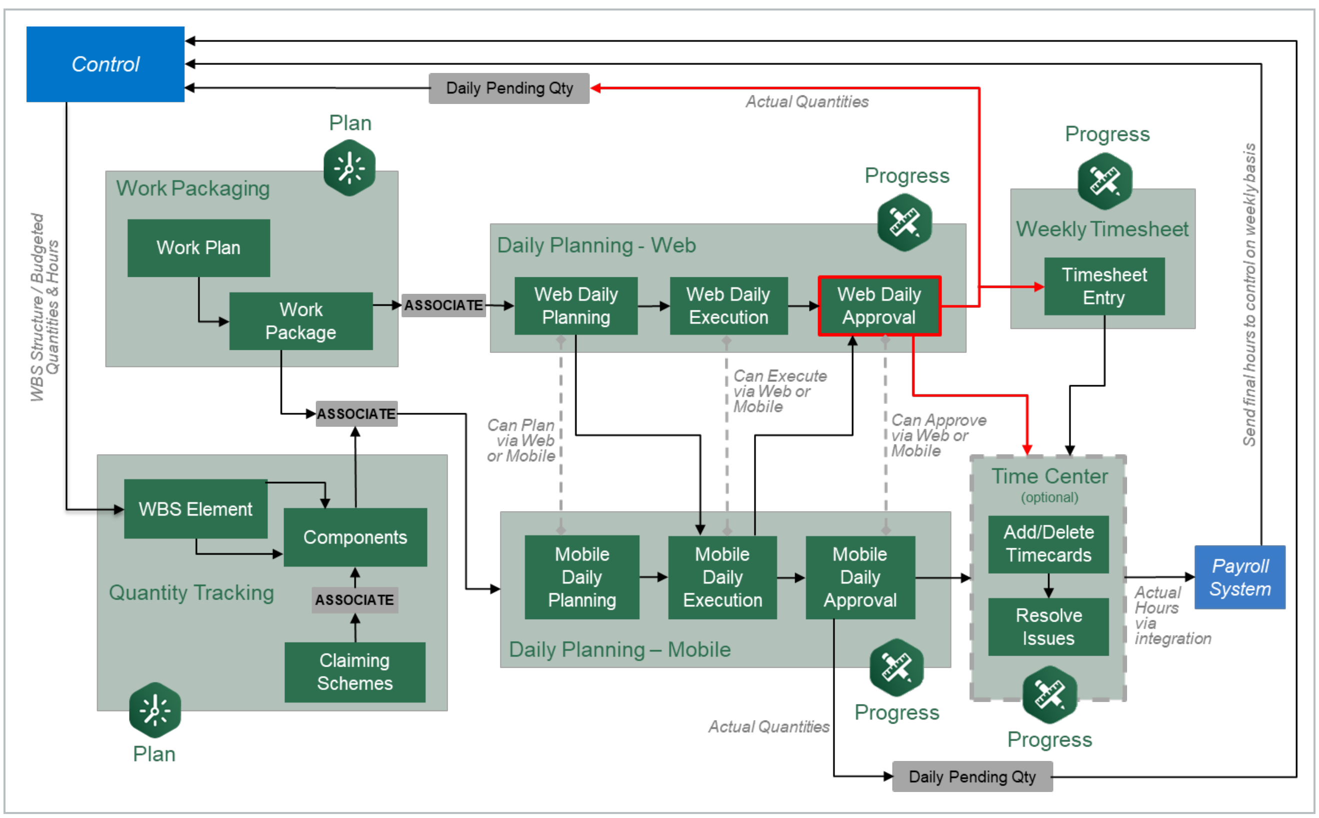



4. Click on **On behalf of employee** in the sign-out area.
5. Enter the employee PIN in the sign-out area.
6. Select **No** for the first question: I was injured while working today.
7. Click **Done**.
8. In the **Employee Override** dialog box, enter your initials, and then click **Done**.




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

# 1.14 DAILY PLAN APPROVAL



# 1.15 REVIEW ACTUALS

## Scenario

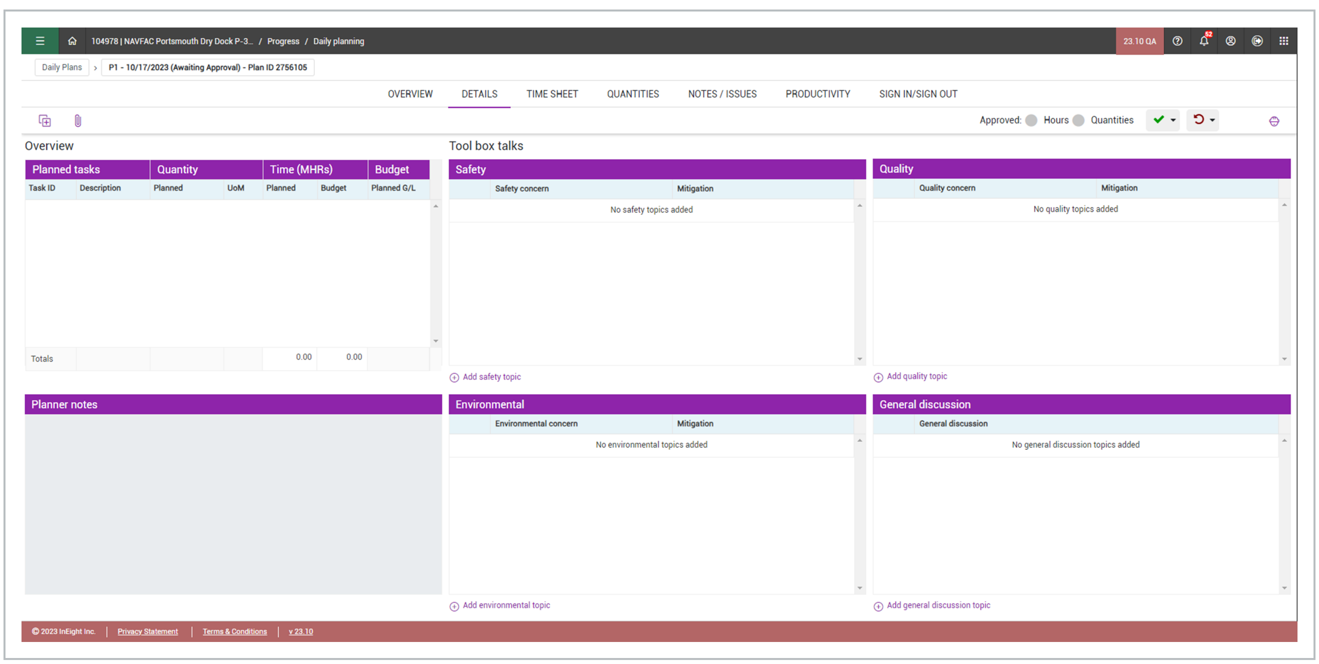
> You are a field engineer and you are responsible for approving all daily plans that your foreman executes. Before approving the plans, you need to review them to verify that all the employee hours and installed quantities are accurate.

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

## 1.15.1 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.

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



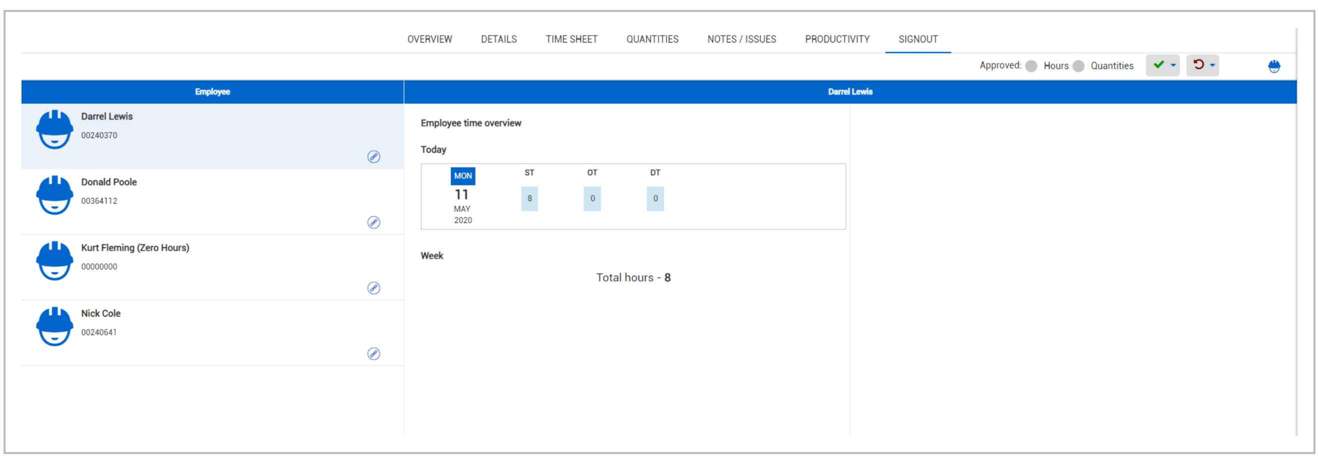
In the Awaiting Approval Phase, a daily plan has seven tabs (same as the Execution Phase):

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

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

The Overview, Details, Time Sheet, Quantities, Notes/Issues and Productivity tabs in the Awaiting Approval Phase are identical to their respective tabs in the Execution Phase. All information entered, edited, or removed in the Execution Phase will be reflected in the Awaiting Approval Phase. Furthermore, the Awaiting Approval Phase has the same level of editing as the Execution Phase does for all the previously mentioned tabs.

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



# 1.16 EMPLOYEE REGISTER

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

## 1.16.1 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.

## 1.16.2 Why use the Employee Register?

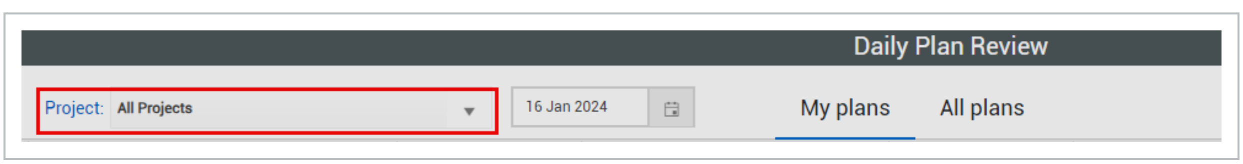
In addition to tracking which projects each employee is assigned to and the planned and actual hours for those plans, the Employee Register also looks for conflicts. For example:

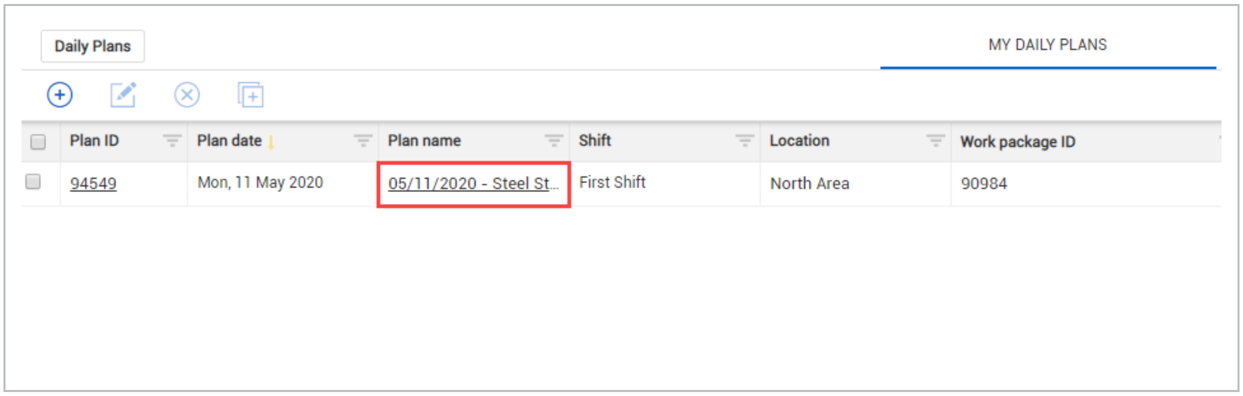
- If an employee is assigned to multiple daily plans for a single day, the register flags that employee by highlighting it yellow
- If an employee's total actual or planned hours exceeds the project's maximum threshold for hours worked in a single day, the resister will flag that employee by highlighting 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

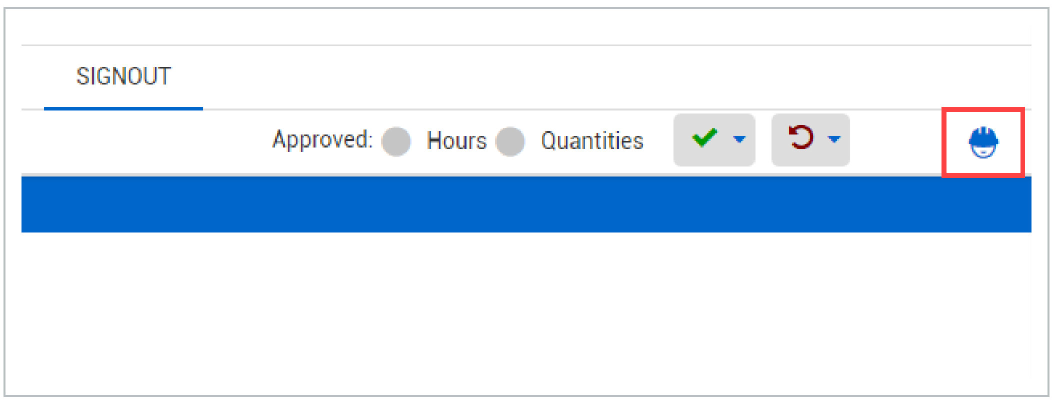
From the Daily Plans home page, open your daily plan.

1. 

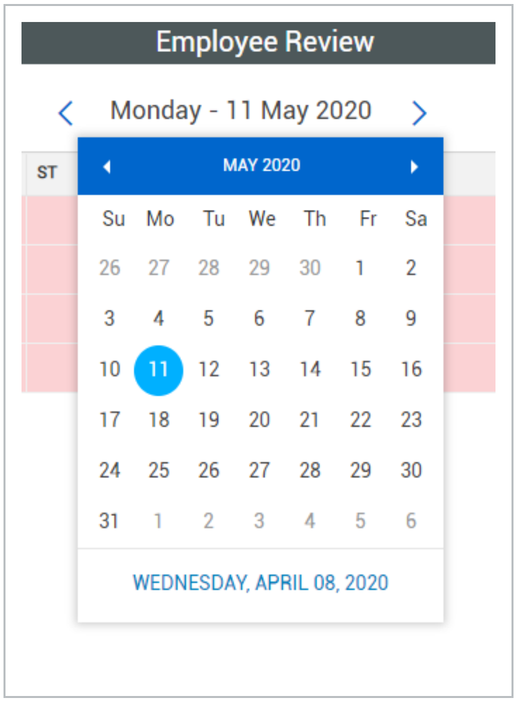



> The All Projects option in the Projects drop-down list lets you review multiple projects in Daily Plan Review.

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




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




## Overview - Employee Register

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

# 1.16.3 Edit Submitted Daily Plan

## Scenario

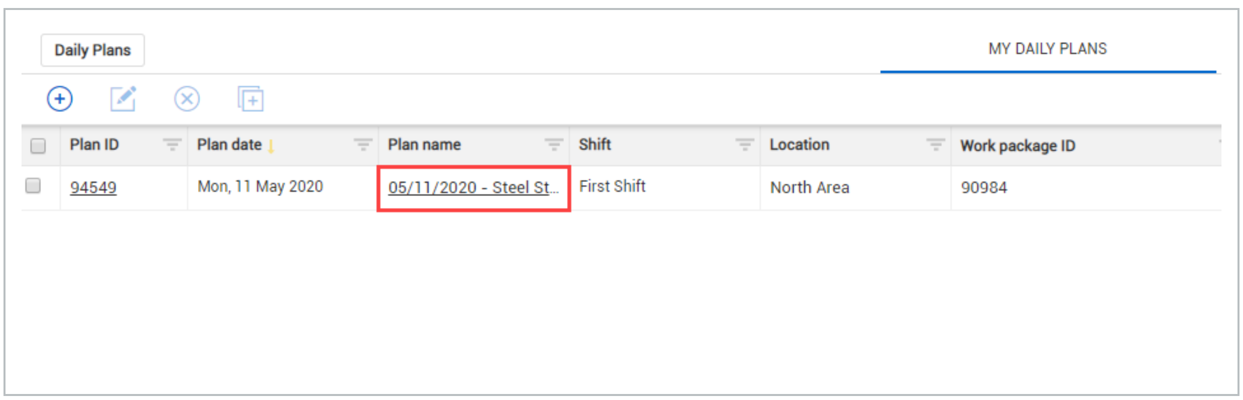
> Upon review of the employee register, it appears that your employee, Joseph Kelly, has had his time entered into two separate daily plans. You now need to go back into your daily plan and zero out his hours to avoid him receiving double pay.

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

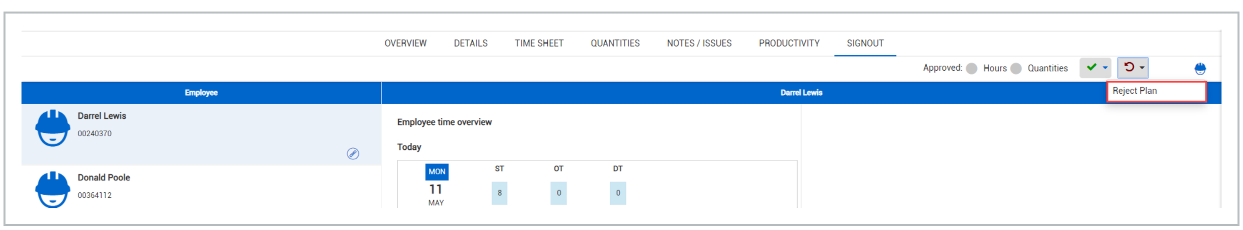
The following Step by Step walks you through how to reject an employee's signout, modify their actual hours, and re-sign them out on their behalf.

## Adjust the Hours of a Signed Out Employee

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

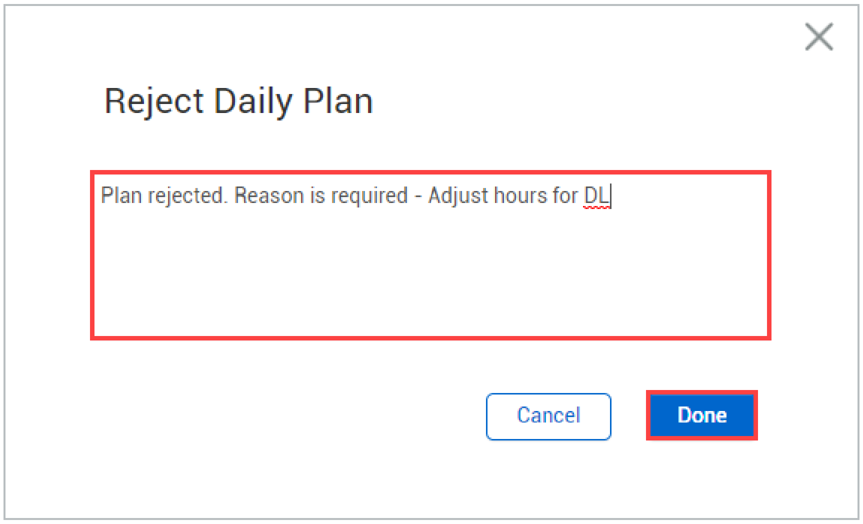



2. Click on the **Signout tab**.
3. Select the employee whose hours you want to adjust, then click on the **Reject icon** on the right.

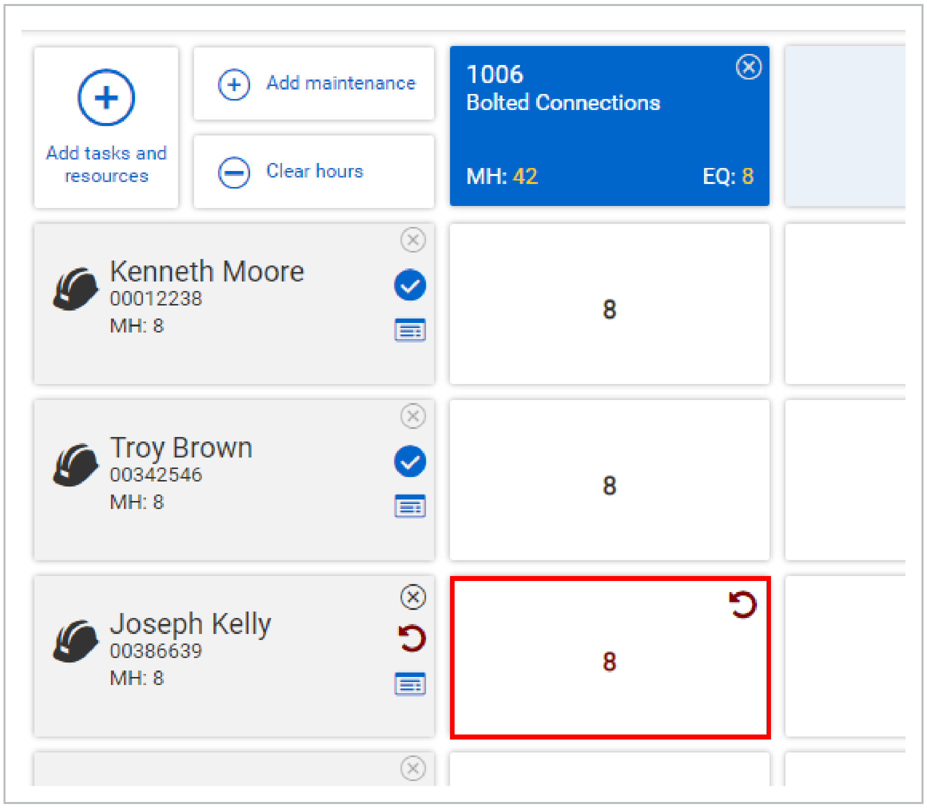


- You should get a pop-up window asking for a reason for rejection

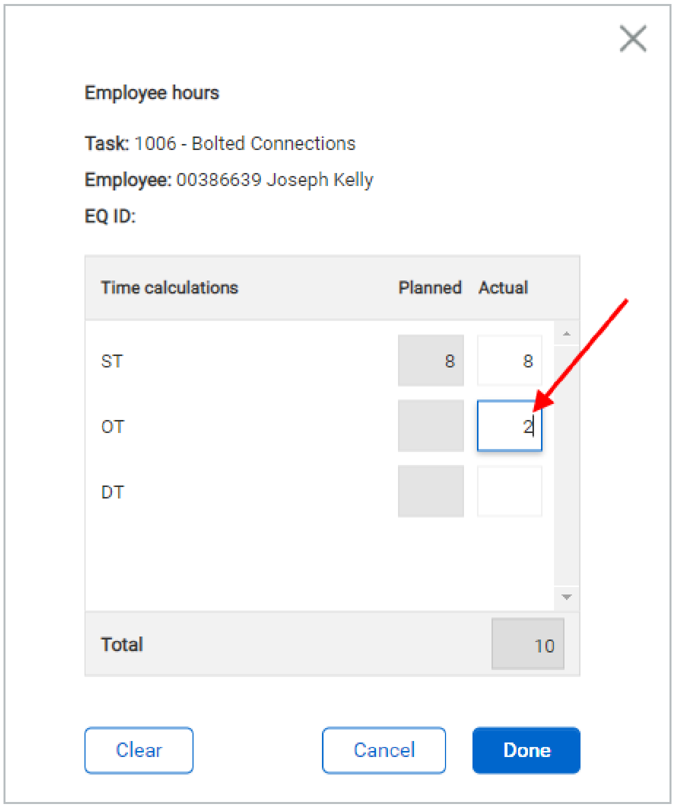
4. Enter a reason for rejection and click **Done**.



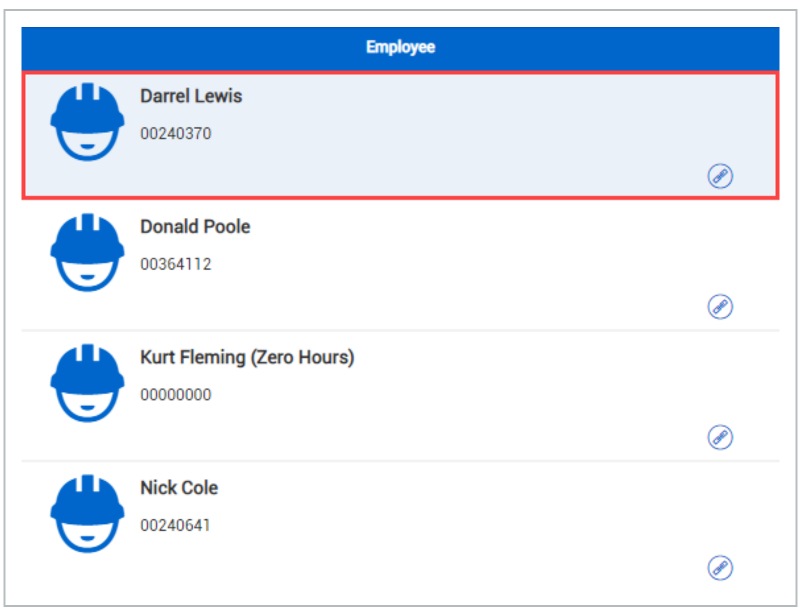

5. Click **Yes**.
6. Select the **Time sheet tab**.
7. Click in the entry cell for the worker whose hours you want to adjust.



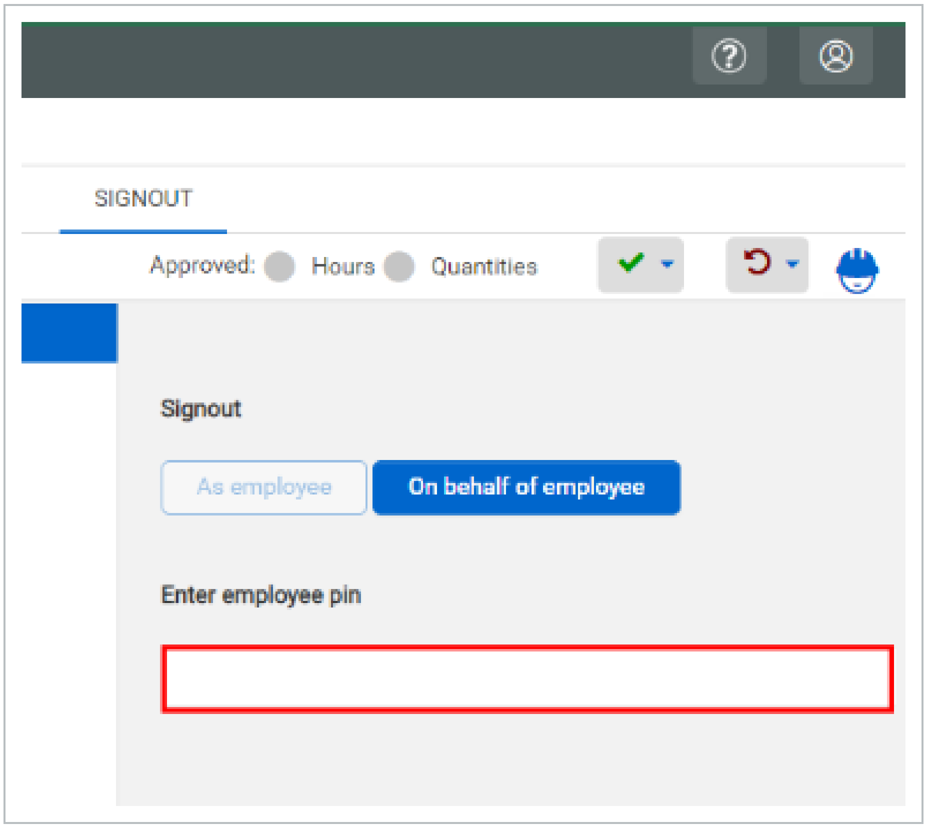

8. Adjust their hours and click **Done**.



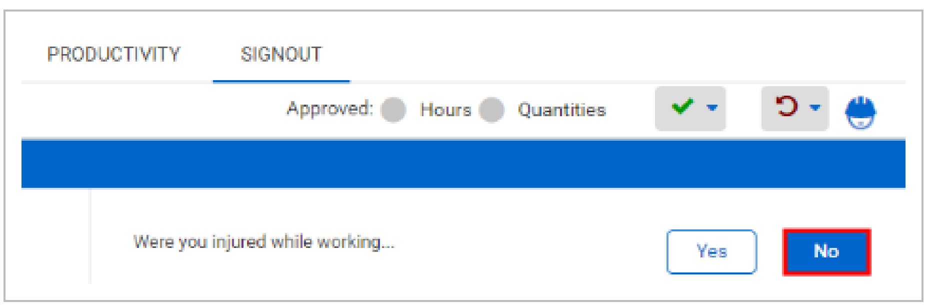

9. Select the **Signout tab**.
10. Select the employee whose hours you've adjusted from the employee list on the left.




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




12. Answer the signout questions.




13. Click **Done**.

# 1.17 APPROVE DAILY PLANS

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

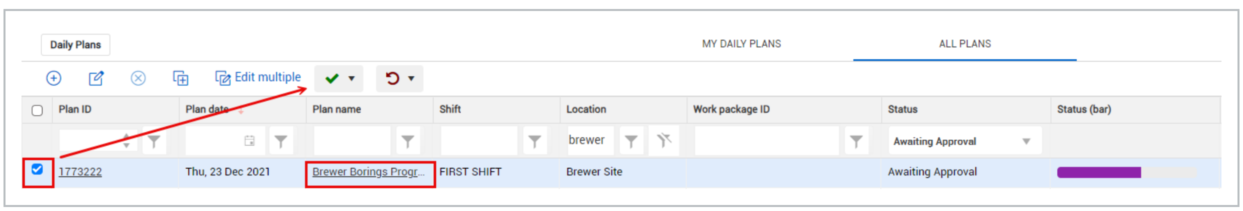
Once a daily plan has been fully executed, you have reviewed actuals, and the Employee Register, the plan is now ready for approval. When approving daily plans there are three options:

- 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.

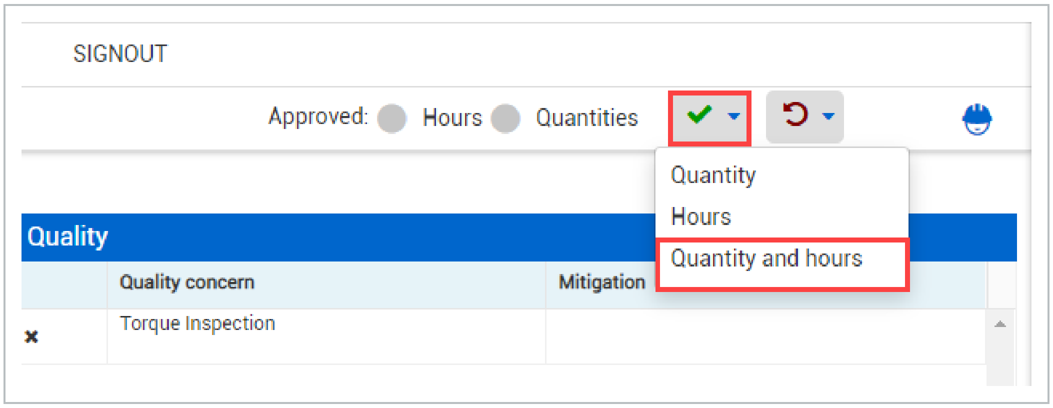
## Approve a Daily Plan

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




> 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.

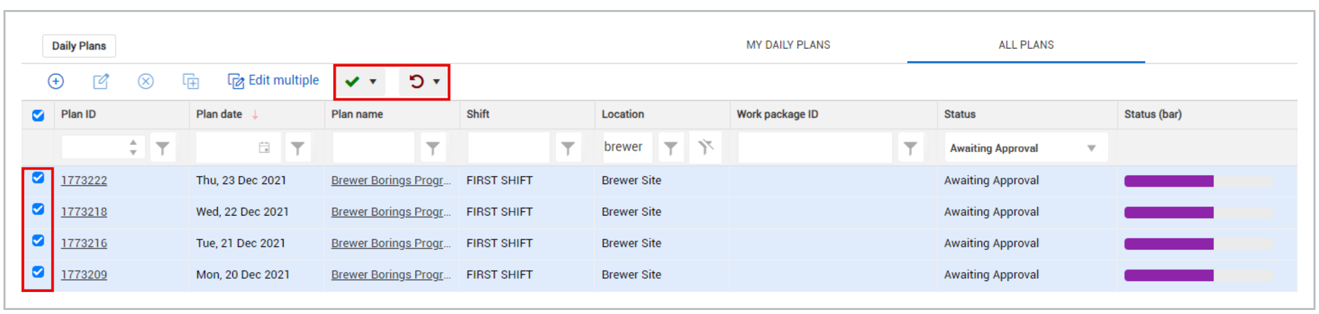



- You should get a pop-up window asking if you are sure you want to submit

4. Click **Yes.**

## 1.17.1 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.



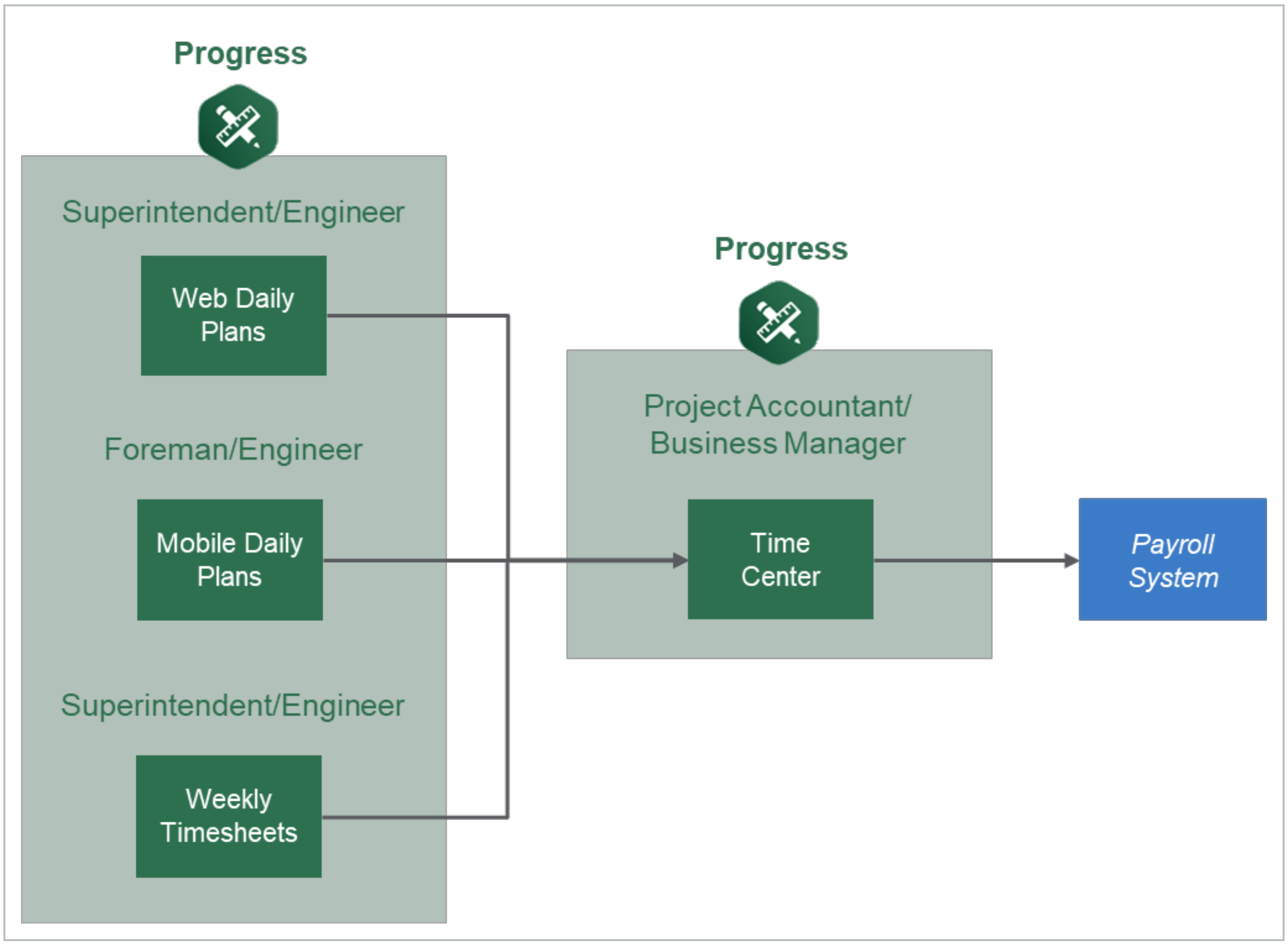
# CHAPTER 2 – TIME CENTER

# 2.1 TIME CENTER NAVIGATION

## 2.1.1 Time Center Overview

Time Center serves as a final repository to review and correct Time sheet information before importing into your payroll system. Time Center allows you to review entries, called **time cards**, brought in from:

- Daily plans approved within the Progress Daily Planning (Web and Mobile) application
- Progress Weekly Time sheet module




### 2.1.1.1 Time Center Purpose

The purpose of Time Center is to:

- Review the daily plans (time cards) received from Plan and Progress
- Ensure time cards have the correct properties and data elements
- Edit and correct any potential errors
- Send the reviewed and corrected time cards to your payroll system to process for payment
- Eliminate the need to edit time cards via payroll system database tables or side spreadsheets exported from Excel

### 2.1.1.2 Display Configurations

The Time center UI is designed for full HD resolution 1920 x 1080 with browser zoom of 100% and Windows display scaling of 100%. Display configurations other than what is recommended might not render correctly.

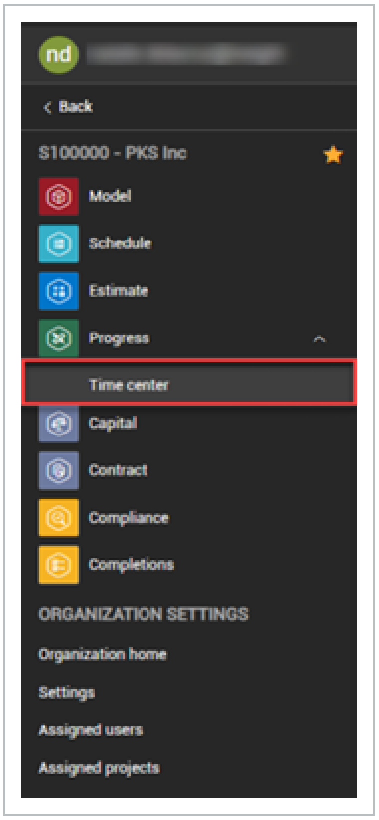
Each InEight application has its own supported display configurations, which might be different than the configuration above.

### 2.1.1.3 Time Center Access

> To access projects in Time center the project setting **Use Employee Reason Codes** must be toggled on. This setting is required prior to creating daily plans and cannot be changed once daily plans are created.

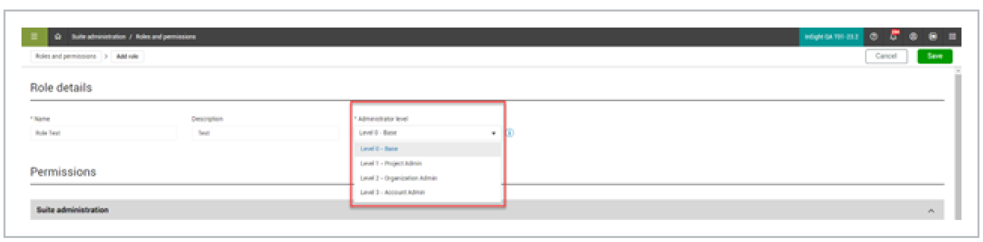
The Progress time center will show as a sub-level menu option under the account level.

You need to have organization or account access to see the sub-level option for Time center.




This option requires level 2 or 3 administrator levels. To set the correct administrator level, Go to Suite administration > Roles and permissions, and then click the Add role icon.

Under Role details, the Administrator level field includes a drop-down menu.



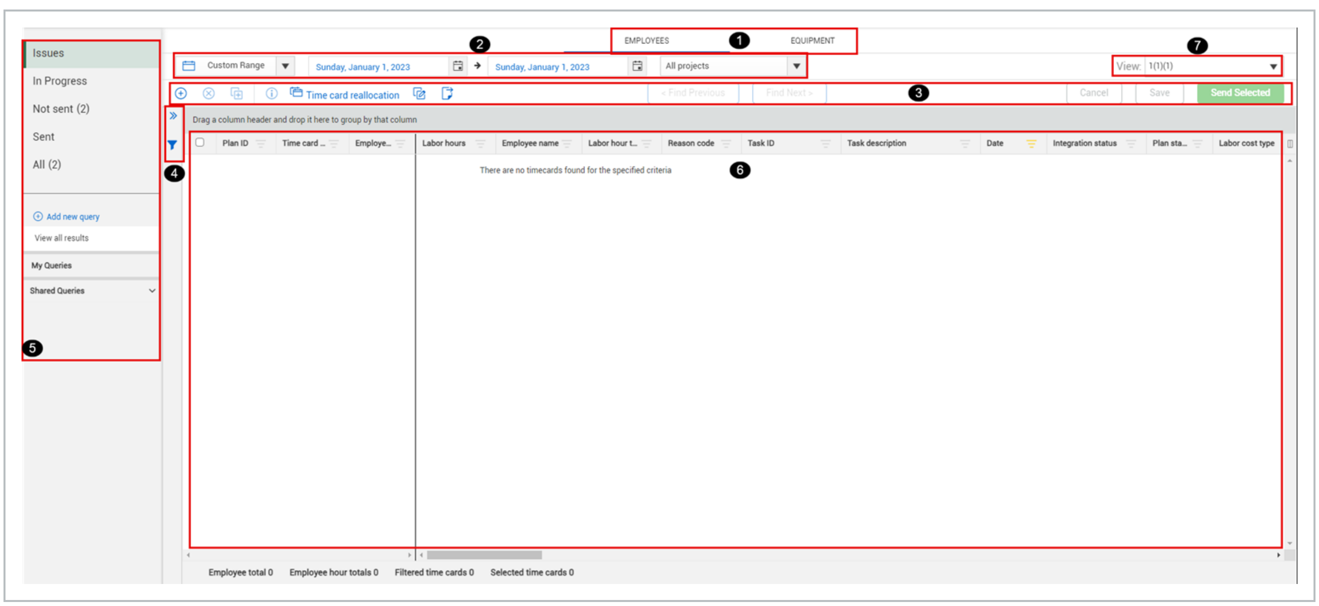

The administrator level can be set and saved only once for every new role.

## Overview - Time Center Register Page

| Title | | Description |
|---|---|---|
| 1 | Employee / Equipment Tabs | Select the appropriate tab to view the time cards for either employees or equipment. |

## Overview - Time Center Register Page (continued)

| Title | | Description |
|---|---|---|
| 2 | Date Filter | Select the date to filter using a custom date range or from a predefined calendar. |
| 3 | Toolbar | Add, edit, delete or copy time cards using the toolbar on the left.<br>View summary information, make bulk edits, and export time cards using the toolbar on the right. |
| 4 | Query Shortcut Icons | The double arrow is a shortcut to expand the Query builder slide out panel. The blue filter icon indicates how many queries are applied. Yellow filter icons appear for each filter applied. |
| 5 | Side Panel | The upper portion has preset filters to view just time-cards with issues, time cards in progress, time cards not sent, time cards sent, or all time cards. The lower portion contains the Query builder to create queries to search for specific time cards. You can save your queries under My queries, and access Shared queries. |
| 6 | Time card register | Contains rows and columns that house all time card data imported from daily plans and weekly Time sheets. |
| 7 | View | Views can be saved, removed, and shared with users and roles. Permissions are required for Time Center access. |



## 2.1.2 Time Center Register Columns

The Time Center register contains all the information captured using the Progress application for your daily plans in the field, as well as weekly Time sheets from the Weekly Time sheets module. The register columns fixed to the left are pertinent for identifying the time cards and include the Plan ID, Time card ID, Employee ID, Employee name and Labor/Equipment hours columns. The columns on the right contain additional data brought in from InEight Progress for you to review for issues.

The following table lists the columns available in the Time center register. You will edit these fields as needed to make corrections to your time cards. Fields not editable in Time Center can be edited in either InEight Progress or in your Payroll application, depending on the field.

| Column | Editable in Time Center? | Sortable? | Filterable? |
|---|---|---|---|
| Plan Level Fields | | | |
| Plan ID | No | Yes | Yes |
| Plan Status | No | Yes | Yes |
| Daily Plan name | No | Yes | Yes |
| Date | No | Yes | No |
| Approver 1 ID | Automatic | Yes | Yes |
| Approver 1 name | Yes | Yes | Yes |
| Approver 1 Role | Yes-Conditional | No | Yes |
| Approver 2 ID | Automatic | Yes | Yes |
| Approver 2 name | Yes | Yes | Yes |
| Approver 2 Role | Yes-Conditional | No | Yes |
| Labor hour type | No | Yes | Yes |
| Client approver name | No | Yes | Yes |

| Column | Editable in Time Center? | Sortable? | Filterable? |
|---|---|---|---|
| Executor name | Yes | Yes | Yes |
| Executor ID | Automatic | Yes | Yes |
| Executor Role | Yes | No | Yes |
| Shift | Yes | Yes | Yes |
| Employee Fields | | | |
| Employee ID | Yes-Conditional | Yes | Yes |
| Employee Name | No | Yes | Yes |
| Labor Hours | Yes | Yes | Yes |
| Reason Code | Yes | Yes | Yes |
| Reason Description | Automatic | Yes | Yes |
| Trade ID | No | No | Yes |
| Trade description | No | No | Yes |
| Employee Fields (Continued) | | | |
| Craft ID | No | No | Yes |
| Craft description | No | No | Yes |
| Override trade | Automatic | No | Yes |
| Override trade description | Automatic | No | Yes |
| Override craft | Yes | No | Yes |
| Override craft description | Automatic | No | Yes |
| Union code | No | No | Yes |
| Employee billing class | Yes | No | Yes |
| Uplift | No | No | Yes |
| Uplift override | Yes | Yes | Yes |

| Column | Editable in Time Center? | Sortable? | Filterable? |
|---|---|---|---|
| Employer company | No | No | Yes |
| Premium 1-6 | Yes | Yes | Yes |
| Time sheet Entry Fields | | | |
| Time card ID | No | Yes | Yes |
| Task ID | Yes | Yes | Yes |
| Task description | Automatic | Yes | Yes |
| Budget Code - Segment 1 (e.g., Cost Center) | Automatic | Yes | Yes |
| Budget Code - Segment 2 | Automatic | Yes | Yes |
| Budget Code - Segment 3 | Automatic | Yes | Yes |
| Budget Code - Segment 4 | Automatic | Yes | Yes |
| Time card Type | No | Yes | Yes |
| Labor Cost type | Yes | No | No |
| Equipment cost type | Yes | No | No |
| Notes | Yes | Yes | No |
| Version number | No | No | No |
| Equipment Fields | | | |
| Equipment ID | Yes | Yes | Yes |
| Equipment description | Automatic | No | Yes |
| Equipment hours | Yes | Yes | Yes |
| Equipment reason code | Yes | Yes | Yes |
| Equipment reason code description | No | Yes | Yes |
| Equipment location | No | No | Yes |
| Maintenance Fields | | | |

| Column | Editable in Time Center? | Sortable? | Filterable? |
|---|---|---|---|
| Work order | Yes | Yes | Yes |
| Work order description | Automatic | Yes | Yes |
| Equipment repair number | Yes | No | Yes |
| Equipment repair description | Automatic | No | Yes |
| Status Fields | | | |
| Modified by | Automatic | Yes | Yes |
| Modified date | Automatic | Yes | Yes |
| Integration status | Automatic | Yes | Yes |
| Validation issue? | Automatic | Yes | Yes |
| Employee shift start | Yes | Yes | Yes |
| Employee shift end | Yes | Yes | Yes |
| Plan shift start | Yes | Yes | Yes |
| Plan shift end | Yes | Yes | Yes |
| Job title | Automatic | Yes | Yes |

The Integration status indicates whether the time cards have been sent to the payroll system.

### 2.1.2.4 Sort Columns

You can sort in ascending or descending (both for alpha and numeric fields) on any column’s header. Click once to sort the column in ascending order (A-Z, 1-10). A yellow arrow displays on the column header pointing upward.


Click a second time on the column header to sort in descending order (Z-A, 10-1), and the arrow will point downward. Click a third time to reset the column to its default state.

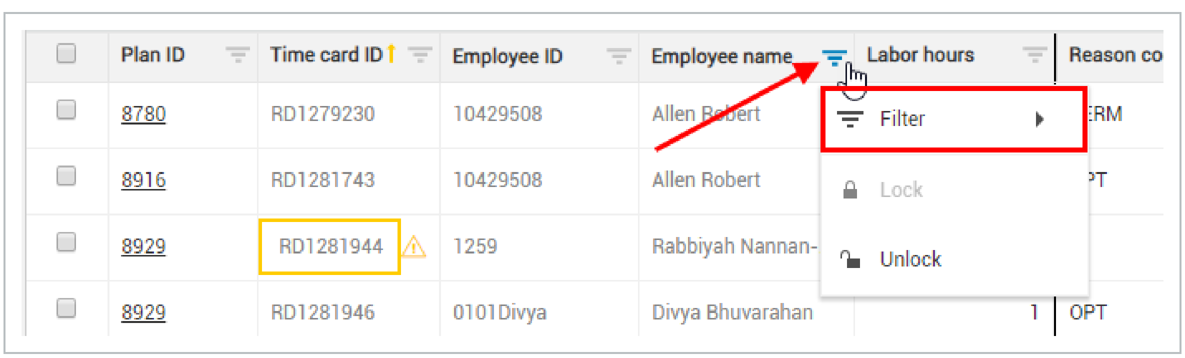
### 2.1.2.5 Move Columns

You can move columns using drag and drop to rearrange them as needed and the system will remember the column order the next time you log in.

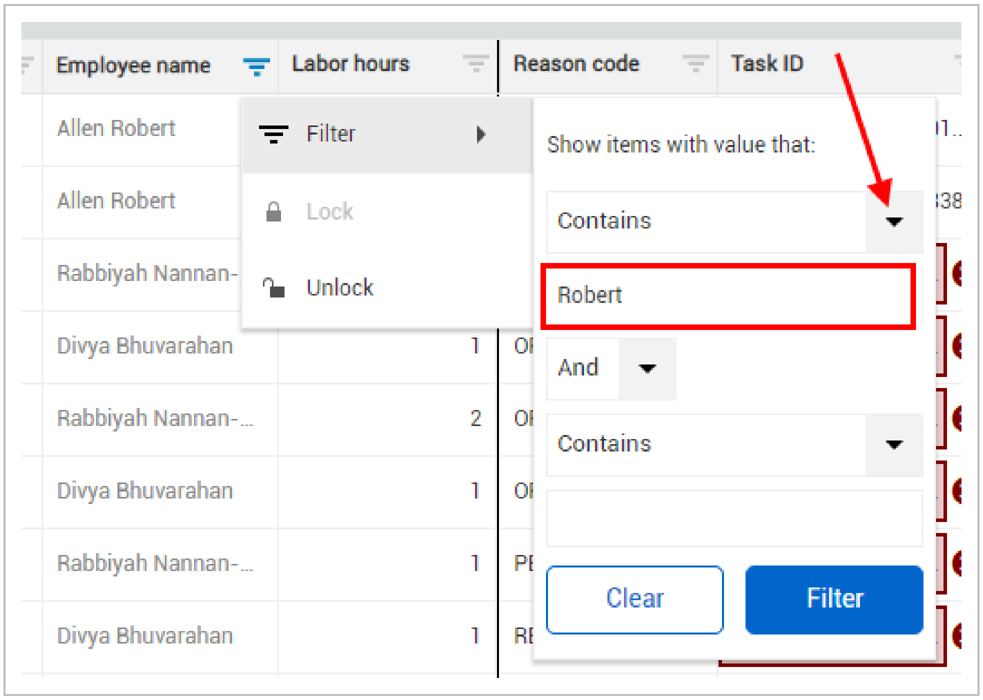
### 2.1.2.6 Filter columns

Depending on the project, you may have thousands of time cards to sift through. You can filter your time cards using column filters to drill down by date, employee, or whatever other criteria you need.

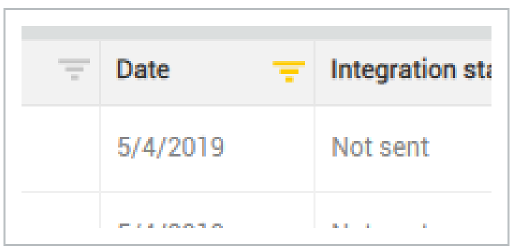
To filter on a column, select the filter icon on the column's header, then hover over the Filter menu option.



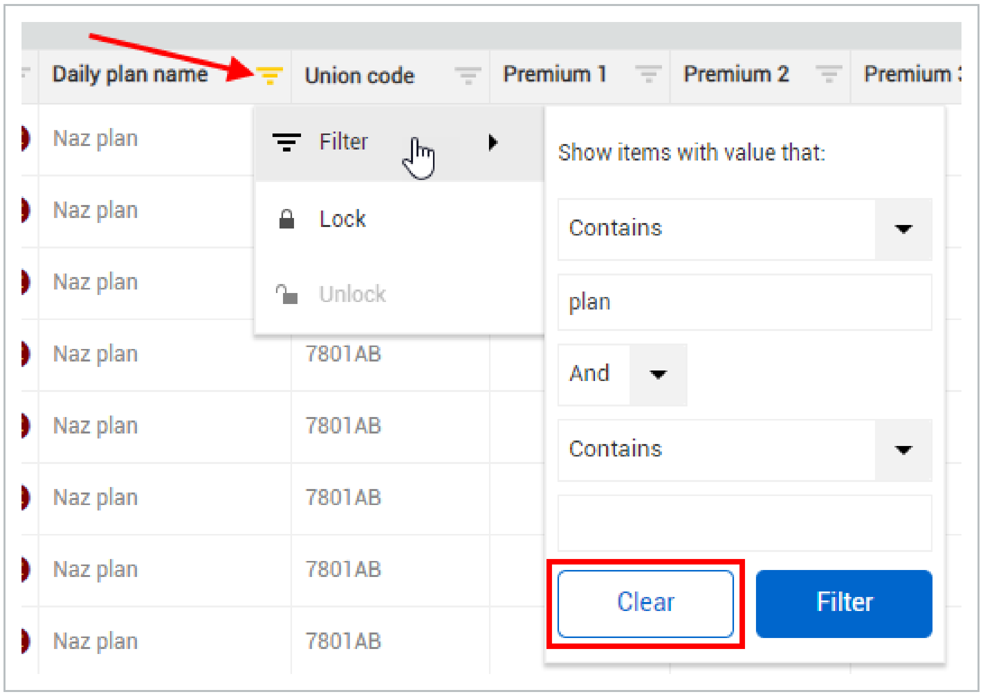

On the resulting Filter window, you can select an operator and value to filter by.




The register now filters your time cards by the filter value you selected, and the filter icon on the column header is yellow to indicate the column is being filtered.



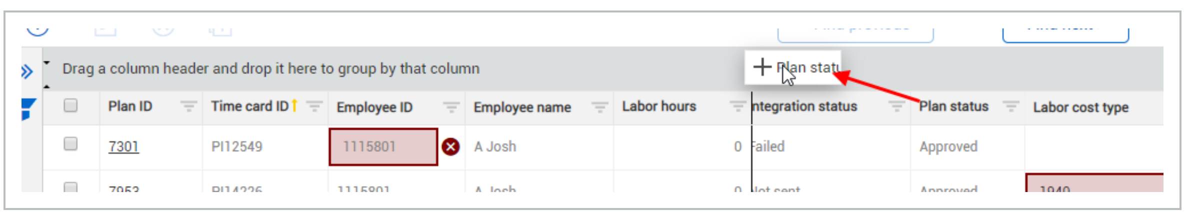

To clear the filter, you would click on the columns filter icon and select Clear.



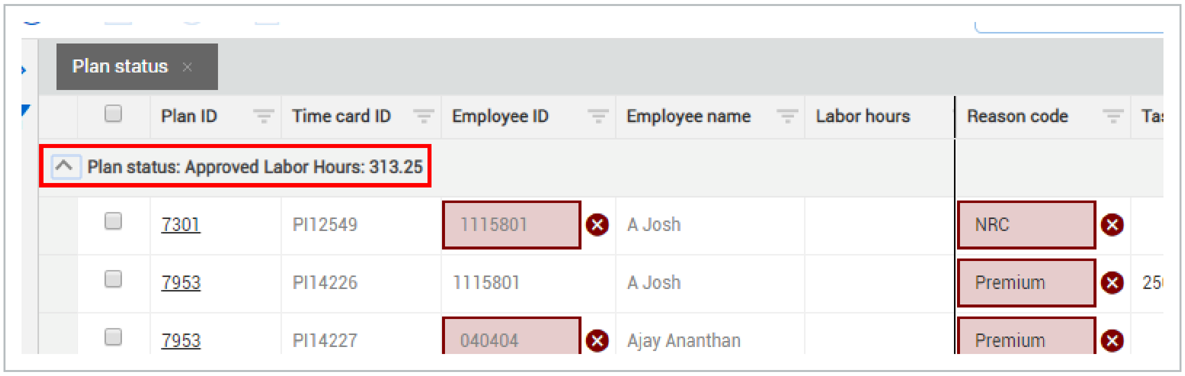

## 2.1.2.7 Group Columns

With column grouping, you can organize your time cards into groups by the values of a selected column. By organizing time cards into groups, you can review time cards more efficiently. Grouping columns lets you group information most applicable to your process, and you can group by any column without affecting any of the time card data.

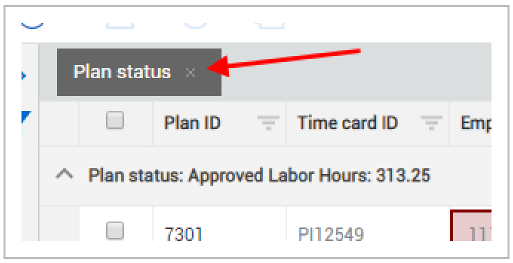
To group by a column, click on the column’s header and drag it into the grey area just above the column headers.




Your time cards are now organized into groups based on the values within the column. Each group is collapsible and subtotals the labor or equipment hours of the time cards within each group.




To remove a grouping, click the x on the grouped column header within the grouping area.



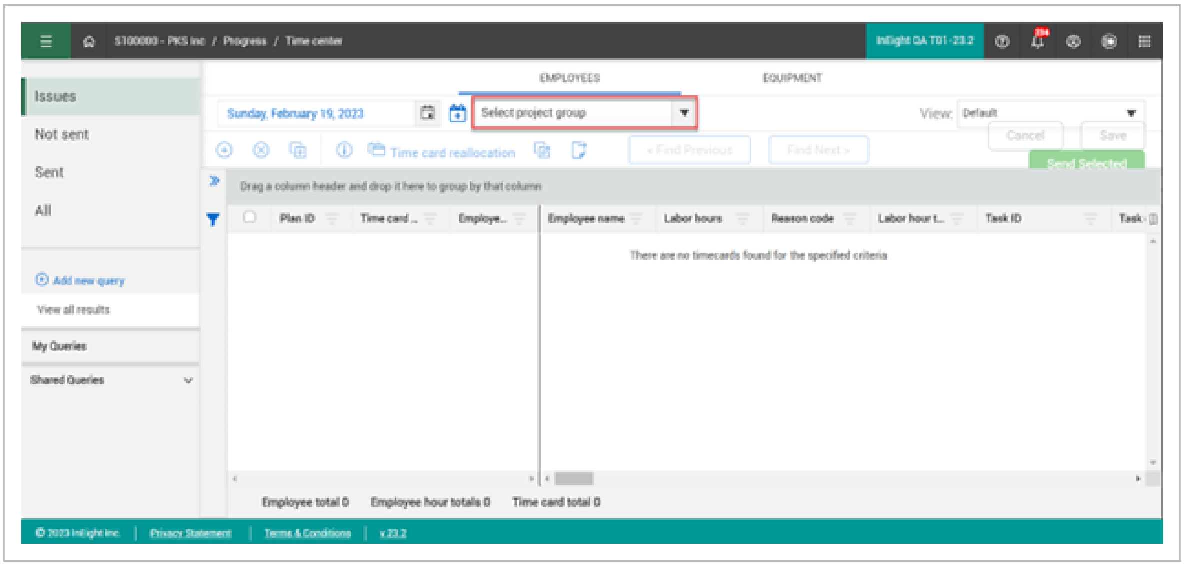

The column will return to its placement within the register.

> When a Group filter is applied, sorting on any of the data fields will be disabled.

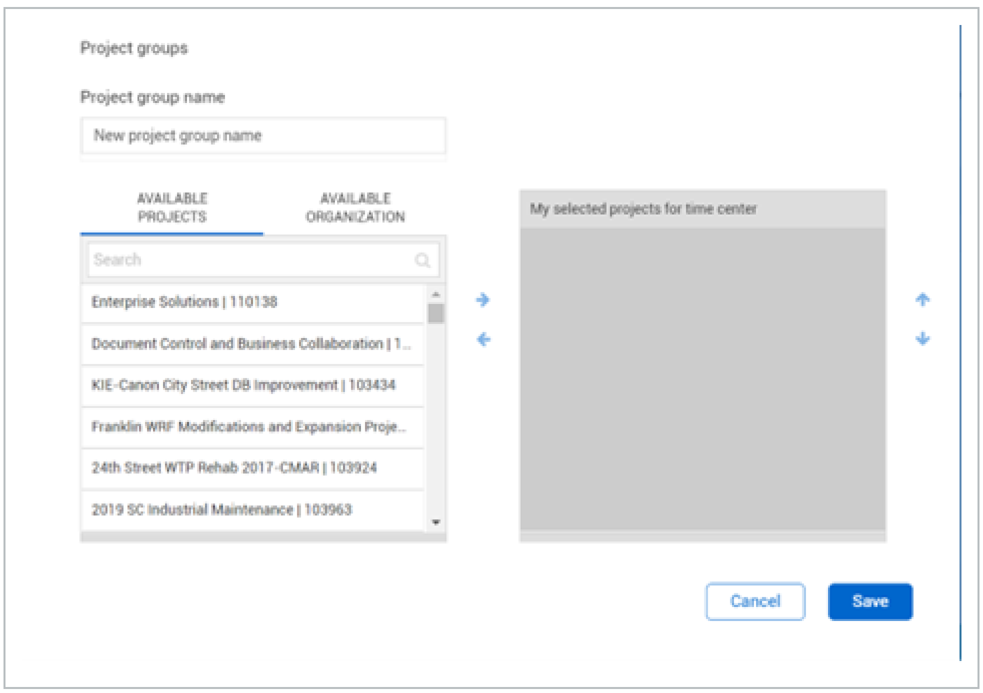
## 2.1.2.8 Project groups

You can view one or more projects at a time in a single grid of data with the project groups option.

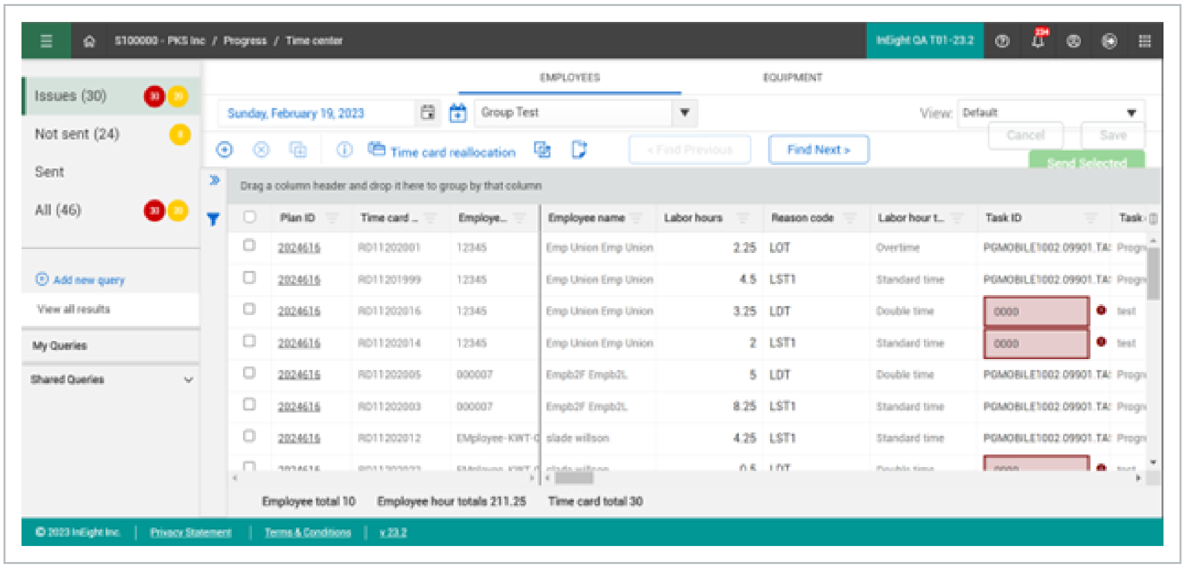
Go to Progress Time center, and then click on the drop-down menu labeled **Select project group**. You can select previously saved groups, and edit or add a new project group.



To add a new group, name the new project group, and then select from the available projects or organizations.




If your resources go across projects, this helps to check employees assigned to multiple projects on a single page instead of checking each project individually.

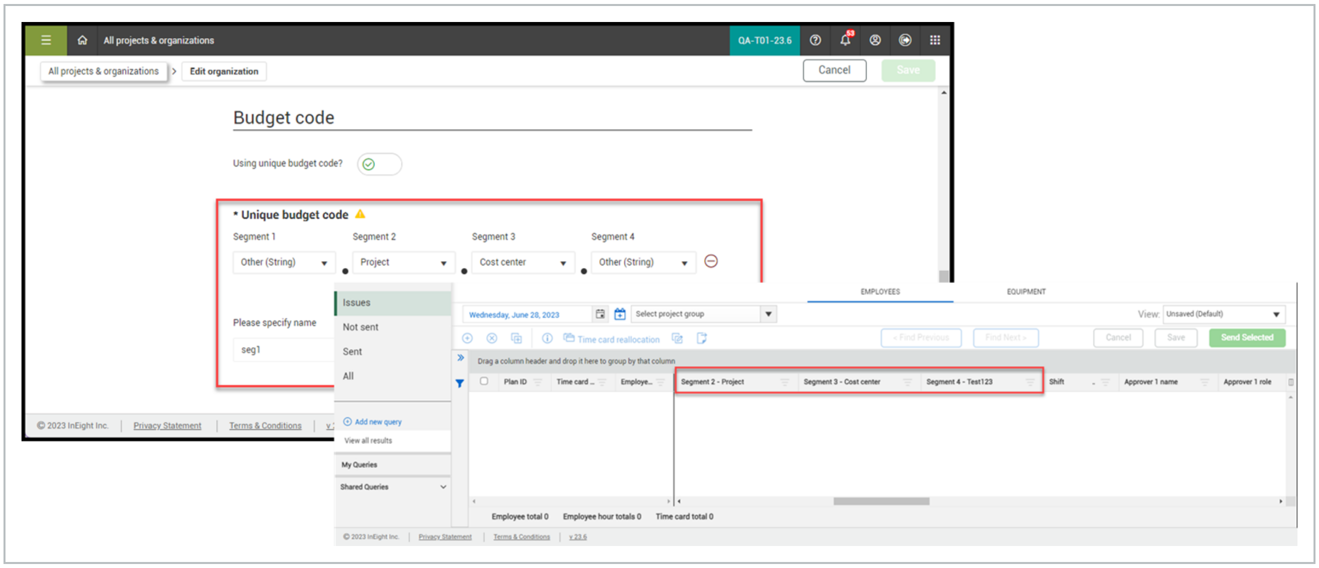



You can still work with a single project. The option to create groups has been added as a quicker work flow option.

> Saved views will migrate while working with groups.

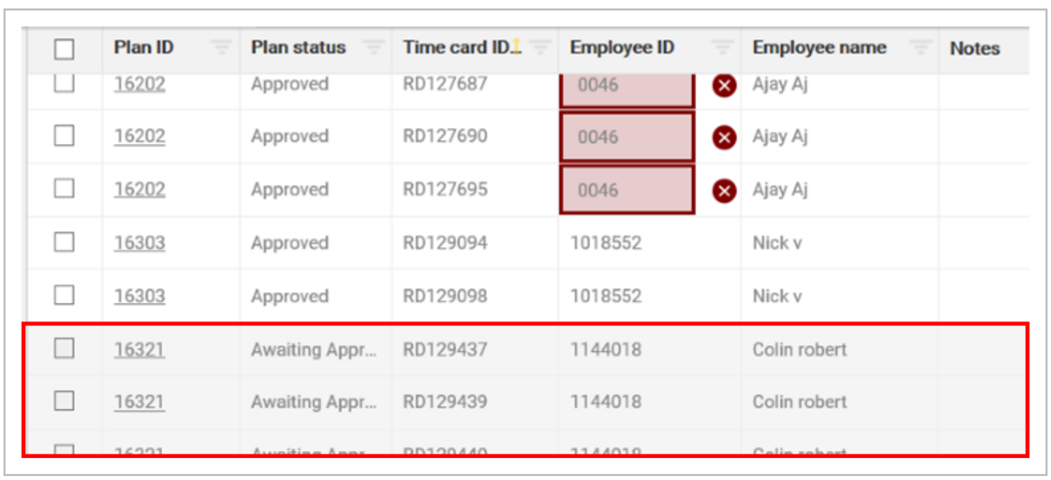
## 2.1.2.9 Unique budget code segments

You can populate budget segments to show a unique code label. Unique budget code segments contain additional options to identify a cost item using four independent fields that are separated by periods. When you configure unique budget codes at the organization level (All projects & organizations > Edit organization) the segment numbers are matched with the corresponding columns in Time Center.




## 2.1.3 Unapproved Time Cards

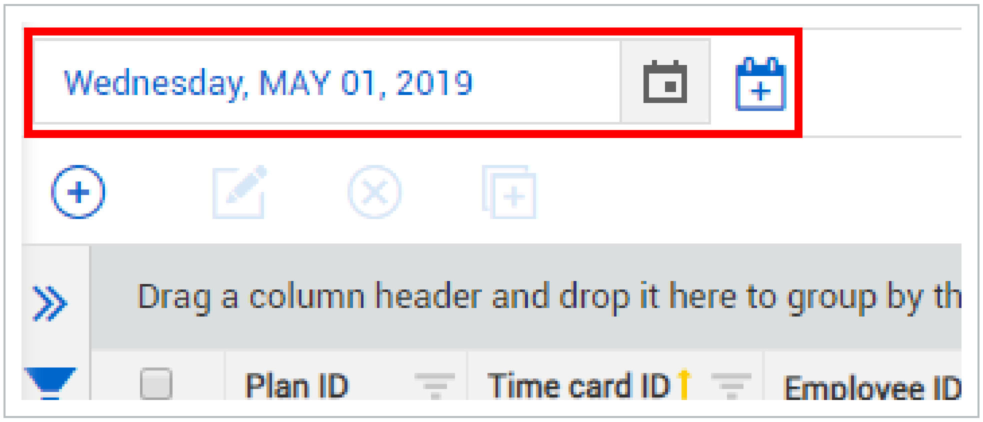
Note that time cards that have not yet been approved and are still in Execution or Awaiting Approval status are not editable within the Time Center register. You can only edit approved time cards.



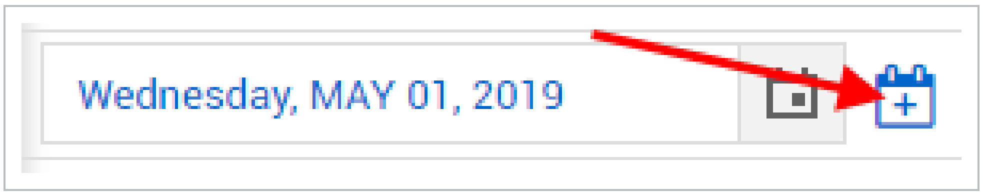
| Plan ID | Plan status | Time card ID | Employee ID | Employee name | Notes |
|---|---|---|---|---|---|
| 16202 | Approved | RD127687 | 0046 | Ajay Aj | |
| 16202 | Approved | RD127690 | 0046 | Ajay Aj | |
| 16202 | Approved | RD127695 | 0046 | Ajay Aj | |
| 16303 | Approved | RD129094 | 1018552 | Nick v | |
| 16303 | Approved | RD129098 | 1018552 | Nick v | |
| 16321 | Awaiting Appr... | RD129437 | 1144018 | Colin robert | |
| 16321 | Awaiting Appr... | RD129439 | 1144018 | Colin robert | |

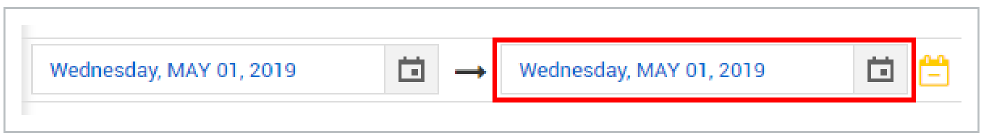
## 2.1.4 Date Filter

You can filter to a specific date for your time cards by either typing the date in the Date field or by selecting the date from the calendar icon.




To select a date range, click the add date icon and select an end date.



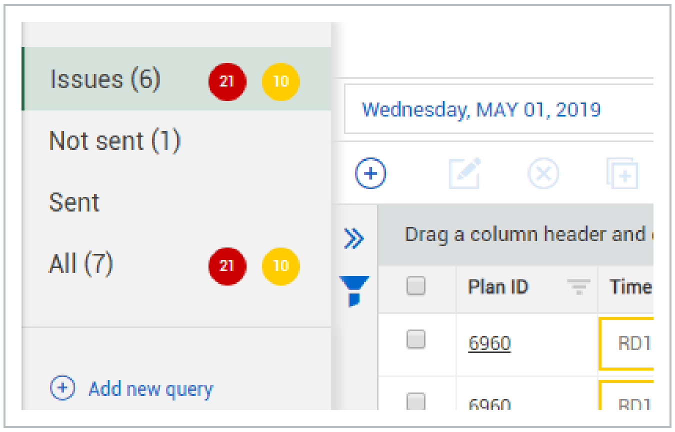




## 2.1.5 Time Card Pre-Set Filters

The upper portion of the left side panel contains pre-set filters to help you focus on the time cards that need review. You have four pre-set filter options you can select from:

- **Issues** – Time cards that have information on them tagged as issues
- **In Progress**– Time cards that are in a processing status before sending to Payroll.
- **Not sent** – Filters to time cards that have an Integration status of Not sent.
- **Sent** – Filters to time cards that have an Integration status of Sent, or time cards that have been sent to Payroll

- **All** – Shows all time cards within the selected date(s)

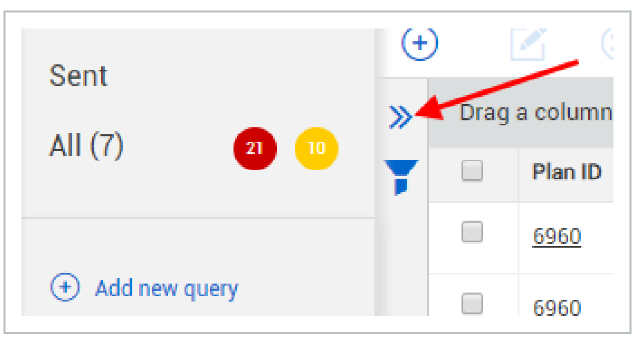



## 2.1.6 Query Builder

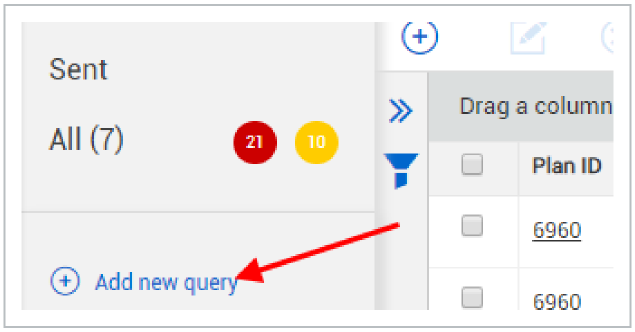
In addition to the filters you can set on individual columns, you can also add filters using the Query Builder. The following steps walk you through creating a query using the Query Builder.

## 2.1 Step by Step 1 – Create a Query

1. From the Time Center register, do one of the following to open the Query Builder:
    - Click on the **double arrows** next to the left side bar.



- Click the **Add new query** link on the left side bar.




2. Type the name of the query in the New query name field.
3. Select **Plan ID** from the Column drop-down list.
4. Select **Equal** from the Operator drop-down list.
5. Type a Plan ID value into the Value field.
6. Click **Apply**.
   - The query applies to the timecards on the left
7. Click on the **Save query** icon to save the query.


   - Your query will now show up under **My queries**. No one will be able to see this query unless you share it
   - The Share query icon appears. You can share your saved queries with others, so they can use the queries as well
8. Select the **Share query** icon.

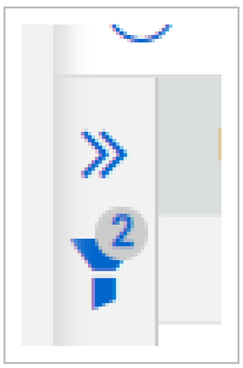

- The query will now show up under Shared queries

> When you share your query, you cannot edit it until you unshare it.

When you are granted level 2 or 3 permission and the Removed shared queries permission is enabled, you can unshare a shared query, removing from the shared list for all users.

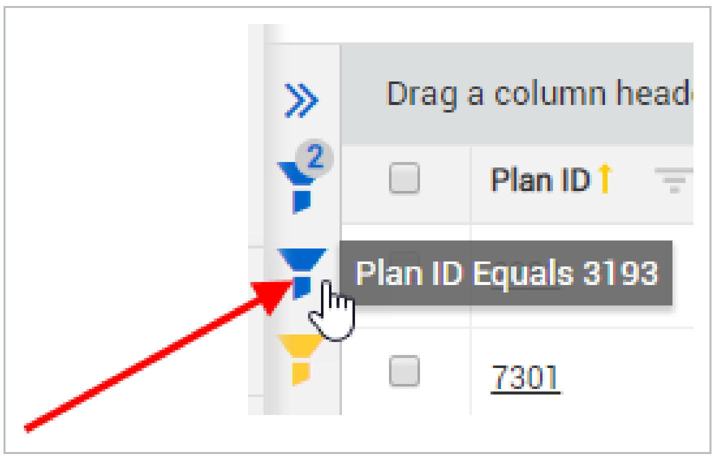
### 2.1.6.10 Filter Indicators

The number next to the top filter indicator shows how many queries have been applied.




An additional filter indicator displays in yellow for each filter applied.

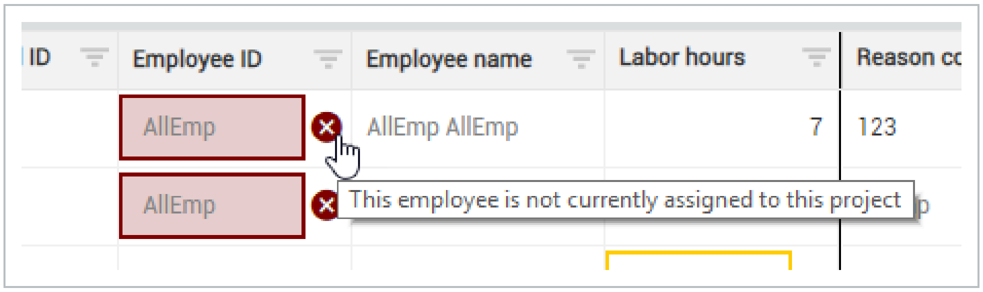
You can hover over the indicator of each applied filter to see the filter name, and you can click on each indicator to remove them from being applied.




# 2.1.7 Error Indicators

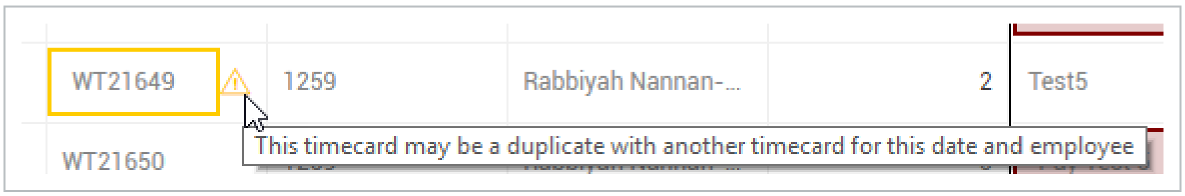
## 2.1.7.11 Errors

Fields that appear in red indicate an error with information on the time card. Time cards with red error indicators cannot be sent to Payroll. Hovering over the X will give you the reason for the error, so you can correct information as needed.




### 2.1.7.12 Warnings

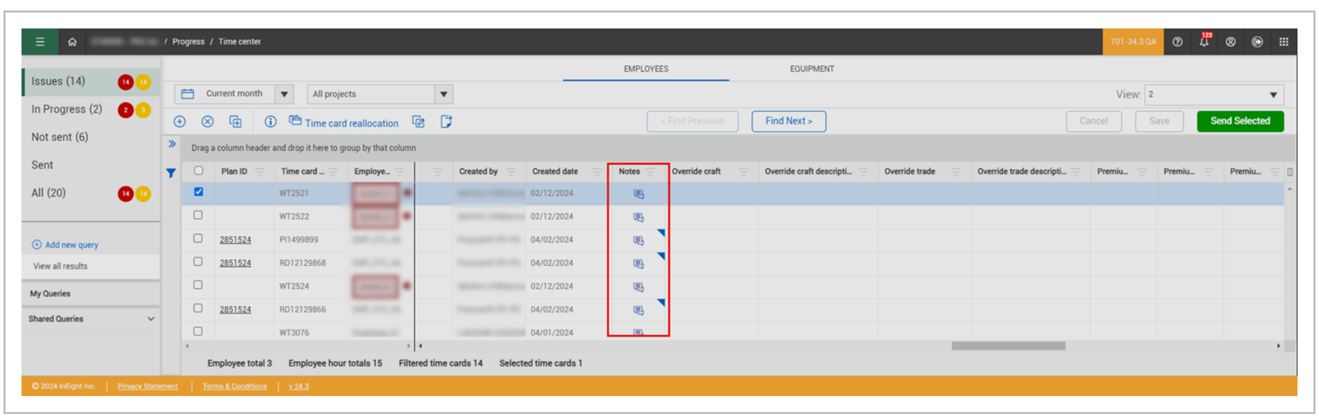
Fields in yellow indicate warnings. Time cards with warnings can still be sent to Payroll, but it is recommended to fix warnings to avoid possible confusion or issues with time cards. You can hover over the warning indicator symbol to see the reason for the warning, so you can make corrections.



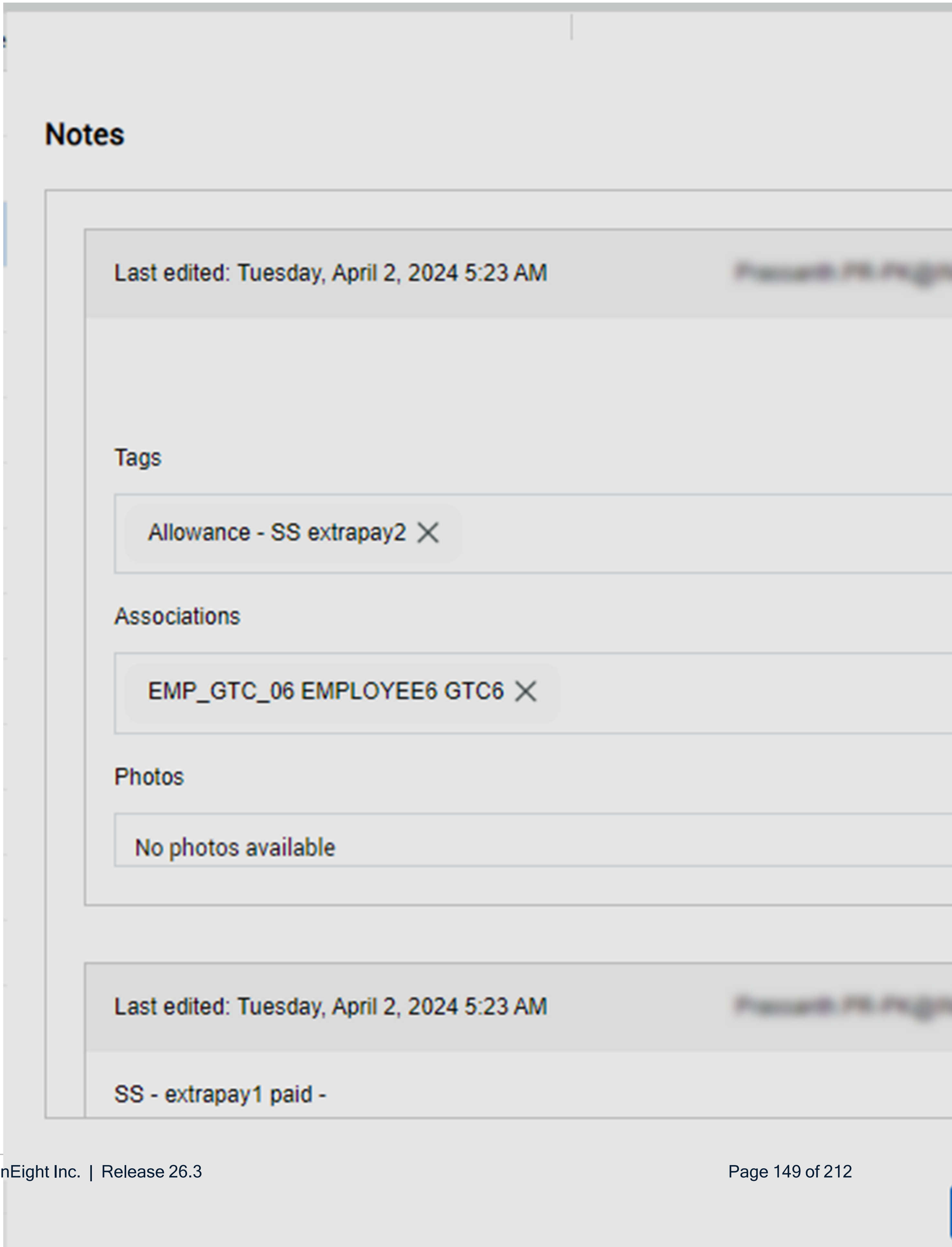

## 2.1.8 Edit notes

You can edit notes originating in the Weekly Time Sheet or Global Time Center.

In the Time card register, under the Notes column, click the **Edit note** icon. .




The Notes dialog box will open where you can add or edit details.


Notes
Last edited: Tuesday, April 2, 2024 5:23 AM
Tags
Allowance - SS extrapay2
Associations
EMP_GTC_06 EMPLOYEE6 GTC6
Photos
No photos available
Last edited: Tuesday, April 2, 2024 5:23 AM
SS - extrapay1 paid -

In the Photos section, you can click the photo to preview, and a larger version of the photo shows. You can right-click on the photo to download or delete it.

# 2.2 TIME CARD MANAGEMENT

## 2.2.1 Time Card Management Overview

As one who oversees payroll for the project, such as a Project Accountant or Business Manager, you will use the Time Center page to ensure that the time card entries you received from the Progress application contain the correct information before passing them on to your accounting system for processing payroll.

Prior to editing timecards in Time Center, your company will have already established options which should be available on your time cards, such as for unions, reason codes, allowances, and premiums, based on your payroll needs.

## 2.2.2 Time Card Review

Within the Time Center register, you can validate your time card data, reviewing each time card for issues, and resolving them as needed. Most issues are highlighted in red with an X, such as the Employee ID fields in the example below.

These Employee IDs may be invalid for reasons such as:

- They may not be assigned to this project
- May have an inactive status during this project

### 2.2.2.1 Data Validation Errors

Below is a list of time card errors and their causes. Errors must be resolved before they can be sent to Payroll.

| Error | Causes |
| --- | --- |
| **Invalid Work Order Number** | Work Order status is not active and is assigned to the Equipment Repaired Number.<br>Work Order status is active and is not assigned to the Equipment Repaired Number. |
| **Invalid Equipment Repaired Number** | Equipment status is not active.<br>Equipment status is active, but not assigned to current |

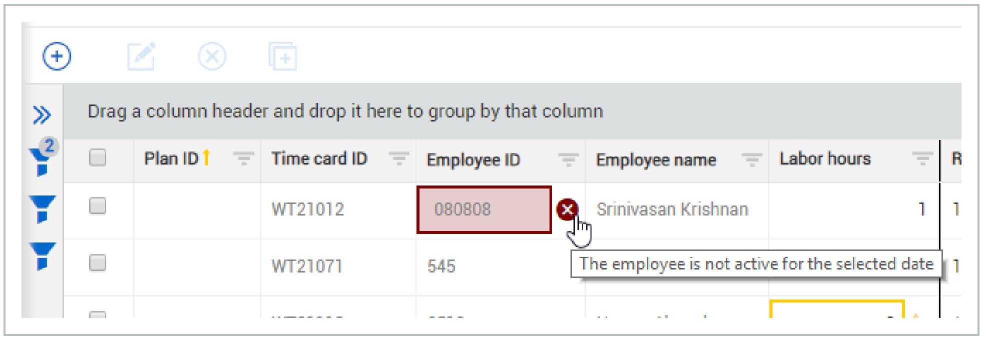
| Error | Causes |
|---|---|
| | project. |
| **Invalid Allowances** | Employee has an allowance assigned that is not valid for that type of employee or for the union it belongs to. |
| **Invalid Employees** | Time card date is not between the employee start and end dates.<br>Employee status is not active.<br>Employee status is set to not report time.<br>Employee is not currently assigned to the project.<br>Time card has an operated equipment reason code and the Employee ID is blank. |
| **Invalid Equipment** | Equipment status is not active.<br>Equipment is not assigned to the project.<br>Employee reason code is "operated", but Equipment ID is blank. |
| **Invalid Task ID** | Task is closed for either employees or equipment.<br>The task is a TEMP (temporary) task.<br>Cost code is not active.<br>Cost code is a TEMP (temporary) cost code.<br>Cost code is not active. |
| **Invalid Labor Cost Type and Invalid Equipment Cost Type** | Cost Type value is not found in the list of available cost types for the Task ID. |
| **Invalid Reason Code - Maintenance Record** | Reason code is something other than the AWK (Work) reason code. |

Depending on the root cause of the error, you may need to make changes in:

- The Time Center register
- InEight Progress
- InEight Suite Administration
- Your payroll system

### 2.2.2.2 Correcting Issues Outside of Time Center

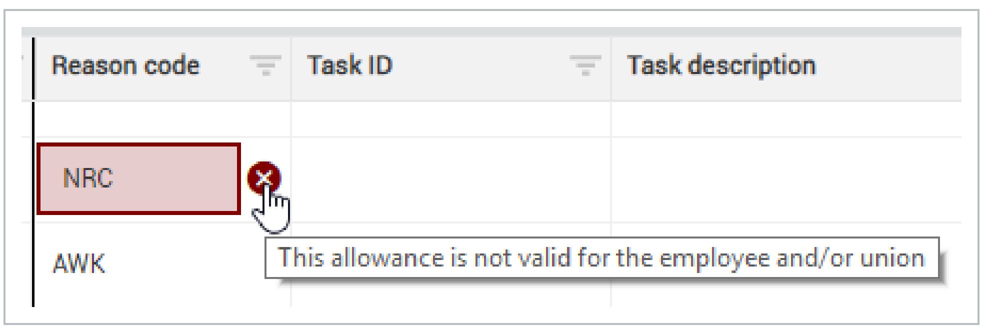
The error message displayed below indicates that the "employee is not active for the selected plan date."




This means the employee was not contracted during the period of time of the project. The employee would need to be edited within Suite Administration (accessed from the 1st Level Menu from the project's Home page), to be active during the date of the time card. Once corrected, this error would be removed.

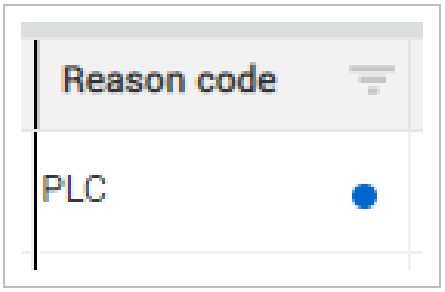
### 2.2.2.3 Correcting Issues in Time Center

Many of the fields within Time Center are editable. Errors can therefore be corrected directly in Time Center. For example, perhaps a Reason Code is used on a time card that is associated with an allowance that is not available.



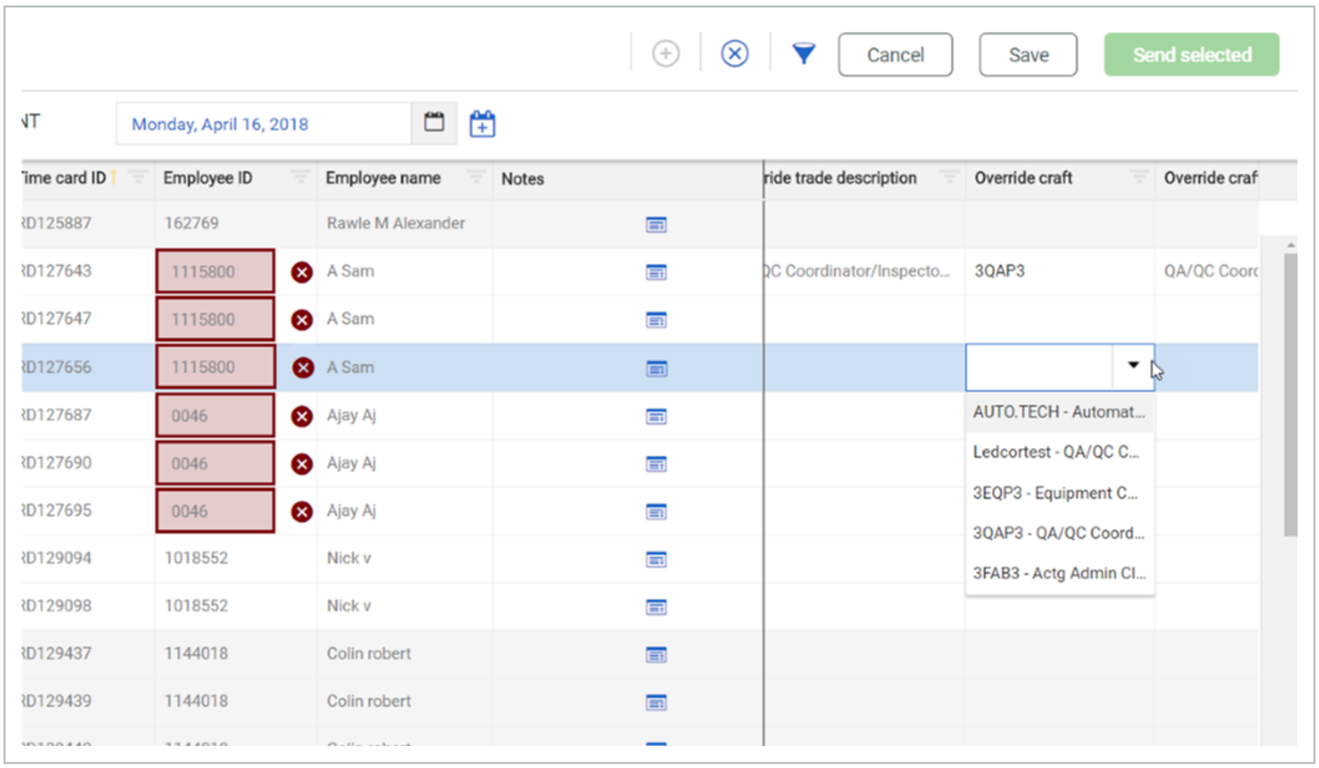

You can edit the Reason Code, changing it to one with a valid allowance for the employee on the time card.

Note that a blue dot appears when any changes have been made prior to saving.



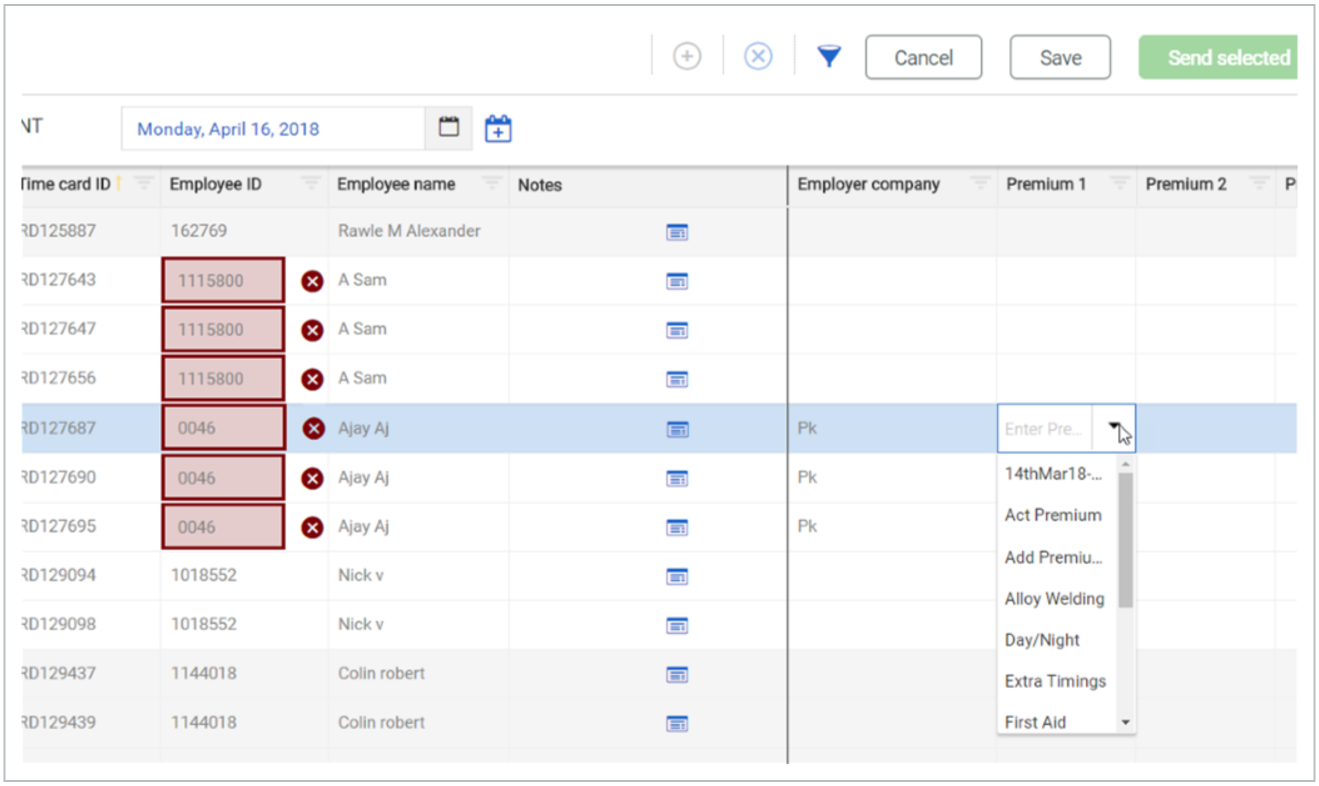

### 2.2.2.4 Other Time Card Adjustments

You may need to make time card adjustments, even when there is no error. For example, you may need to override the craft assignment of an employee. You can make this change in the Override Craft column of the time card.




For craft and trade overrides, the override craft or trade specified for the employee must pertain to the appropriate union, as assigned at the project level or as defined and imported from the ERP, otherwise there will be an error.

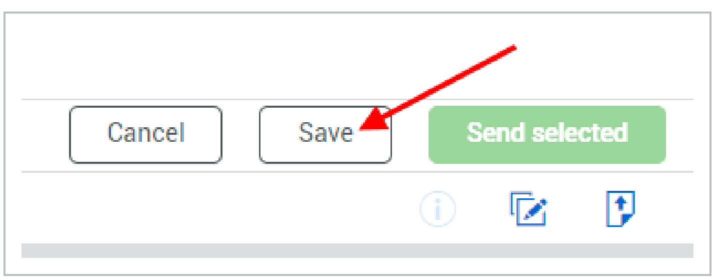
You can also assign or correct premiums. There are identified premiums (created at the project level) from which you can choose.




Do not confuse premiums with allowances (known as Extra Pay in the Progress application). Unlike premiums, allowances apply for the entire day.

## 2.2.3 Saving Changes

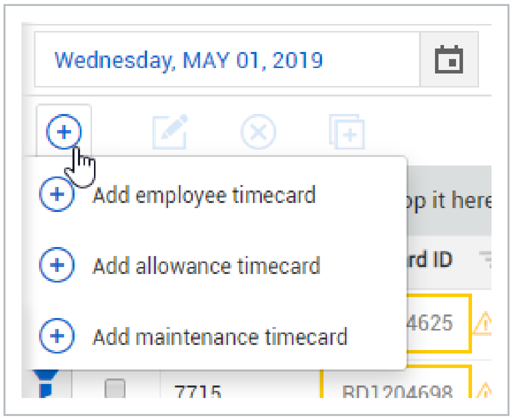
As you make changes, be sure to click **Save** in the upper right-hand corner to save your edits.




Any changes made in Time Center will update automatically in the daily plans of the InEight Progress application.

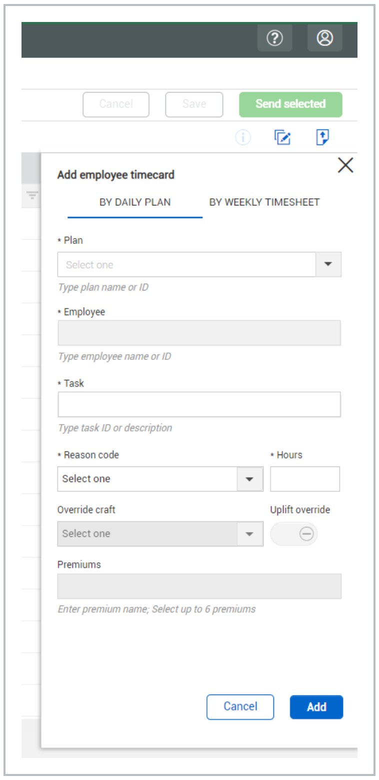
## 2.2.4 Add Time Card

At times you may need to account for employee hours, allowances, or maintenance hours that were not captured in a daily plan or weekly Time sheet. Perhaps they were missed, or you need to make a quick adjustment without going back to the InEight Progress application. You can add a new time card to record the hours by clicking the **Add time card** button and selecting the type of time card to add.




Until you save your changes, you will not be able to add or delete any time cards.

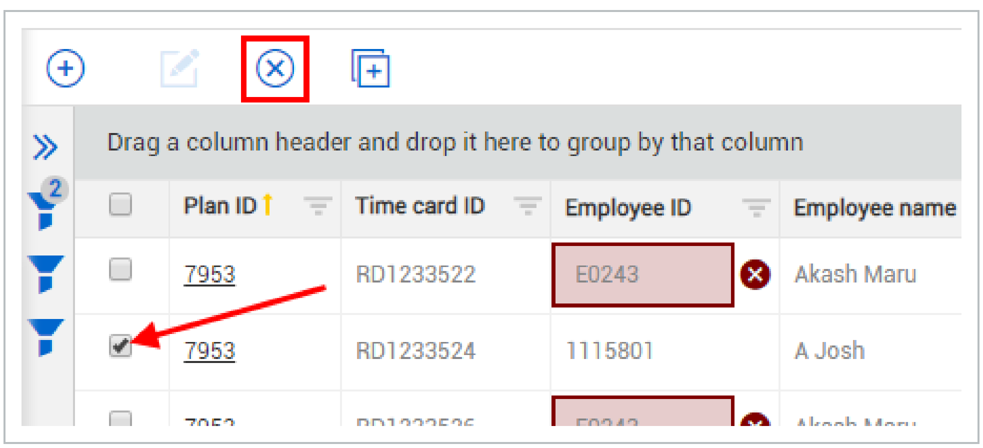
A slide out panel opens on the right to fill out and add the time card.




This same process is followed when you want to create time cards for allowances and maintenance.

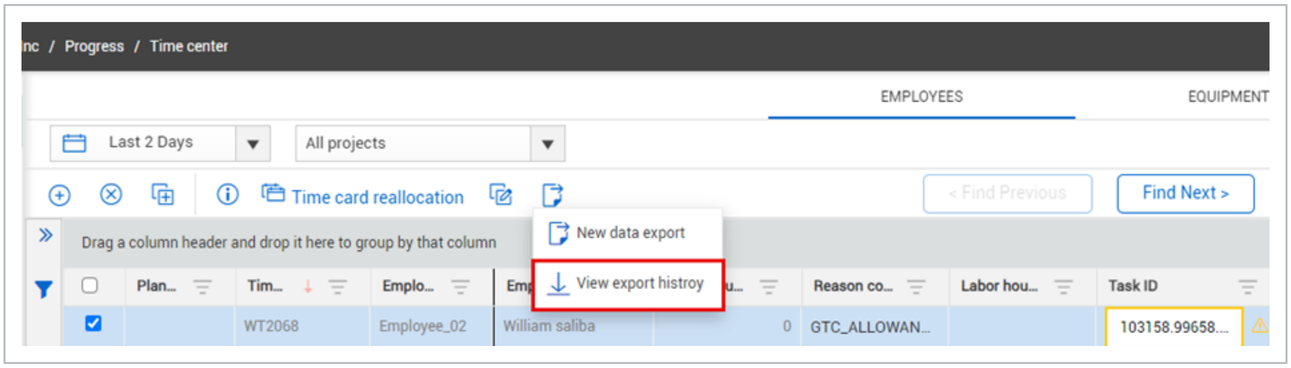
## 2.2.5 Delete Time Card

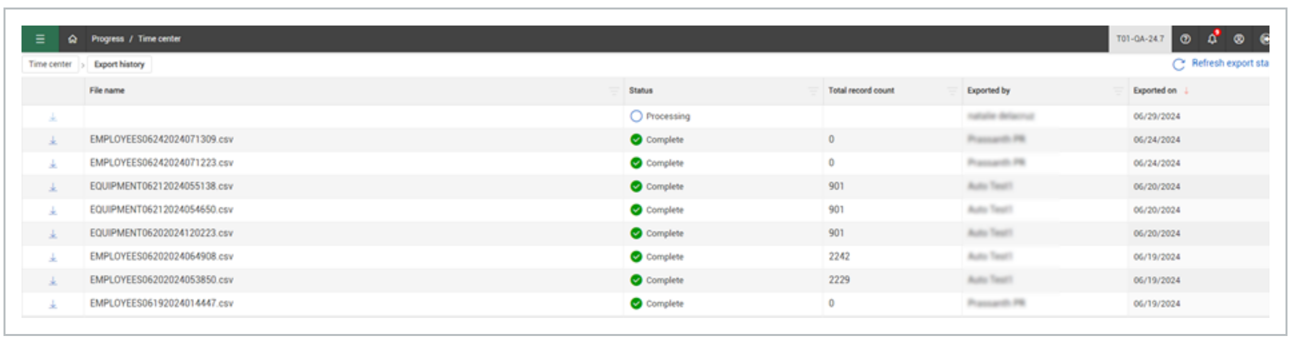
To delete a time card, you check the row header check box of the time card and select the **Delete time card** button.



## 2.2.6 Export Time Cards

In Time Center > Export time cards > **New data export**, you can export time cards with will then send you to the Export history page. There you can also download previous time card history exports. The export is a Microsoft Excel file with nearly unlimited time card export count restrictions. If you do not need to export a specific time card and only need to view the Export history, follow the same steps as above and select **View export history** from the drop down list.

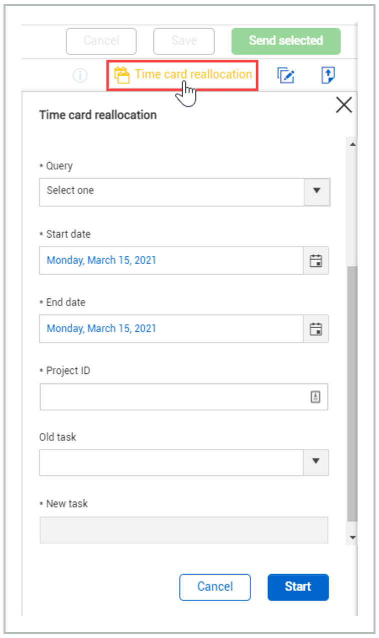



## 2.2.7 Reallocate Time Cards

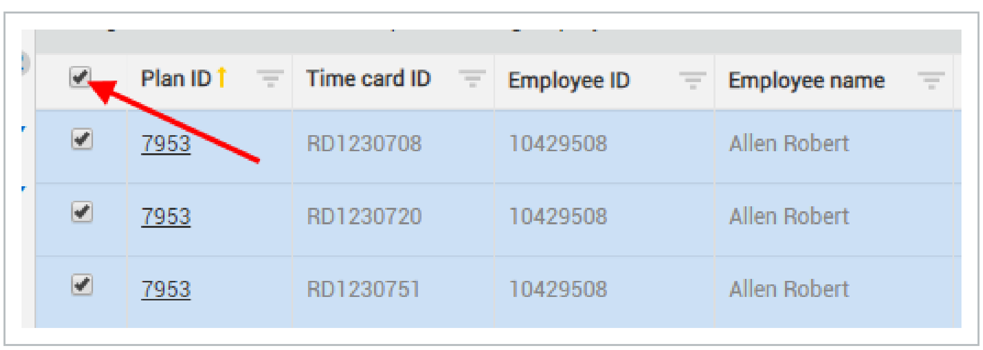
You can move Weekly time sheet time cards from one project to another project. To move time cards to another project, you must first create a query that includes all time cards you want to reallocate. After you create the query, click **Time card reallocation** in the upper right of the page. In the slide-out panel, select the query and the start and end dates of all the time cards you want to move. You must then enter the new project ID. You can also move all time cards to a new task in the new project.

If you leave the Old task field blank, you can reallocate all selected time cards to one new task. This is a many-to-one reallocation. If you select a task in the Old task field, only time cards with that task are reallocated. To do a many-to-many reallocation, you must perform multiple reallocations.

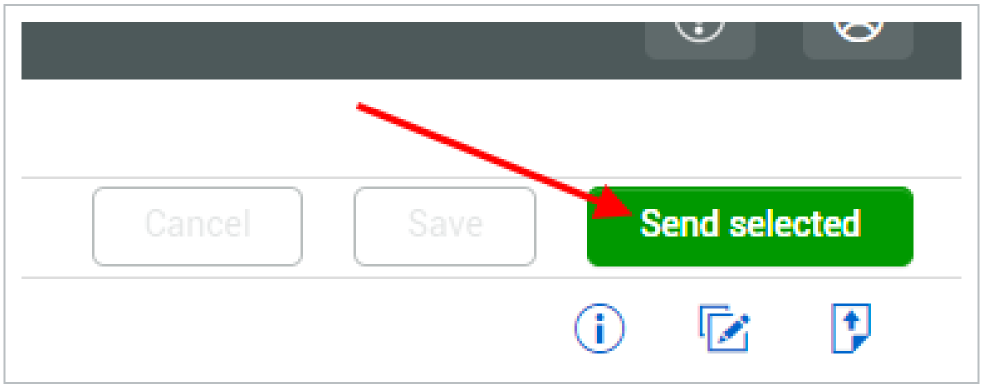



## 2.2.8 Submit to Payroll

When all the time cards are reviewed and issues resolved, you can either select the time cards individually, hold the shift key to multi select or check the box to select all time cards.



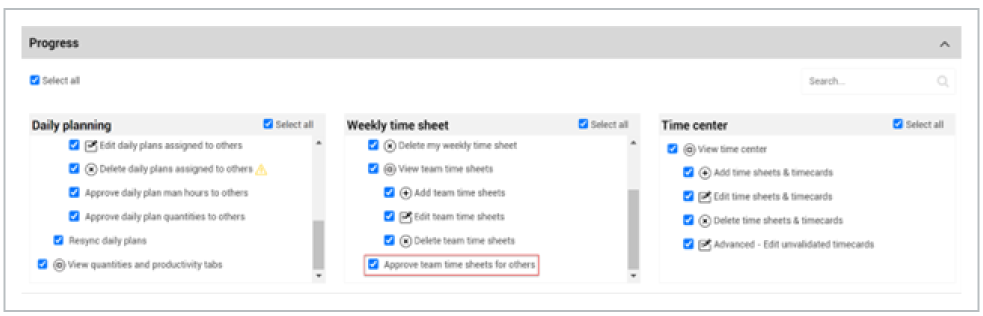

With the time cards selected, click the **Send Selected** button.




This sends the selected time cards to your Payroll system.

## 2.2.9 Approval Delegation Permission

The **Approve team time sheets for others** option allows the selected employee to submit time sheets (other than a supervisor). Go to Roles and permissions > Weekly time sheet, and then select Approve team time sheets for others.

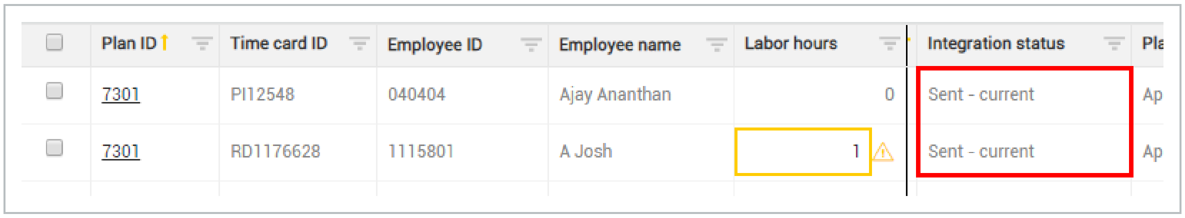



### 2.2.9.5 Integration Validation

The system will validate the information to make sure there are no errors.

- If there are errors, that time card will not be sent
- If there are no errors, the records are put in queue and sent to your ERP system to be processed for payroll

Once processed, you will get back a result from Payroll indicating whether it succeeded or failed. If successful, the Integration status updates to **Sent – current**.



| | Plan ID | Time card ID | Employee ID | Employee name | Labor hours | Integration status | Pla |
|---|---|---|---|---|---|---|---|
| | 7301 | PI12548 | 040404 | Ajay Ananthan | 0 | Sent - current | Ap |
| | 7301 | RD1176628 | 1115801 | A Josh | 1 | Sent - current | Ap |

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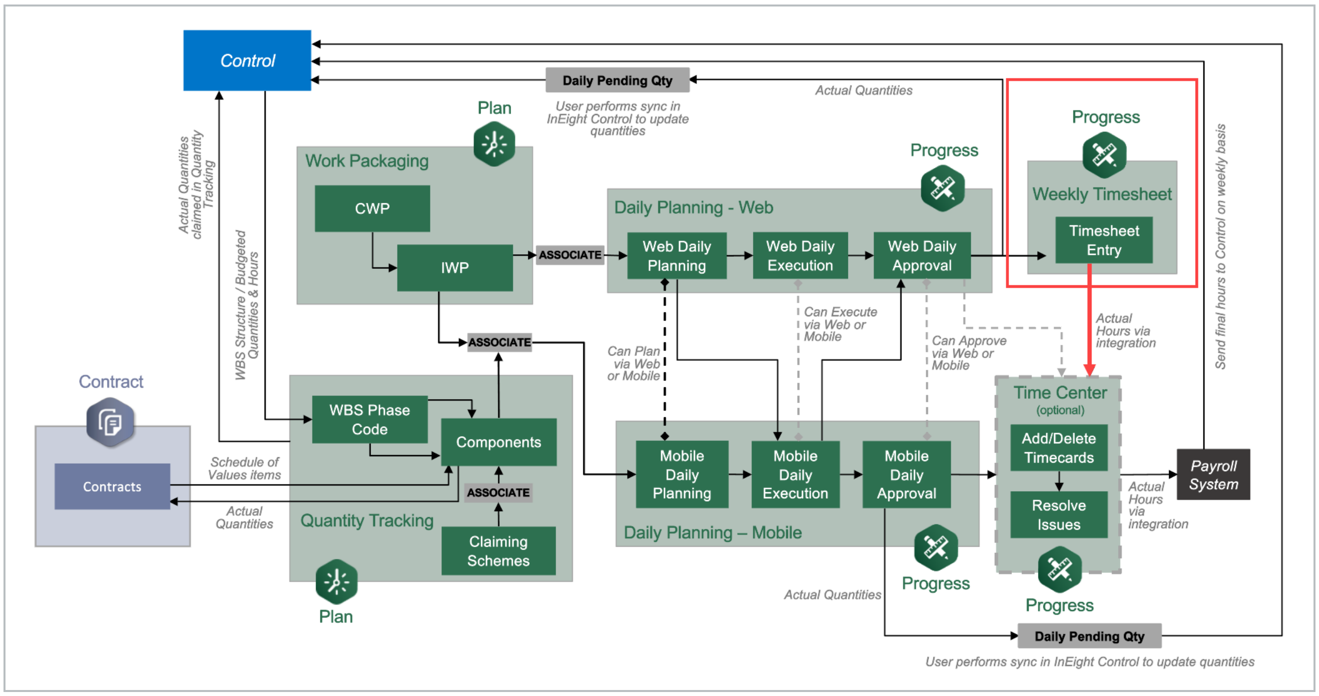
# CHAPTER 3 – WEEKLY TIME SHEET

# 3.1 WEEKLY TIME SHEET OVERVIEW

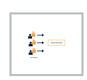
Weekly Time Sheet is an organization-level module that lets you manage individual or team work hours on a weekly basis.

Weekly Time Sheet is a convenient option for workers who are utilized across projects, or for indirect personnel who need to enter time without being associated to a specific daily plan. Work hours, allowances, and equipment hours can be recorded through Weekly Time Sheet.




Depending on your project settings, you will likely use one of the following workflows in Weekly Time Sheet:

Team members create their own time sheets and submit them for payroll processing on a weekly basis.



Team members create their own time sheets. Team leaders review team time sheets and submit them for payroll processing.

Team leaders create time sheets for their team and submit them for payroll processing.

# 3.2 WEEKLY TIME SHEET SETUP

To enable Weekly Time Sheet for your organization, the following areas must be configured with the appropriate details:

- Organization Setup
- Employee and User Setup
- Project Setup

> To set up Weekly Time Sheet, it’s recommended that you complete the following steps in order.

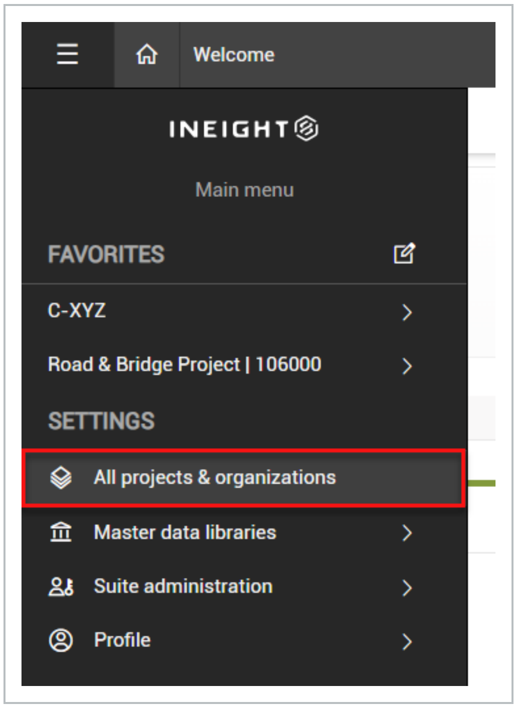
## 3.2.1 Organization Setup

### 3.2.1.1 Budget Code Setup

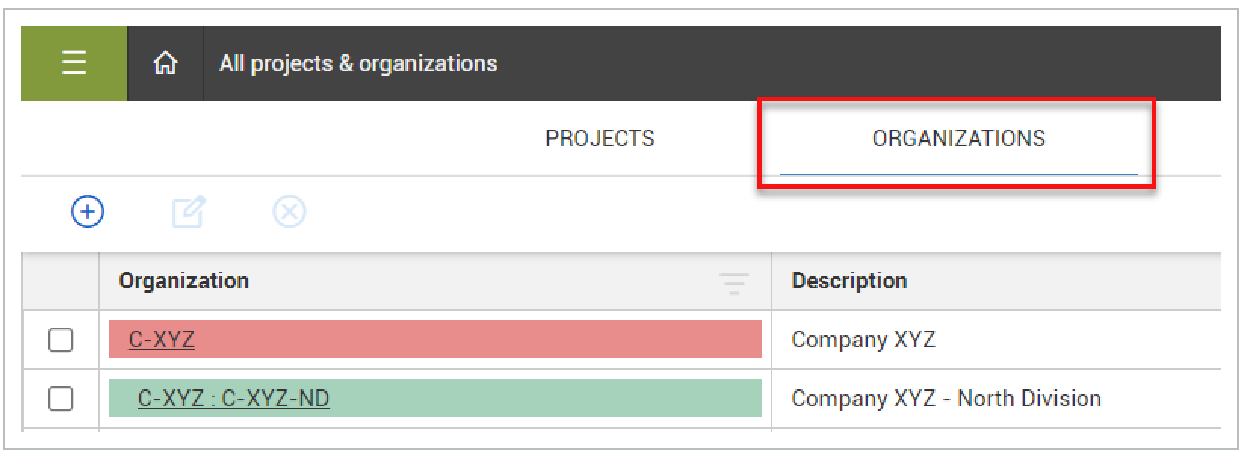
The Unique Budget Code setting is required in order to use Weekly Time Sheet. Follow the steps below to enable unique budget codes.

# Enable Unique Budget Codes

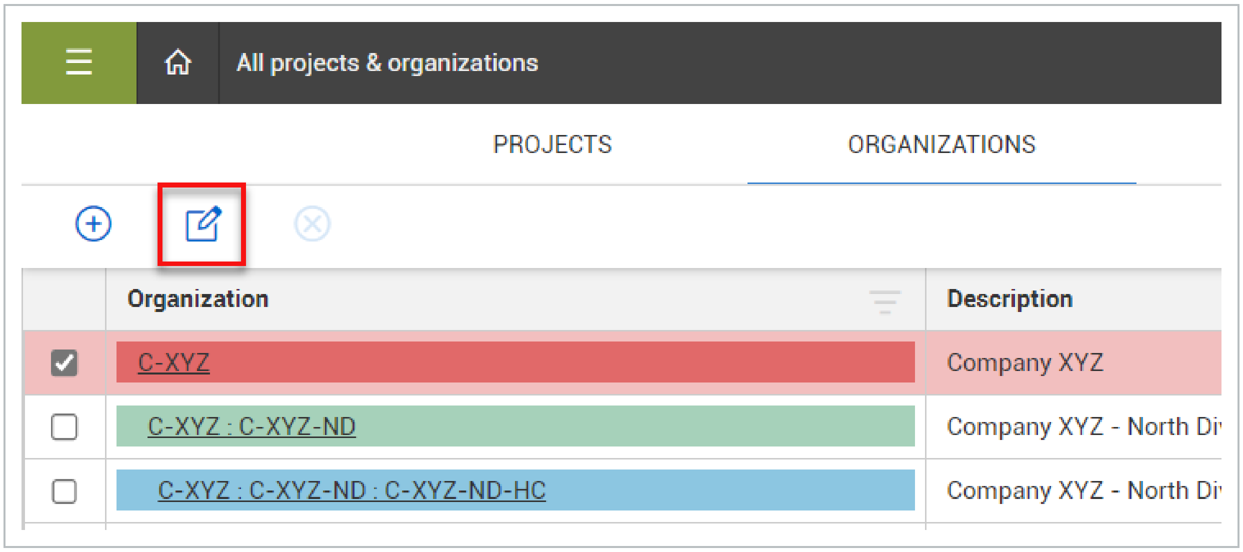
1. Open the Main menu and select **All Projects & Organizations**.



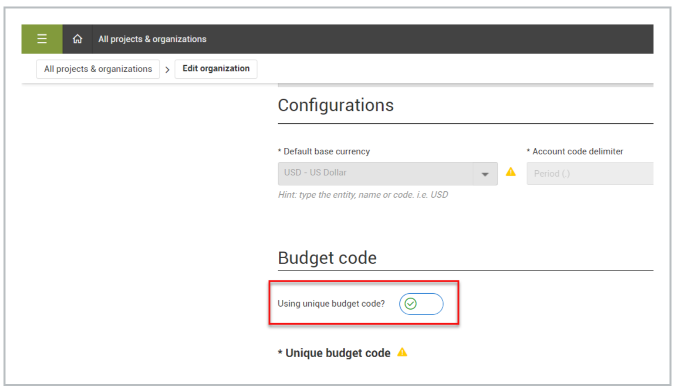

2. Open the **Organizations** tab.




3. Select the root organization and click the **Edit** icon.




4. Under the Budget Code section, click the toggle to enable unique budget codes.



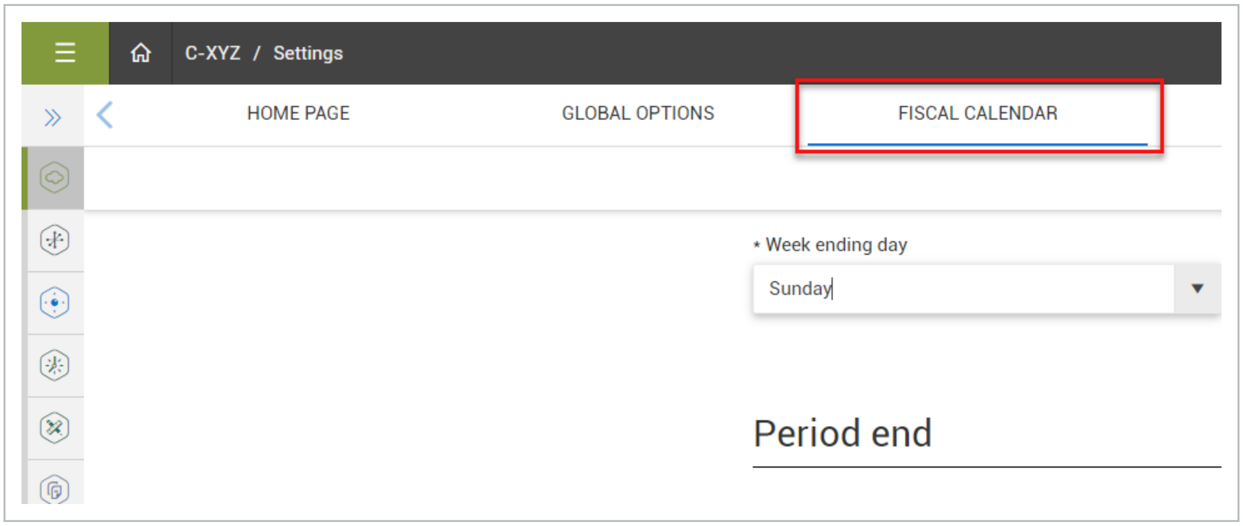

5. Click **Save**.

## 3.2.1.2 Organization Settings

Confirm that your fiscal period settings are appropriate for Weekly Time Sheet.

## Confirm Fiscal Period Settings

1. From the Organization menu, select **Fiscal calendar**.

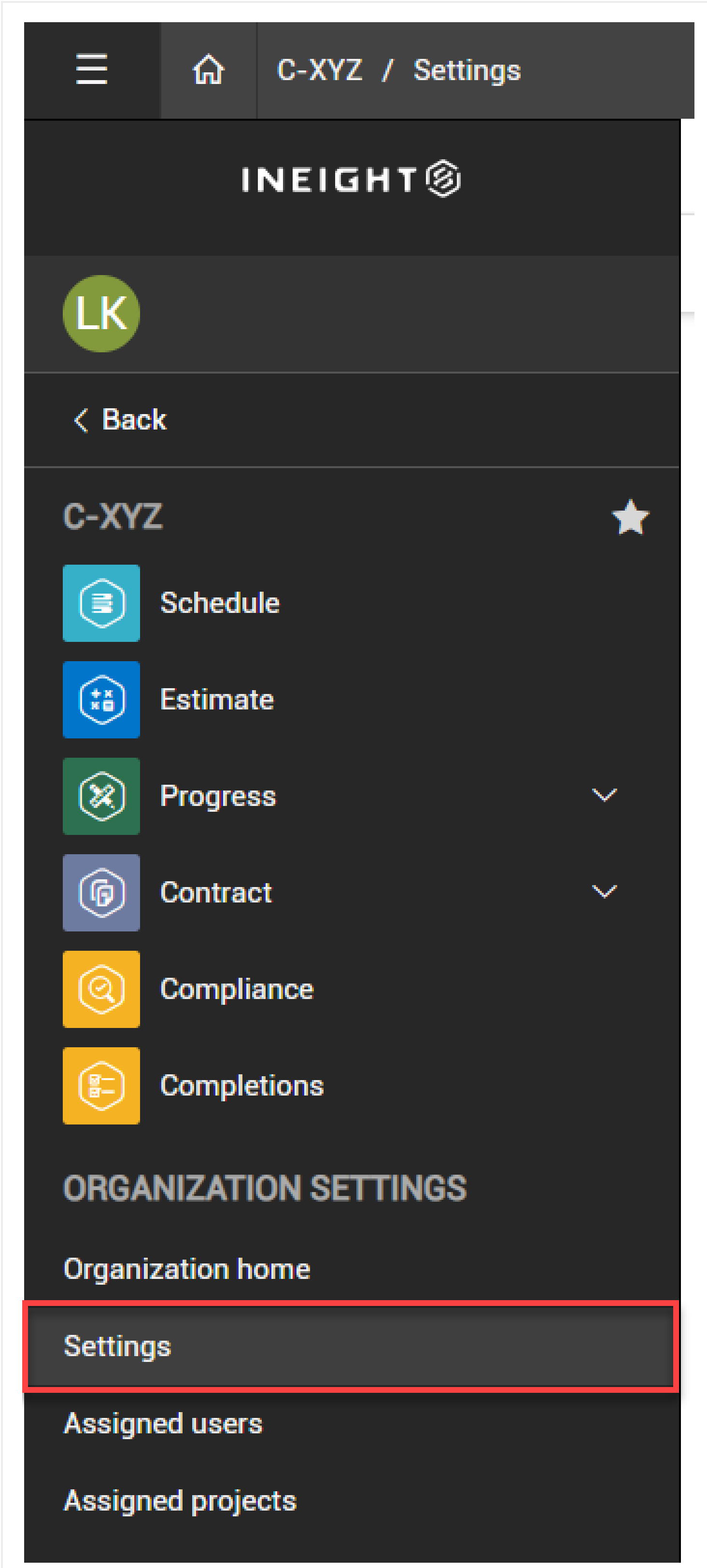



2. Set the **Week ending day** to Saturday or Sunday.
    - Setting this field to a weekday might impact performance.
3. Click **Save**.

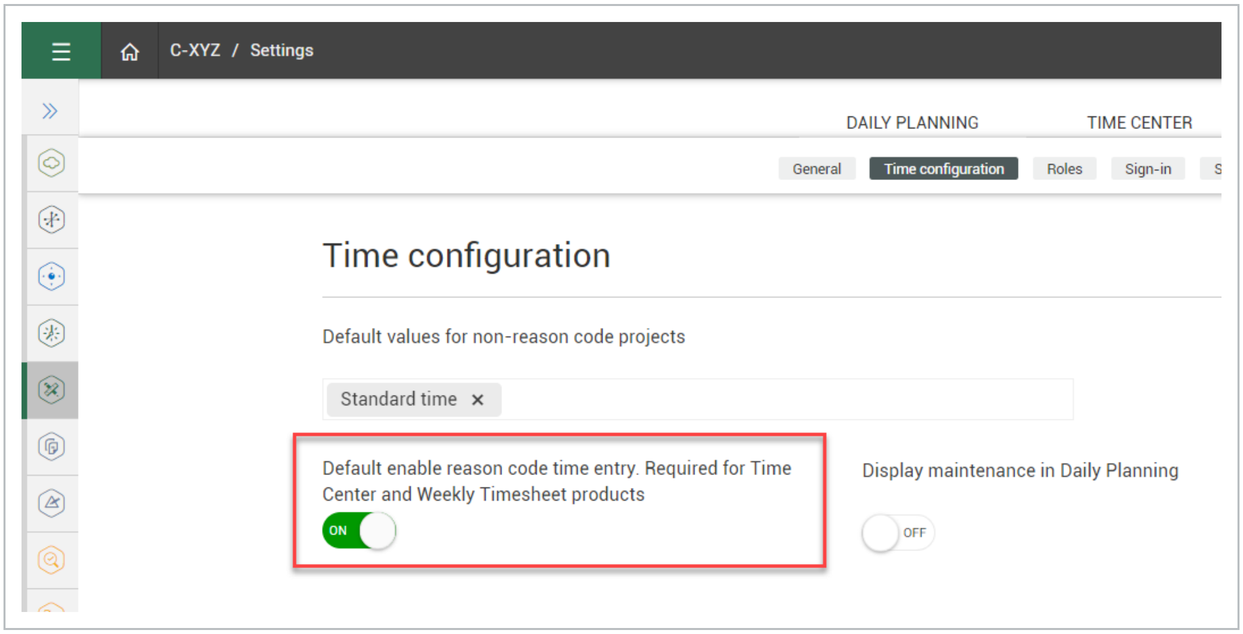
Confirm that organization reason codes are set up correctly.

## Confirm Reason Code Settings

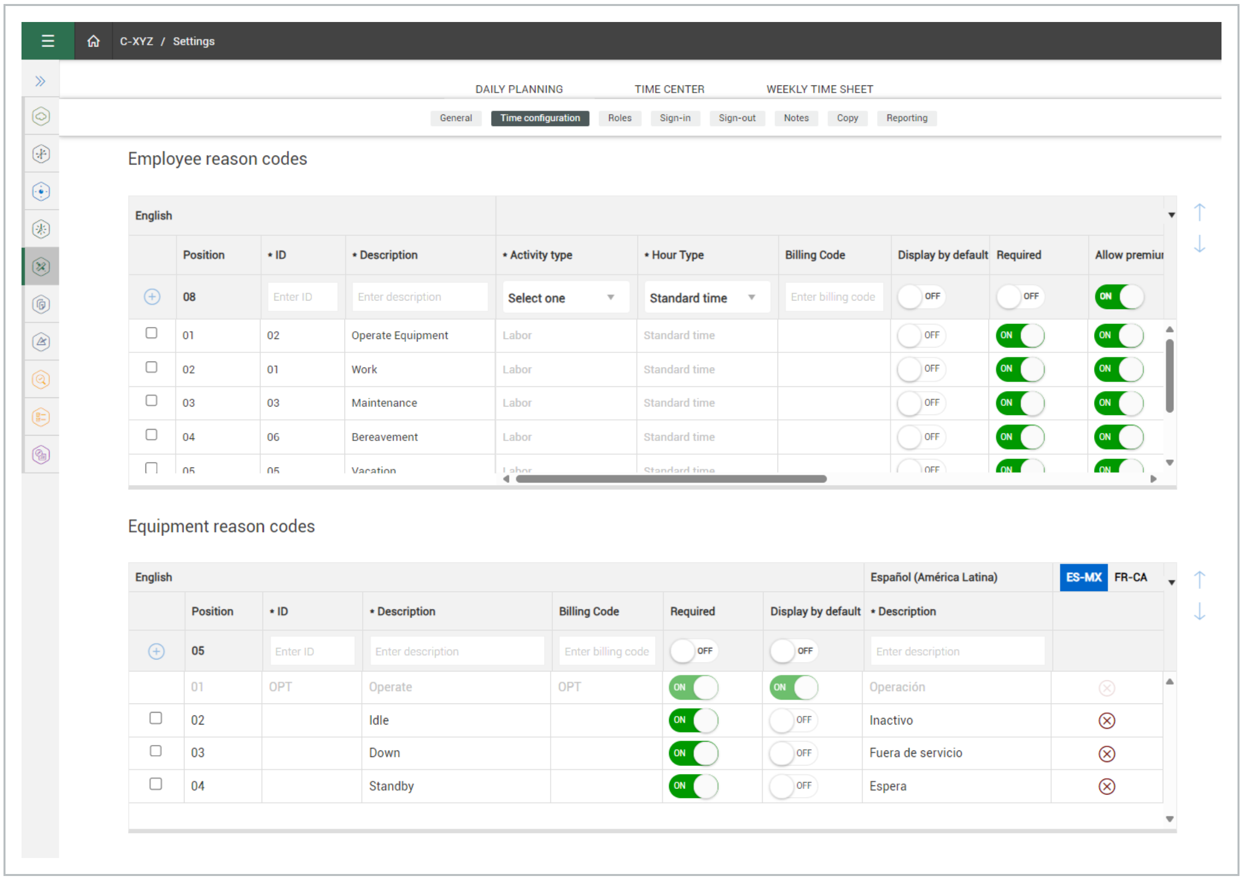
1. From the Organization menu, select **Settings**.


C-XYZ / Settings
INEIGHT
LK
Back
C-XYZ
Schedule
Estimate
Progress
Contract
Compliance
Completions
ORGANIZATION SETTINGS
Organization home
Settings
Assigned users
Assigned projects

2. Open Progress settings.
3. Under the Time configuration section, click the toggle to enable default reason code time entry.




4. Confirm that IDs are set up in each of the following tables:
   - Employee reason codes
   - Equipment reason codes

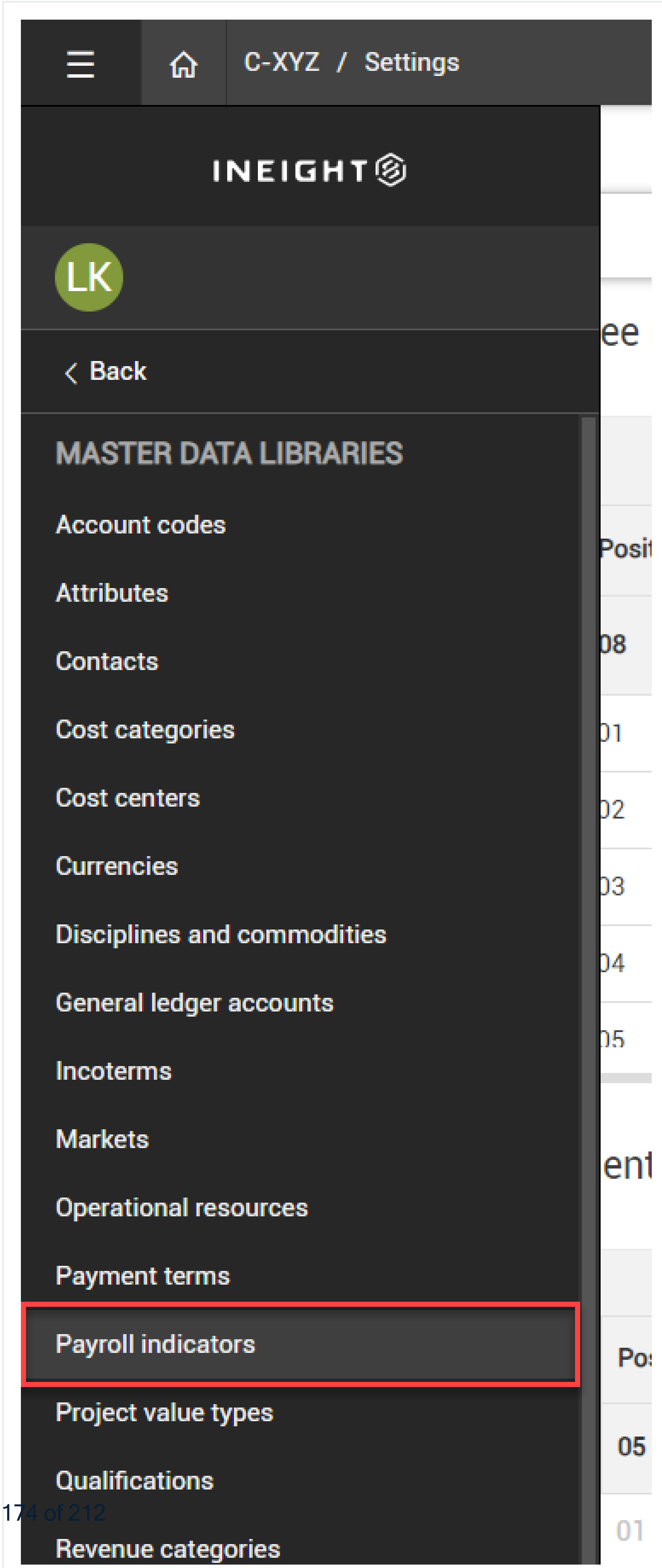


5. Click **Save**.

Confirm that employee premiums and allowances are set up correctly.

## Confirm Premiums and Allowances

1. From the Main menu, select **Master data libraries**.
2. Select **Payroll indicators**.


C-XYZ / Settings
INEIGHT
LK
Back
MASTER DATA LIBRARIES
Account codes
Attributes
Contacts
Cost categories
Cost centers
Currencies
Disciplines and commodities
General ledger accounts
Incoterms
Markets
Operational resources
Payment terms
Payroll indicators
Project value types
Qualifications
Revenue categories

3. Open the **Allowances** tab. Confirm that appropriate allowances are set up.
4. Open the **Employee Premiums** tab. Confirm that appropriate premiums are set up.

## 3.2.2 Employee and User Setup

### 3.2.2.3 Roles

In Weekly Time Sheet, time cards can be entered by a supervisor, a team leader, or directly by employees. Depending on the needs of your organization, you may modify user roles to include permissions for Weekly Time Sheet or create custom roles to ensure appropriate access.

The following permissions are available for Weekly Time Sheet:

Weekly Time Sheet Permissions

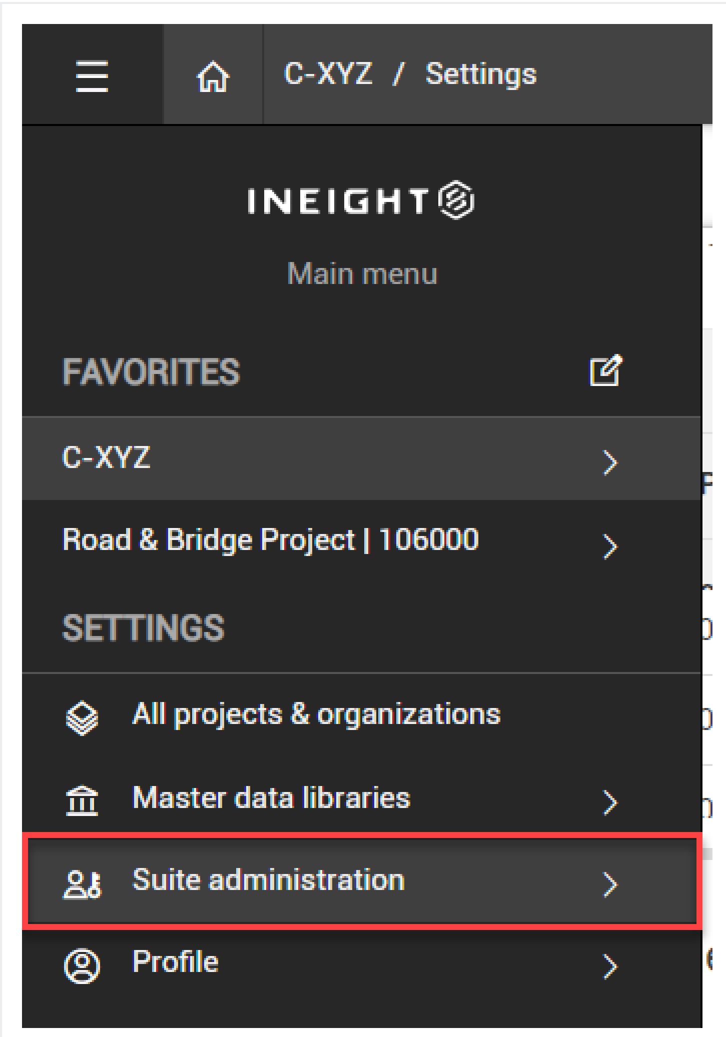
| Title | | Description |
|---|---|---|
| 1 | View my weekly time sheet | Allows the user to access the Weekly Time Sheet module and view their personal time sheet. |
| 2 | Add my weekly time sheet | User can add a new time sheet. |
| 3 | Edit my weekly time sheet | User can edit a saved time sheet. |
| 4 | Delete my weekly time sheet | User can delete a saved time sheet. |
| 5 | View team time sheets | User can view time sheets for other employees assigned to their team in Weekly Time Sheet. |
| 6 | Add team time sheets | User can add a new time sheet for a team member. |
| 7 | Edit team time sheets | User can edit a team member’s saved time sheet. |
| 8 | Delete team time sheets | User can delete a team member’s saved time sheet. |
| 9 | Approve team time sheets for others | User can approve time sheets for other employees assigned to their team in Weekly Time Sheet. |

**Modify Roles**

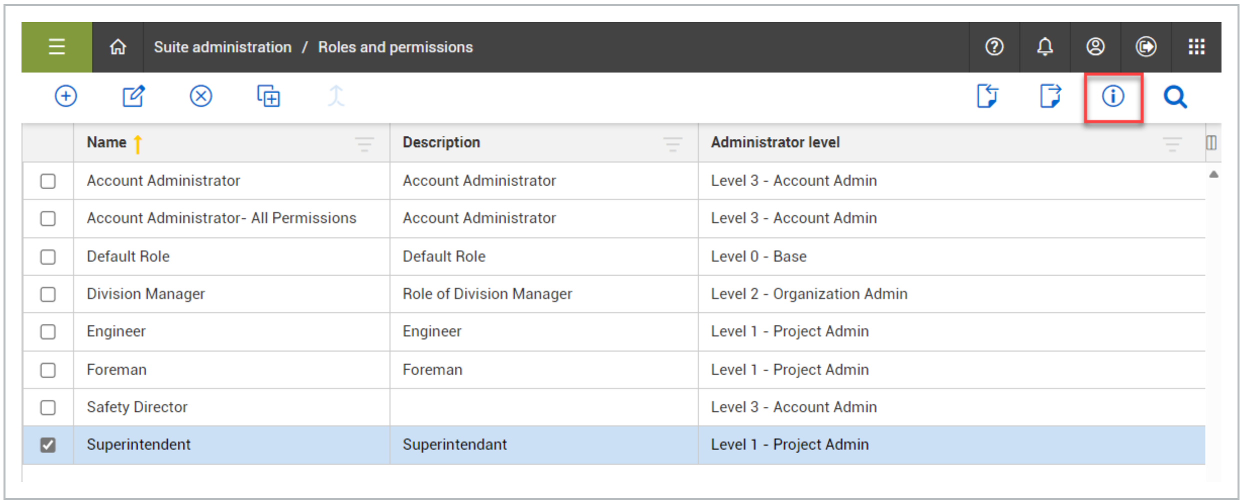
Follow these steps to confirm that a role has appropriate permissions for Weekly Time Sheet.

## Review Roles

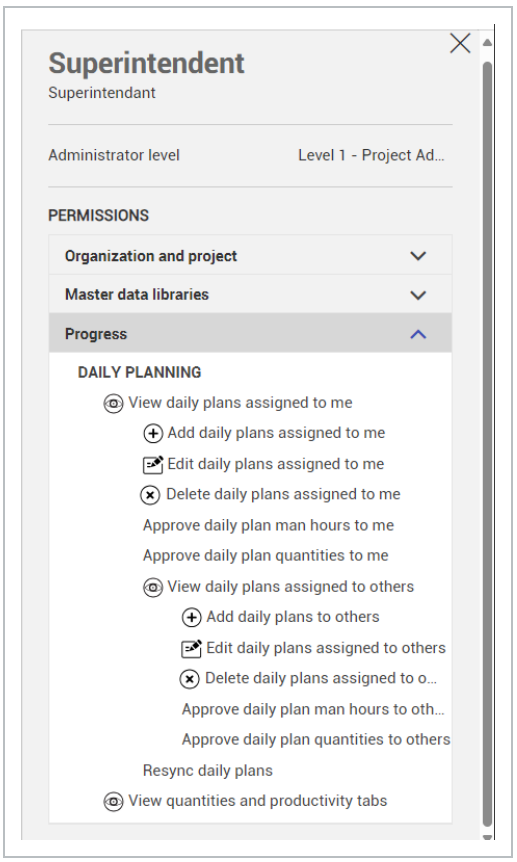
1. From the Main menu, select **Suite administration**.



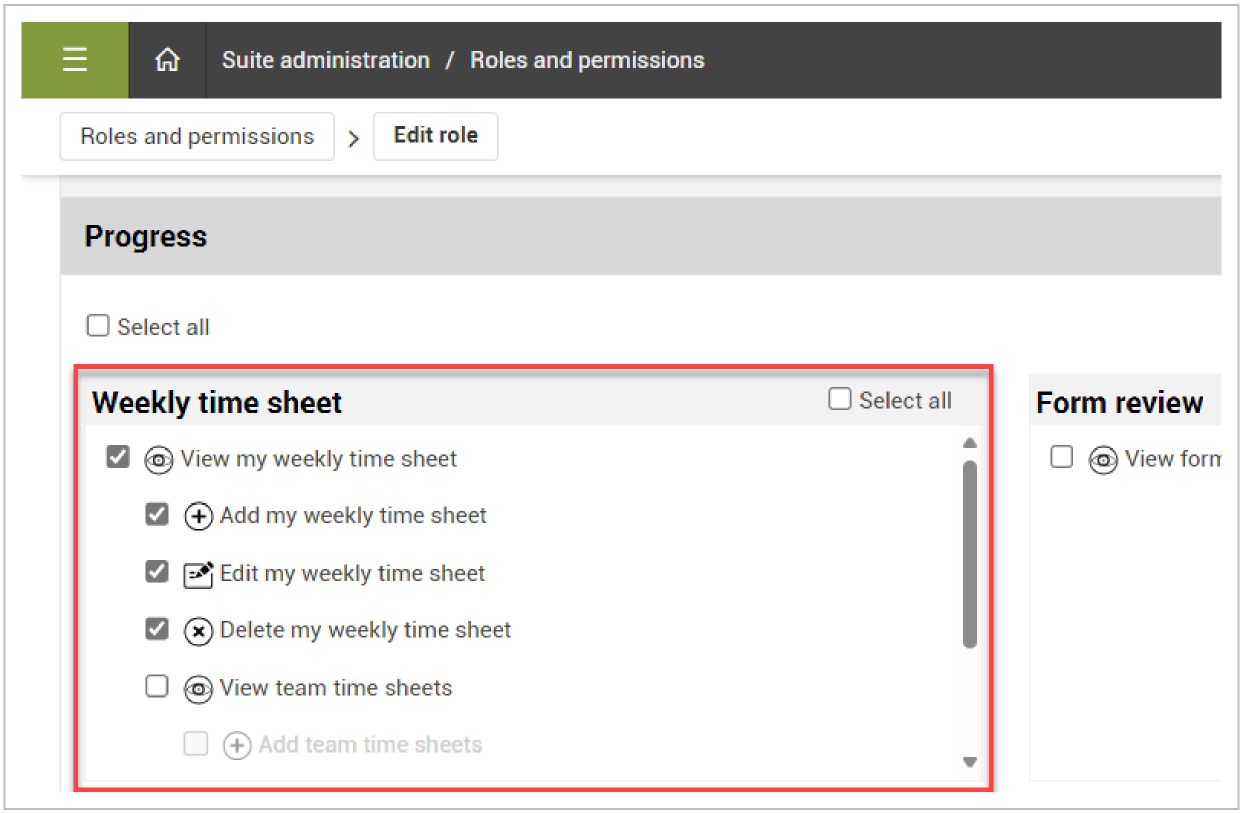

2. Select **Roles and permissions**.
3. Select a role and click the **Details** icon.




4. Under **Permissions > Progress**, review the current permissions for Weekly Time Sheet.




5. If the role does not include the appropriate permissions, click the **Edit** icon.
6. Under **Progress > Weekly time sheet**, select the checkboxes to assign permissions.




7. Click **Save**.

> You can assign an additional role to the user instead of changing permissions for their current role, if necessary.

**Create a Custom Role**

For users who do not require other permissions in the Suite, custom roles can be created to grant access to Weekly Time Sheet. For example, a role can be created for team leaders who need to approve team time sheets, but who do not have any other supervisory permissions for your organization. Similarly, a custom role can be created for employees who need to access Weekly Time Sheet to manage their personal time cards, but who do not require access to other areas of the InEight Suite.

Visit Roles and Permissions to learn how to create a custom role.

The following table details the permissions required for accessing Weekly Time Sheet, managing personal time sheets, and managing team time sheets. You can access these permissions under Suite administration > Roles and permissions.

### Accessing Weekly Time Sheet

| Weekly Time Sheet Function | Section | Group | Permissions |
|---|---|---|---|
| **Access Weekly Time Sheet (Administrator Level 0 - Base)** | Master data libraries | Operational employees | View employees |
| | Progress | Weekly time sheet | View my weekly time sheet |
| **Manage personal time sheets (Administrator Level 1 - Project Admin)** | Progress | Weekly time sheet | Add my weekly time sheet<br>Edit my weekly time sheet<br>Delete my weekly time sheet |
| **Manage team time sheets (Administrator Level 1 - Project Admin)** | Progress | Weekly time sheet | View team time sheets<br>Add team time sheets<br>Edit team time sheets<br>Delete team time sheets<br>Approve team time sheets for others |

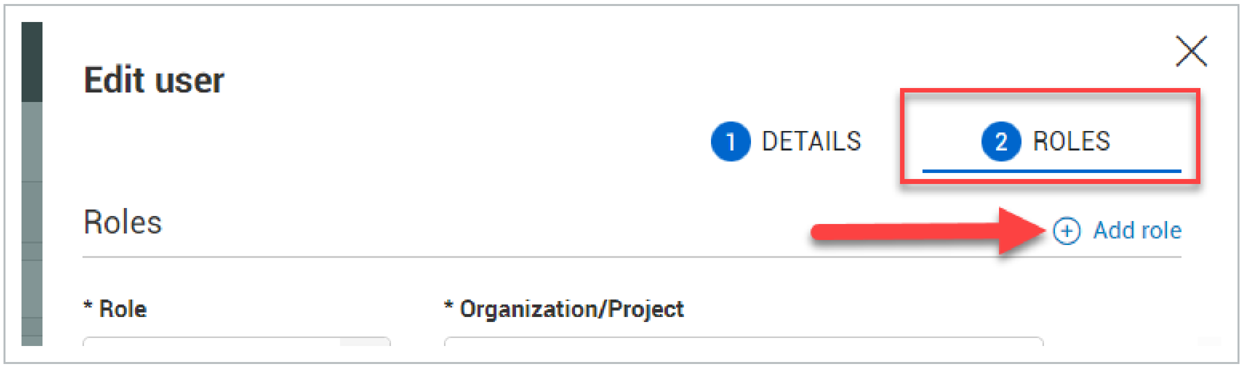
> The minimum permissions for Weekly Time Sheet users are "View employees" and "View my weekly time sheet."

## 3.2.2.4 Users

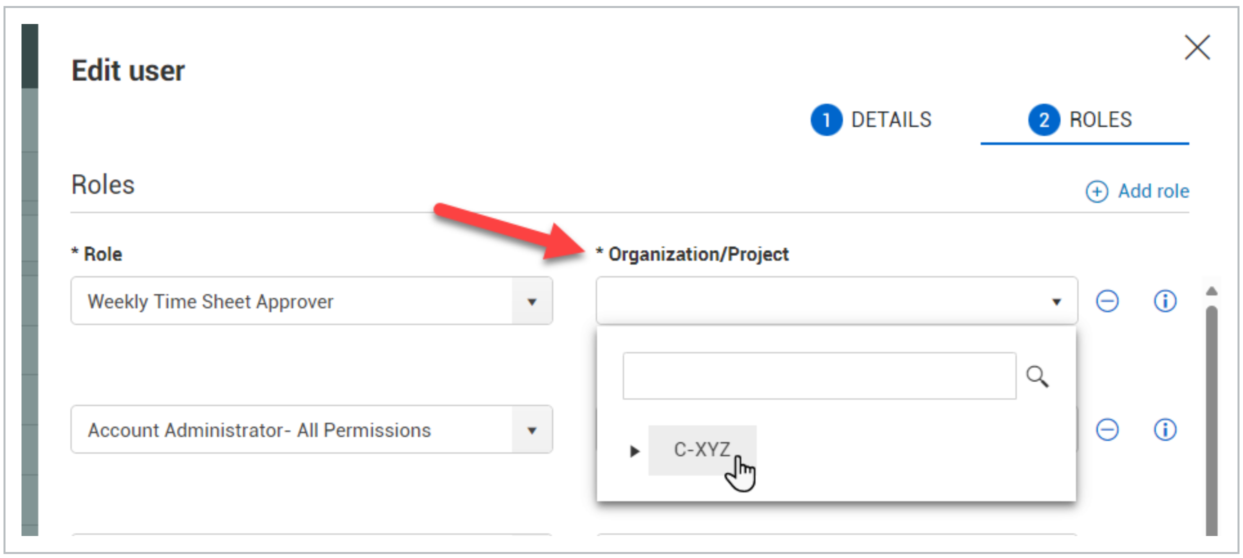
With roles set up in Suite administration, you can grant users appropriate access to Weekly Time Sheet.

### Add a User Role

1. Open **Suite administration > User management**.
2. If the individual does not already have a user record, click **Add users** and enter user details. If the individual already has a user record, select the user and click the **Edit** icon.
3. Switch to the **Roles** tab and click **Add role**.




4. Open the **Role** drop-down list and select an appropriate role.
5. Open the **Organization/Project** drop-down list and select the organization.




- Weekly Time Sheet is an organization-level module. Make sure the role is assigned at the organization level.

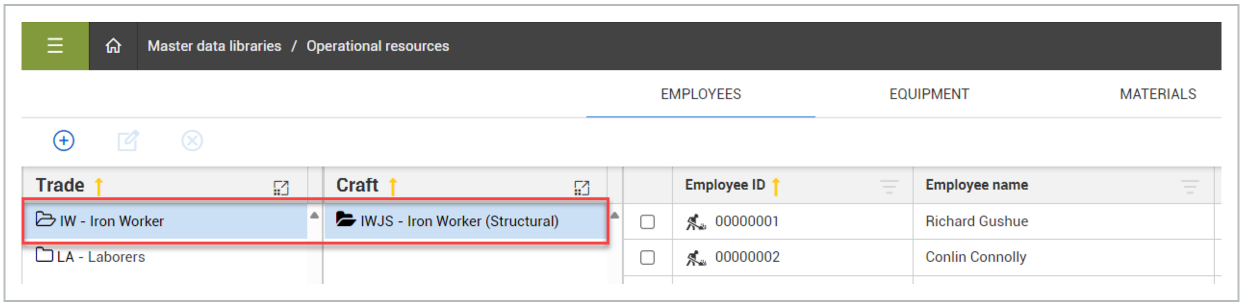
6. Click **Save**.

## 3.2.2.5 Employees

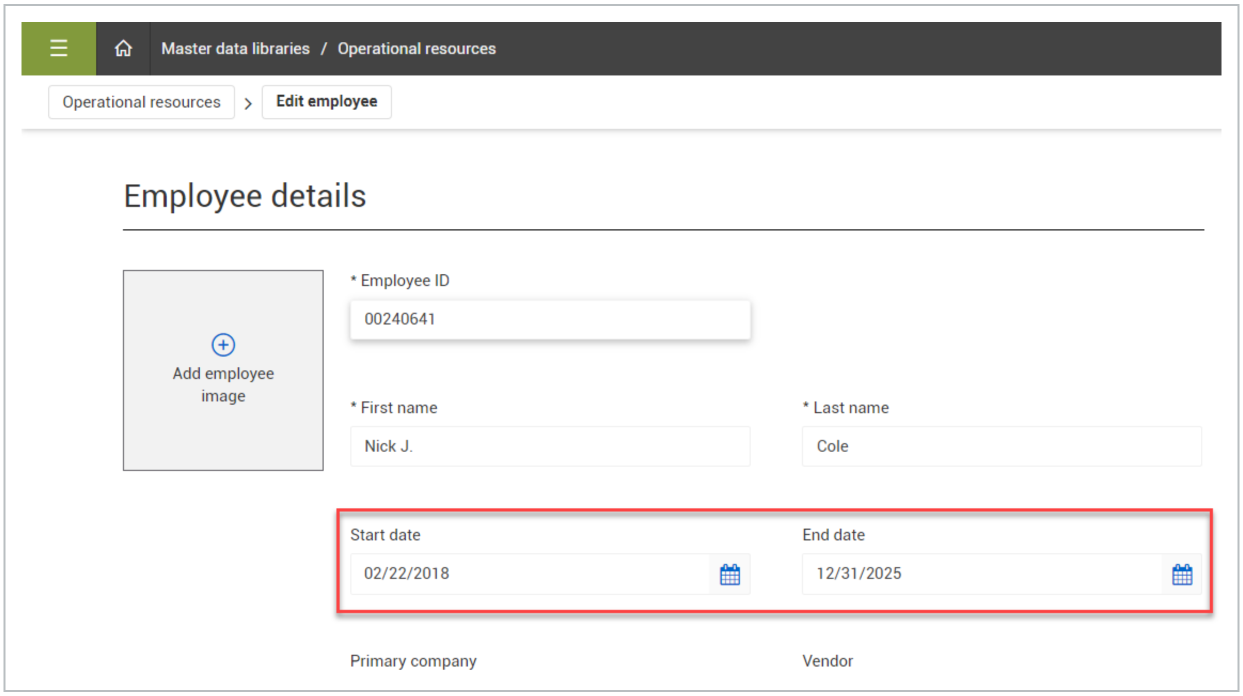
Confirm that team members have an active employee record and are available for selection in Weekly Time Sheet.

# Review Employee Record

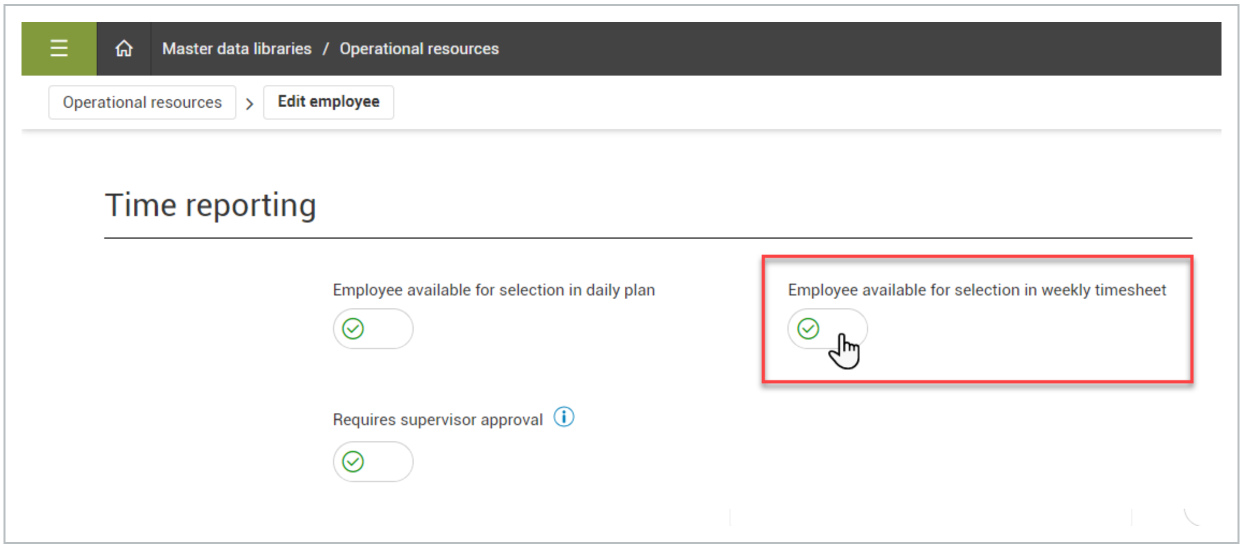
1. Open **Master data libraries > Operational resources**.
2. On the **Employees** tab, select the employee's trade and craft.




3. Select the employee and click the **Edit** icon.
4. Under the Employee details section, confirm that the employee has a current **Start date** and **End date**.




5. Under the Time reporting section, click the toggle to enable **Employee available for selection in weekly timesheet**.




6. Click **Save**.

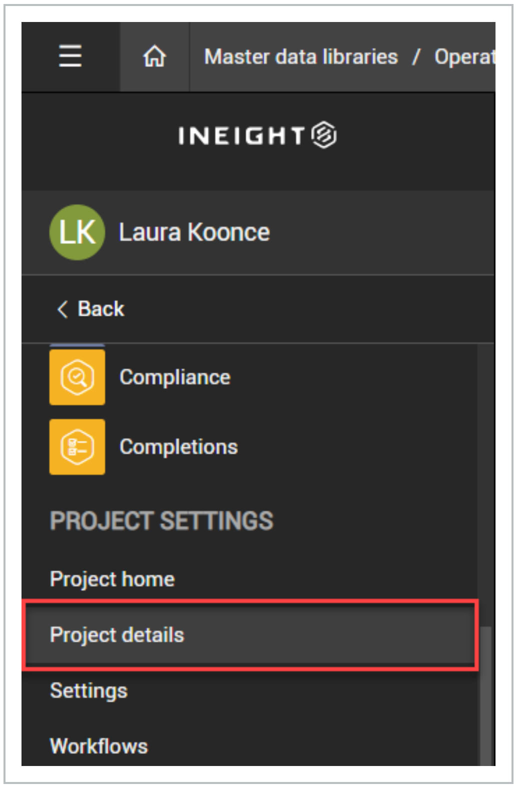
## 3.2.3 Project Setup

### 3.2.3.6 Project Details

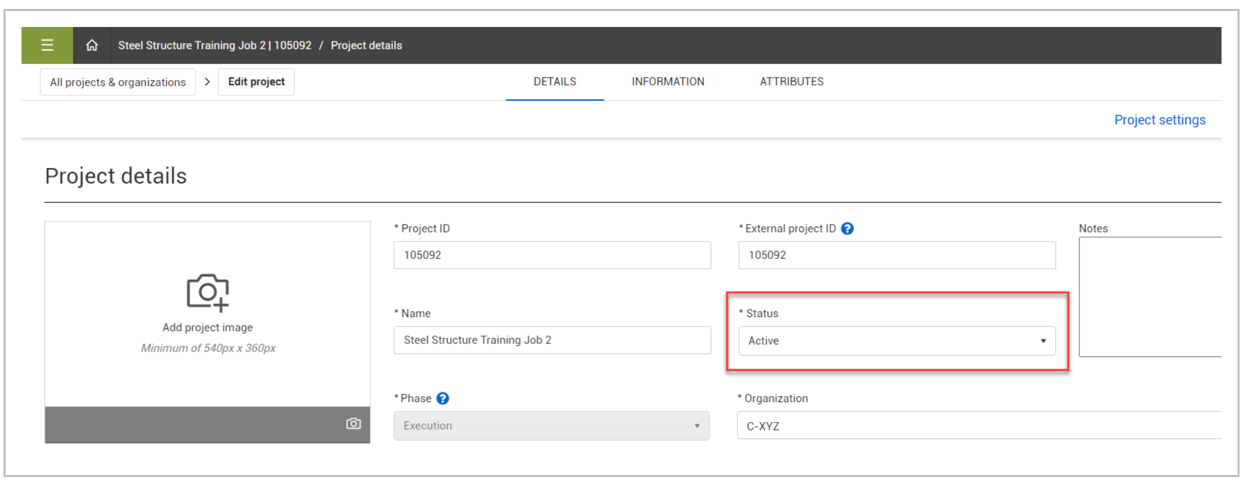
Confirm the project details.

# Confirm Project Details

1. From the Project menu, select **Project details**.




2. Under the Project details section, set the **Status** to Active.




3. Under the Project dates section, select a **Project start date** and **Project end date**.

4. Click **Save**.

### 3.2.3.7 Assign Employees

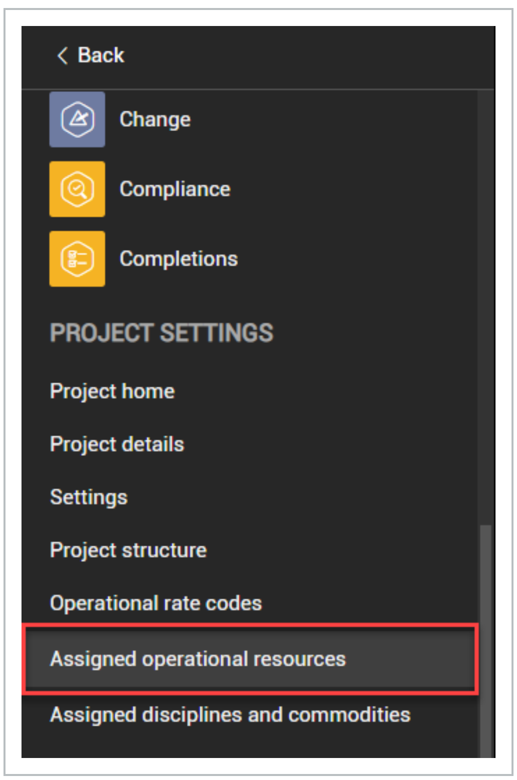
In addition to setting up users and employees at the organization level, employees must also be assigned to one or more projects in order to be available for selection in Weekly Time Sheet.

Before assigning employees to a project, confirm that you have completed the following steps:

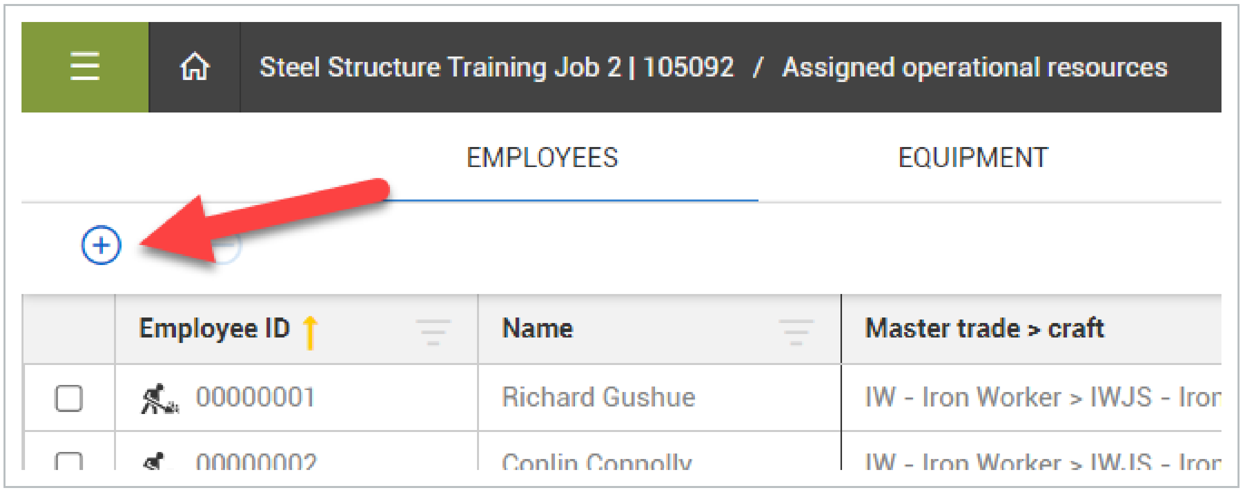
- The employee has an active record created in Master Data Libraries, and the setting **Employee available for selection in weekly timesheet** has been enabled.
- If the employee needs to manage their own time cards in Weekly Time Sheet, confirm that they have a user record created in Suite Administration with the appropriate role(s).

## Assign Employees to Project

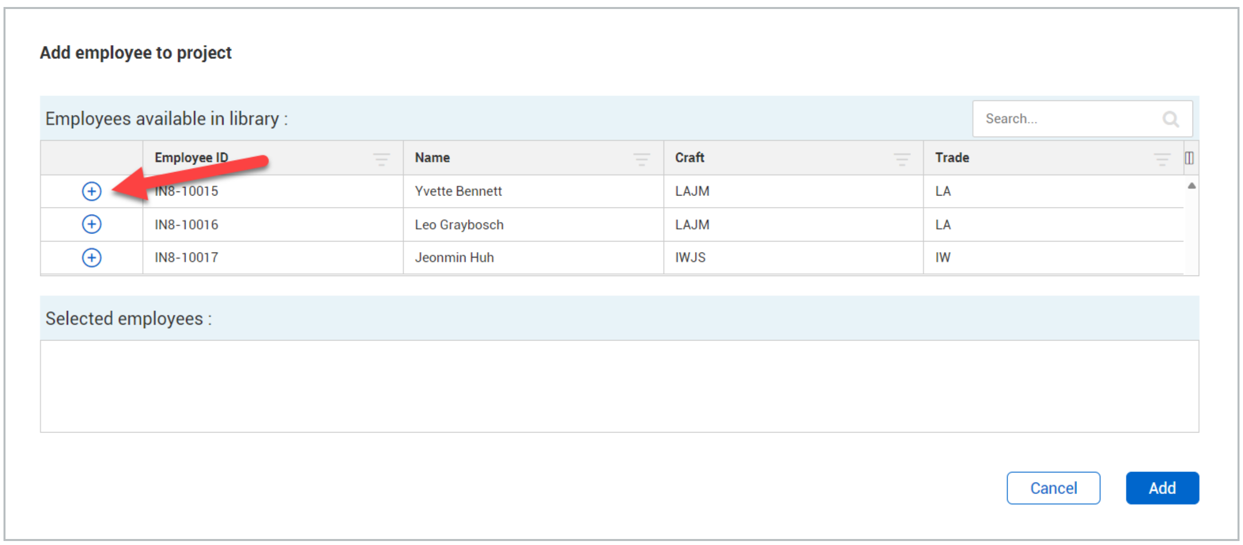
1. From the Project menu, select **Assigned operational resources**.



2. Click the **Add** icon.




3. Click the **Add** icon to add employees to the list of selected employees.

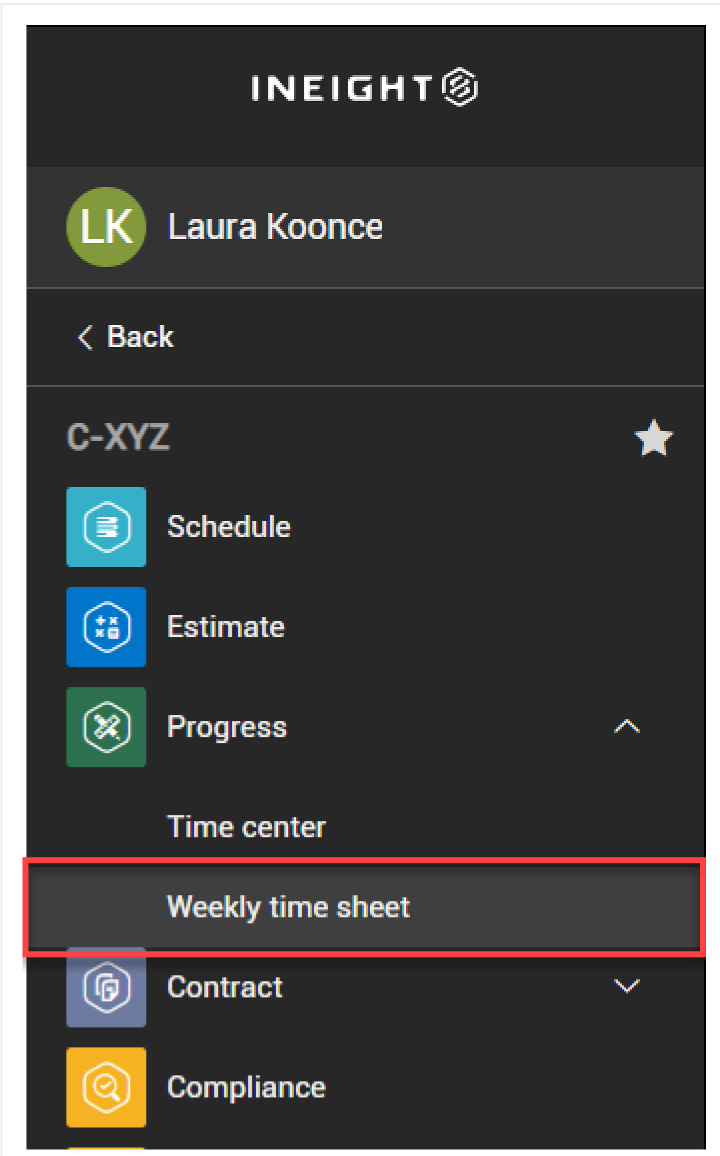



4. Click **Add**.

# 3.3 WEEKLY TIME SHEET NAVIGATION

## 3.3.1 Open Weekly Time Sheet

To open Weekly Time Sheet, select your organization from the Main Menu. Under **Progress**, select **Weekly time sheet**.

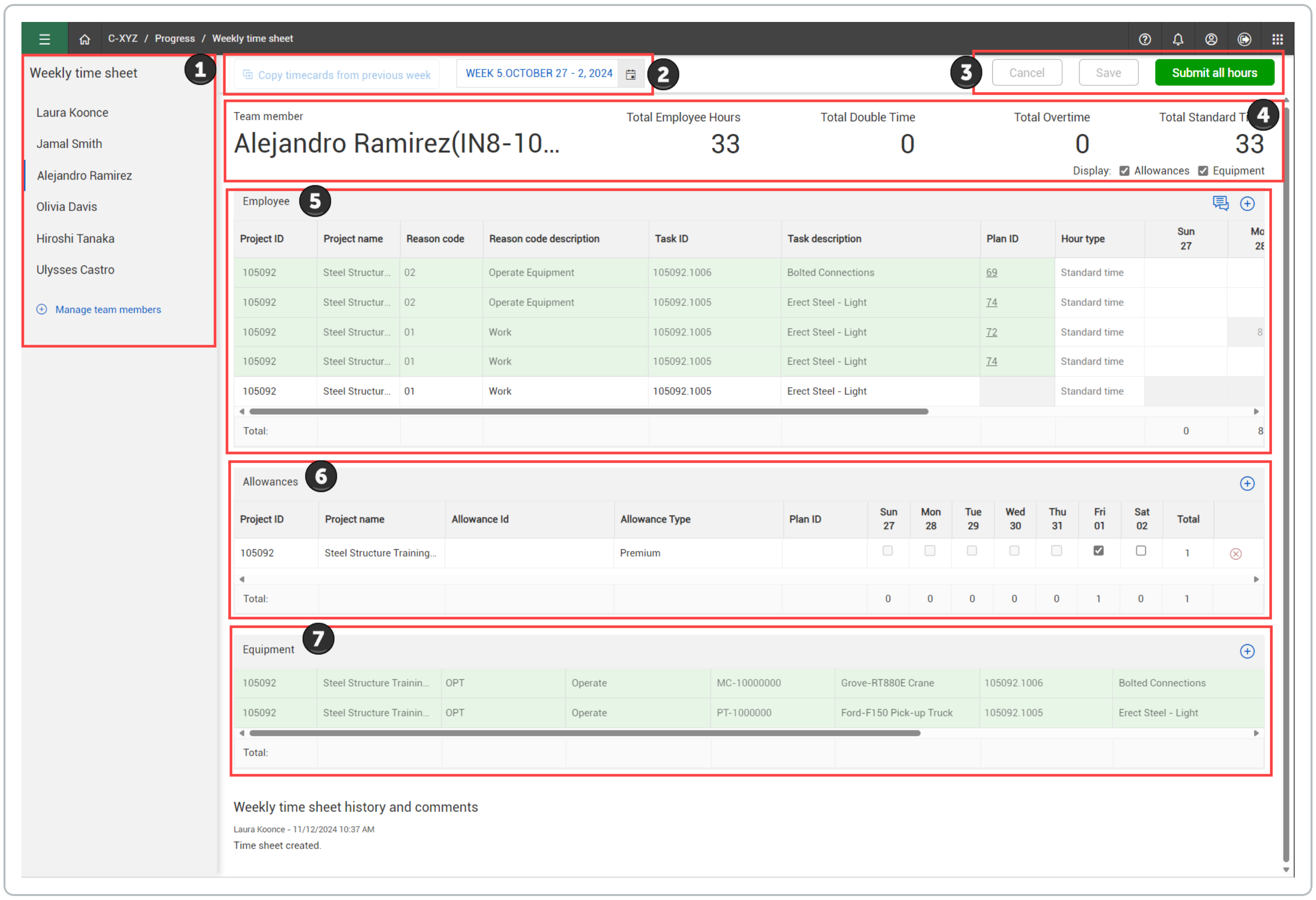


## 3.3.2 Weekly Time Sheet Register

The Weekly Time Sheet register is the main page of Weekly Time Sheet. From the register, you can manage team members, review and modify time cards, and submit hours.

Weekly Time Sheet Register

| Title | | Description |
|---|---|---|
| 1 | Side panel | Access your personal time sheet or team member time sheets. Manage team members. |
| 2 | Date filter | Select a week range to view time cards. Copy time cards from the previous week. |
| 3 | Toolbar | Save or cancel changes. Submit hours for all team members. |
| 4 | Time sheet summary | View name and ID for current employee. See total hours, double time, overtime, and standard time for the selected week. |
| 5 | Employee grid | Add, edit, or delete time cards for the current week. Access links to associated daily plans. View notes associated with employee time cards. |
| 6 | Allowances grid | Add, edit, or delete assigned allowances. Access links to associated daily plans. |
| 7 | Equipment grid | Add, edit, or delete hours for equipment operation. |


C-XYZ / Progress / Weekly time sheet
Weekly time sheet
1
Laura Koonce
Jamal Smith
Alejandro Ramirez
Olivia Davis
Hiroshi Tanaka
Ulysses Castro
Manage team members
Copy timecards from previous week
WEEK 5.OCTOBER 27 - 2, 2024
2
3
Cancel
Save
Submit all hours
4
Team member
Alejandro Ramirez(IN8-10...
Total Employee Hours
33
Total Double Time
0
Total Overtime
0
Total Standard T
33
Display: Allowances Equipment
Employee
5
Project ID
Project name
Reason code
Reason code description
Task ID
Task description
Plan ID
Hour type
Sun 27
105092
Steel Structur...
02
Operate Equipment
105092.1006
Bolted Connections
69
Standard time
105092.1005
Erect Steel - Light
74
72
01
Work
Total:
Allowances
6
Allowance Id
Allowance Type
Mon 28
Tue 29
Wed 30
Thu 31
Fri 01
Sat 02
Total
Steel Structure Training...
Premium
Equipment
7
Steel Structure Trainin...
OPT
Operate
MC-10000000
Grove-RT880E Crane
PT-1000000
Ford-F150 Pick-up Truck
Weekly time sheet history and comments
Laura Koonce - 11/12/2024 10:37 AM
Time sheet created.

# 3.4 MANAGE TEAM MEMBERS

If you are a supervisor or team leader, you can track, review, and submit hours for your team through Weekly Time Sheet.

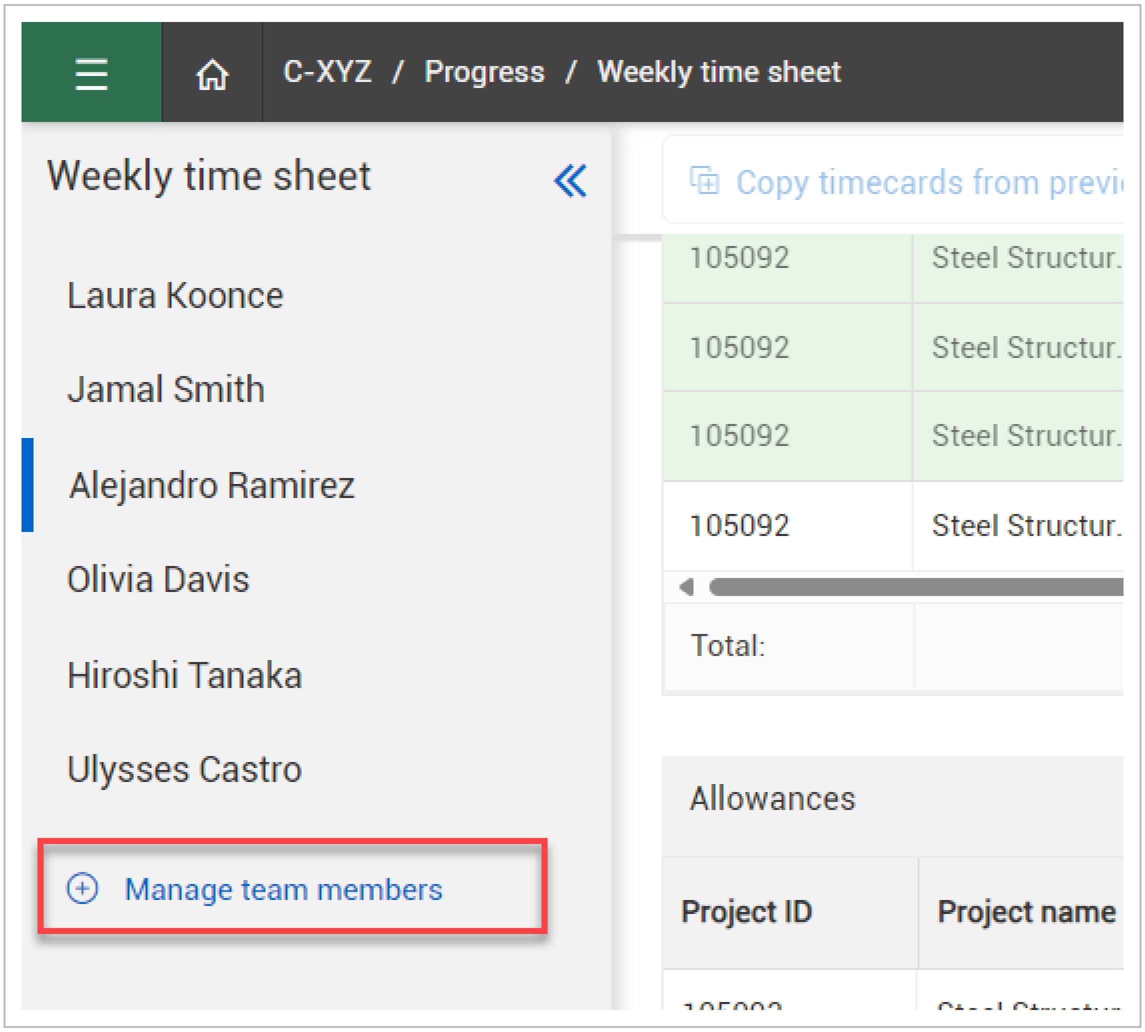
> As the supervisor or team leader, you must be added to a project as an **assigned operational resource** in order to manage team members on that project.

## 3.4.1 Manage Team Members

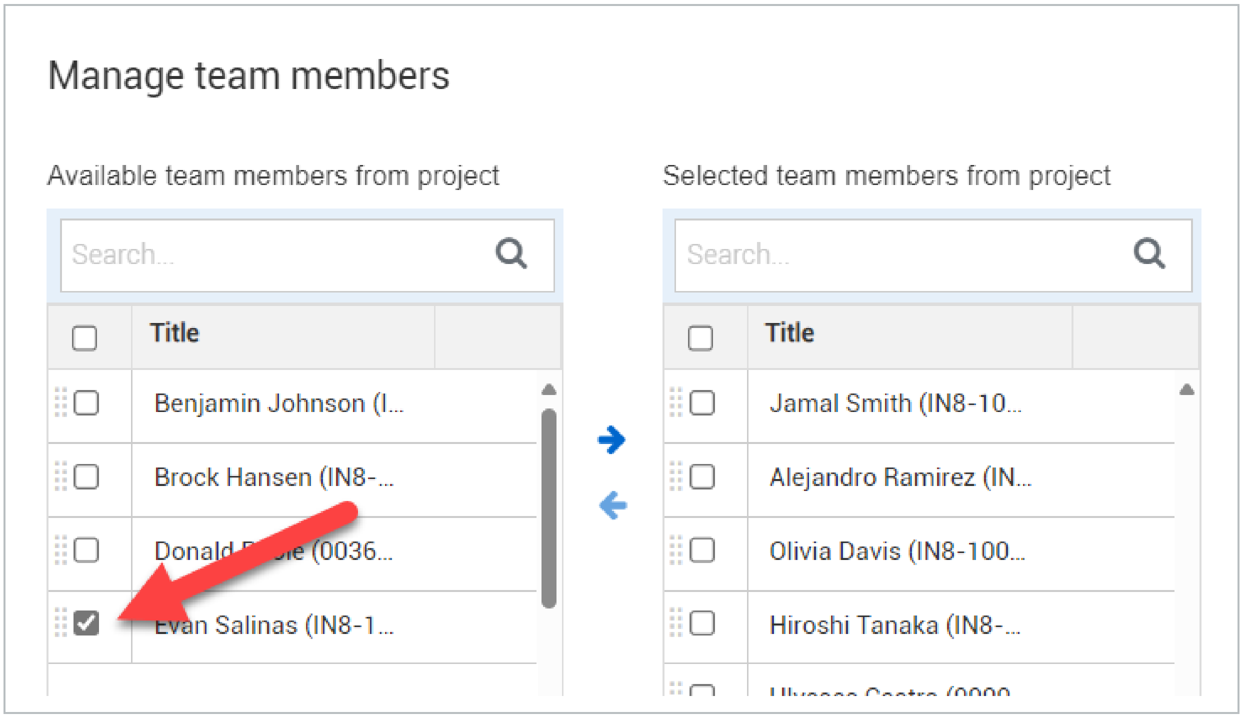
The following steps walk you through how to add, reorder, and remove team members in Weekly Time Sheet.

# Manage Team Members

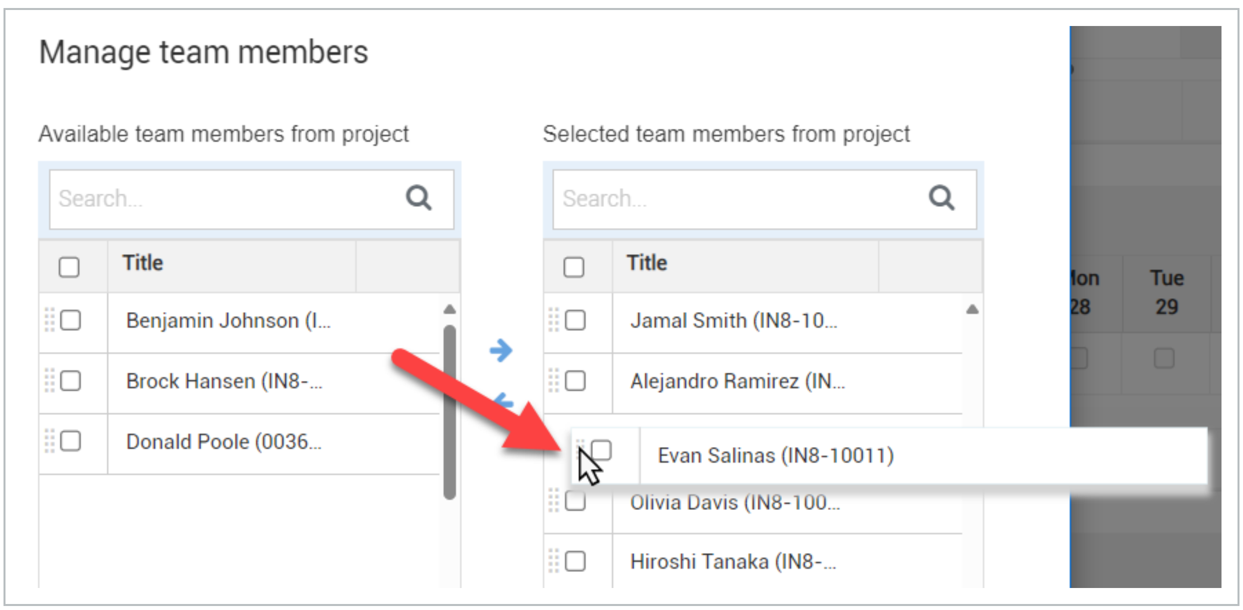
1. From the left panel, select **Manage team members**.



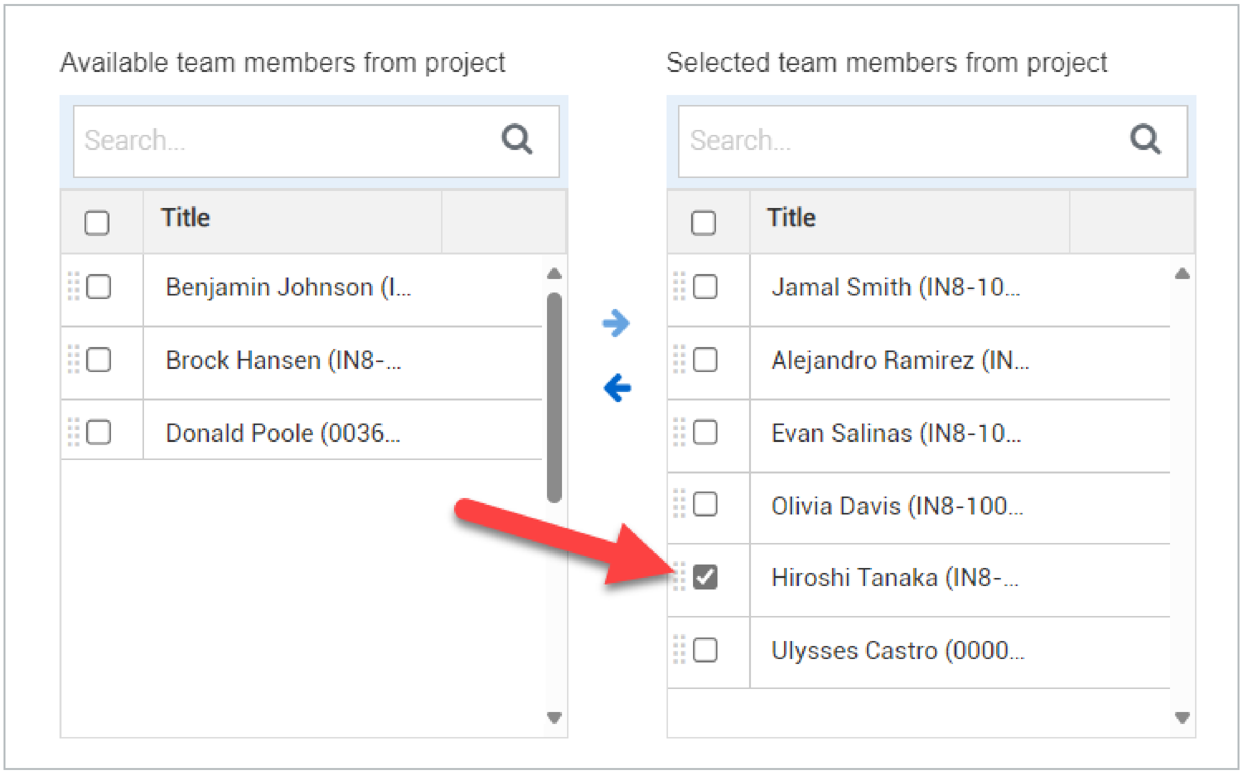

2. Under Available team members from project, select the checkbox for the team member(s) you want to add.



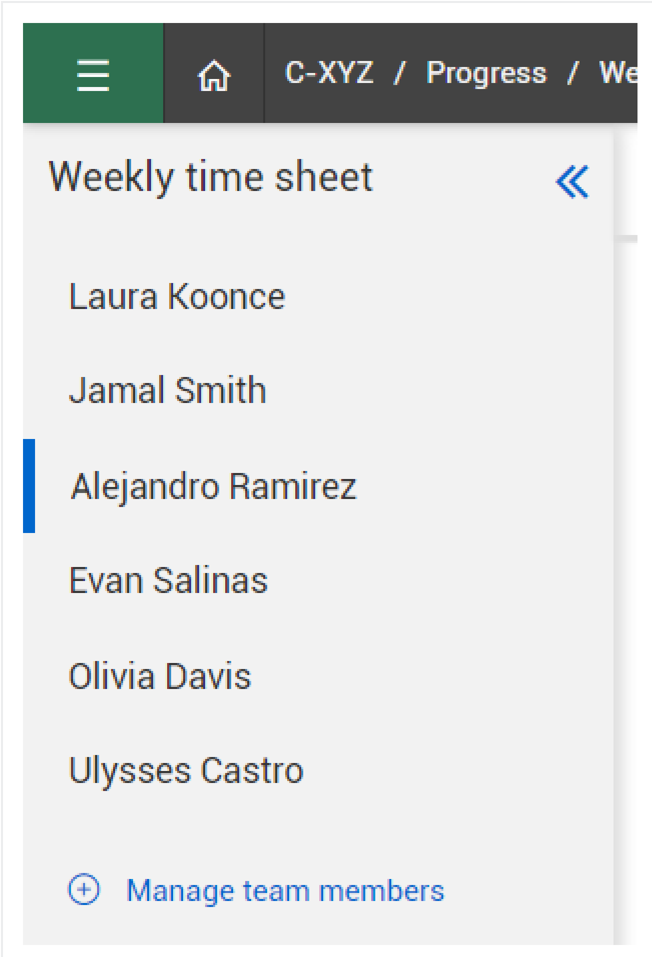

3. Click the **right arrow** to add the employees to the list of selected team members.
4. To change the order of the employee list, drag and drop the employee row to a new position.



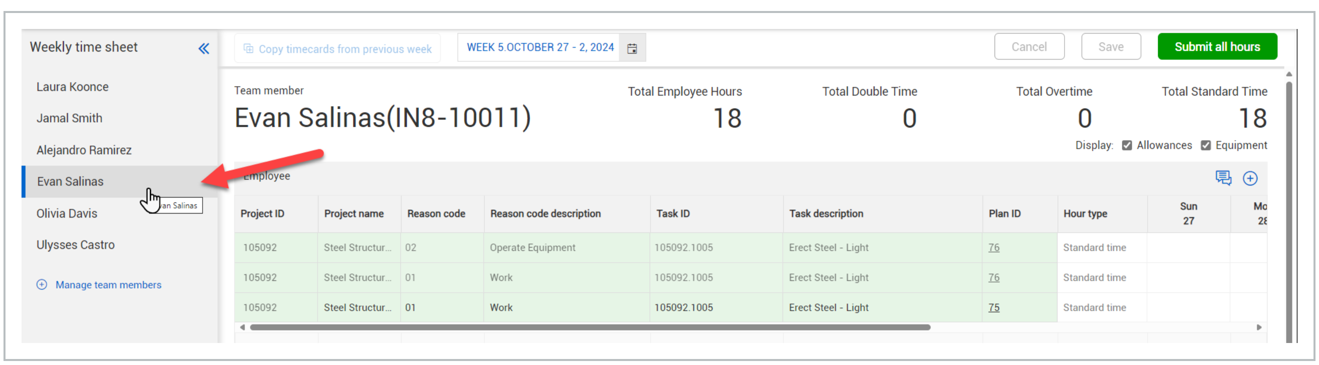

5. To remove an employee from Weekly Time Sheet, select the employee from the list of selected team members and click the **left arrow**.




6. When you're finished, click **Save**.
7. You now see the updated list of team members in the left panel.




After you add employees to your list of team members, you can manage their time sheet by selecting the employee name from the left panel.



## 3.4.2 Troubleshooting

If the team member you want to add does not appear in the list of available team members, check the following details:

- An employee record must be created in **Master Data Libraries > Operational resources**.
- The employee record must include valid **Start and End dates** which do not conflict with the project dates.
- The employee record must have the setting **Employee available for selection in weekly timesheet** enabled.
- The employee must be assigned to a project under **Project Settings > Assigned operational resources**.
- You, or the user who is managing team members, must be assigned to the project under **Project Settings > Assigned operational resources**.

# 3.5 MANAGE TIME CARDS

A time card is a specific time entry associated with a single project and reason code. A time sheet comprises the weekly time card entries for one employee.

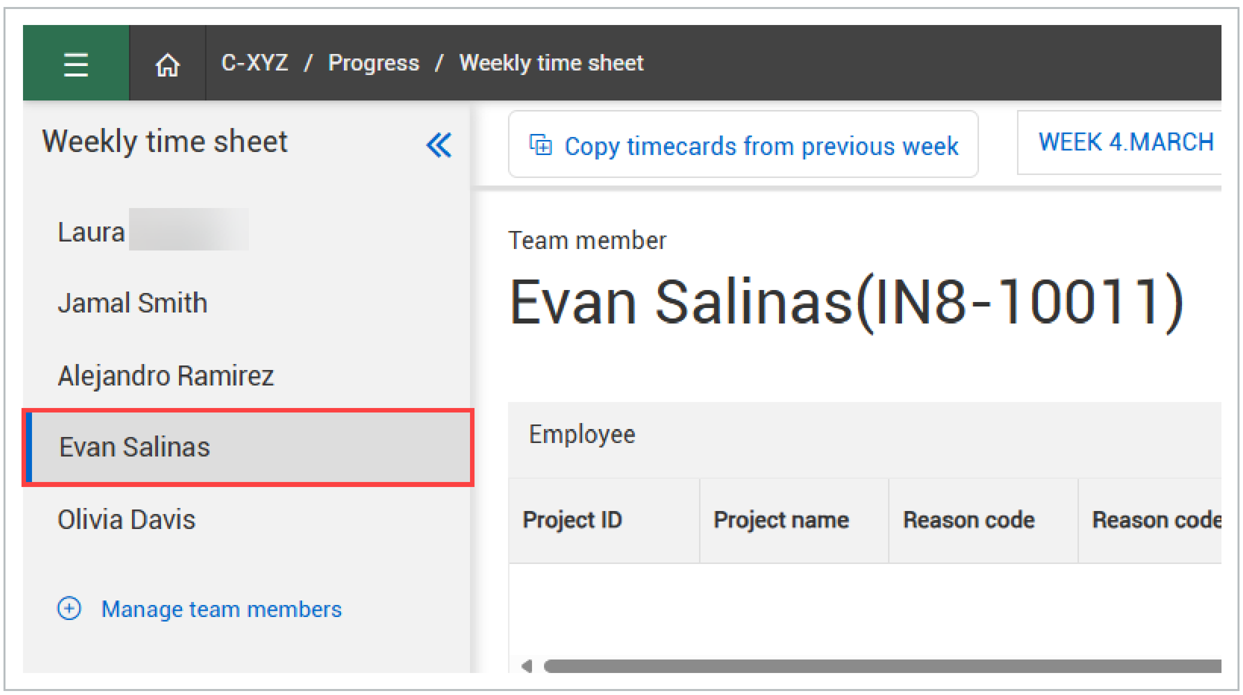
> To manage time cards in Weekly Time Sheet, users must have appropriate roles and permissions set up **and** be assigned to one or more projects as an operational resource.

## 3.5.1 Create Time Cards

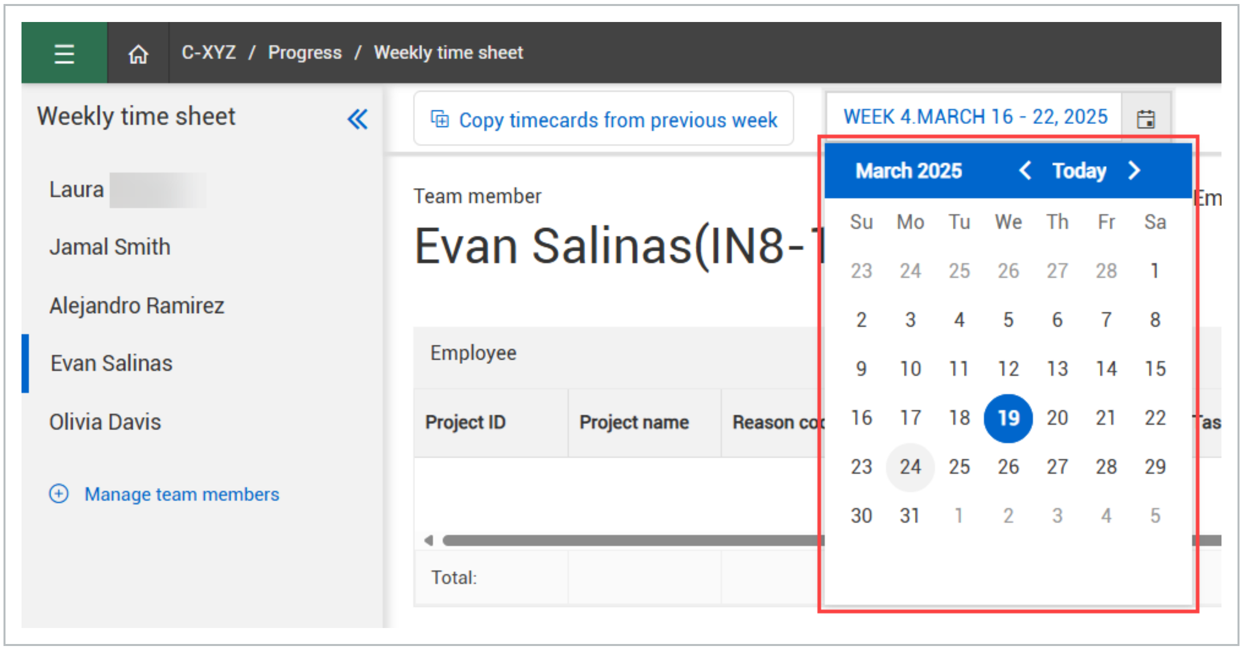
The following steps walk you through how to create a time card and input hours.

### Create a Time Card

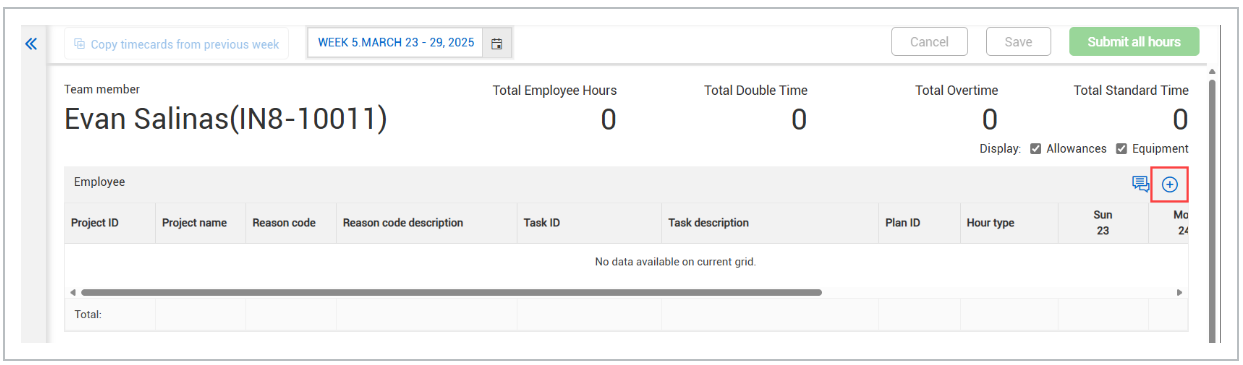
1. If you are managing time cards for a team member, select the team member from the left panel.



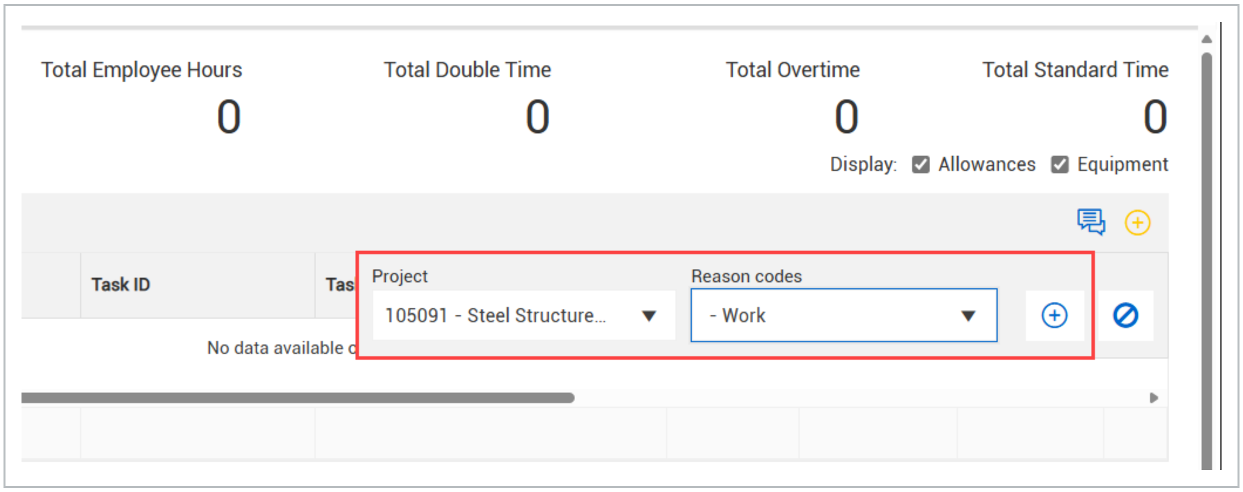

2. Select the week from the date filter in the top toolbar.



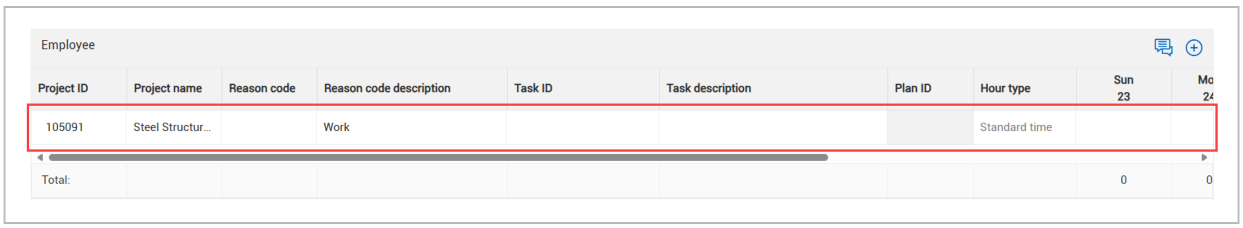
3. In the Employee grid, click the **Add** icon.



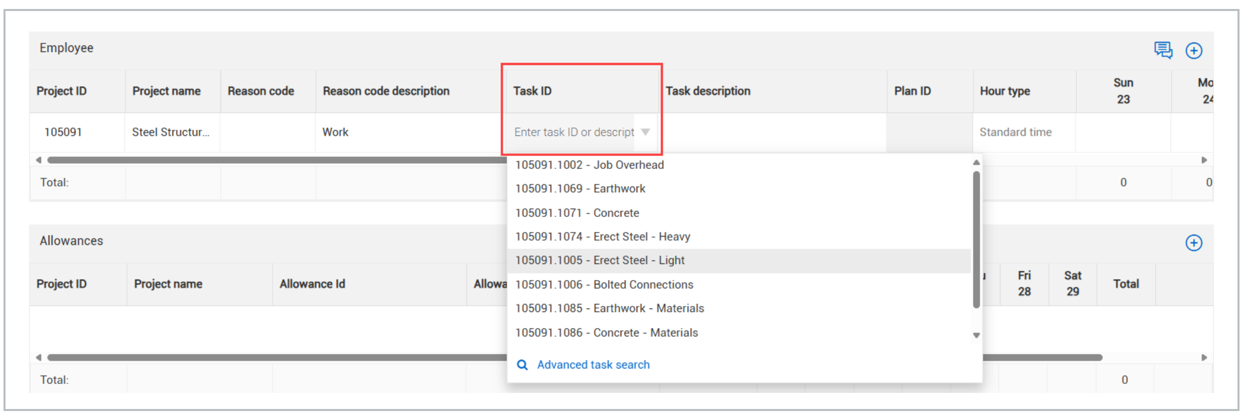
4. Select the project and reason code from the drop-down menus. Then click the **Add** icon.



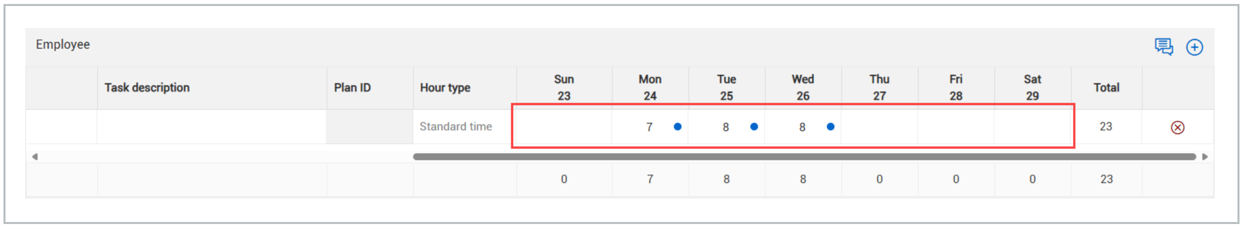

A new row for the time card now shows in the Employee grid.




5. Open the **Task ID** drop-down and select the work task.




6. Scroll to the right. Enter the work hours in the date fields.

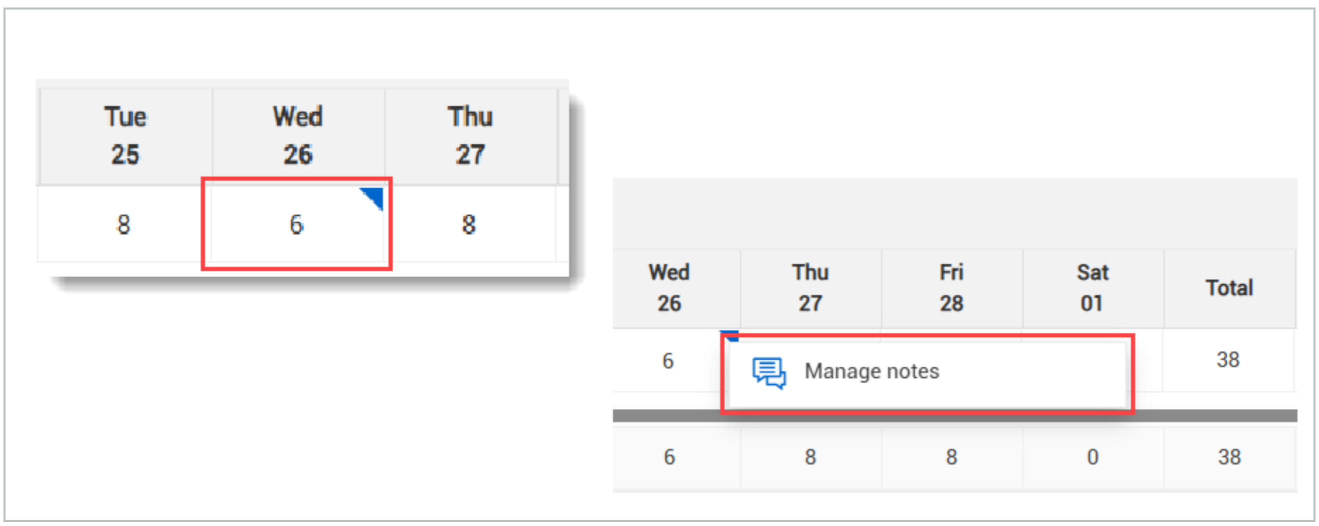



- Blue dots indicate unsaved changes.

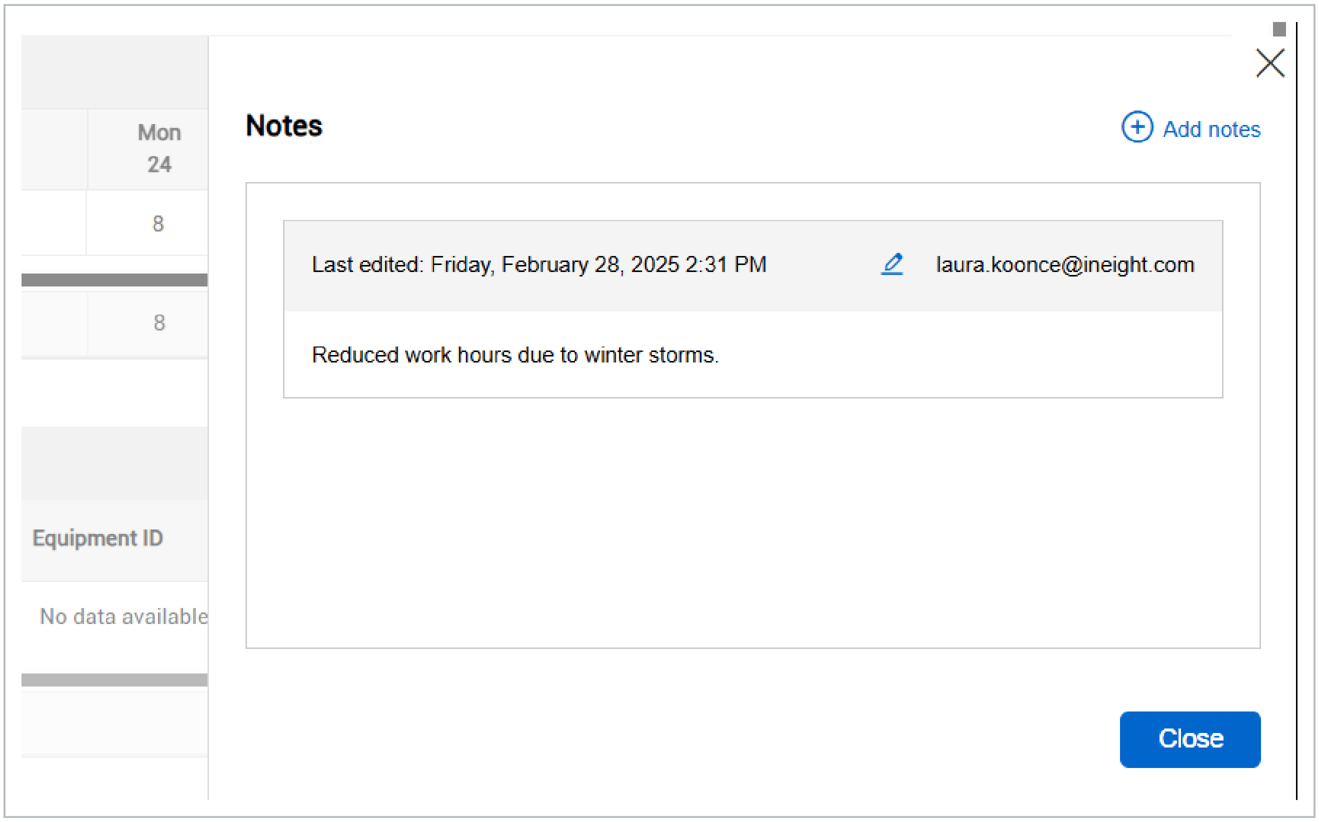
7. If there are work hours for a different project or associated with a different task, click the **Add** icon to add a new time card row.
8. When finished, click **Save** in the top toolbar.

## 3.5.1.1 Add & Review Notes

Notes can be associated to specific time cards in the Employee grid. Time cards with notes are marked with a blue corner indicator. To view the notes on a time card, right-click the indicator, and then select **Manage notes**.



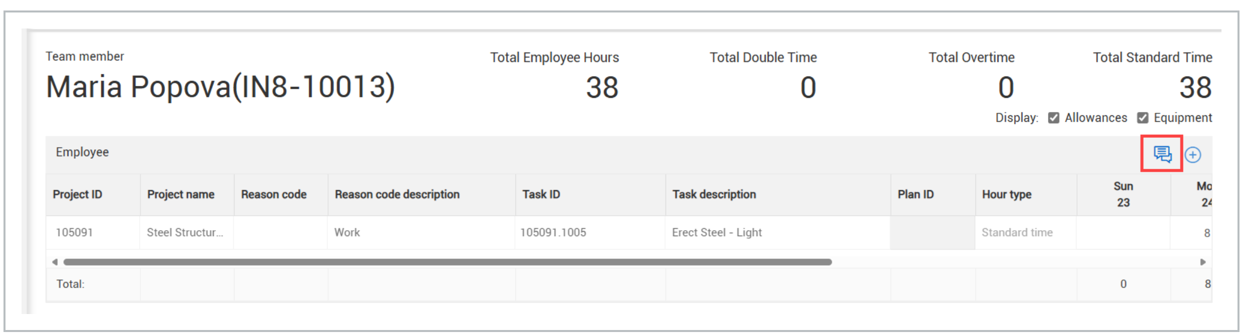

The Notes slide-out panel opens. In the slide-out panel you can add new notes, view, or edit existing notes.




Follow these steps to add a new note to a time card.

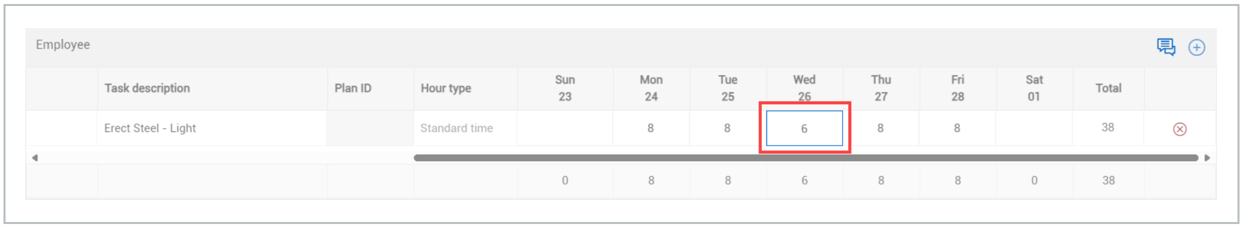
## Add A NEW NOTE

1. From the employee grid, click the **Notes** icon.

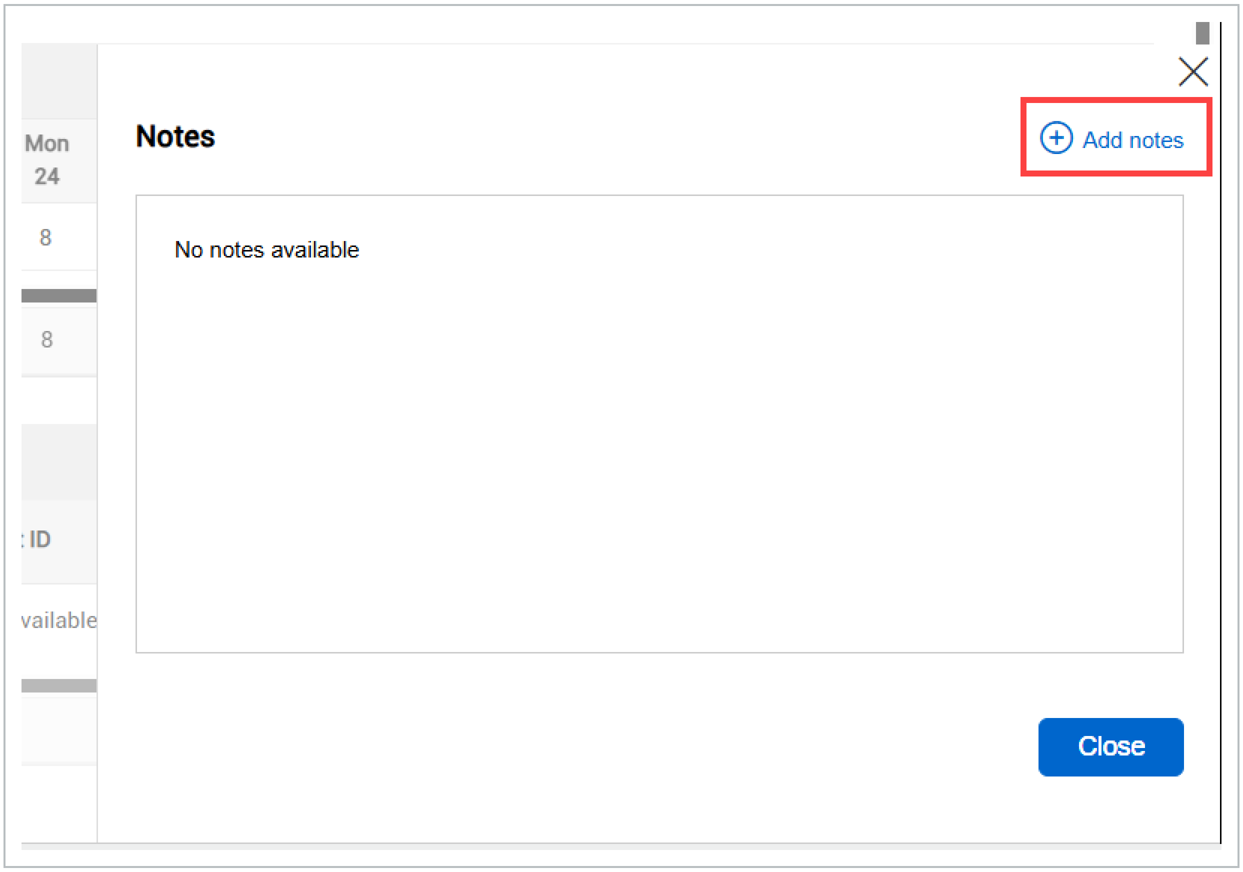



   The Weekly Time Sheet register is disabled while you manage notes.

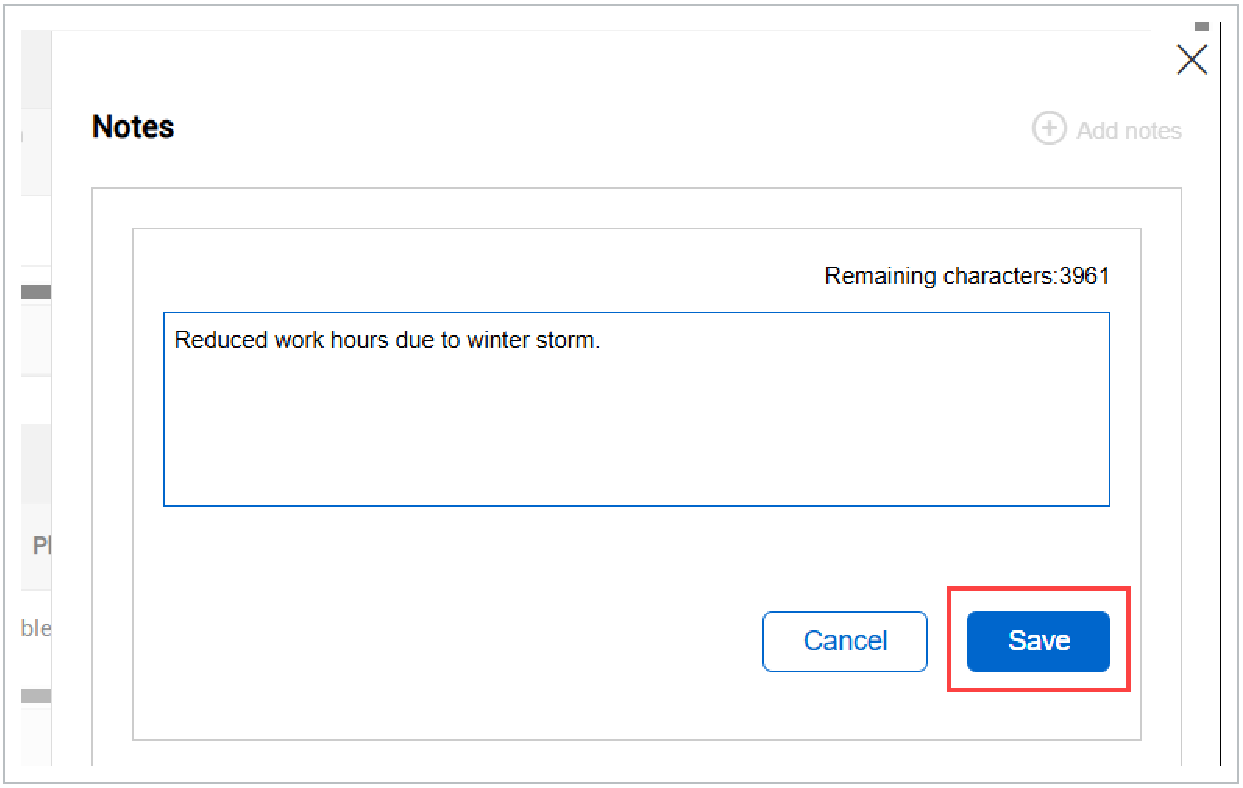
2. From the time card row, click a calendar day.



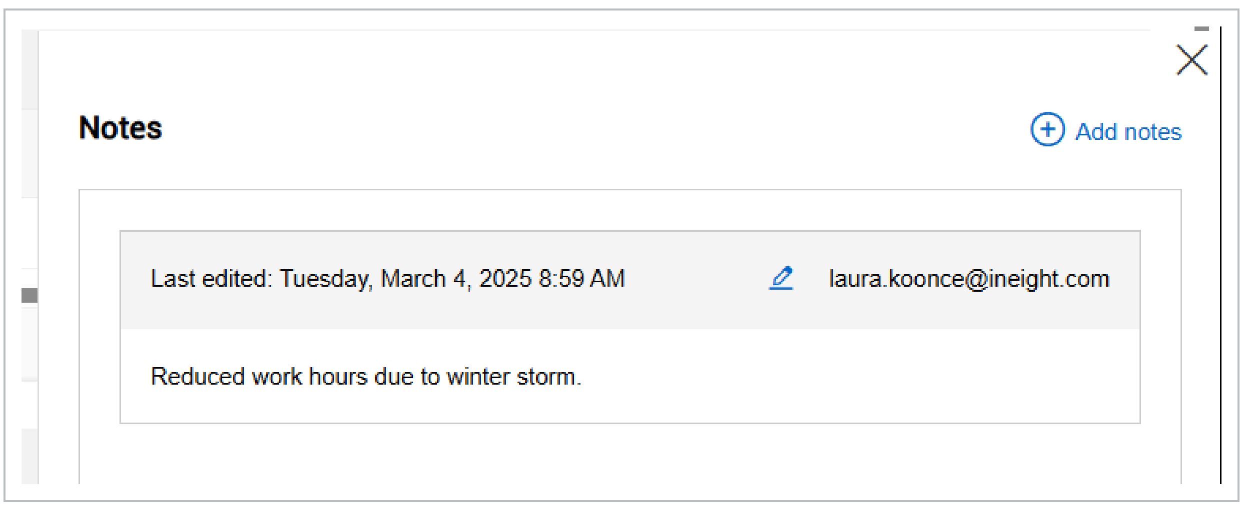

3. Click **Add notes** from the top of the Notes slide-out panel.




4. Type your note in the text field, and then click **Save**.

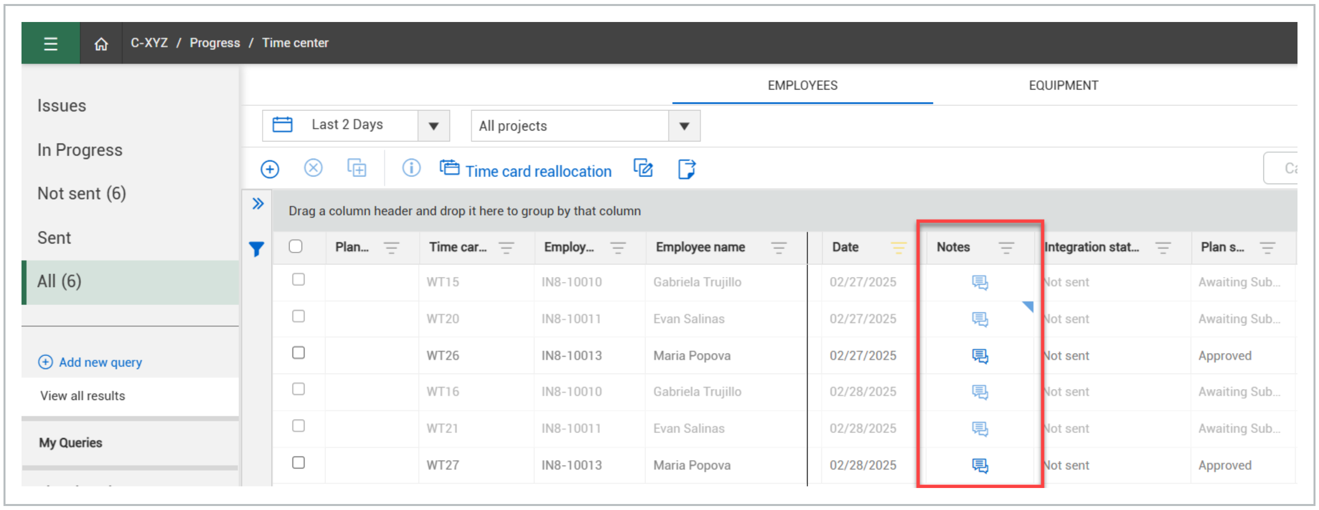



5. Your note now shows in the Notes slide-out panel.




6. Click **Close** to close the slide-out panel.
7. When you are finished managing notes for this time sheet, click the **Notes** icon again.

Notes added in Weekly Time Sheet are also visible in Time Center after the time sheets are submitted.

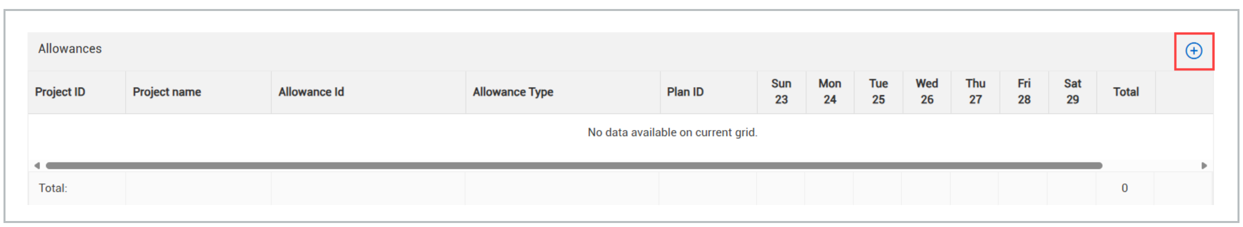


## 3.5.1.2 Add Allowances

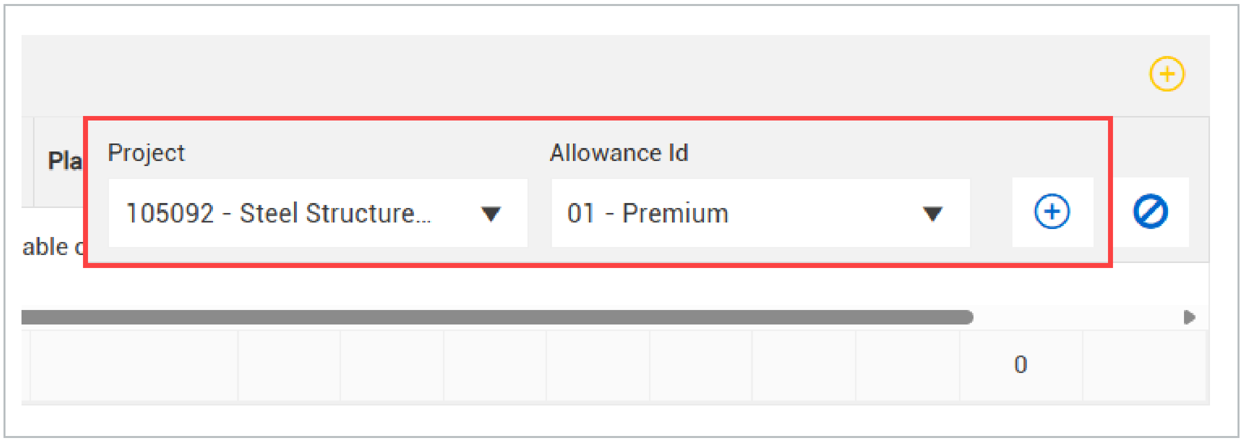
Follow these steps to add allowances to a time card.

## Add Allowances

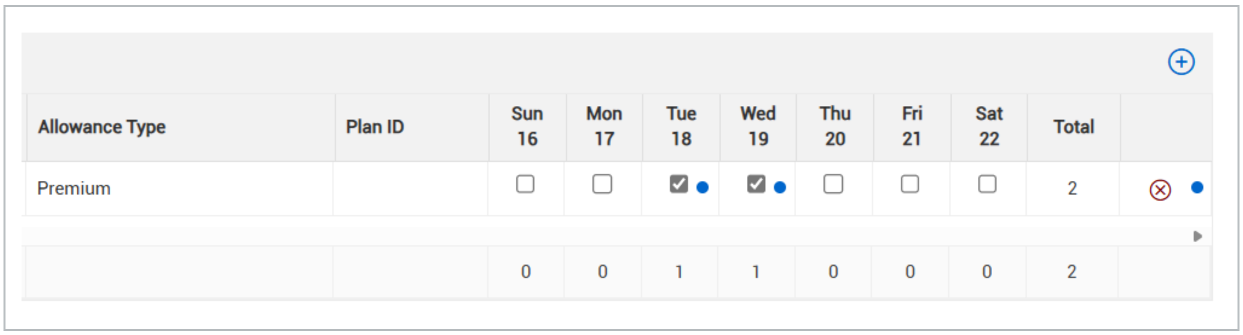
1. In the Allowances grid, click the **Add** icon.



2. Select the project and allowance ID from the drop-down menus. Then click the **Add** icon.




3. Select the checkbox for each date the allowance is applied to.



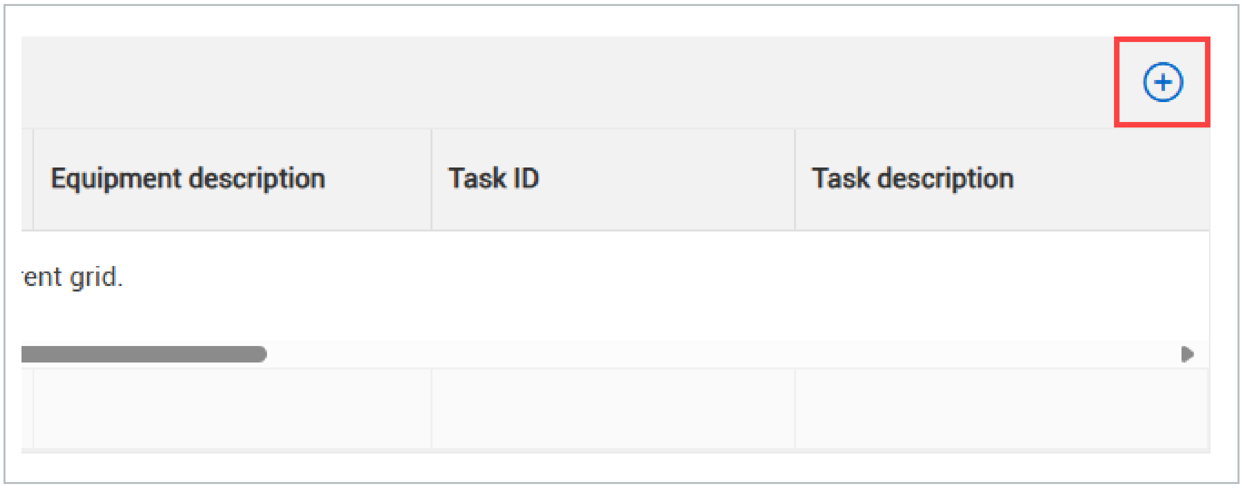

4. When finished, click **Save** in the top toolbar.

## 3.5.1.3 Add Equipment Hours

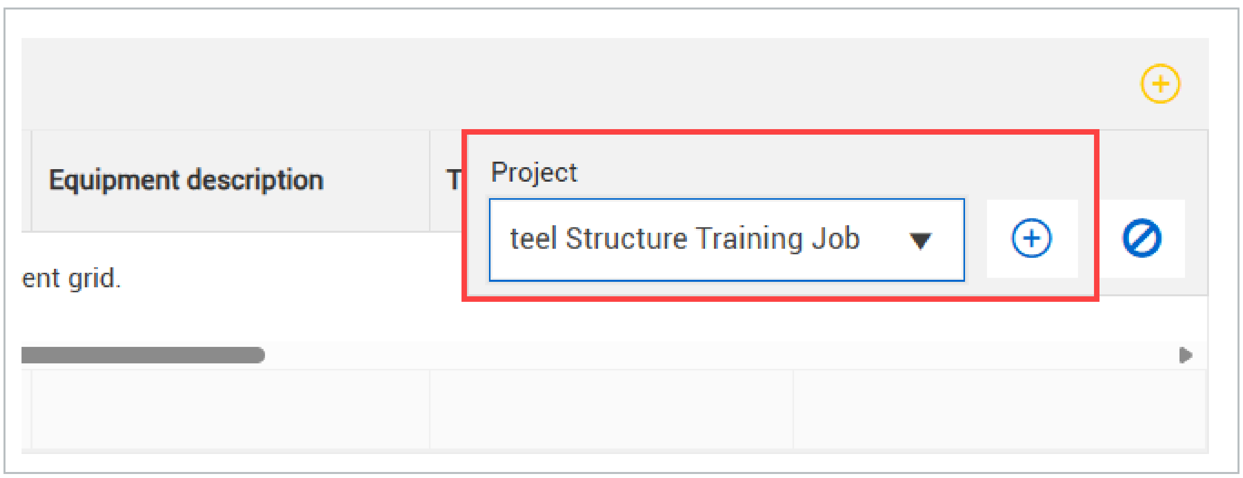
Follow these steps to add equipment hours to a time card.

## Add Equipment Hours

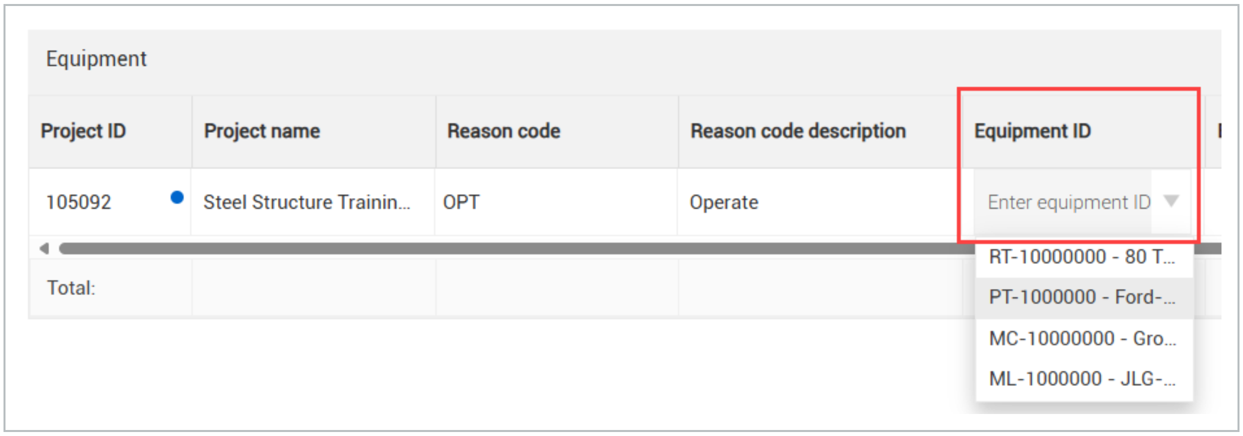
1. In the Equipment grid, click the **Add** icon.



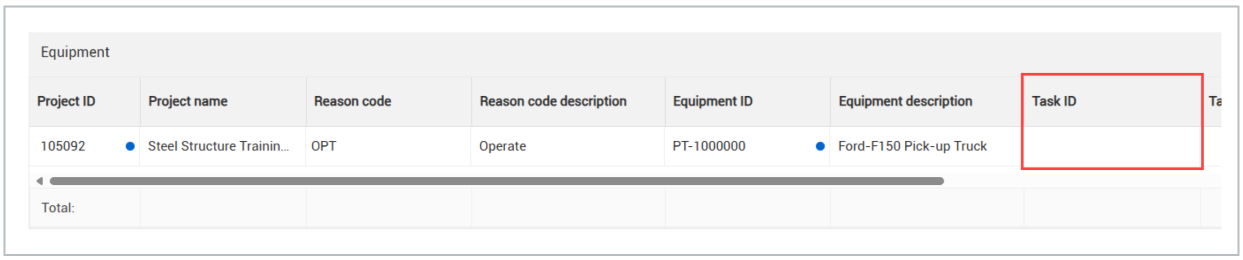

2. Select the project from the drop-down menu, then click the **Add** icon.



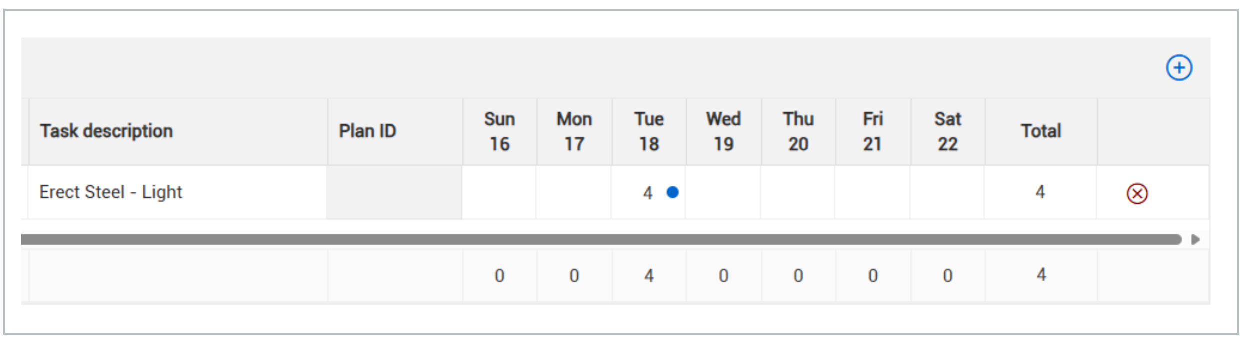

3. Open the **Equipment ID** drop-down and select the equipment.




4. Open the **Task ID** drop-down and select the work task.




5. Enter the hours that the equipment was operated in the date fields.

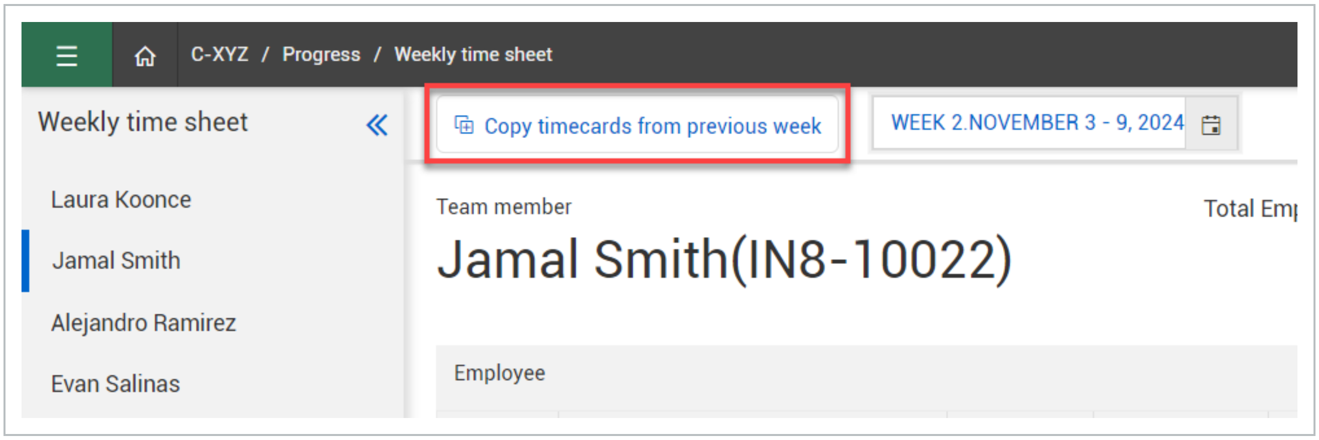



6. When finished, click **Save** in the top toolbar.

## 3.5.2 Copy Time Cards

If there are no entries for the current week, you can save time by copying time cards from the previous week.

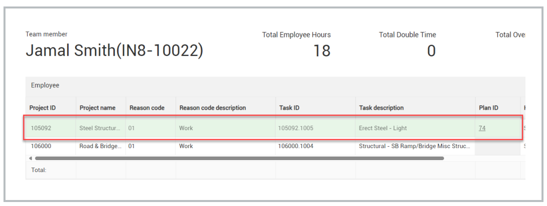
Select **Copy timecards from previous week** from the top toolbar.




You can delete or modify entries after they have been copied from the previous week.

## 3.5.3 Review Time Cards

Employee hours submitted through a daily plan appear in green in Weekly Time Sheet.

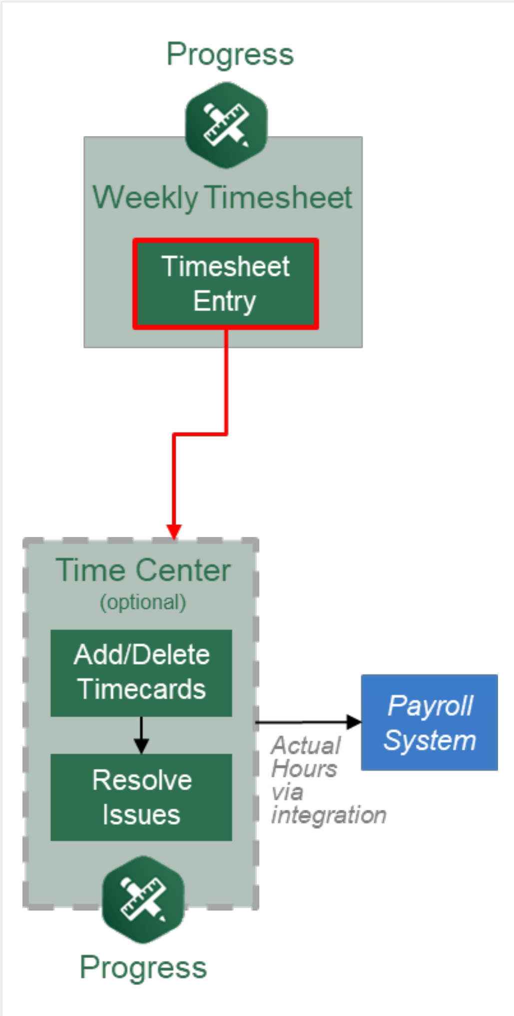



Daily plans in the execution, awaiting approval, and approval phase appear in Weekly Time Sheet.

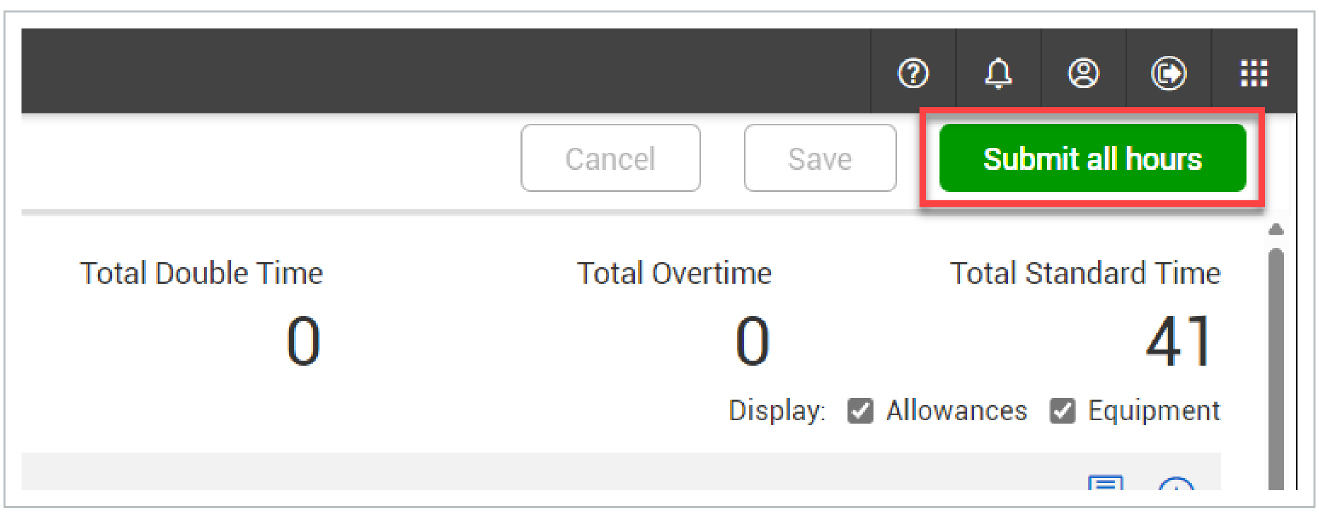
If you are the executor on a daily plan, you can make changes to the reason code or Task ID of a time card. However, hours submitted through a daily plan cannot be modified in Weekly Time Sheet.

## 3.5.4 Submit Hours

After all hours are input for the week, you can submit them to Time Center for final review before they go to your payroll system.



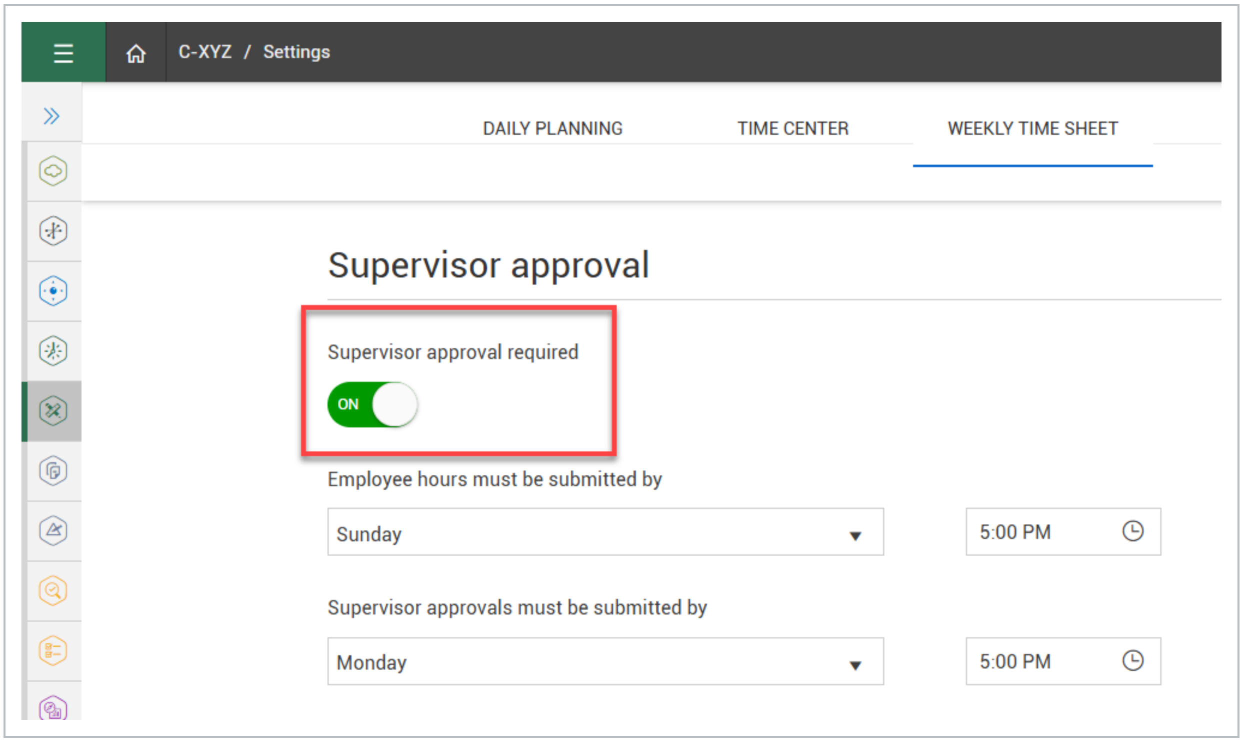

To submit hours to Time Center, click **Submit all hours**.



### 3.5.4.4 Supervisor Approval

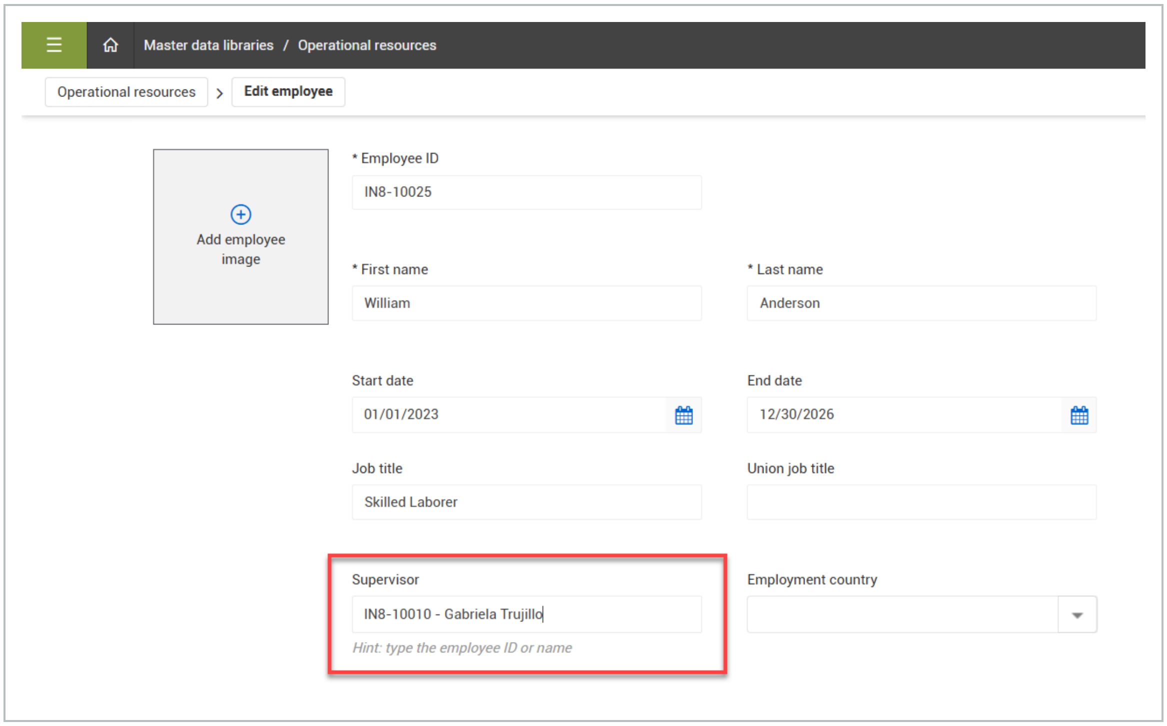
Your organization may require a team leader or supervisor to approve employee time cards before they are submitted for payroll processing. To set up supervisor approval, ensure that the following steps have been completed:

- In Organization Settings > Progress > Weekly Time Sheet: Enable the setting "Supervisor approval required"

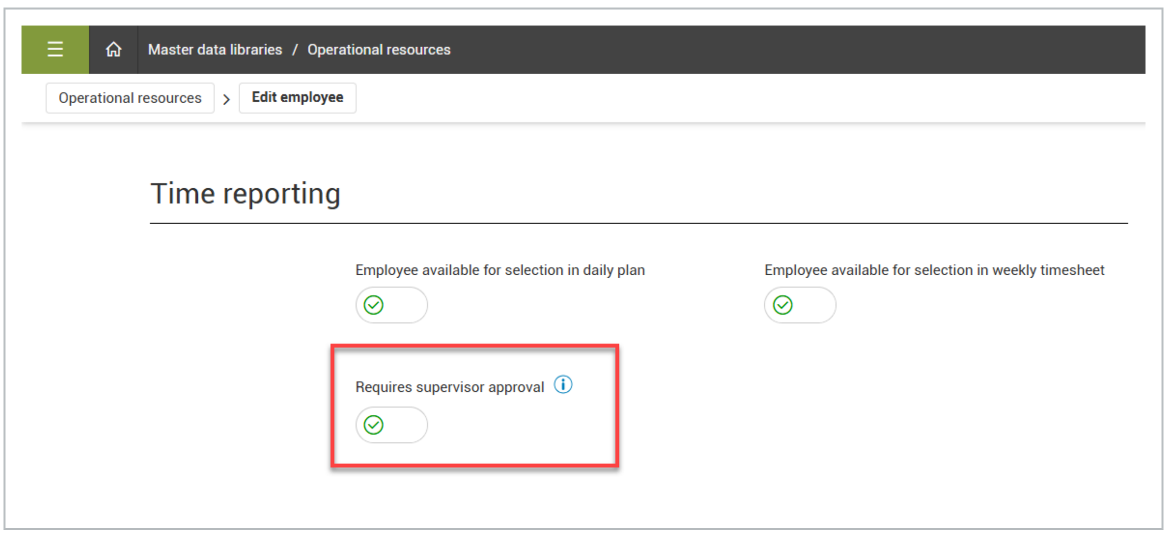



- In Master data libraries > Operational resources > Employee record

- Assign a supervisor



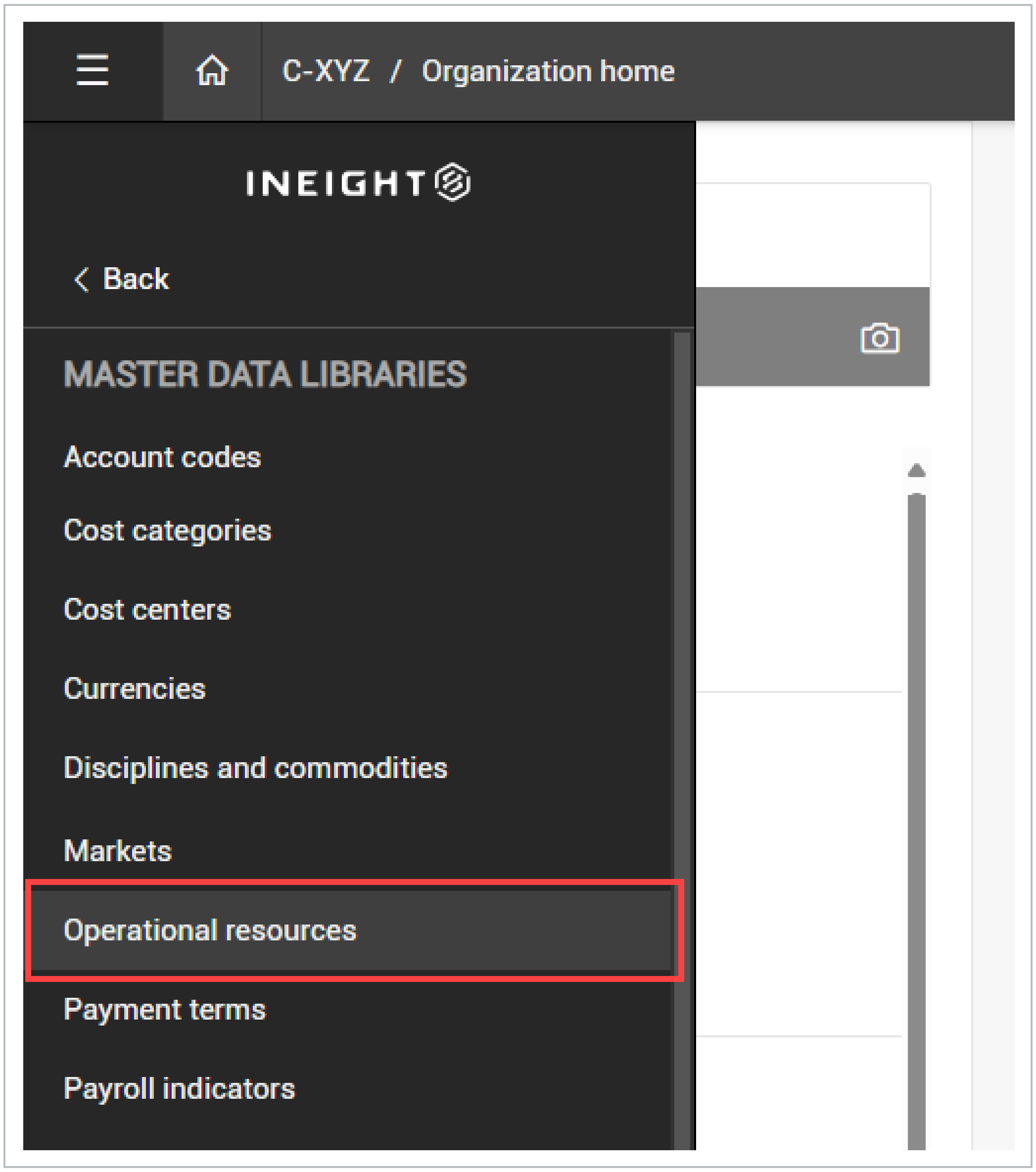

- Enable the setting "Requires supervisor approval".



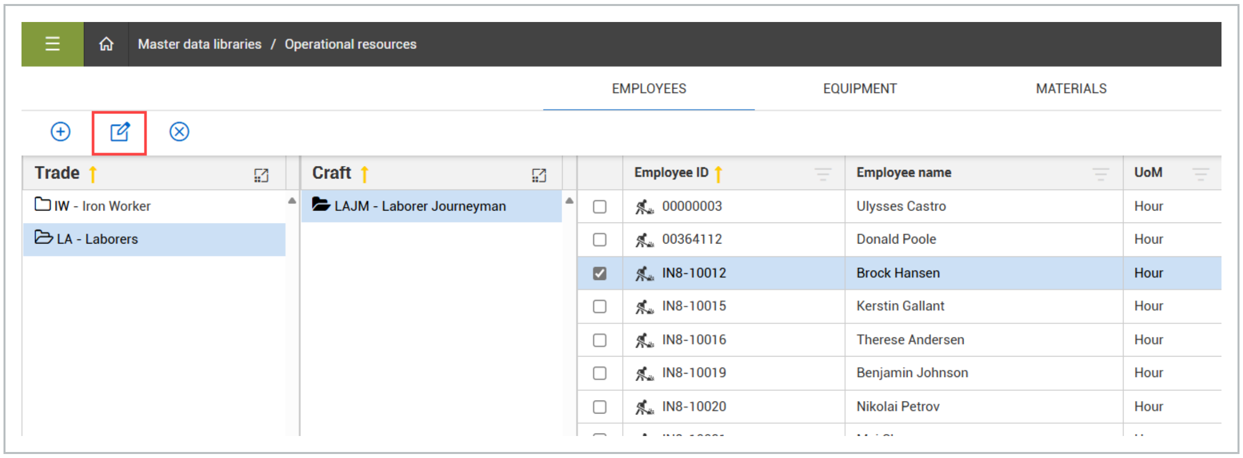

Follow these steps to edit an operational resource.

## Edit Operational Resource

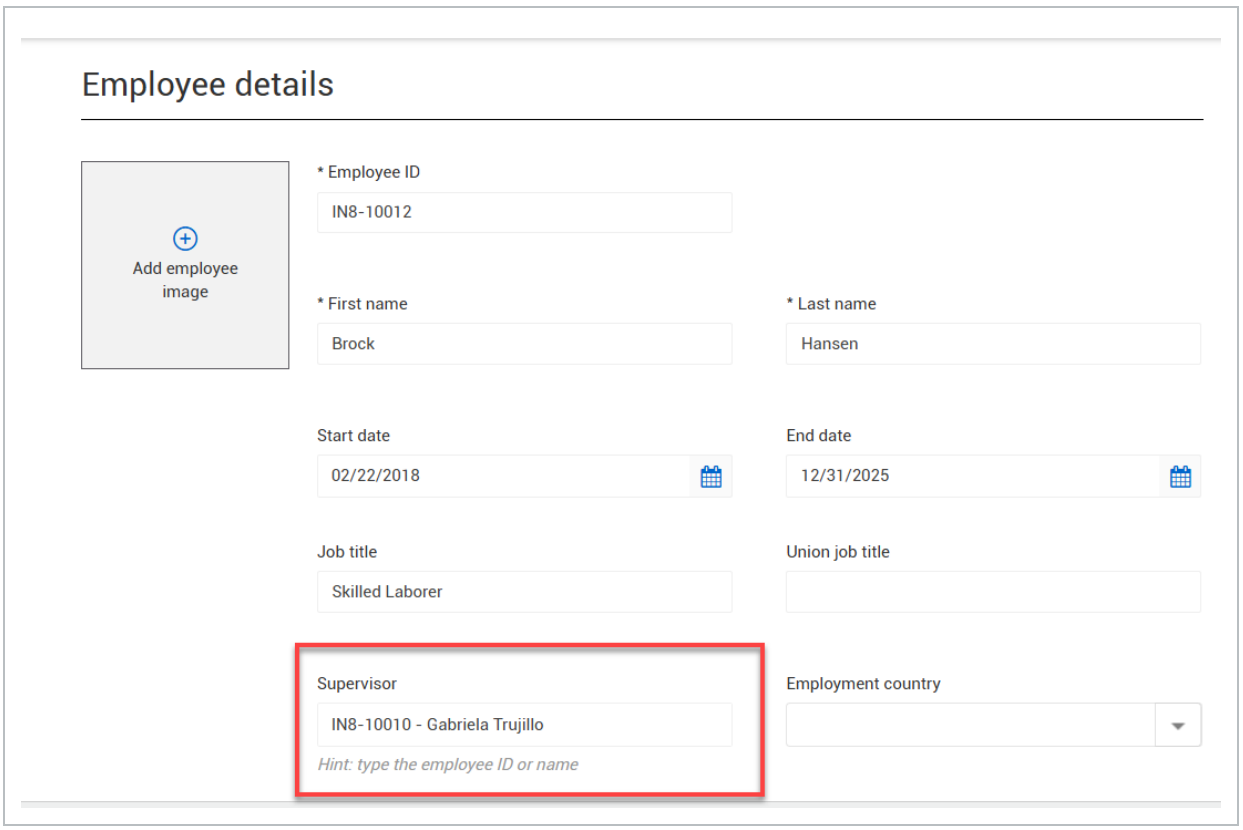
1. Open **Master data libraries > Operational resources**.



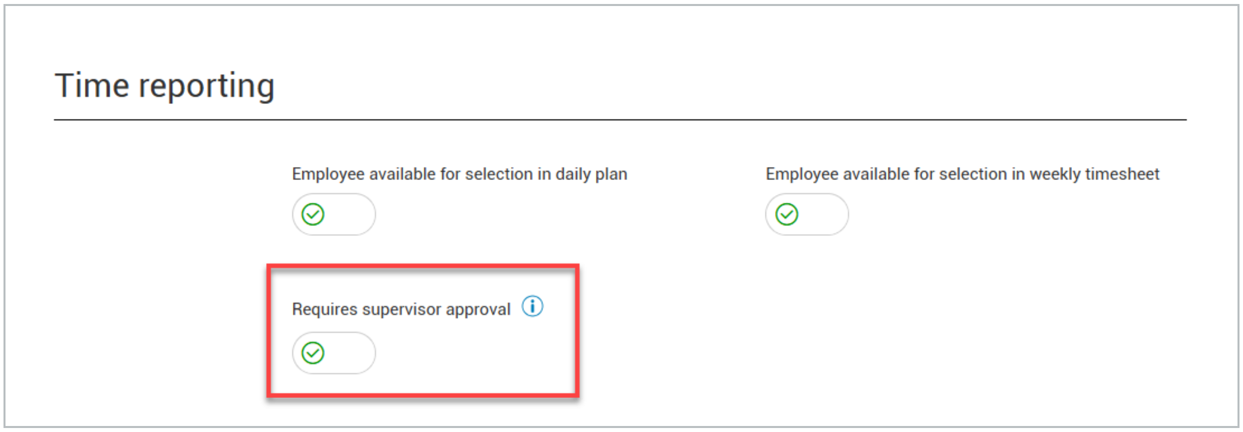

2. Select a resource and click **Edit resource**.




3. Under Employee details, enter a name or employee ID in the **Supervisor** field.

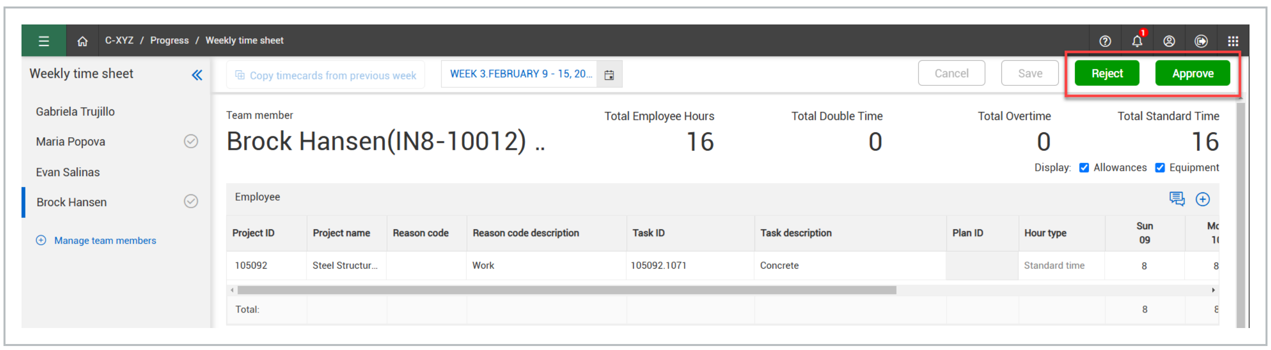



4. Under Time reporting, click the setting "Requires supervisor approval" to enable.




With supervisor approval enabled, employees can enter their hours in Weekly Time Sheet and click **Submit all hours**. The time sheet is now in the approval step, and their supervisor receives a notification.

Supervisors can reject, edit, or approve submitted time sheets.




In Time Center, time cards set up for supervisor approval will show a status of Awaiting Submission, Awaiting Approval, or Approved.

## 3.5.4.5 Automatic Time Sheet Approval

Time sheets are automatically approved in the following cases:

- If the setting “Supervisor approval required” is not enabled in Organization Settings
- If an operational resource does not have an assigned supervisor
- If a supervisor enters and/or submits an employee time sheet
- If a supervisor submits their own time sheet