INEIGHT

PROGRESS USER GUIDE

PROGRESS

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EXERCISES

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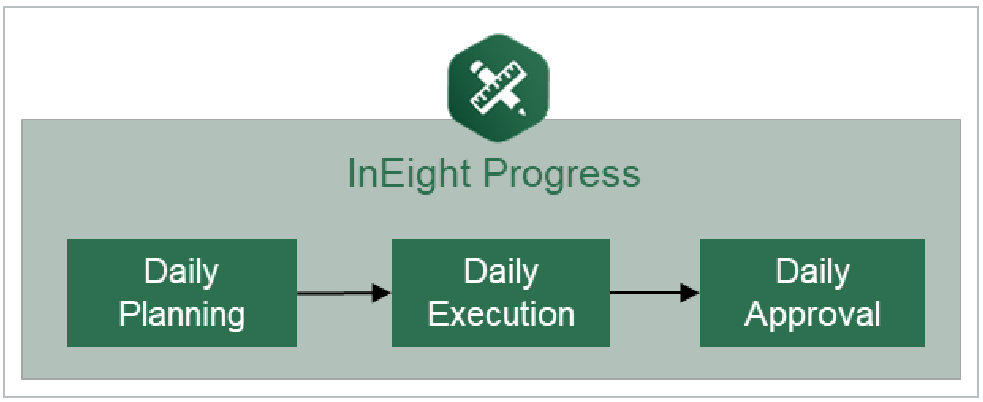
1.1 INEIGHT PROGRESS OVERVIEW

InEight Progress is one of the applications within the InEight portfolio of products. It is an integrated electronic time, equipment and quantity collection tool as well as a daily field log. The InEight Progress solution includes three submodules: Daily Planning, Weekly 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.



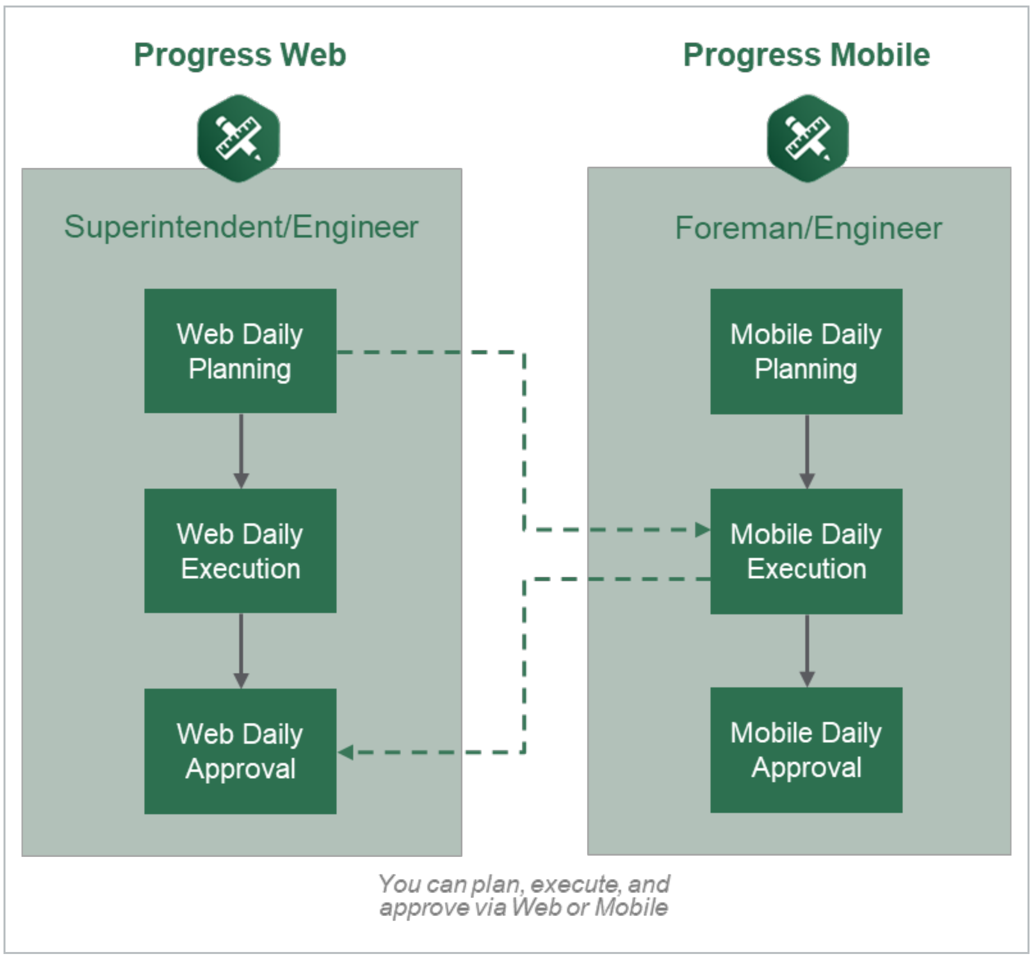
A daily plan is created by a project member to specify the tasks to be completed by a given crew, and to ensure productivity targets are met. Budget, quantity, safety, quality and other details are entered during the Planning phase to provide streamlined communication from the office to the field. Once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

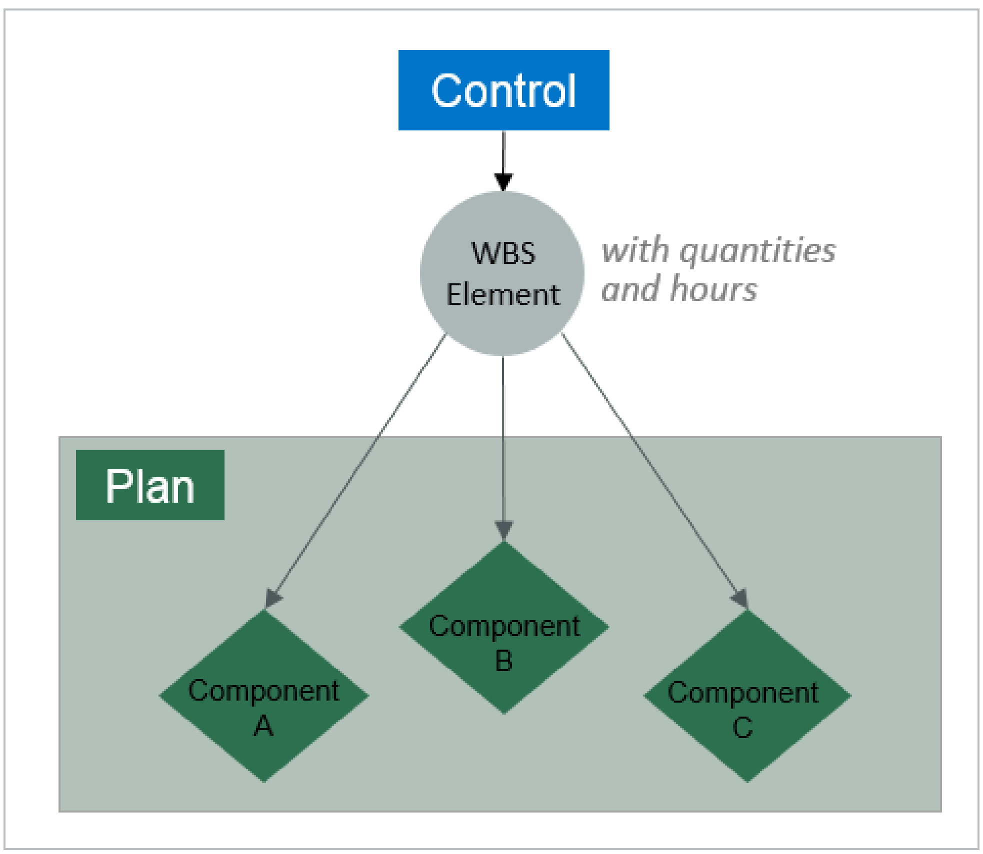


A daily plan can be accessed in either program in any of the phases of daily planning. The program used for a phase may vary from project to project and depends largely on the roles of the project members involved. For example, it may be preferable to have a staff member such as a superintendent or engineer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

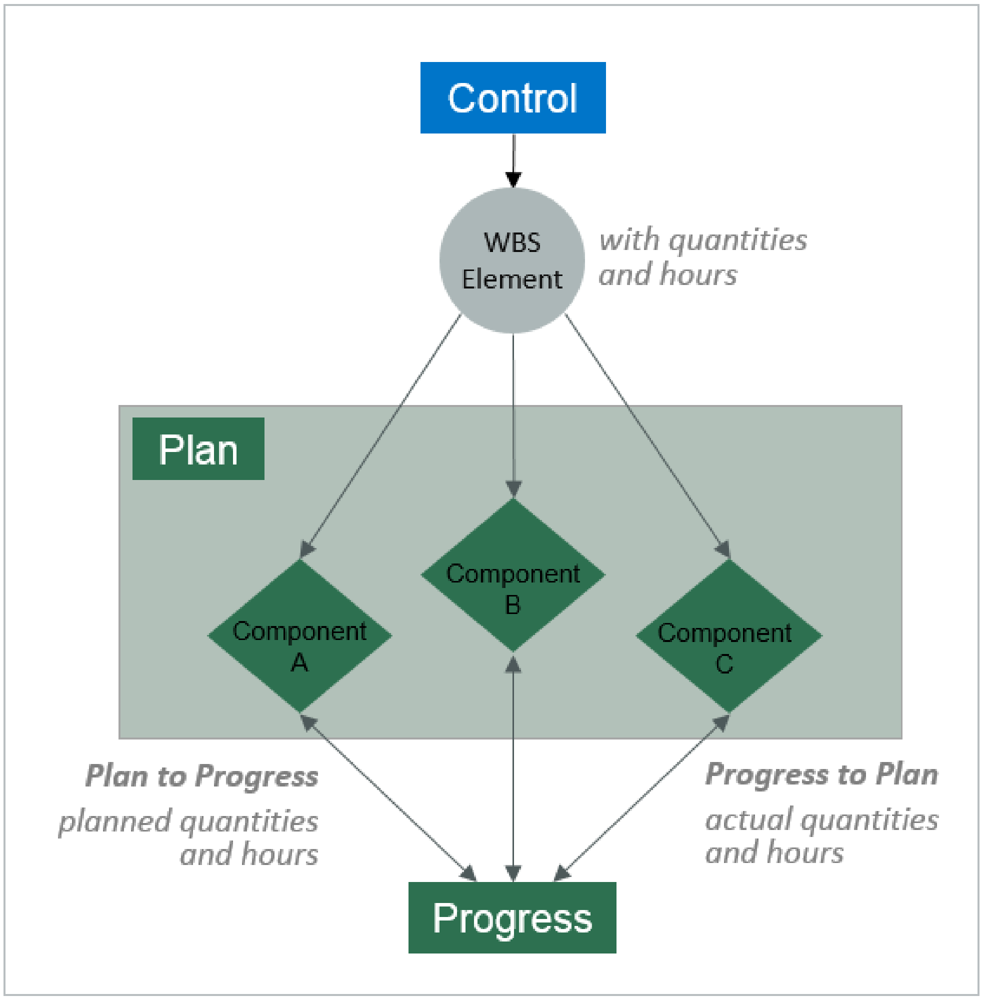
> Mobile Daily Planning has all the same functionality as Web Daily Planning for InEight Progress, but is available as a mobile-only application.

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).

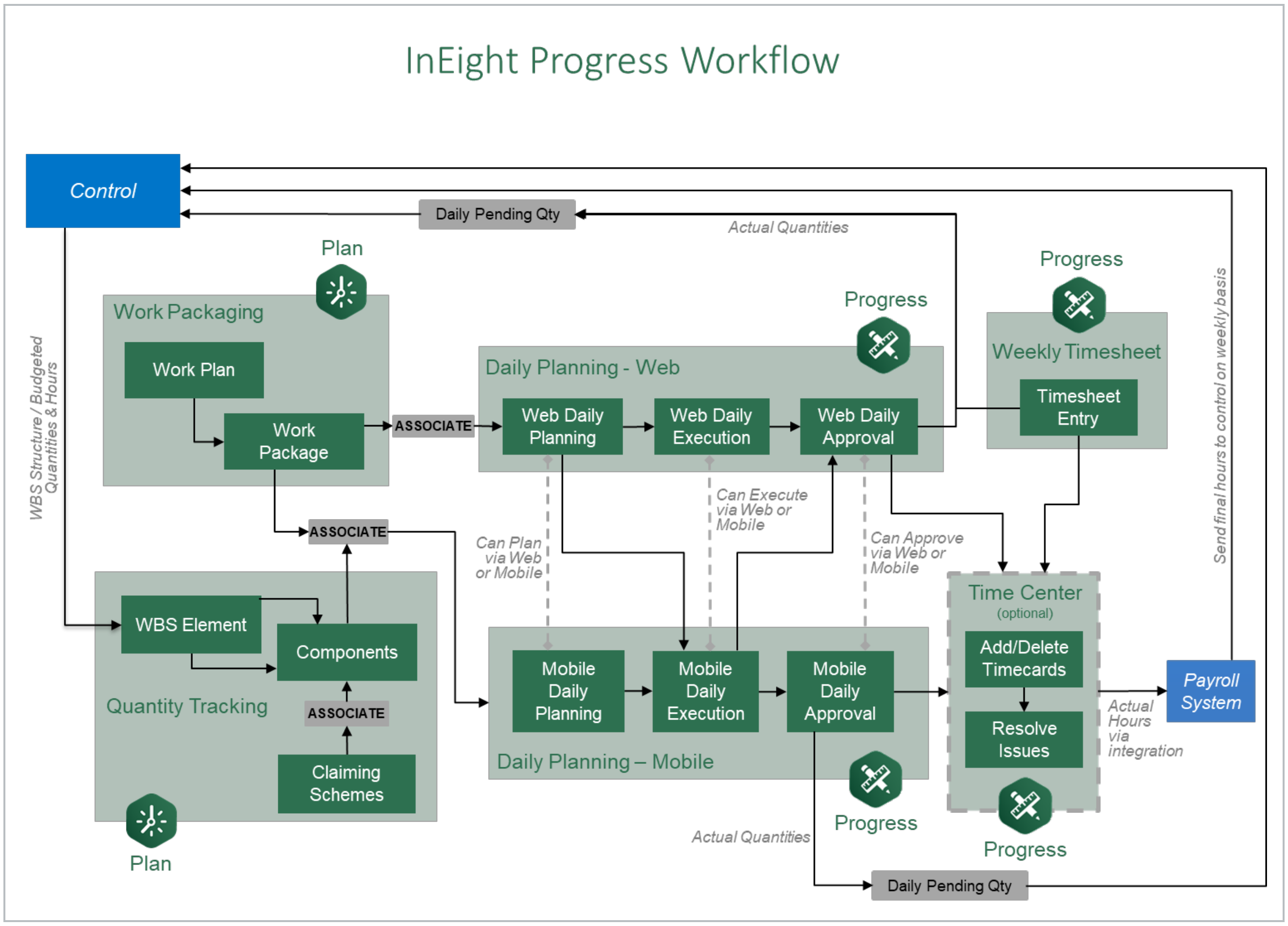
1.1.7.1 Hours

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
Time Center
(optional)
Add/Delete Timecards
Resolve Issues
WBS Element
Components
Quantity Tracking
ASSOCIATE
Claiming Schemes
Mobile Daily Planning
Mobile Daily Execution
Mobile Daily Approval
Daily Planning – Mobile
Payroll System
Actual Hours via integration
Progress
Progress
Plan
Actual Quantities
Daily Pending Qty

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2.1 MOBILE OVERVIEW

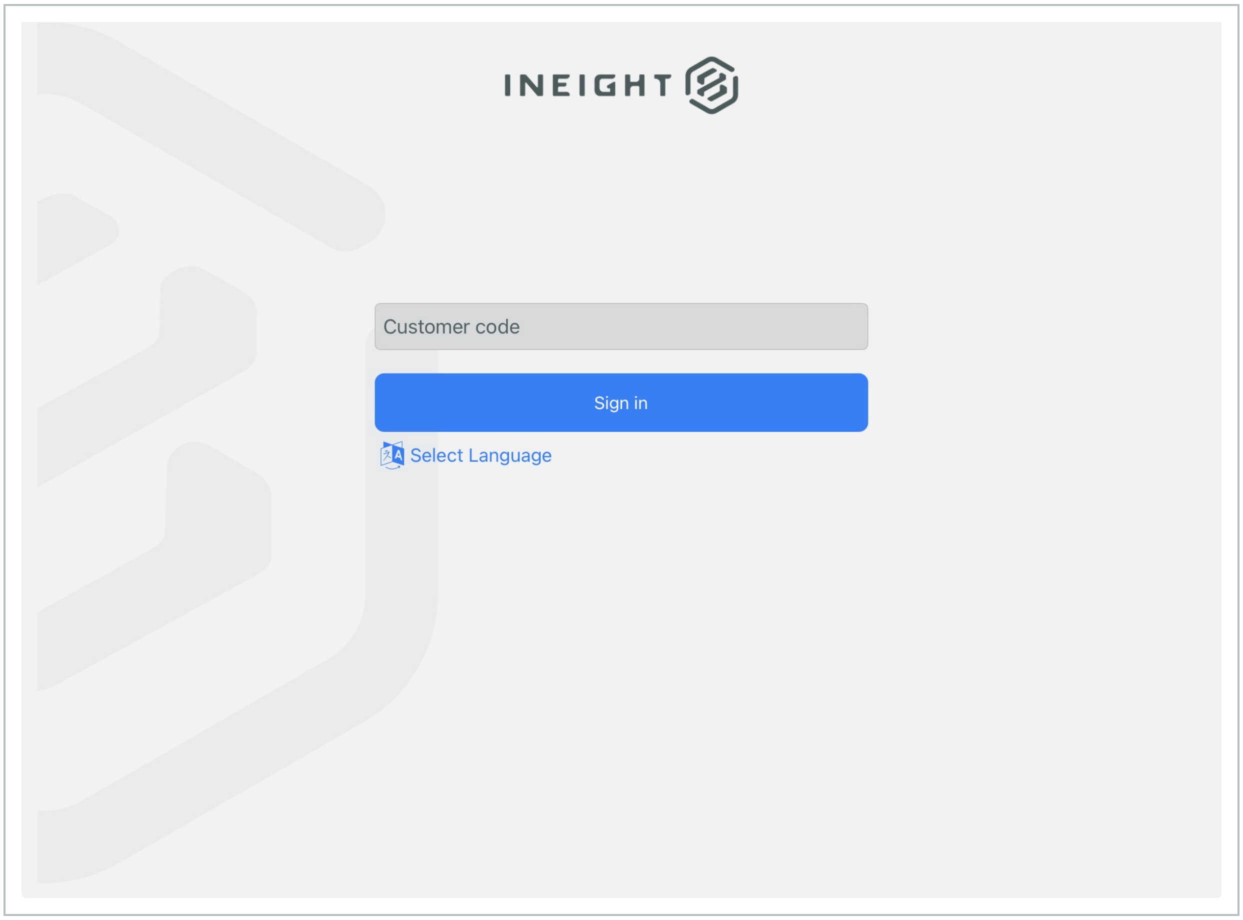
2.1.1 Login

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

Log into InEight Progress

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

2. Enter the customer code for your organization.



3. In the **User Pin** field, enter the password provided by your manager.
    - InEight Progress automatically syncs during the initial sign in. After syncing, the available projects assigned to the user are listed

2.1.2 Kiosk Mode

Progress Mobile allows multiple users to log in on the same device using Kiosk Mode, so that only one device is needed for multiple users to perform their daily activities.

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

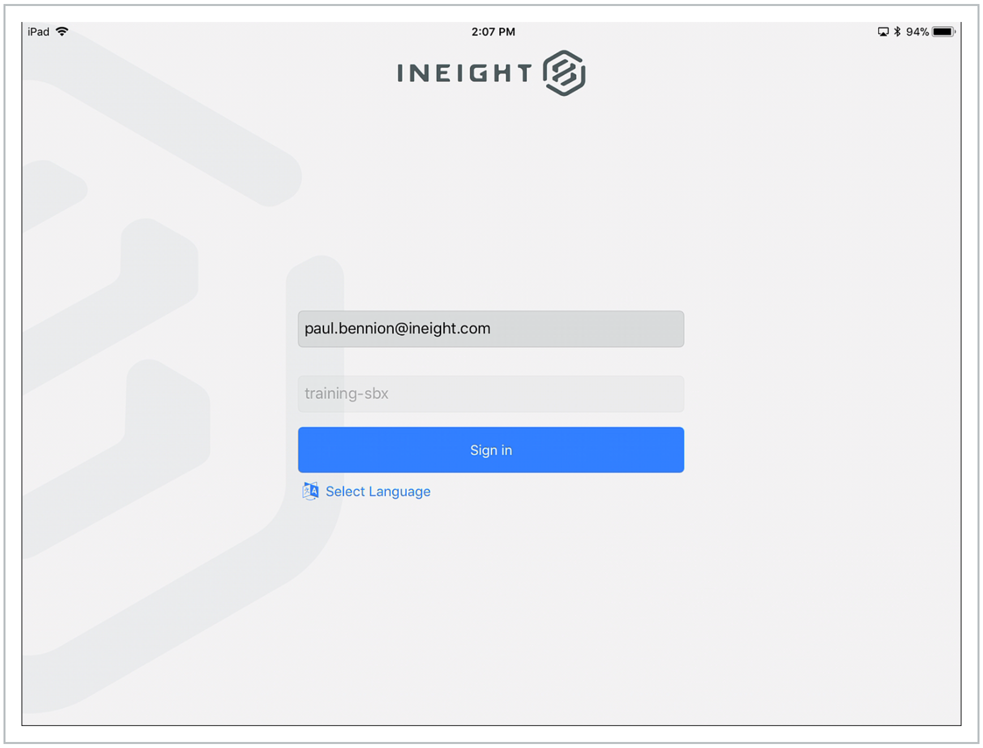
When you are using Kiosk Mode, a sync occurs automatically when you sign out.

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

2.1.2.1 Kiosk Workflow

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

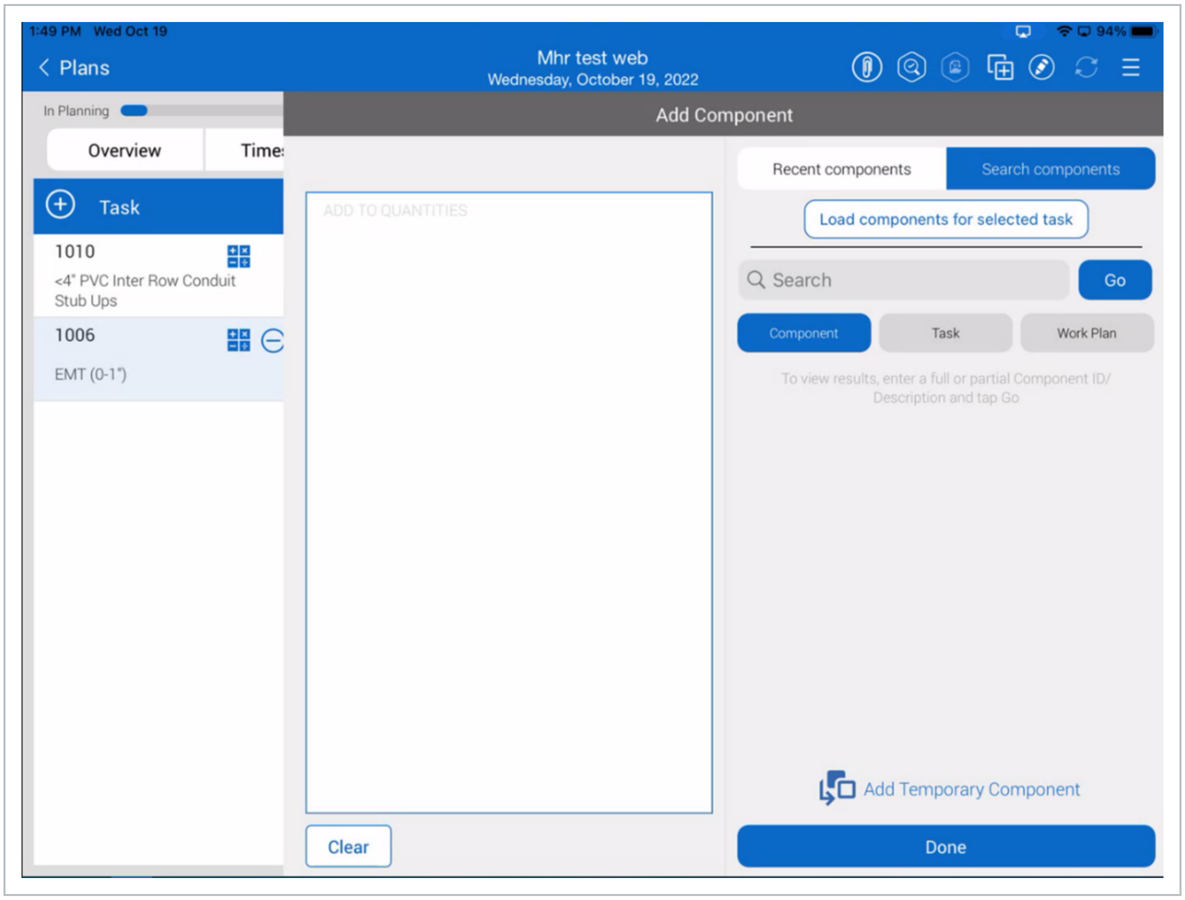
Selecting the option to sign in as a different user will take you to a new login screen where you can input your email and sign in for the first time on the device.



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

2.1.2.2 Component Search

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



2.1.3 Project List

Scenario

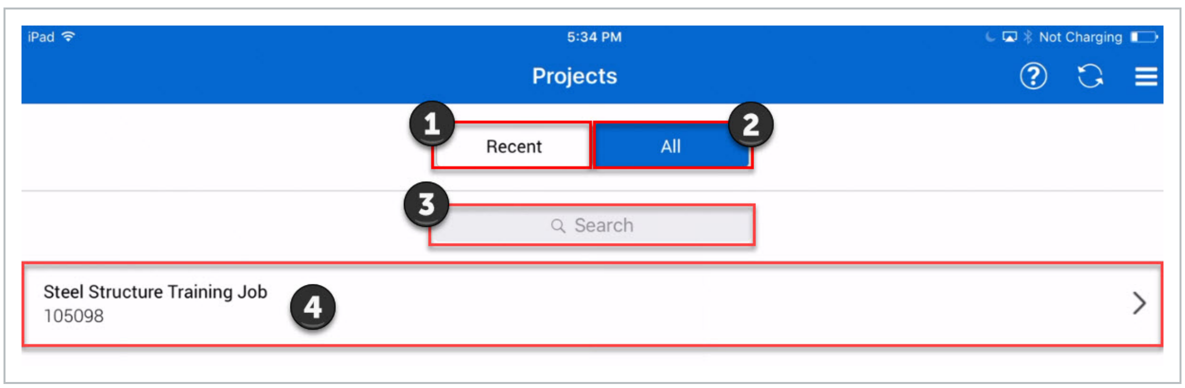
> Paul is an electrical superintendent on a project. Earlier that afternoon, he asked his foreman to create a daily plan for tomorrow's work. At the end of the day Paul sits down to review the plan the foreman created.

Navigating through InEight Progress is straightforward. First, you select a project and then create and/or execute a daily plan. The following sections walk you through the process.

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

Overview - Project List

Title		Description
1	Recent Projects	Select to view all projects that you have opened recently.
2	All Projects	Select to view all projects you are assigned to.
3	Search Bar	Only appears when viewing all projects. Allows you to filter down the project list by typing any part of the project number or description in the search field.
4	Project List	List of projects to choose from. To open a project, simply tap on that project in the list.

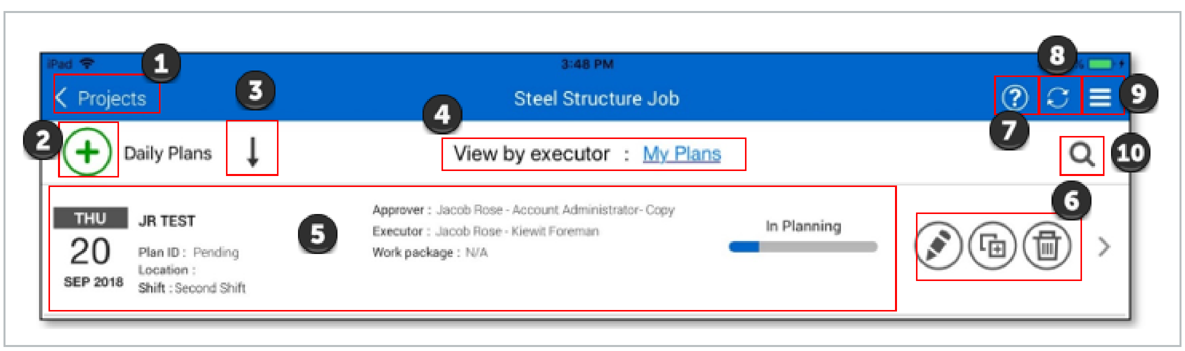


2.1.4 Plan List

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

Overview - Plan List

Title		Description
1	Project List	Takes you back to the Project List.
2	Create Daily Plan	Select this to create a new daily plan.
3	Sort	Toggles sort between ascending and descending dates.
4	View by Executor	Allows you to view plans assigned to a specific foreman.
5	Plan Header Details	Displays plan name, date, shift, location, superintendent, engineer, foreman, work plan and status. Tapping on this section will open the plan.
6	Edit / Copy / Delete	Allows you to edit, copy or delete a plan.
7	Help Overlay	Provides explanations for key items on the current screen
8	Sync	Updates the application with the latest information from InEight Cloud Platform and pushes any changes from InEight Progress Mobile back to InEight Progress Web. This is used often when working in offline mode when you return to a location with access to internet.
9	Menu	Contains quick links to the project list and sign out. Also displays the current date, app version, and date/time of last sync.
10	Search	Free text search bar to find daily plans by plan name.



> Selecting a work plan ID will sync all components associated with that plan to the iPad for use in offline mode.

You can copy daily plans in the plan list. This is especially useful when completing repetitive work that will span multiple days.

2.2 NAVIGATE DAILY PLANNING

To navigate through the Daily Planning Phase, you will tap and complete each tab in the navigation bar.

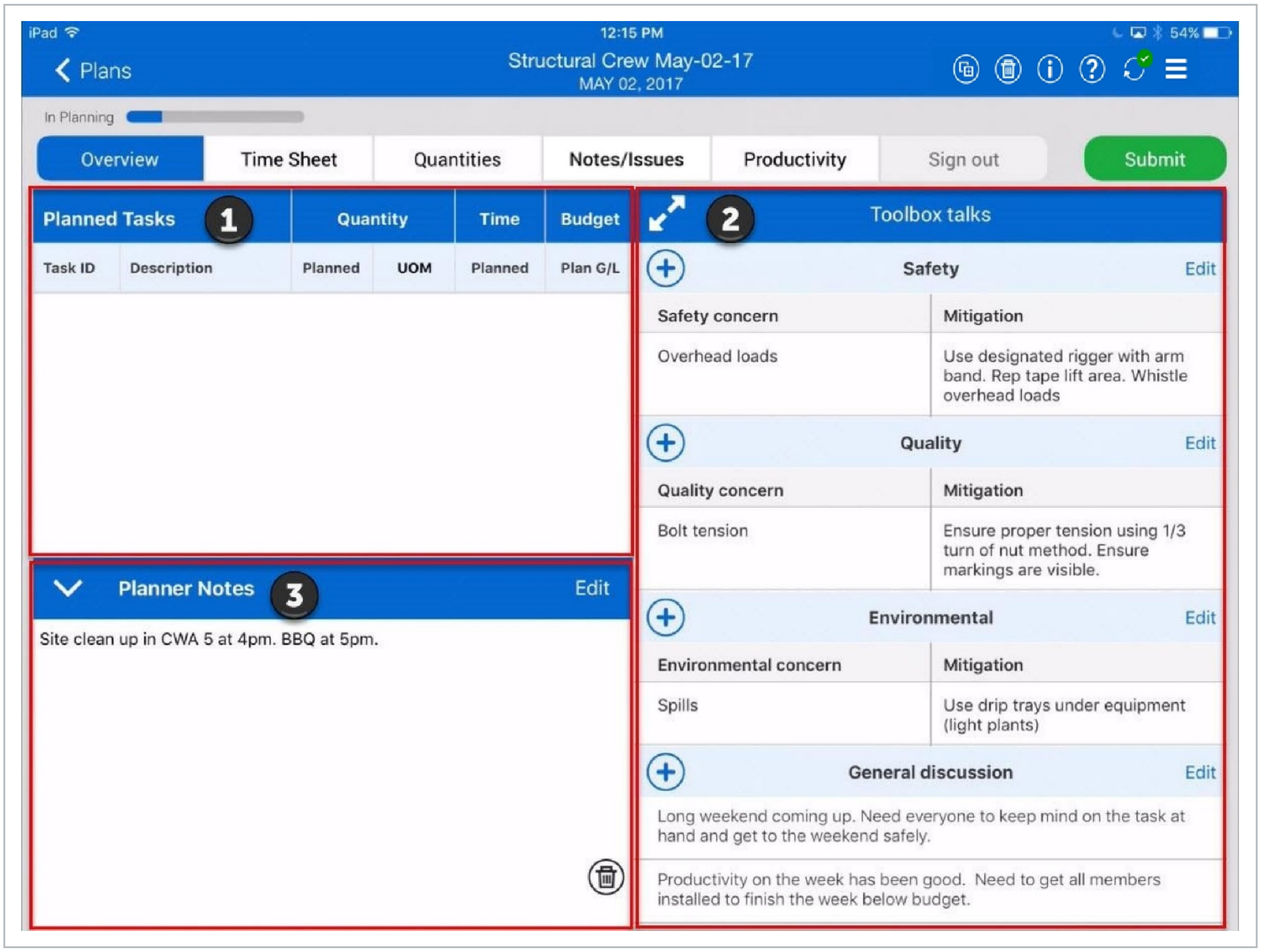
While in the Planning Phase, the screen is highlighted with a blue accent. When in the Execution Phase, this changes to green. This helps to remind yourself which phase of the process you are in.

2.2.1 Overview

Once a daily plan is created, you are taken to an Overview screen. Initially this screen is blank because you have not entered any information. The Overview screen allows you to review your daily plan before starting work and includes the following information:

Overview - Overview Tab

Topic		Description
1	Tasks	Include the planned quantity, man-hours and budget gain/loss (G/L).
2	Tool Box Talks	Provide key information including general discussion, safety, quality, and environmental considerations.
3	Planner Notes	Provides space for additional notes related to the plan.



On the Overview tab, you can:

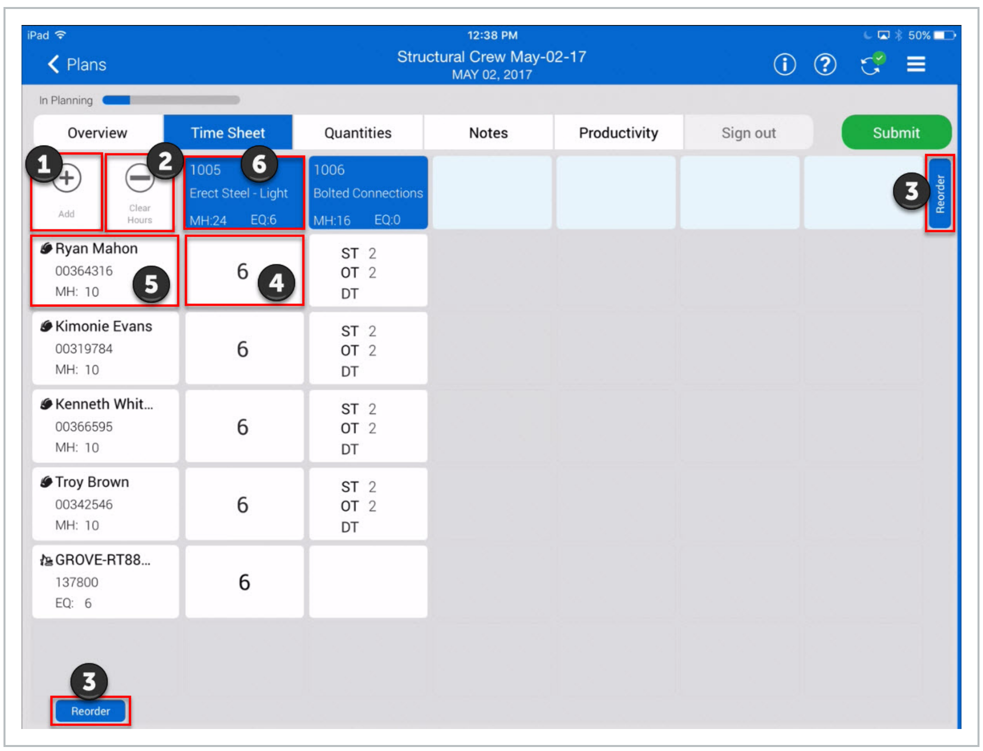
- Add tool box talk items by tapping the  icon
- Tap the  icon to expand to a larger view
- Minimize planner notes by tapping the  icon

2.2.2 Time Sheet

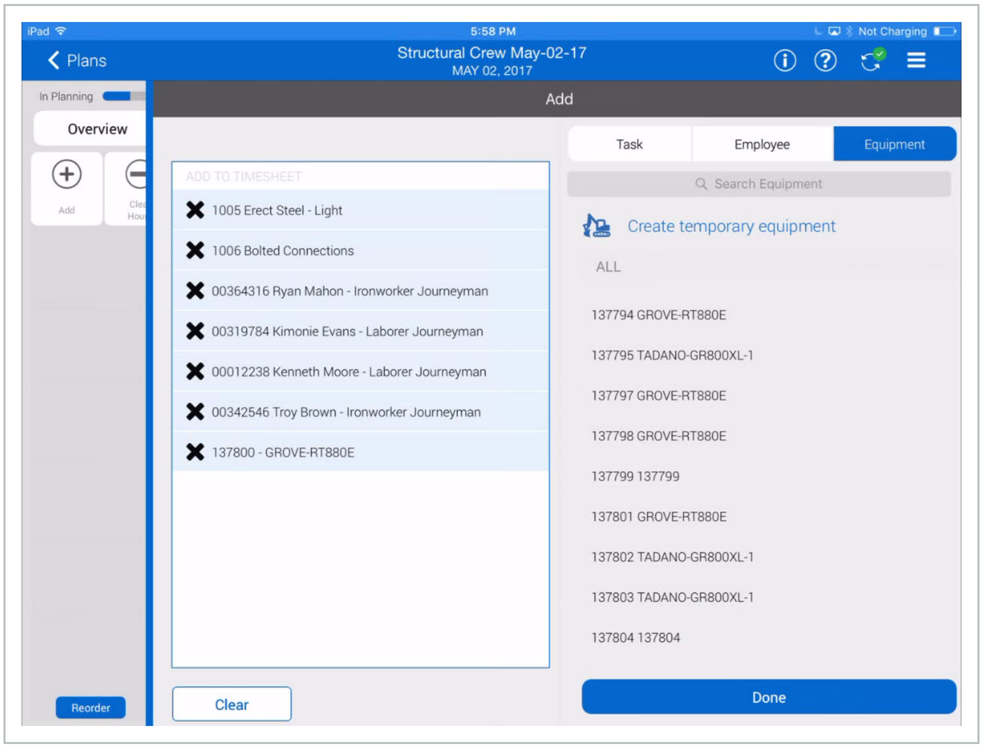
On the Time Sheet tab, you can enter all your tasks, employees and equipment and assign hours to each. The table below explains key navigation points.

Overview - Time Sheet Tab

Title		Description
1	Add	Tap here to add tasks, employees and equipment. (Further explained below.)
2	Clear Hours	Tap here to clear all hours from the time sheet.
3	Reorder	Tap here to reorder tasks, employee and equipment in the time sheet.
4	Enter Hours	Tap here to enter hours (ST, OT, DT) for employees and equipment.
5	Employee / Equipment Details	Tap here to mark attendance, enter extra pay, temporarily change billing class, add notes, delete row, or clear hours.
6	Task Details	Tap here to enter total task planned hours, add notes, swap task or delete task.



When adding tasks, employees, or equipment, the Add slide out panel appears as shown below.



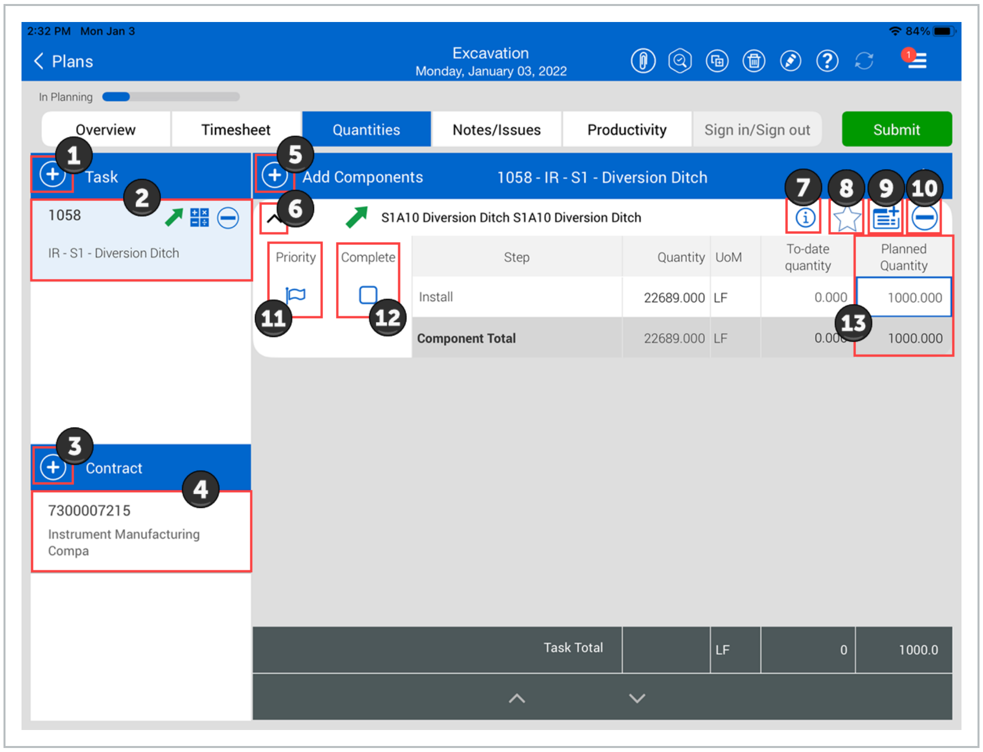
- View your lists of all available tasks, employees and equipment by tapping on the appropriate tab at the top of the window
- Once selected from a list, items appear on the left-hand side of the window under Add To Time Sheet as shown above
- Tapping on the **X** next to an item removes it from the list
- If an item you require is not available in the list, you can add a temporary task, employee or equipment by selecting **Create Temporary Task**, **Create Temporary Employee**, or **Create Temporary Equipment**
- When you are satisfied with the list to be added to the Time Sheet, tap **Done** to return to the time sheet

2.2.3 Quantities

In the Quantities tab, you select components for each task. If you plan to use claiming rules with multiple steps, you can choose which steps you plan to complete. You can also indicate which components are higher priority.

Overview - Quantities Tab

Title		Description
1	Add task	Tap here to add additional tasks. Resource hours must be assigned back in the Time Sheet tab.
2	Select task	Tap here to show or add components for the selected task.
3	Add contract	Tap here to add contracts.
4	Select contract	Tap here to show or add components for the selected contract.
5	Add Components	Tap here to add components for the selected task or contract by selecting from a list.
6	Expand / Collapse	Tap here to expand and collapse individual component details.
7	Information	Tap here to show a description of the component.
8	Favorite	Tap here to add the component to your favorites.
9	Add note	Tap here to add a note or issue associated with an individual component.
10	Delete component	Tap here to delete a component.
11	Priority	Tap here to mark a component step as a priority.
12	Complete	Tap here to select a component step to complete as part of the daily plan and add the corresponding quantity to the planned quantity.
13	Planned Quantity	Tap here to enter the planned quantity for a component step, providing the planned quantity does not exceed the component quantity.
14	View Planning slide-out panel	(Not pictured. See Daily Plan from Scratch) Tap here to view the quantity needed to break even for the selected task. Or you can manually enter any quantity to see how it would affect the gain/loss for the selected task.



2.2.4 Notes/Issues

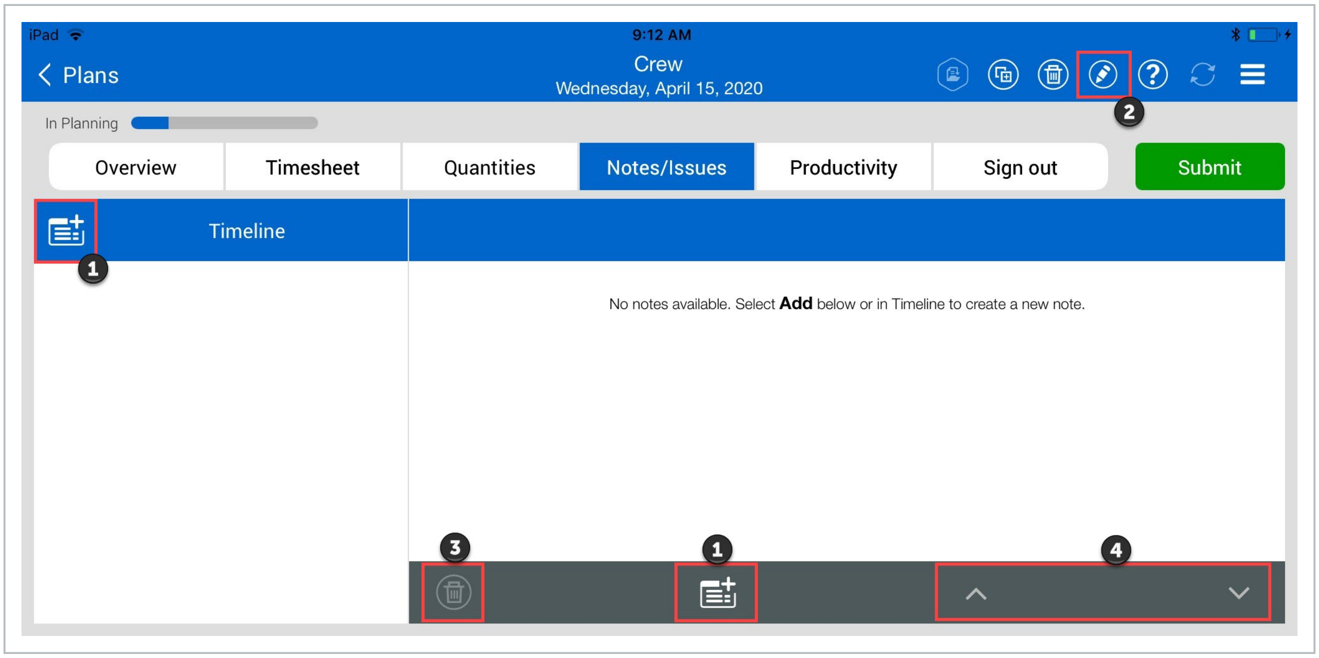
The Notes/Issues tab is where you can enter additional information regarding a task or component for the crew to be aware of when they execute the plan. You can add safety, quality control, environmental, subcontract, and other information. If an issue is added it will automatically show up on the issue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

Overview - Notes/Issue Tab

	Title	Icon	Description
1	Add		The Add button allows you to add a note or issue under the Notes/Issues tab.
2	Edit		The Edit button allows you to make changes to an existing note.
3	Delete		The Delete button allows you to remove existing notes.

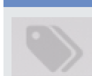
Overview - Notes/Issue Tab (continued)

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



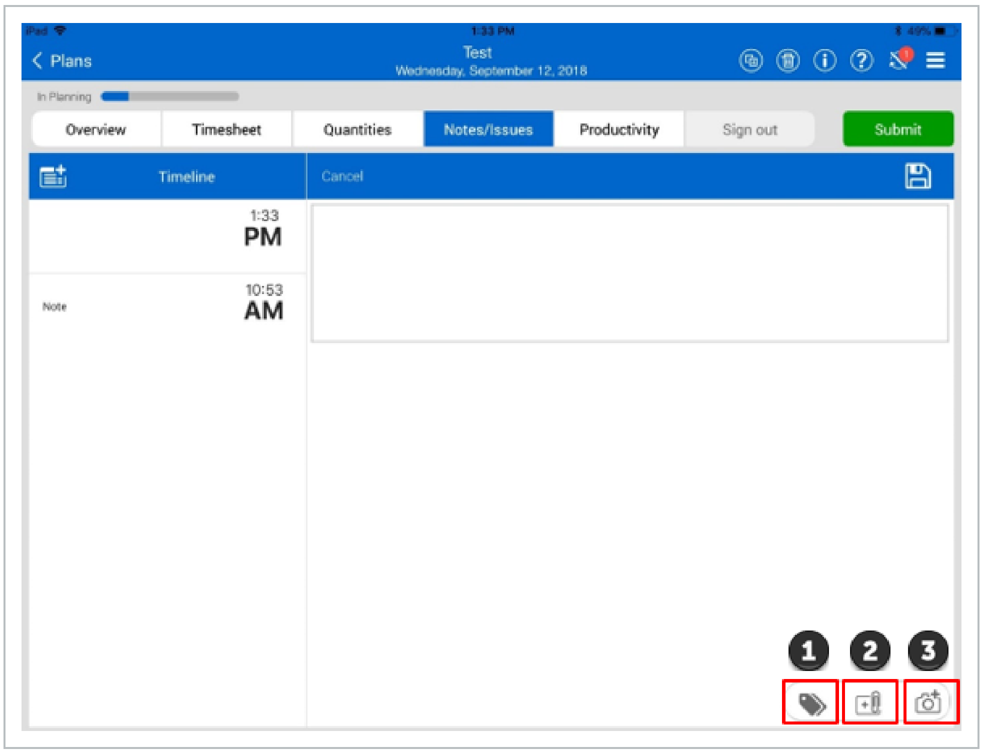
When you add a new note or issue, three icons will appear at the bottom. The following overview explains these icons.

Overview - Tags & Associations

Title		Icon	Description
1	Tags		The Tags button allows you to add tags to your notes. The following tags are available: • Safety • Quality • Environmental • Extra Work/Changes • Delay • Production Notes

Overview - Tags & Associations (continued)

Title		Icon	Description
2	Associations		The Associations button allows you to associate the note with a specific task, employee, equipment, components, or vendors.
3			The Photo button allows you to add a picture to a note. The photo can either be taken from the device's camera or from the saved photos on the device.

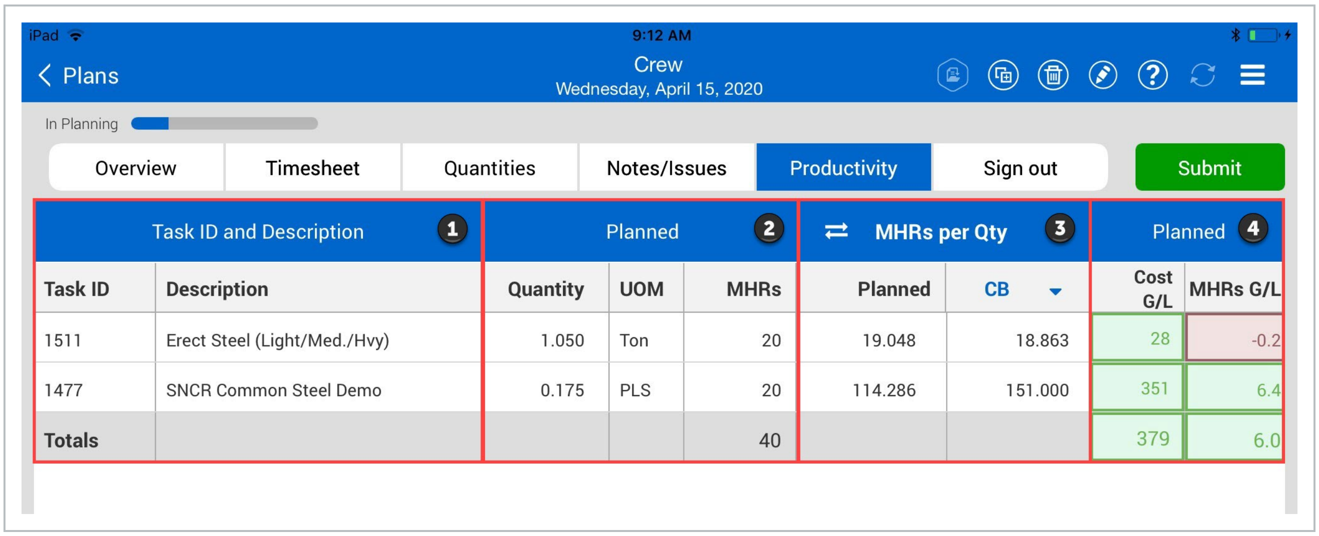


2.2.5 Productivity

The Productivity tab is where you can review the planned quantity and man-hours in comparison to current budget, current estimate, and forecasted or goal unit rates which shows your planned gain/loss.

Overview - Productivity Tab

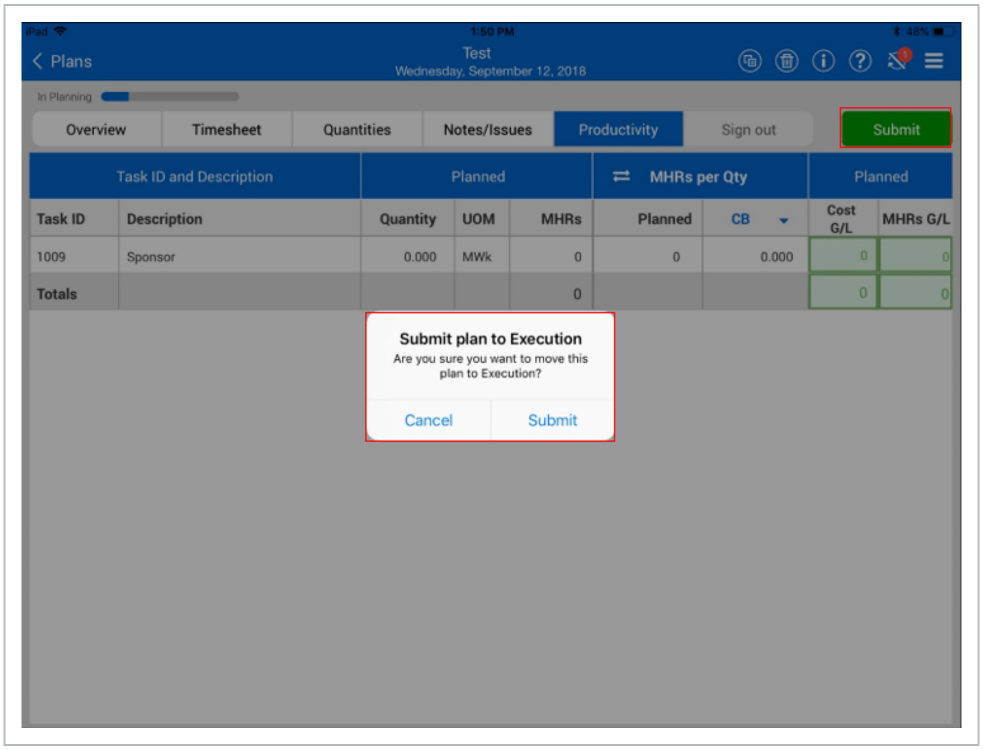
Title		Description
1	Task ID and Description	Indicates the tasks planned for the crew to perform that day.
2	Planned	Displays the plan information you entered in the Quantity tab (quantity, unit of measure, and man-hours).
3	MHRs per Qty	Compares the planned values to the current budget values.
4	Planned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



2.2.6 Submit & Sync

After reviewing the planned information in the Productivity tab and confirming that the employees and equipment you have are accurate for the tasks, you can tap on the Submit button.

When you tap on the Submit button, a warning pop-up window appears asking if you are sure you want to move the plan to Execution.



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

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

Scenario Recap

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

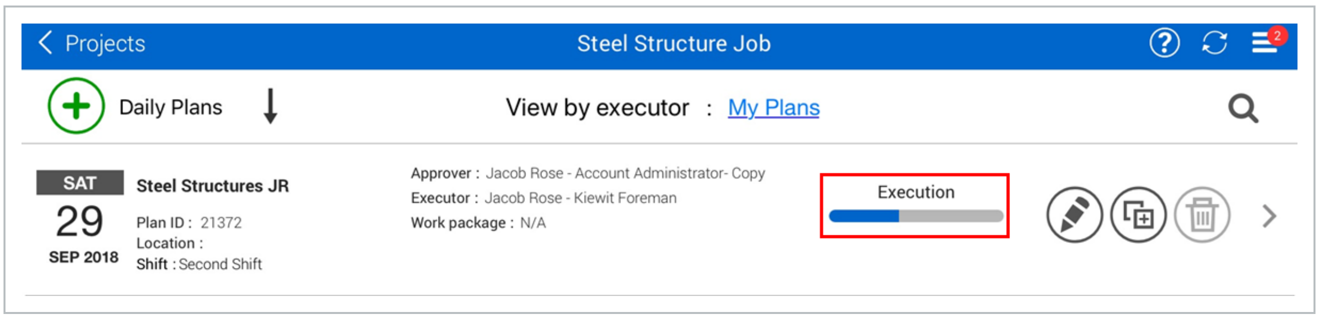
2.3 NAVIGATE EXECUTION

Scenario

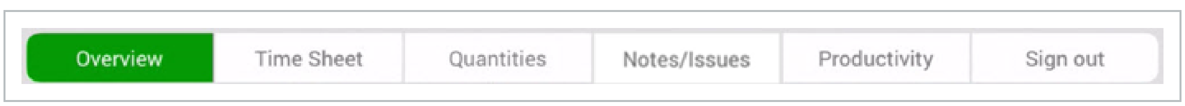
> Steve is an electrical foreman on a project. Yesterday he created a daily plan that was reviewed by his superintendent, Paul. He is now preparing for the morning meeting and getting ready to execute the daily plan.

2.3.1 Plan List

You access a daily plan from the list of daily plans. Note that the current status is now Execution.



Navigating through the Daily Execution Phase is very similar to the Daily Planning Phase. The same navigation bar appears at the top of the screen and you work though each tab to review the plan information and enter actual data. The tabs in the navigation bar are the same as in the planning phase except you are now able to access the Sign Out tab.



2.3.2 Overview

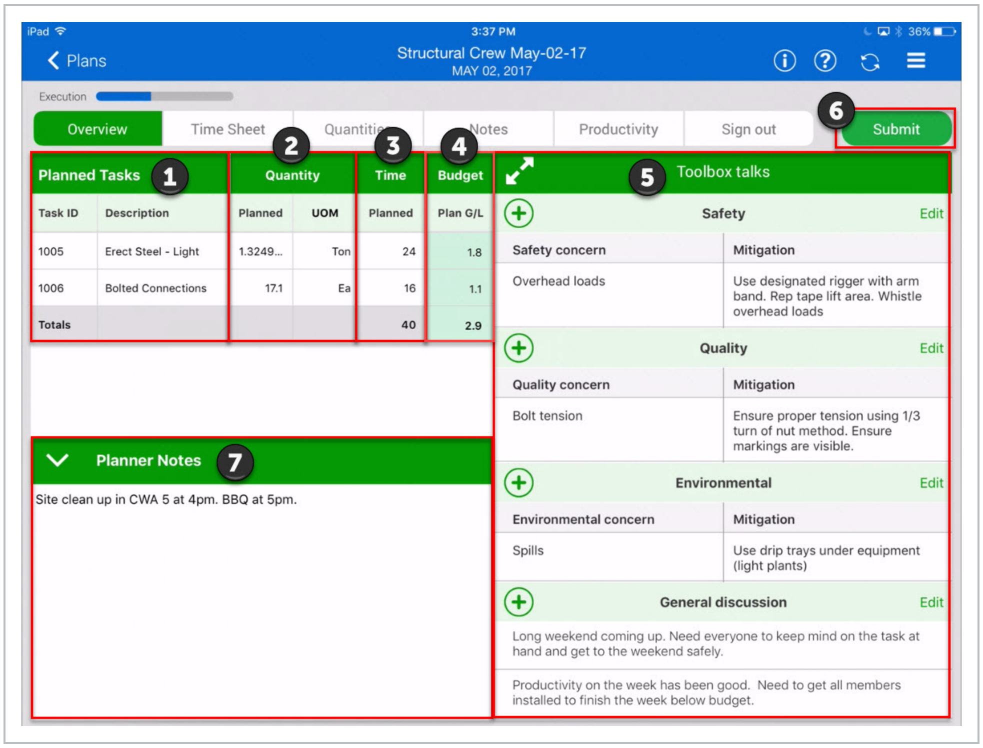
The first tab that you open to is the Overview tab. The Overview tab contains key information you would want to review with your crew at the start of the shift such as:

- Planned tasks
- Planned quantity for each task
- Planned budget

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

Overview - Overview Tab

Title		Description
1	Planned Tasks	Displays the Task ID and Description of each planned task.
2	Quantity	Displays the Planned Quantity and Unit of Measure for the task. The Planned Quantity comes from information entered during the planning phase.
3	Time	Displays the planned hours for the task.
4	Budget	Displays the planned gain or loss in manhours by comparing the planned hours and planned install quantities to the budget unit rates.
5	Tool Box Talks	Contains plan information on Safety, Quality (Quality Concern and Mitigation), Environmental (Environmental Concern and Mitigation), and General Discussion.
6	Submit	Once the plan is executed and all data has been entered, you can tap the Submit button to send the daily plan to the approval phase. You can access the submit button while working in any of the daily plans.
7	Planner Notes	Shows general notes input during the planning phase. During execution phase this block is not editable.



2.3.3 Time Sheet

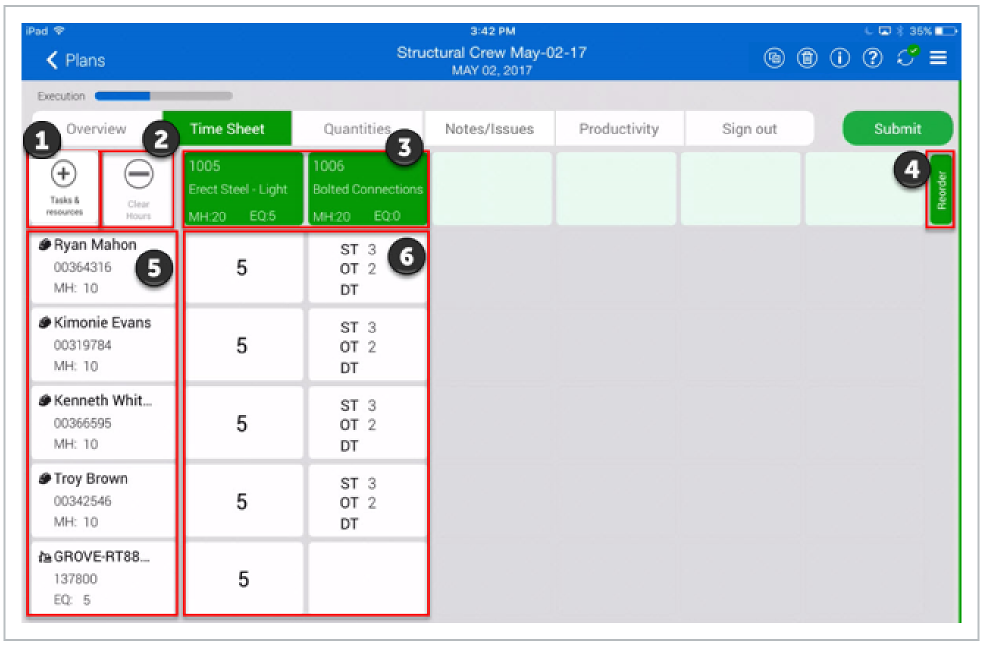
In the Time Sheet tab, the planned tasks, resources and hours are all displayed. As the day progresses you can enter in actual hours for each resource and task. If you need to add tasks or resources, you can do it here as well.

Time Sheet Tab

Title		Description
1	Add ⊕	Allows you to add additional tasks, employees, and equipment to the Time Sheet. You can also create temporary tasks, employees, and equipment.
2	Clear Hours	Allows you to clear all the hours from the Time Sheet. For instance, if you copied a daily plan and copied in the hours worked by the employees you can clear it out for the new task.
3	Tasks	The work operations to be completed. These are also the cost codes you are charging employee time to.
4	Reorder	Allows you to reorder the list of items in the time sheet any way you want,

Time Sheet Tab (continued)

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

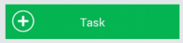
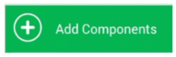
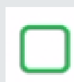
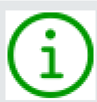


- To enter hours for equipment and crewmembers, you click on the hour box under each task and next to the crewmembers' name
- A window appears where you can enter ST (Straight Time), OT (Over Time), or DT (Double Time)

2.3.4 Quantities

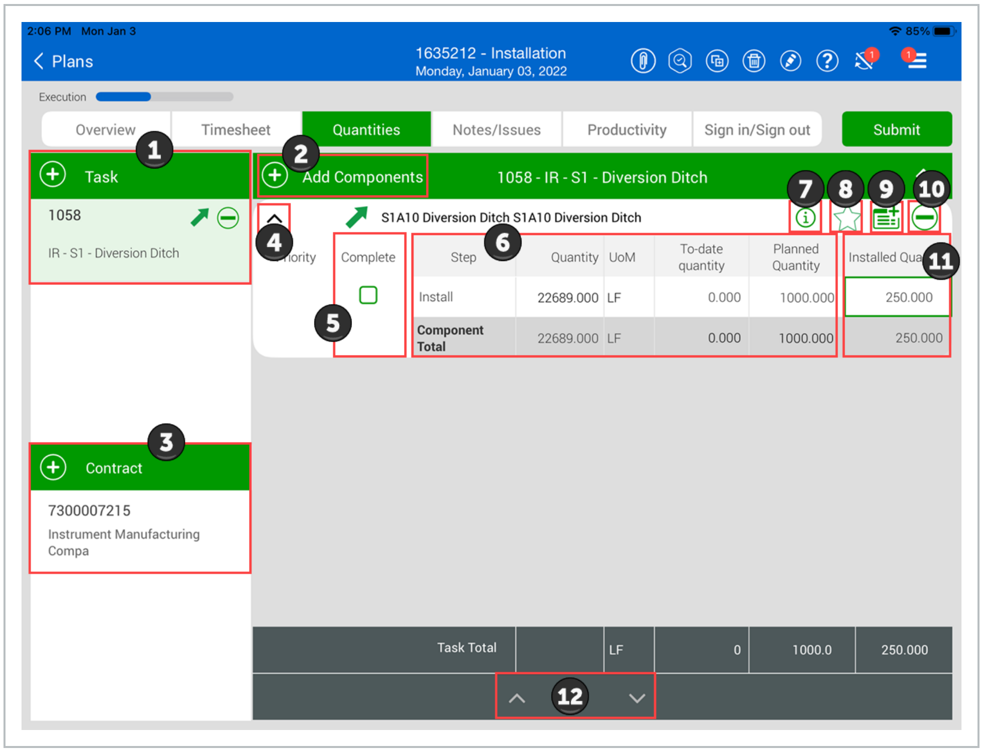
In the Quantities tab, all the components that were included in the planning process for each task are shown. Actual quantities are claimed by entering the quantity or tapping the Complete check box. You can add or delete components at this point if required.

Overview - Quantities Tab

Title		Icon	Description
1	Add task		Lets you add tasks. You can also add temporary tasks.
2	Add Component		Lets you add components for the task or contract selected in the left side panels. You can also add temporary components.
3	Add contract		Lets you add contracts.
4	Expand / Collapse Icon	 	Selecting these icons will either expand or collapse the component details.
5	Complete check box		Check this box when the component of the task is complete.
6	Component breakdown		Displays the Planned Quantity and what is claimed to date. Displays the claiming steps or rules of credit for that specific component. This area is greyed out because it is not an editable field.
7	Information		Shows a description of the component.
8	Favorite		Adds the component to your favorites.
9	Notes		Allows you to add notes and issues to the components.
10	Delete		Tap this icon to remove the component.
11	Installed Quantity		Enter the numerical value of the installed quantity for each claiming step here. Checking the Complete box will auto populate this field with the total quantity.
12	Up and down		Allows you to navigate through the different tasks.

Overview - Quantities Tab (continued)

Title	Icon	Description
arrows		



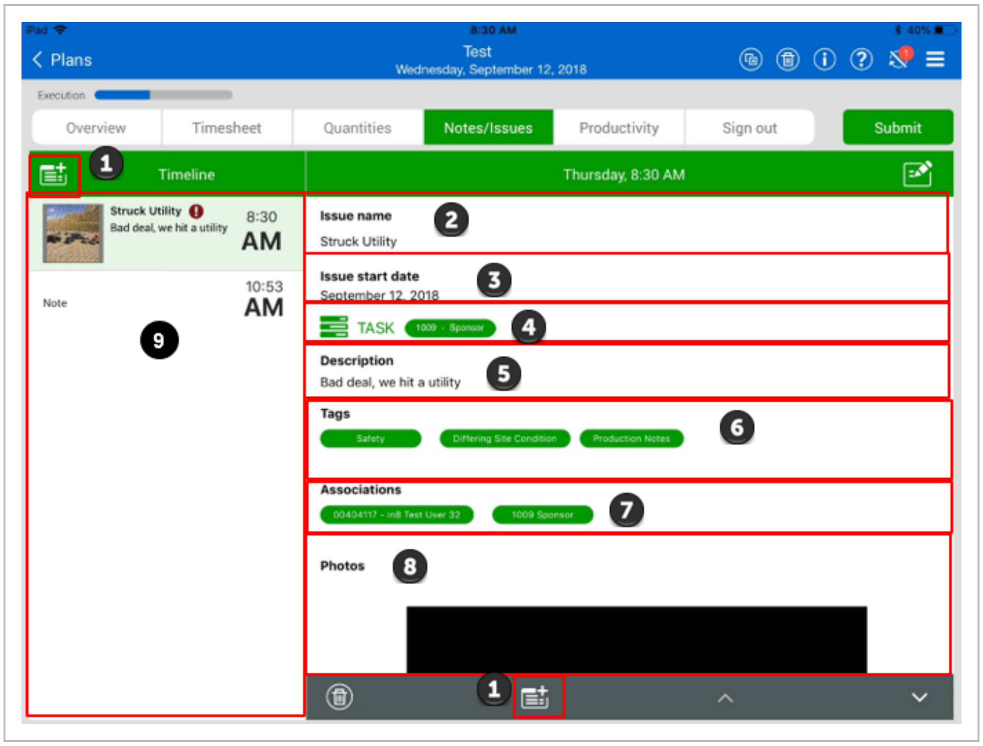
2.3.5 Notes/Issues

Use the Notes/Issues tab to add notes to your components or task, for example to provide additional information regarding the operation you performed for the day, the performance results, quality issues, environmental compliance and many more.

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

Overview - Notes/Issues Tab

Title			Description
1	Add	 	Click either icon to add a note/issues to this daily plan.
2	Name		Displays the name of the note or issue.
3	Date		The start date of the note or issue
4	Tasks		Associates the note/issue to a specific task.
5	Description		A free text field of the description of the note/issue.
6	Tags		Allows you to tag the notes/issues to a certain category such as Safety, Quality, Environmental, Extra Work/Change, Delay, or Production Notes. To see this icon, you must click on the add button.
7	Associations		Allows you to add associations to your notes, such as task, employee, equipment, components, and vendors. To see this icon, you must click on the Add button.
8	Pictures		Allows you to take a photo and attach it with your notes, or to select a photo from the photo library. To see this icon, you must click on the Add button.
9	Timeline		Thumbnail view of all notes in daily plan organized in chronological order.

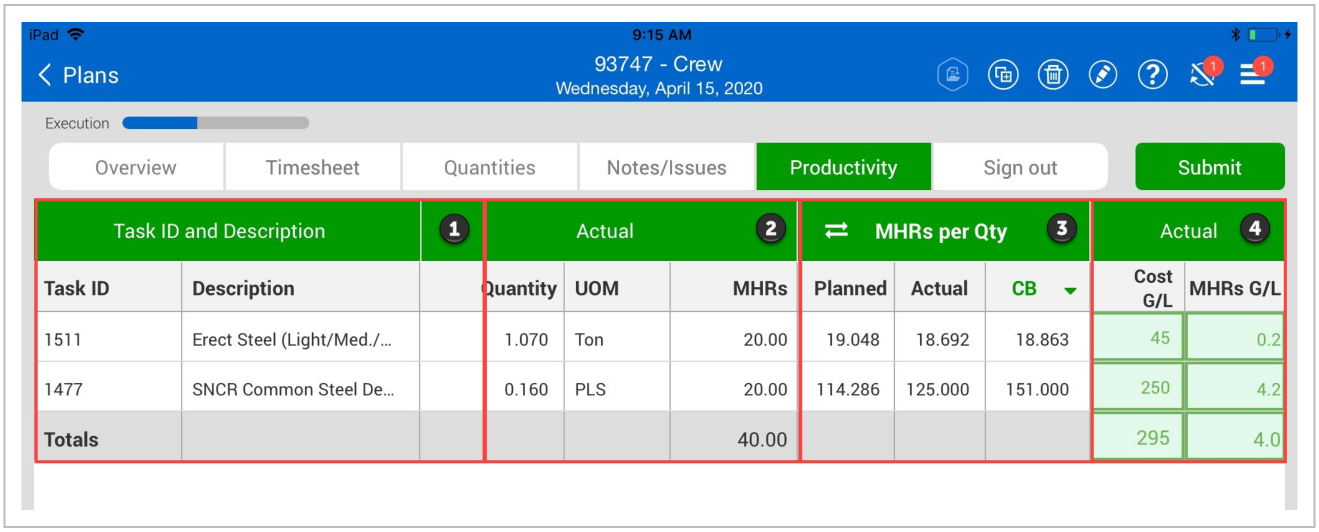


2.3.6 Productivity

In the Productivity tab you can review your tasks, quantities, and hours claimed for the tasks, and compare the actuals to the planned quantities and hours as well as view your actual gain/losses.

Overview - Productivity Tab

Title		Description
1	Task ID and Description	Displays the task ID and description.
2	Actuals (UoM and MHRs)	Displays the actual claimed quantities and man-hours.
3	MHRs per Qty	Compares the Planned versus Actual MHRs per Qty. You can select CE (Current Estimate) or CB (Current Budget) or Foecast or Goals.
5	Actual (G/L)	Compares actual cost or MHRs to budgeted cost or MHRs for each task and shows the gain or loss for each task.



2.3.7 Sign Out

Before submitting a completed daily plan for approval, employees need to sign out by tapping their name. You enter the employee PIN (personal information number) which can be the birthdate of the employee or a number that the IT personnel has assigned to that employee.

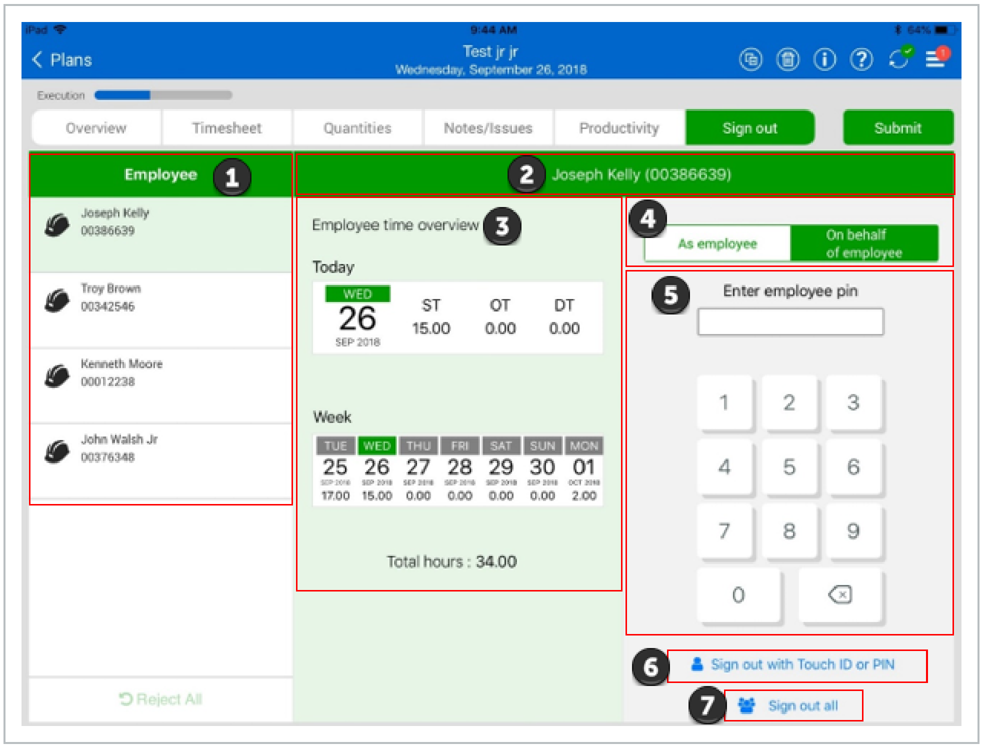
The employee will be able to review the hours input by the Foreman before signing the card. At this point, they can agree or disagree with the hours and negotiate the hours before signing out.

Overview - Sign out Tab

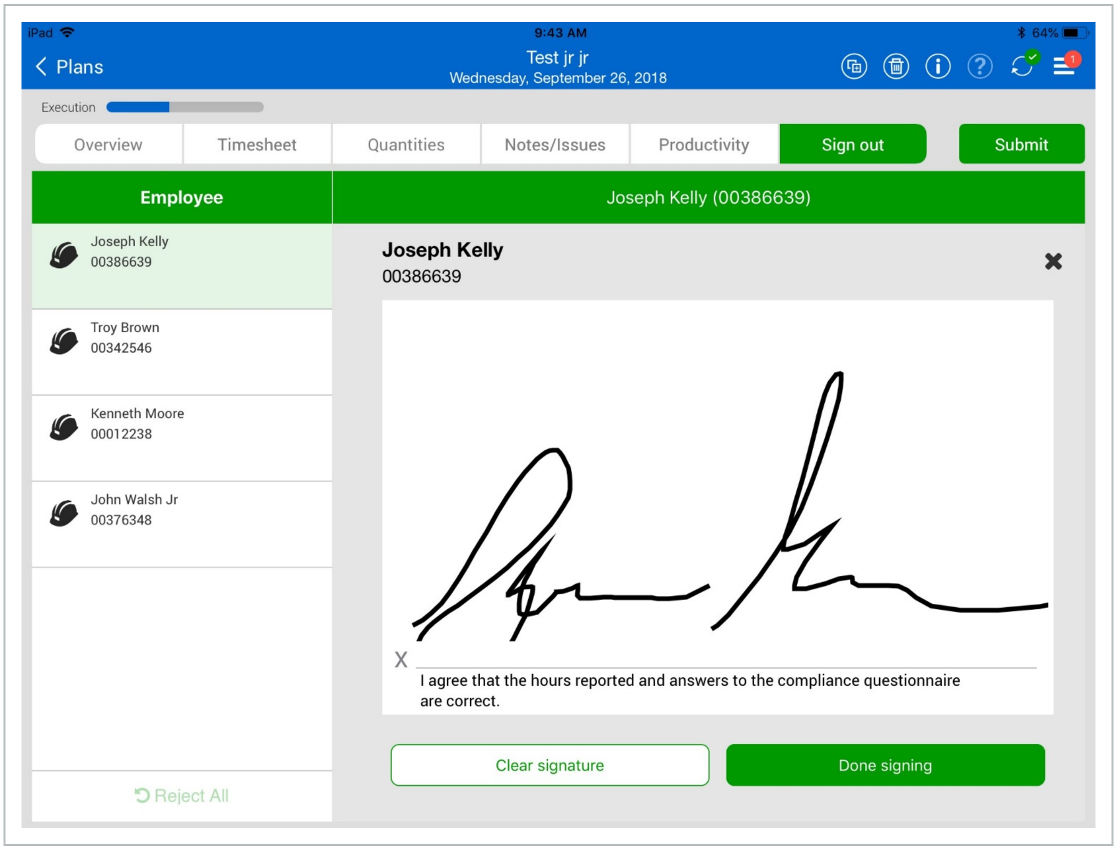
Title		Description
1	Employee	Displays all the employees including the foreman on a specific daily plan.
2	Employee Name	Displays the name of the employee selected to sign out.
3	Employee Time Overview	Displays a summary of hours for the day and week entered for that employee.
4	As Employee/On Behalf of Employee	There are two options for signing out: the employee can sign out, or the foreman with permissions can sign out for the employee.
5	Employee Pin	Where employees enter their pin numbers.

Overview - Sign out Tab (continued)

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



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



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

2.3.8 Submit and Sync

Like the planning phase, you must select Submit to send the daily plan to the Approval Phase. All employees must be signed out to submit the daily plan for approval. Tap the Sync button to push any updates to the InEight Cloud Platform.

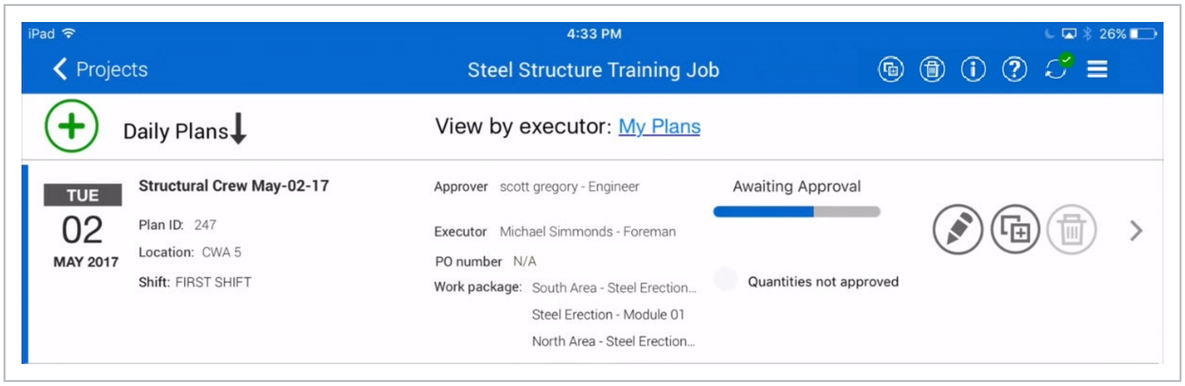
Scenario Recap

> Steve and his crew could execute the work on the jobsite and he was able to complete the Execution Phase of his daily plan by navigating through each tab of the navigation bar. At the end of the shift when all employees had signed out, he submitted the daily plan for approval.

2.4 NAVIGATE APPROVAL

2.4.1 Plan List

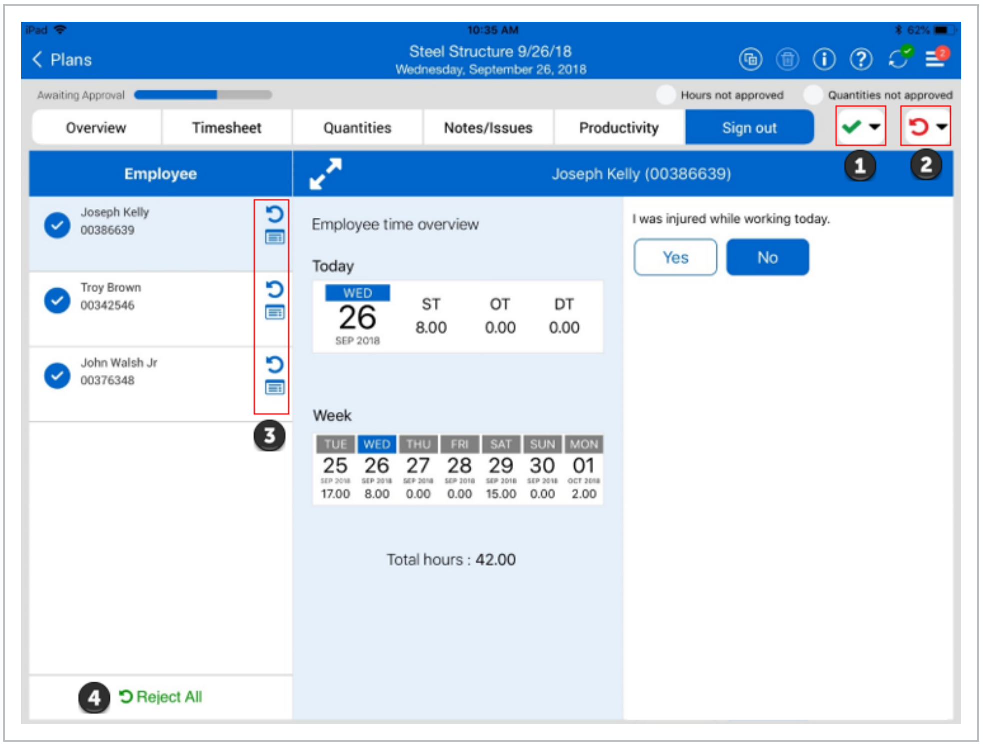
You access a daily plan from the list of daily plans. Note that the current status is now Awaiting Approval. There is also a note indicating that the quantities have not been approved.



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

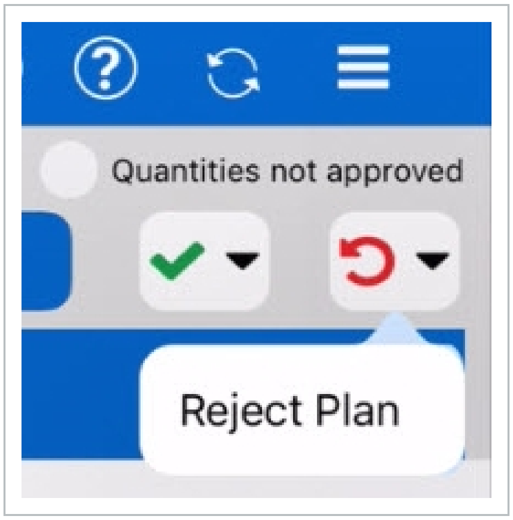
Overview - Sign out Tab

Title		Description
1	Approval	Approves actual quantities, hours or both.
2	Reject	Rejects the plan and sends it back to the Execution Phase.
3	Reject Sign out	Rejects the sign out for an individual employee. This must be done before editing any hours on the Time sheet. The employee must sign out again after changes have been made or the supervisor approving the timecard can sign out on behalf of the employee.
4	Reject All	Rejects the sign out for all employees. This must be done before editing any hours in Time sheet. The employee must sign out again after changes have been made.



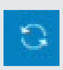
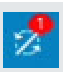
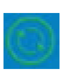
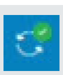
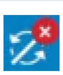
There is no requirement to enter new information in the Approval Phase. If the information is all correct, the plan can simply be approved by selecting “Approve Quantity and Hours”. If there are changes to be made that affect quantities, but the hours are correct, then you can select “Approve Hours” to send the hours to ERP payroll for processing while the changes to quantities are sorted out. The opposite is true when the quantities are correct but changes to the hours are required.

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



2.5 DATA SYNC

The InEight Progress application must be synced periodically receive updates from other InEight Cloud modules and vice versa. The following table explains the different sync symbols you may encounter when using InEight Progress.

Icon	Title	Description
	Available (Online)	App is online but has not been synced.
	Offline	App is offline.
	Unsynced Changes	Changes have been made to plans that haven't been synced (number of plans with unsynced changes will appear in red dot).
	Syncing	App is currently syncing (icon will spin).
	Success	Latest sync was successful.
	Failed	Latest sync was unsuccessful.

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

2.6 ATTACHMENTS ON MOBILE

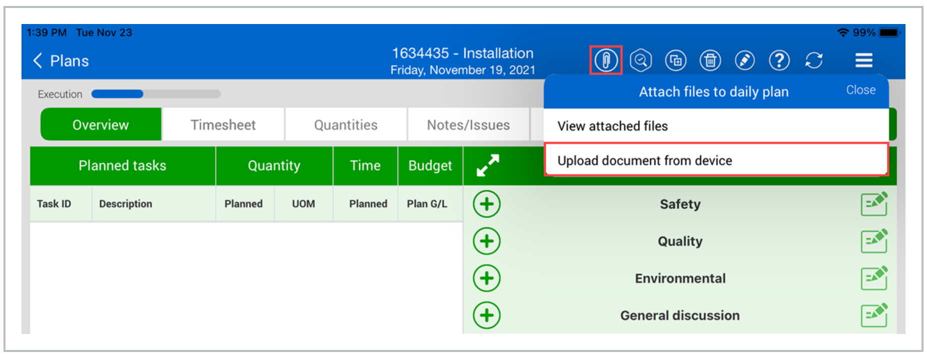
In the mobile application, you can attach files to a daily plan and view existing attachments.

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

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

Add an attachment on mobile

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



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

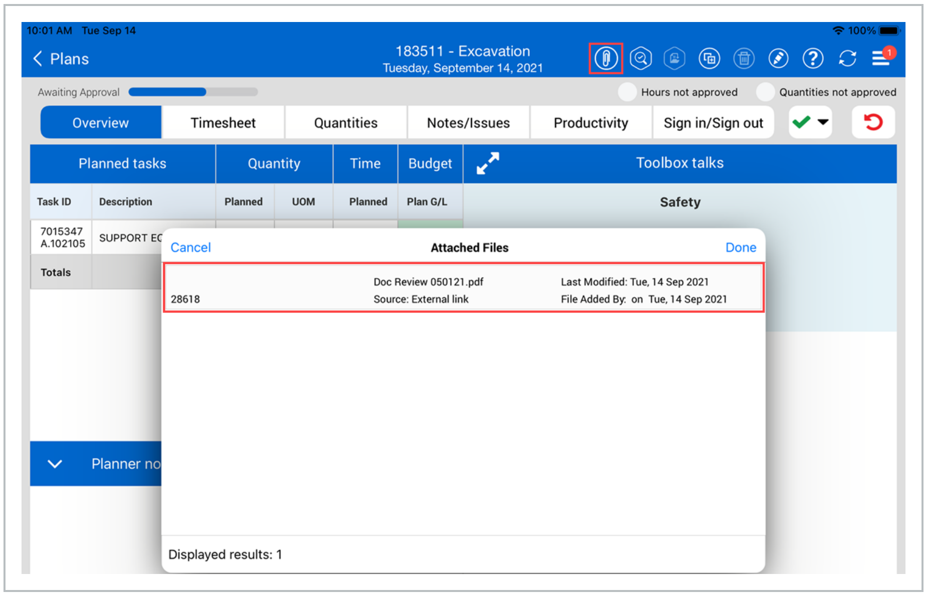
> An attachment must be 10 MB or less.

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

View an attachment on mobile

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

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

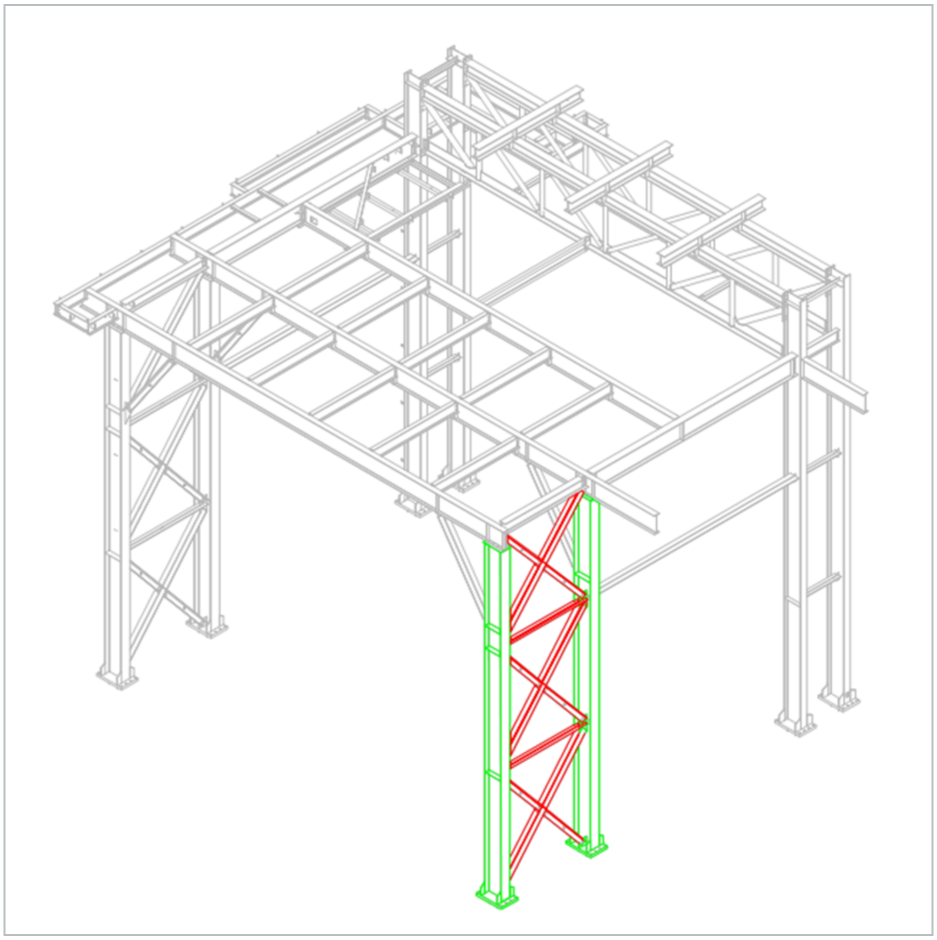


> You can only view attachments whose source is InEight Document in the Document mobile app if you have the app downloaded and have access to the same project in Document.

2.7 DAILY PLAN FROM SCRATCH

Scenario

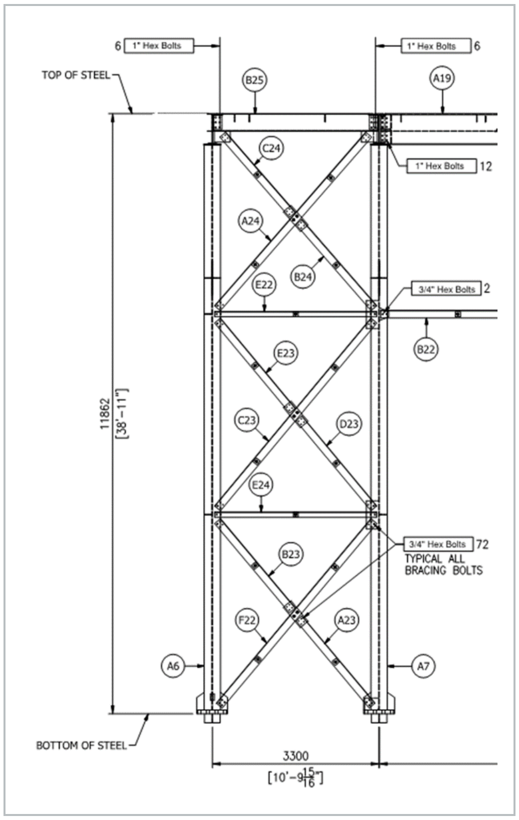
> Today, your crew is installing two columns of the Support Steel Structure 1 (green columns). Your plan for tomorrow is to install the horizontal and cross member assemblies (red cross bracing).



The steel members you will be installing are:

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

- *E24*
- *F22*



The plan for our crew tomorrow will be to shake out and transport the steel members by truck to the work area. We will also plan to erect and bolt up members C23, D23, E23, and E24. We will use a JLG to help with erection.

A plan is a list of steps that includes the time and resources (labor and equipment) that is used to achieve a goal or objective.

In InEight Progress Mobile, you can create a plan from scratch, if there is no existing plan to use that was previously created on the project. A plan can be created by either a foreman or an engineer.

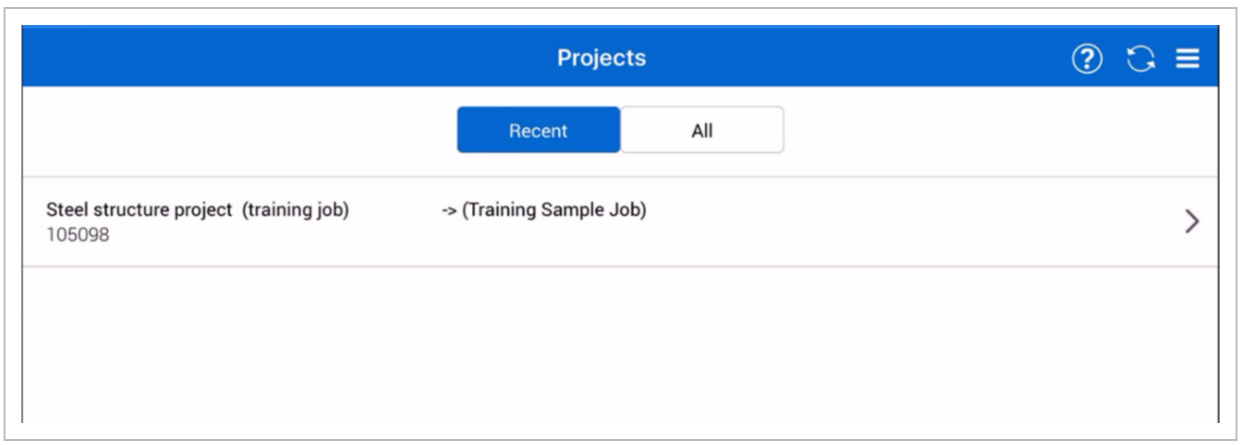
2.7.1 Plan Creation

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

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

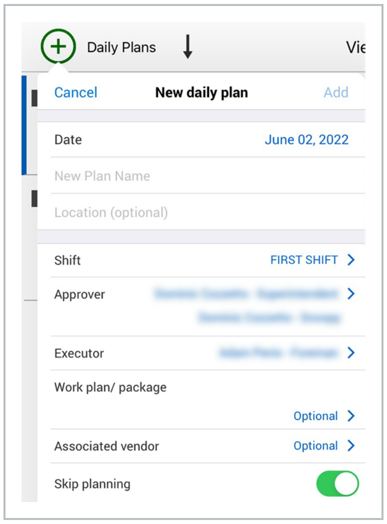
> You must provide a date of when the plan will be executed, select an approver, and select an executer when you create a plan from scratch.
>
> If an executor or approver is removed from the project, an error will appear in the Progress Mobile application prompting you to replace them on your daily plan.
>
> Some projects or organizations may choose to not require an executor which is a setting that can be changed in the project settings. Refer to the Progress Admin User Guide for more information on settings.

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



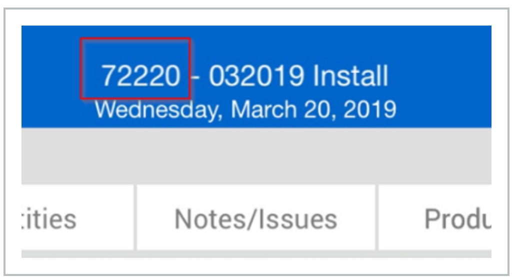
When you select the project you want to create a daily plan for, you will open the Daily plans page opens, where you will see the **Add** button.

When you tap The Add button icon, a slide-out panel opens from the left where you can provide a plan description, location and date. You can also select an approver, executer, Work plan/package ID, and associated vendor. When you have completed the plan information, you create the plan by selecting Add in the top right corner.

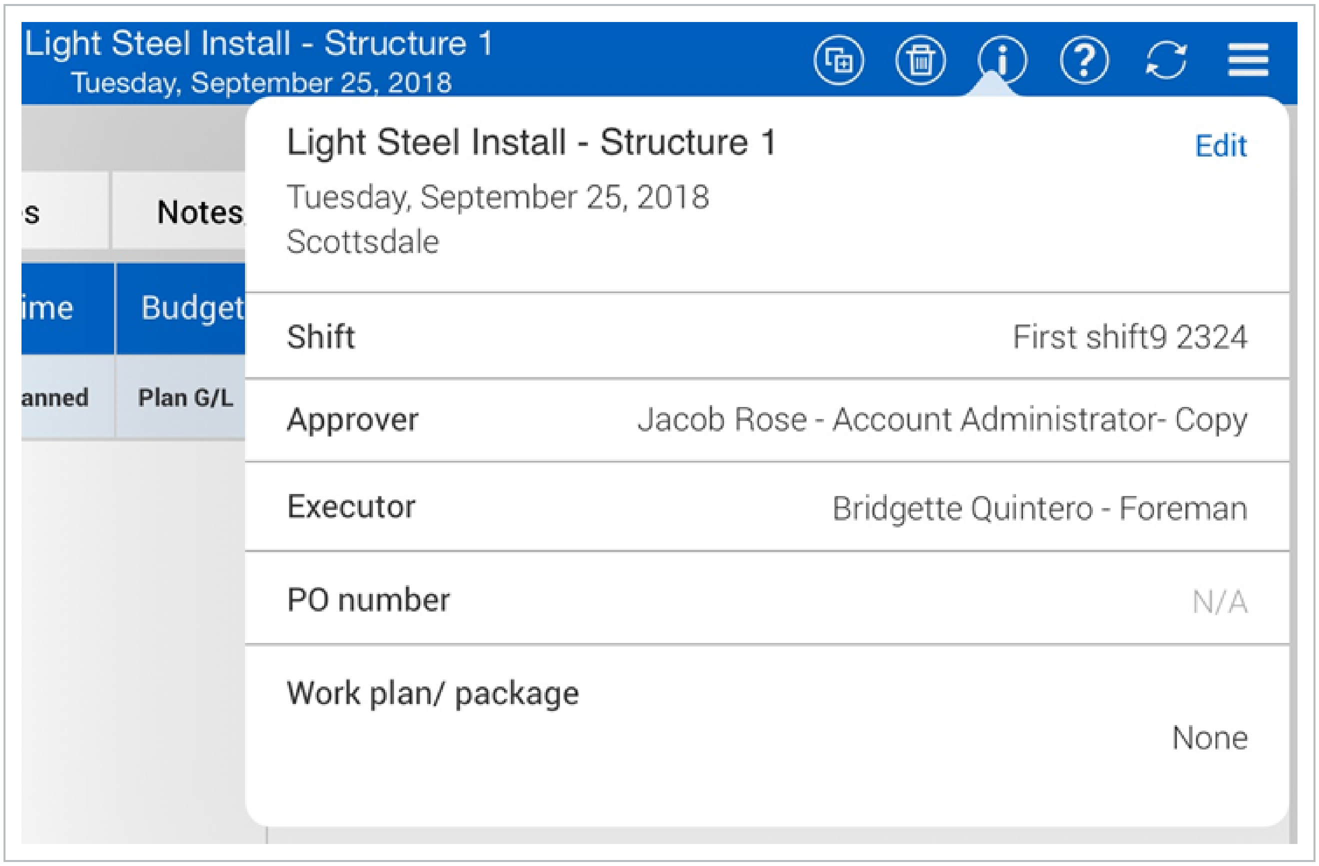


2.7.1.1 Daily Plan ID

When you create a new daily plan in the Progress Mobile application, the daily plan ID will be pending until it is synced with the Progress Web application. After a daily plan ID is assigned to the plan, it will be visible along with the plan description at the top of the screen.



After you create your plan, you will open to the Overview tab of the plan opens where you can enter information such as Planner Notes, Safety, Quality, Environmental, and General Discussion notes. To review or edit this initial information from any screen, you can select the Information icon.



2.7.1.2 Overview Tab

After you create a plan, within the Overview page you can provide key plan information, including:

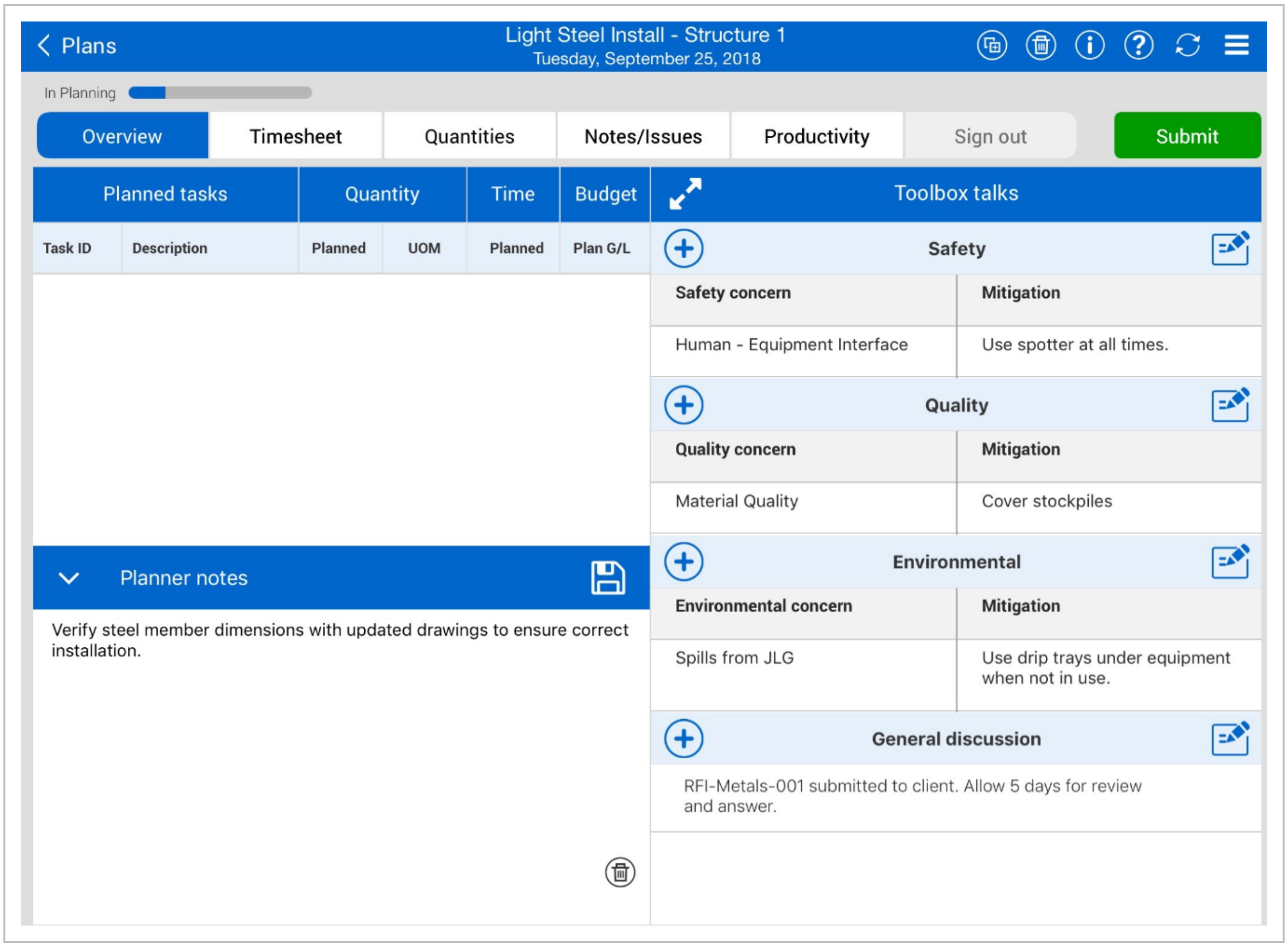
- The safety information pertaining to the Operation
- Quality concerns or required hold points
- Environmental concerns regarding your work or the area near your work
- Other notes regarding best practices

These notes become a reminder as you execute and review the plan, to ensure the required inspections for a particular section of your work are completed.

Within the General Discussion section is a note field, where you can include information to talk to your crew or foreman about, that doesn’t fit in the three major categories: Safety, Quality, and Environmental. Examples include:

- A pending RFI requires a response from the engineer to perform a section of work due to a design conflict
- A reminder of material requisition that you need to complete for upcoming work

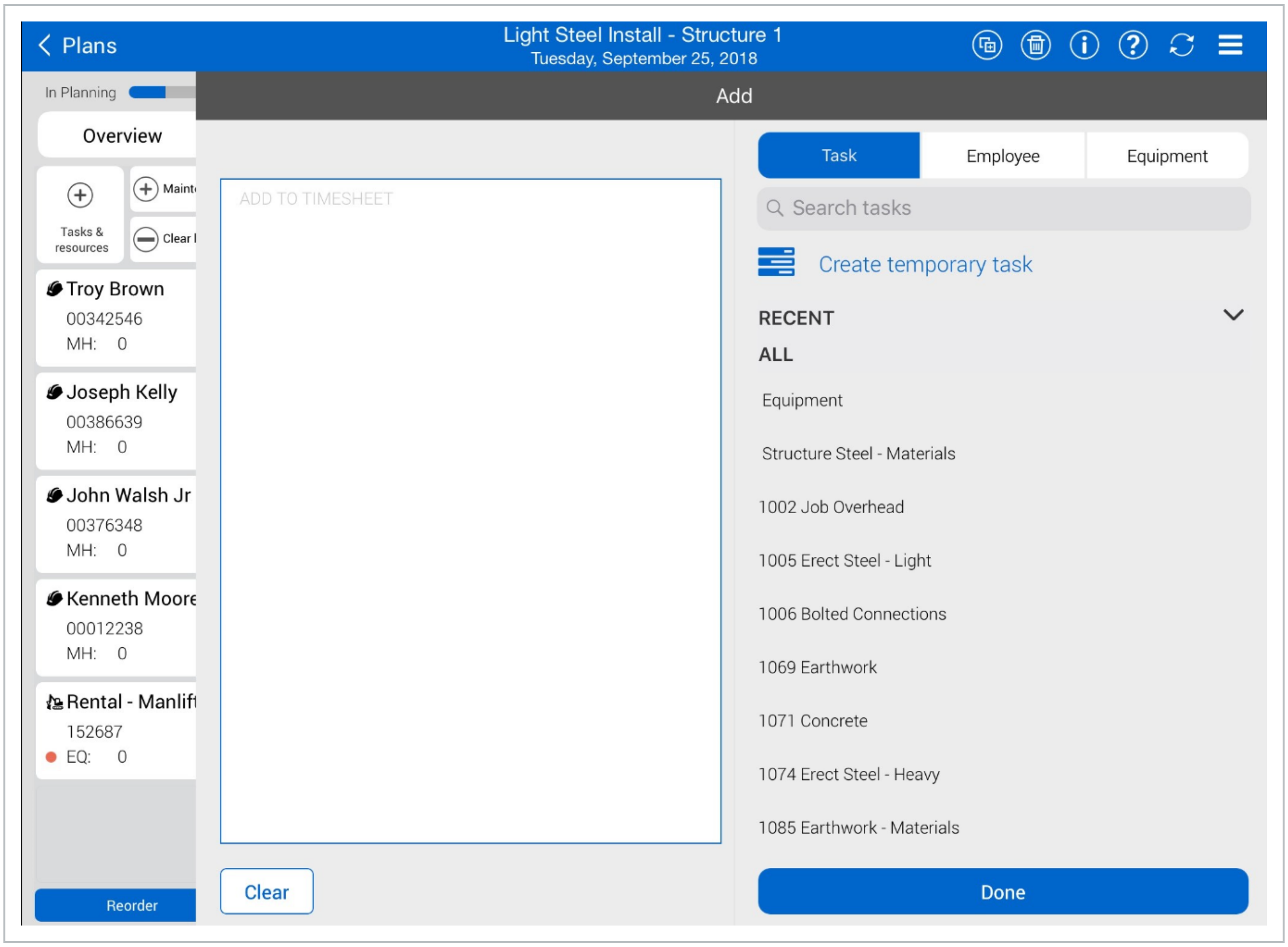
Aside from entering notes, you will be able to view your planned tasks information on the Overview tab after you enter your resources, quantities, and time into the other tabs.



2.7.2 Time sheet Tab

2.7.2.3 Add Tasks

The key aspect to planning work is the task or objective that needs to be completed. You add tasks under the Time sheet tab. Tasks are scopes of work that equal one cost item or line in the overall project budget. They are the charge codes you will charge employee and equipment hours to. Tasks are designated by a unique WBS number which is established in InEight Control and can vary greatly from company to company based on how you standardize cost coding structures.



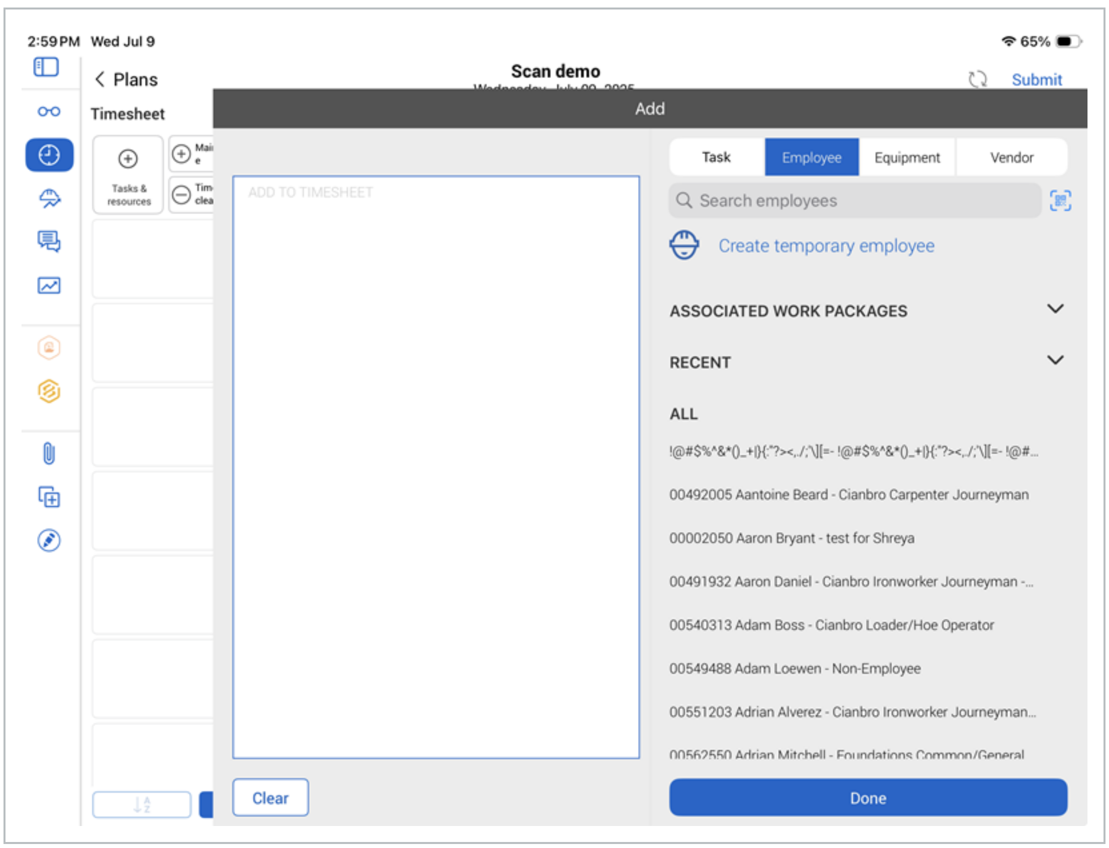
2.7.2.4 Add Employees and Equipment

Part of planning the work includes planning the work hours for your labor and equipment resources to accomplish each task.

On the Time sheet tab, the foreman and/or engineer plans how long each crewmember and piece of equipment will be used to perform a specific task in your plan to maximize the crew's productivity and reduce cost, so there is no equipment standing by or crewmember roaming around with no work to perform.

You can select employees from the projects list, add a temporary employee or scan a QR code to look up employees.

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



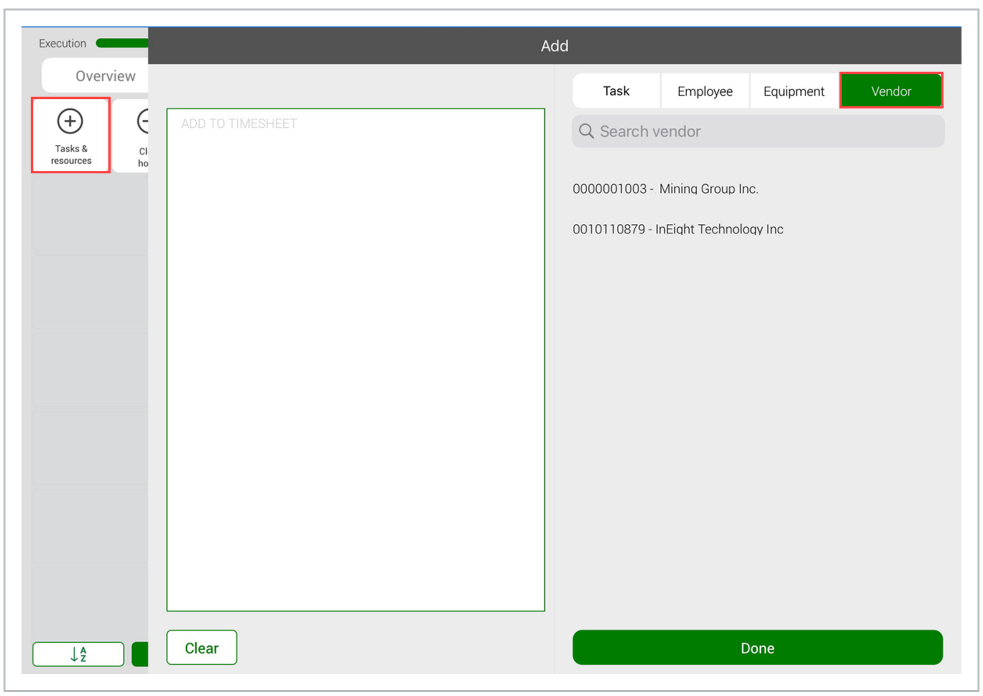
You can add employees and equipment only if the plan date is within the resources' project start and end dates. These dates are managed in your project’s Assigned operational resources page.

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

2.7.2.5 Add vendors

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

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



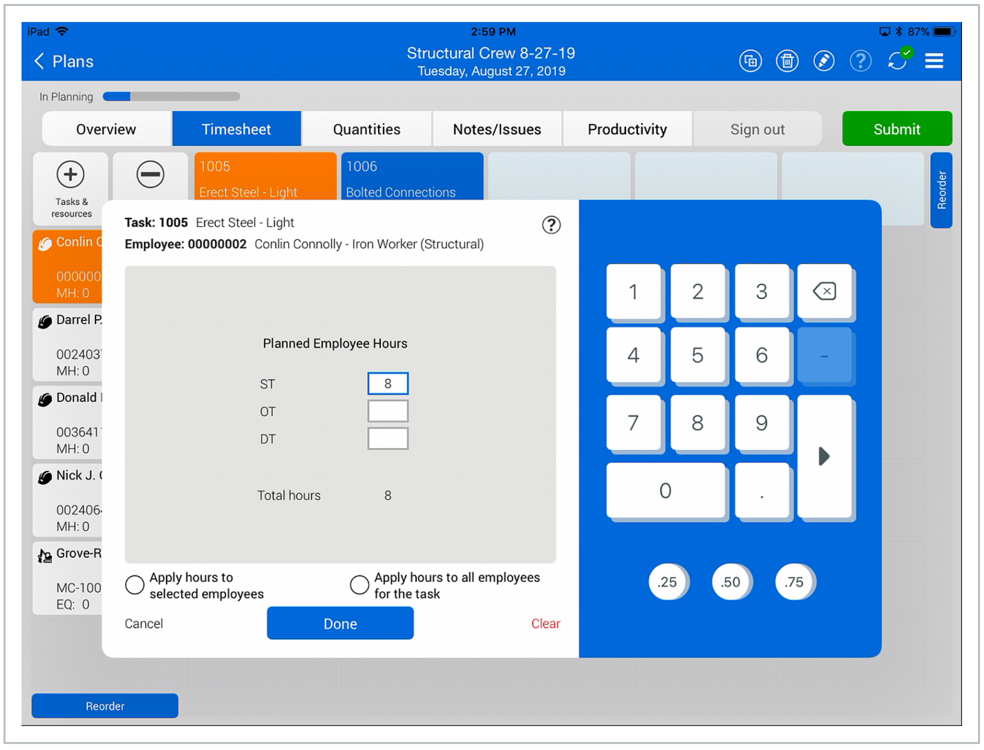
2.7.2.6 Temporary Employees and Equipment

As you are going through the list of equipment for your project, if you cannot find the right equipment for the operation, you can create a temporary piece of equipment in InEight Progress. To create a temporary piece of equipment you will need to have a Temporary Equipment ID and Name.

2.7.2.7 Add Hours

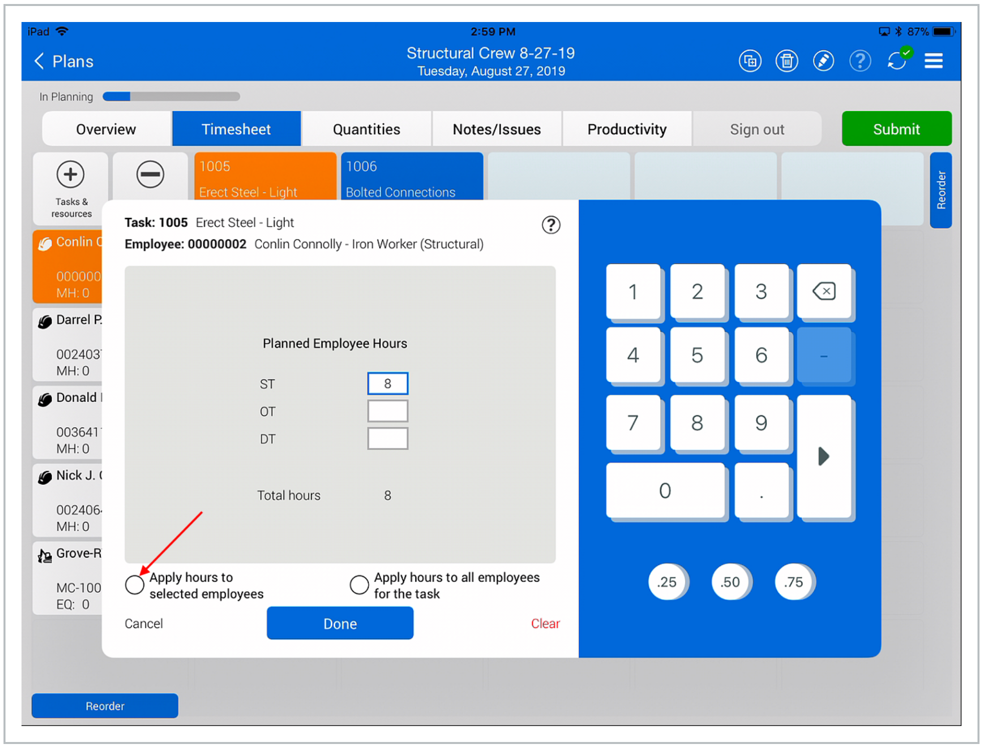
After you add tasks, labor, equipment, and vendor resources to the project, you can add time to the tasks and resources.

- Time units are in hours
- You can plan the work for straight time, overtime, or double time
- To enter hours, you tap on the hour box
- If you want to apply the same hours to other selected employees, you can select the **Apply hours to selected employees** option
- If the planned hours for all employees will be the same, you can select the option **Apply hours to all employees for the task**
- If you select the ? icon, you can bring up the help screen
- If you are adding hours to a vendor resource, there is an additional Number of employees field.

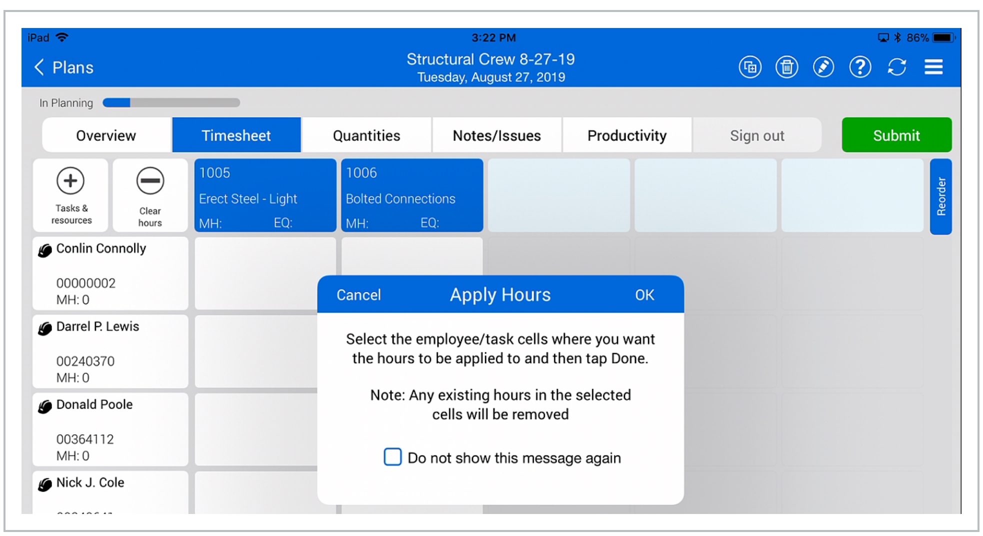


2.7.2.8 Apply Hours to Selected Employees

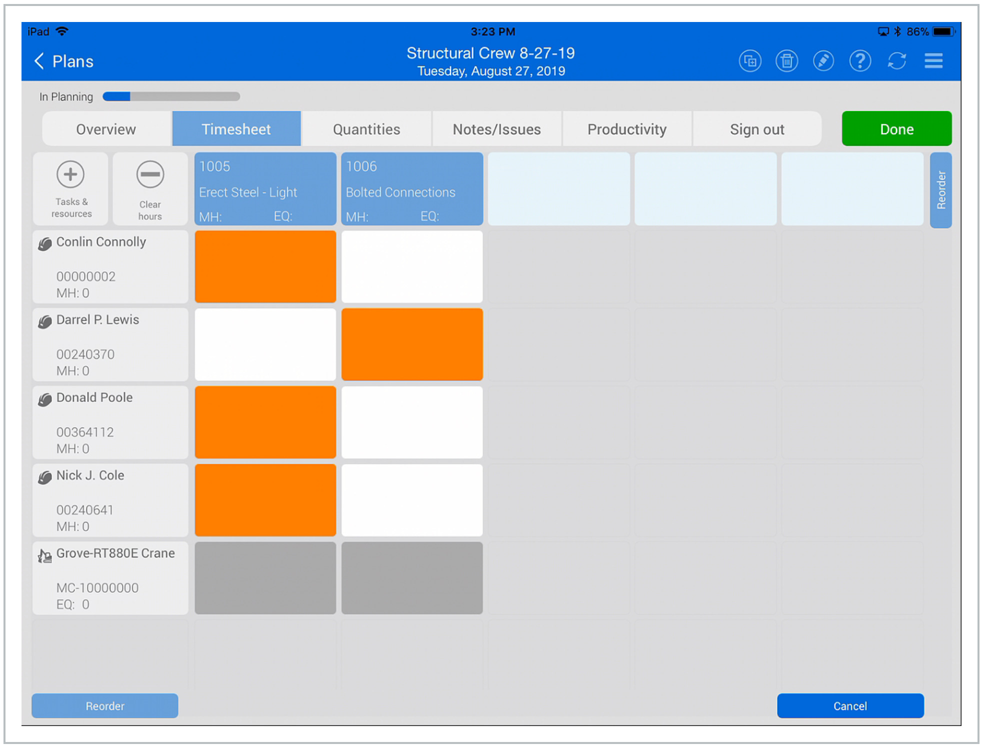
To save time, you can add hours to multiple employees at once. To do so, you would tap on the hours box for an employee and enter the number of hours you plan for them to work. You can then select **Apply hours to selected employees**.



The Apply Hours dialogue box appears with further instructions. You can check the box to not show the message again, to avoid it in the future.

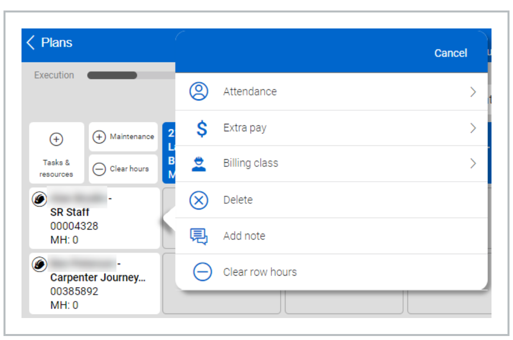


When you tap OK to close the dialogue, you can then select the hours boxes for all the employees you want to assign the same number of hours to, then tap Done.



2.7.2.9 Additional Options

By tapping on the individual employee box, you will have the following options:



- When you select **Attendance**, you can mark an employee present, absent excused – unpaid, absent excused – paid, and absent unexcused – unpaid
- When you select **Extra pay**, you have the choice from none, premium, Foreman for the day, pay scale level change, and additional lump sum amount

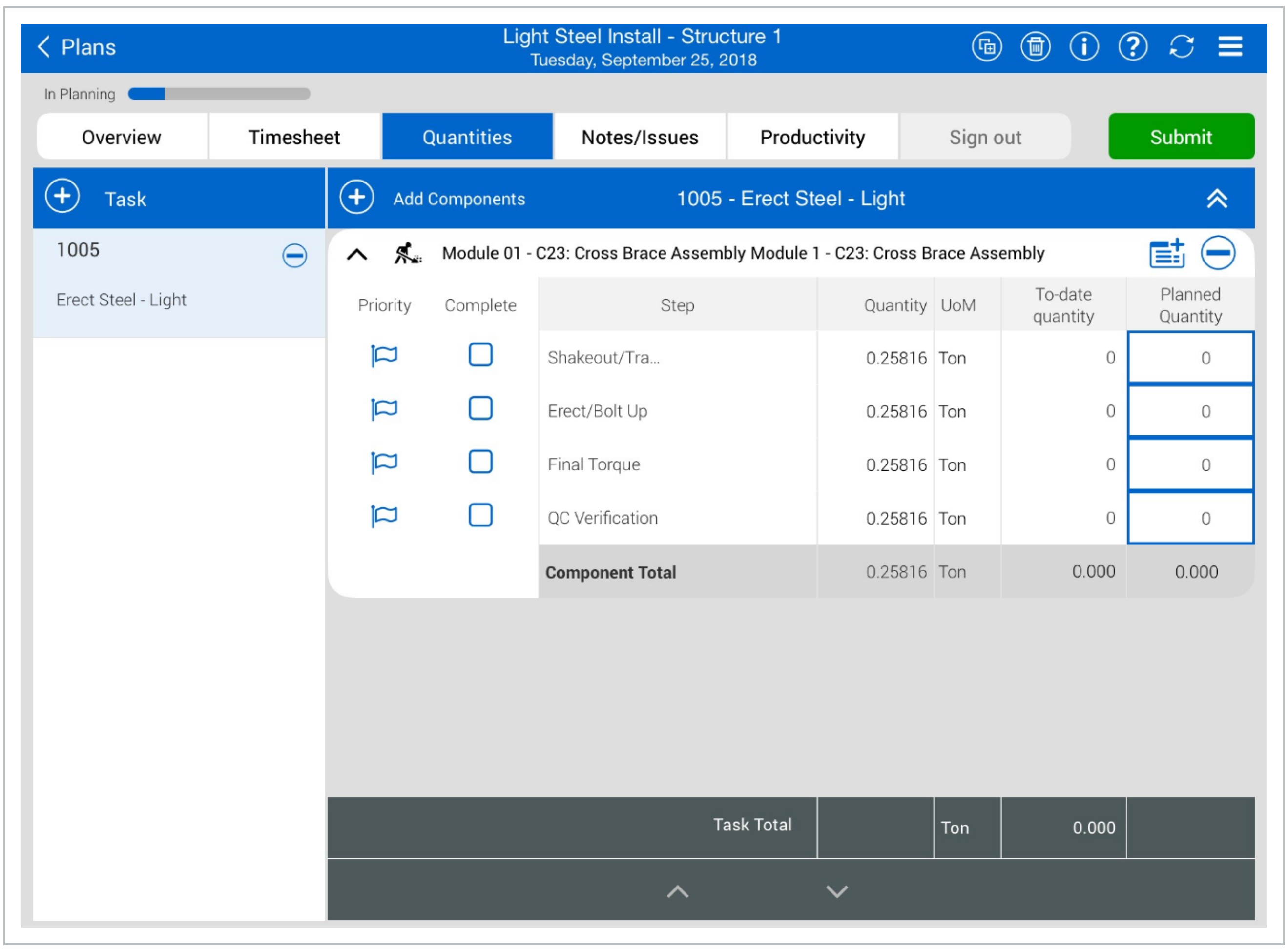
- When you select **Billing class**, you can override the employee's default billing class with a different billing class.

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

- Add a note
- Delete row
- Clear row hours

2.7.3 Quantities Tab

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

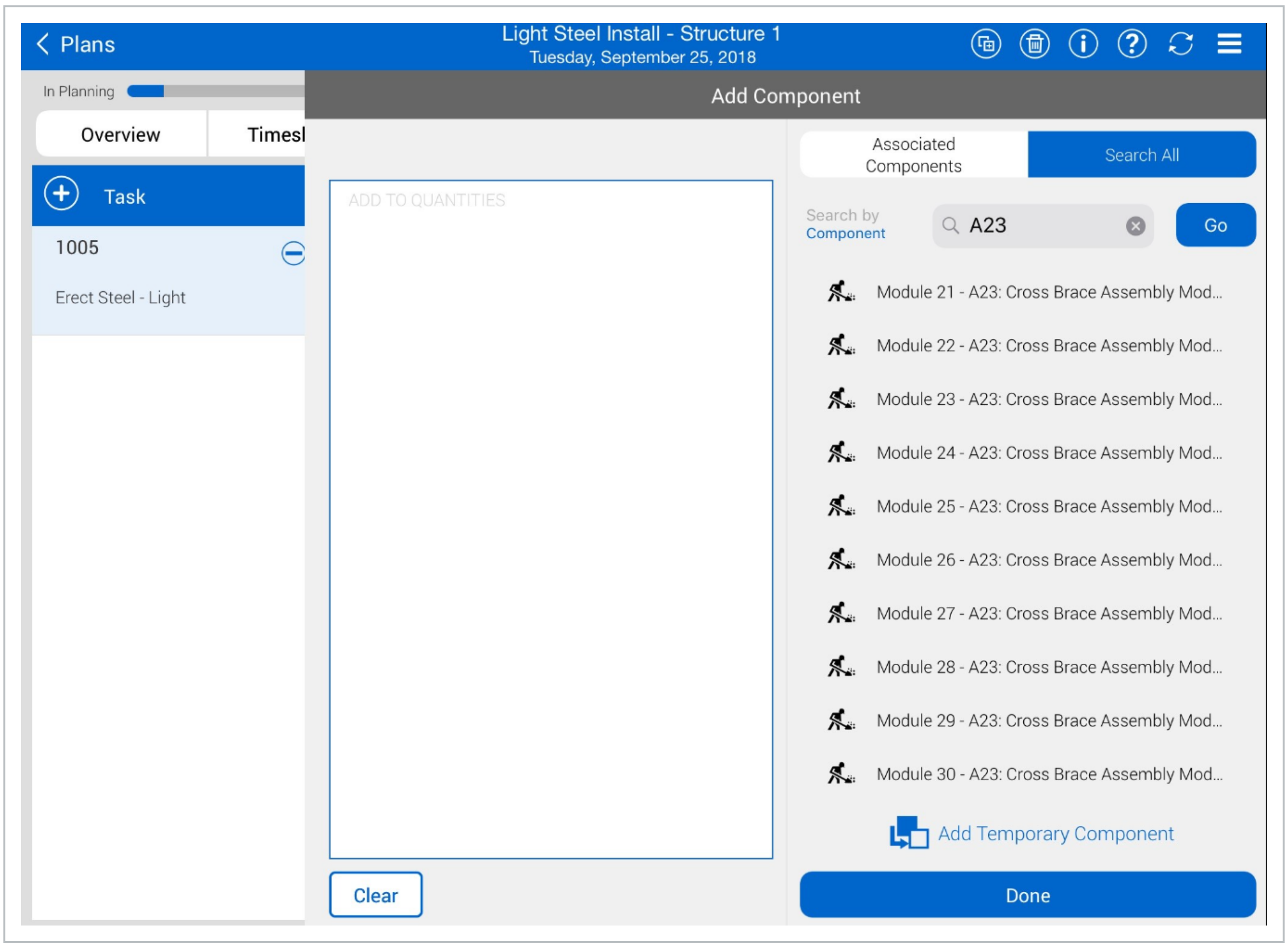


2.7.3.10 Components

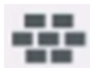
Components are portions of a cost item created to divide cost item quantities into manageable and identifiable tasks, so they are easier to track out in the field. A component can be a beam, light pole, systems testing for a switchgear, a jet fan, etc. Within the components, you will see a breakdown of steps for completing the component.

On the Quantities tab, you can add tasks from your project list or add a temporary task.

- If you select a task from the project list, you will be able to see components loaded for that task, if they are associated with a Daily plan
- If no work plan was associated, you can go back to the Daily plans page and add a work plan
- If the Daily plan cannot be associated to any work plan, then within the Quantities tab, you can add a temporary component

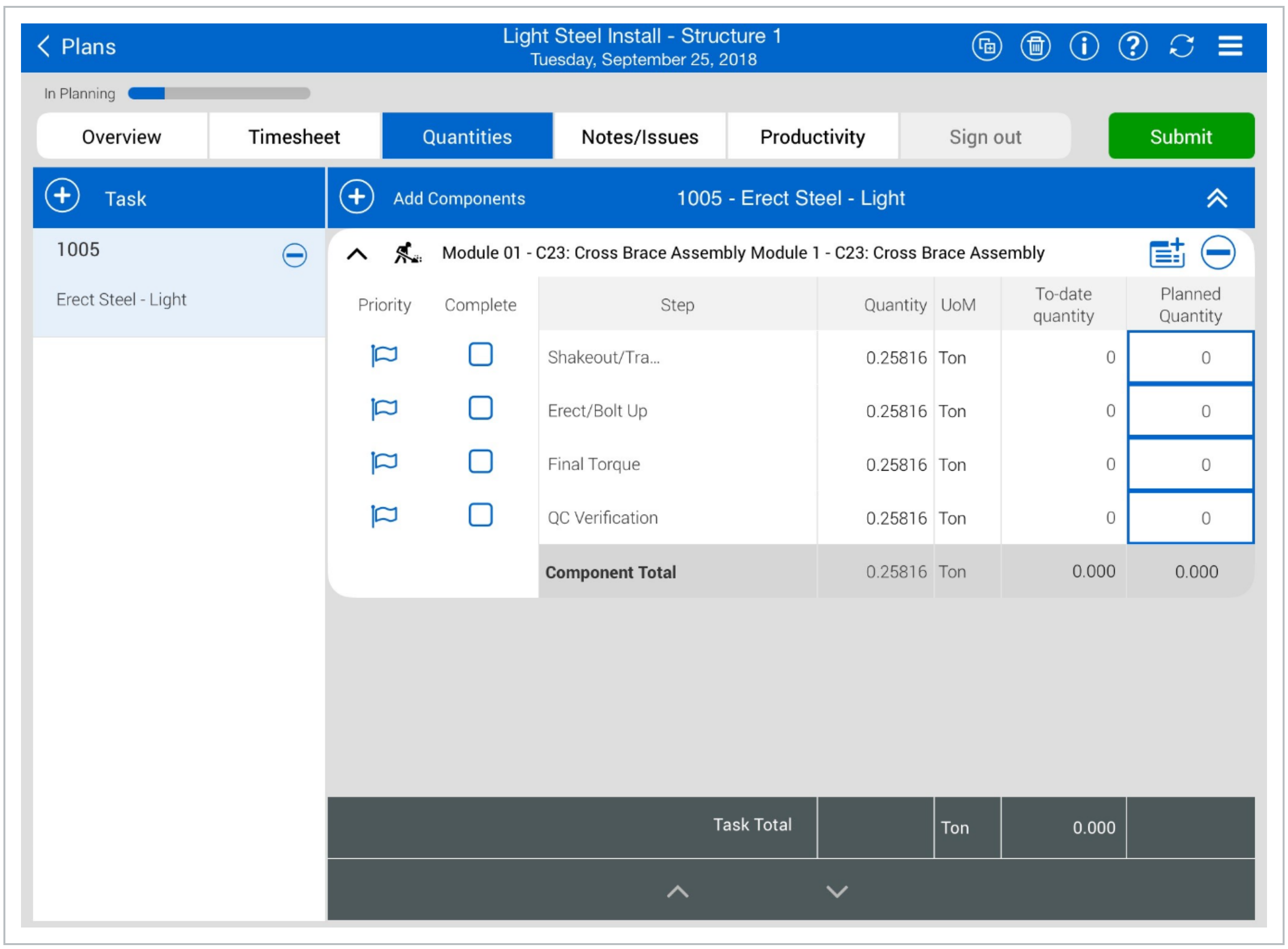


There are several types of components:

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

2.7.3.11 Planned Quantity

The planned quantity gives you an idea of what to work towards as a goal. Meeting the planned quantity goal will keep you on schedule with completing the task and let you know how much quantity should be complete by the end of the day.



2.7.3.12 Contracts

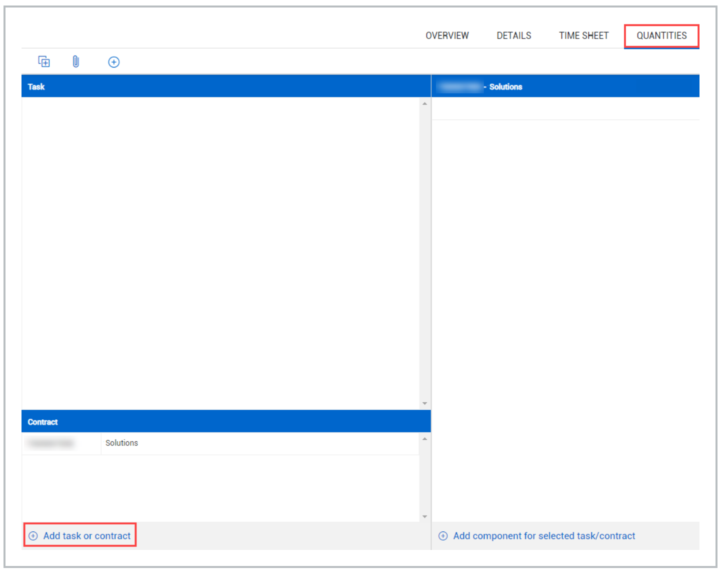
Contracts can be added to a daily plan so that you can add associated contract components to track for billing validation.

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

The following steps show you how to add a contract.

Add a Contract to a Daily Plan

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



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

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

2.7.3.13 Contract components

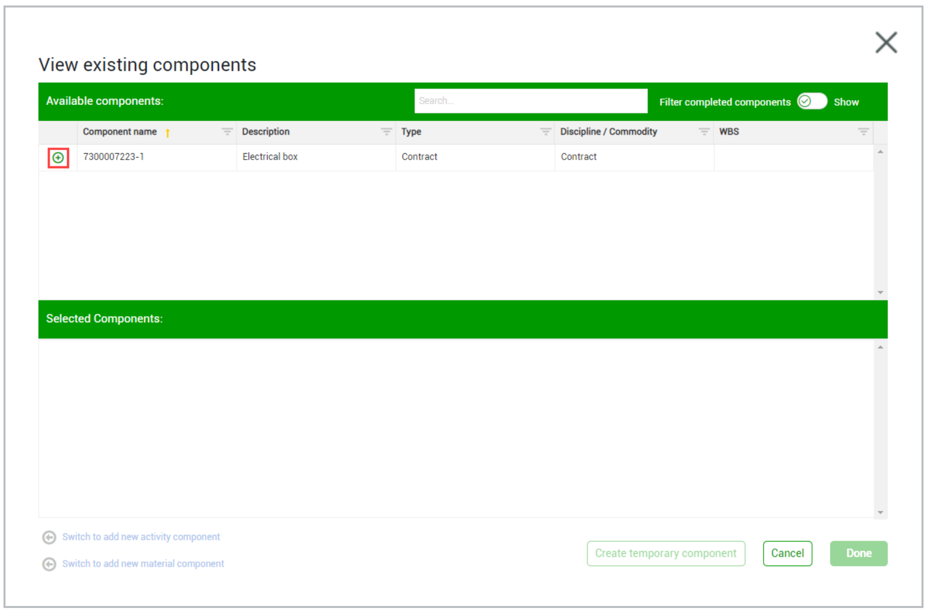
Contract components are used to track quantities for billing validation.

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

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

Add a Contract Component to a Daily Plan

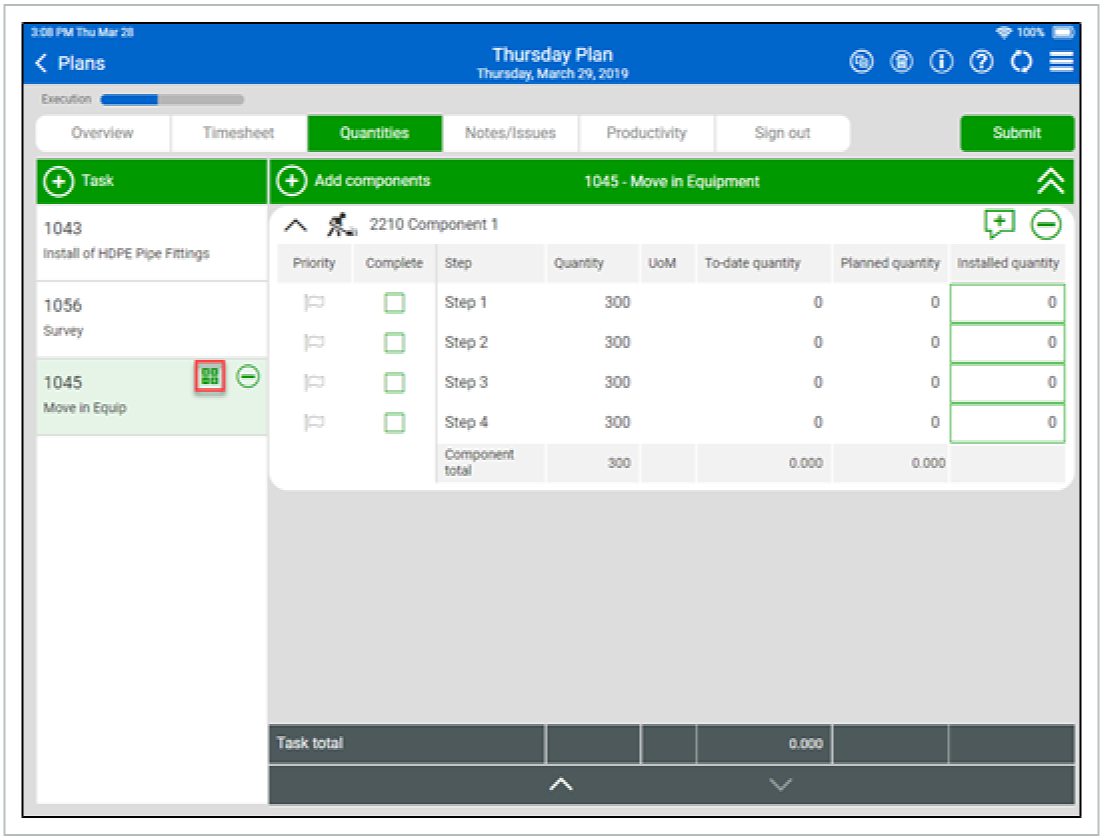
1. Select a contract from the Contract list in the lower left of the Quantities tab.
2. Click **Add component for select task/contract**.



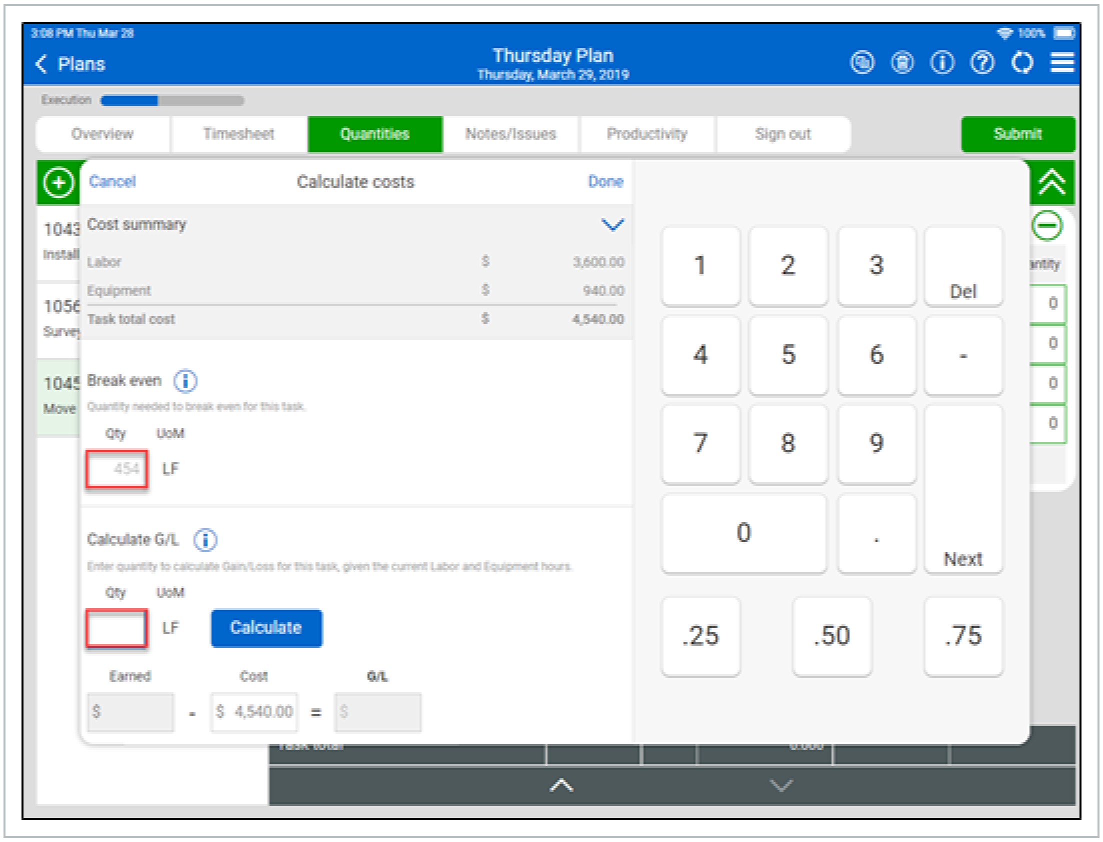
3. Select a contract component from the View existing components slide-out panel, and then click **Done**.

2.7.4 Planning Slide-Out

You can access the Planning Slide-Out by tapping on this icon in the Tasks column.



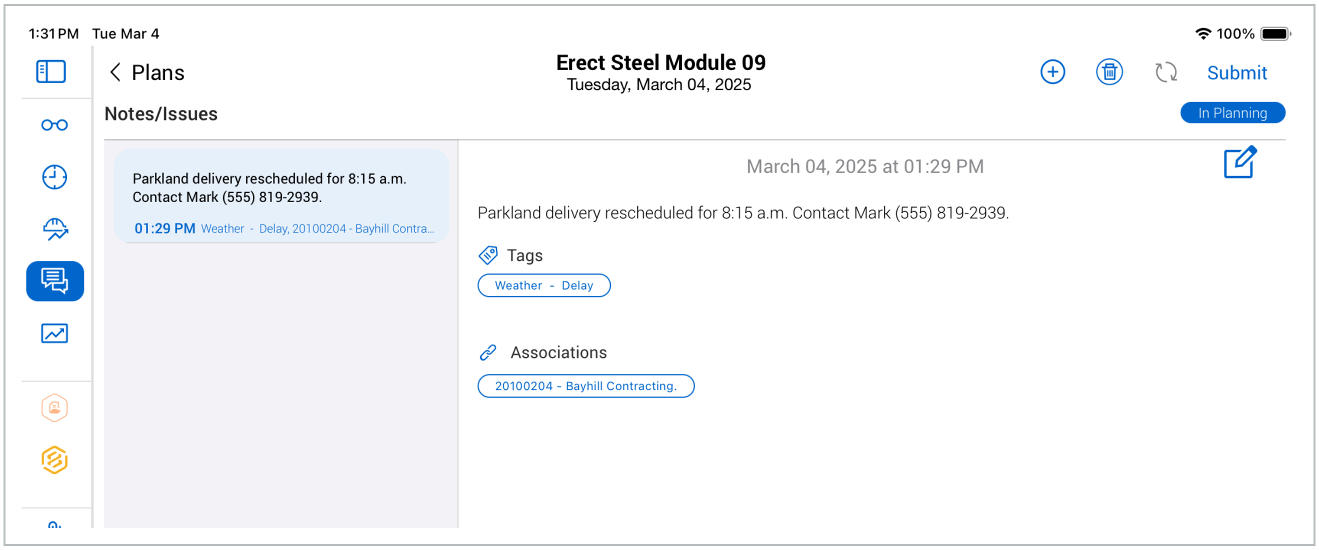
On this slide-out, you can view the quantity needed to break even for the selected task. Additionally, you can manually enter any quantity to see how it would affect the gain/loss for the selected task.



2.7.5 Notes/Issues Tab

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

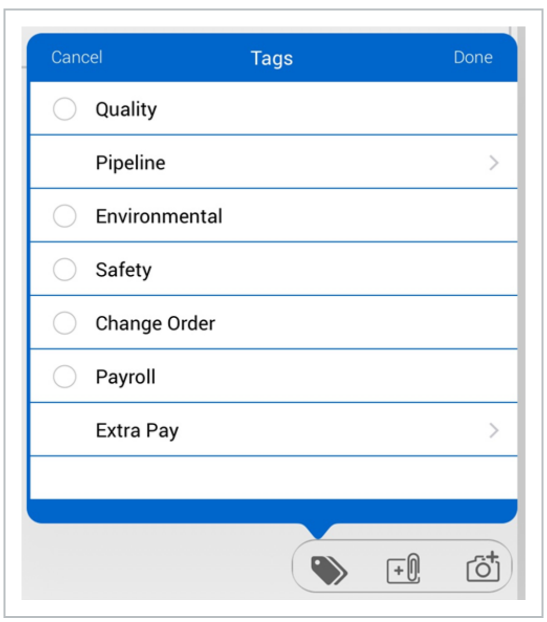
- A permanent material needed as part of the installation work
- A Request for Information involving a change in the design that impacts the installation and daily plan
- An environmental concern
- Leave of Absence or extra pay for an employee



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

2.7.5.14 Tags and Associations

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

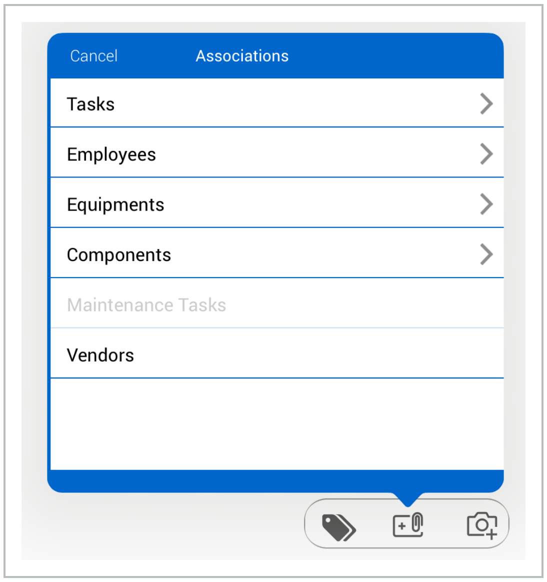


You can also associate notes and issues to any of the following categories:

- Task
- Employee

- Equipment
- Component
- Maintenance Task
- Vendor

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

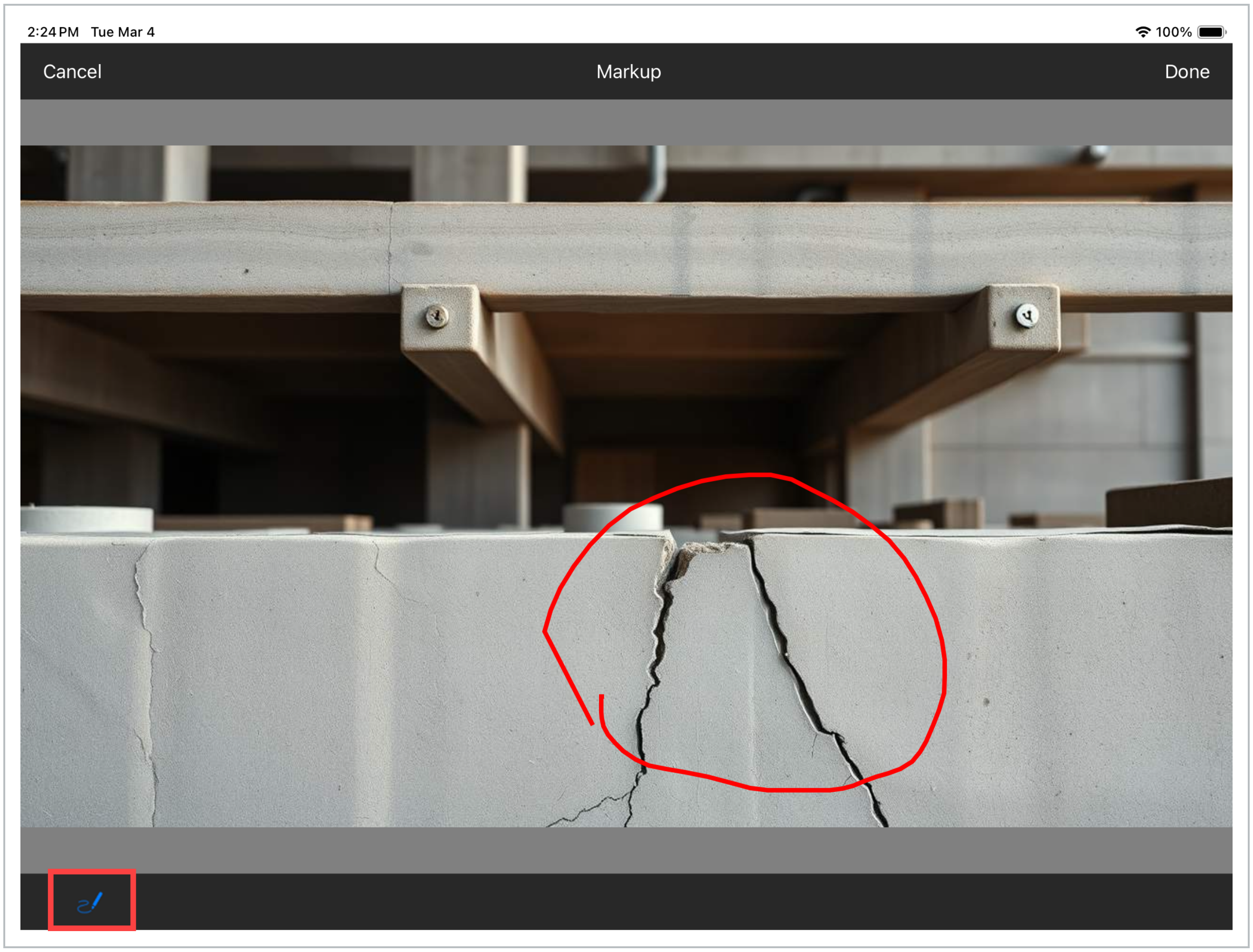


2.7.5.15 Adding and Editing a Picture

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

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

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

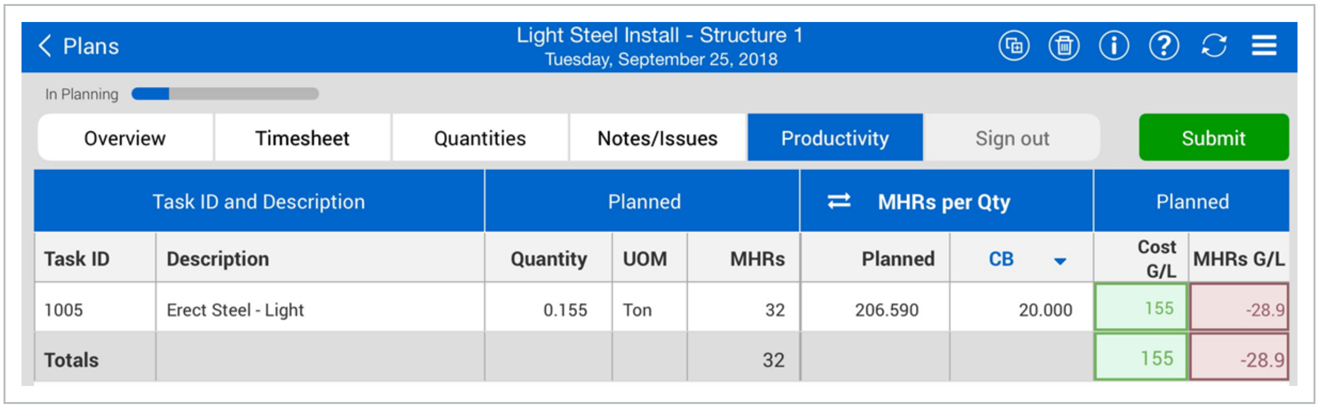


You can also download or remove photos from the notes tab.

2.7.6 Productivity Tab

After planning your work within the Time sheet and Quantities tabs, you can view the quantities and man-hours within the Productivity tab.

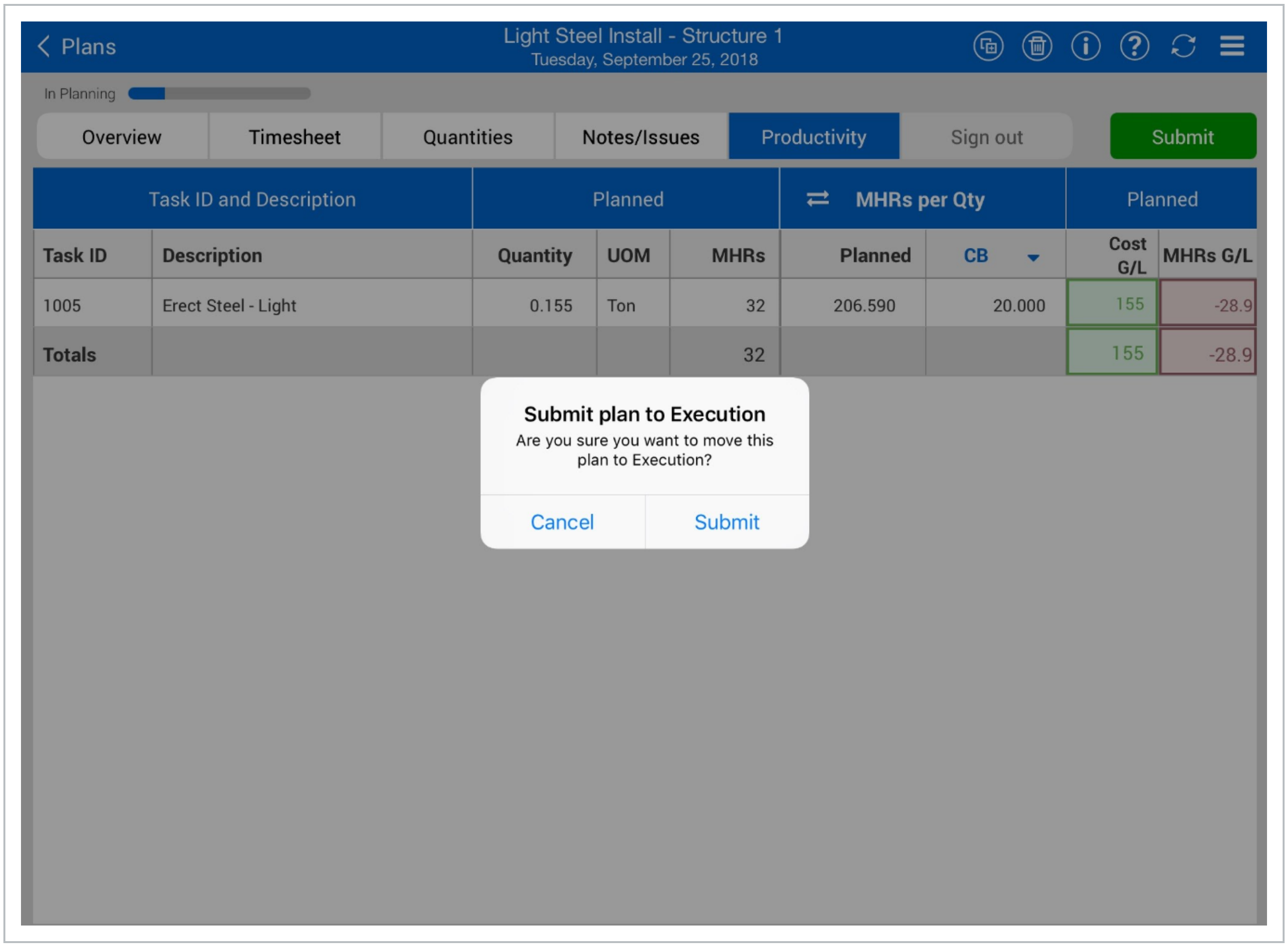
On the Productivity tab, you can compare your planned quantities and man-hours against the budget. If there is an error for your planned quantities or man-hours, you can go back to the other tabs and revise.



2.7.7 Submit and Sync Button

Once you are complete with reviewing the Daily plan that you put together, you can now Submit and Sync the information, which updates the information to other applications and users in InEight. The engineer or superintendent that oversees your daily plans will then review and either approve or reject the Daily plan.

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

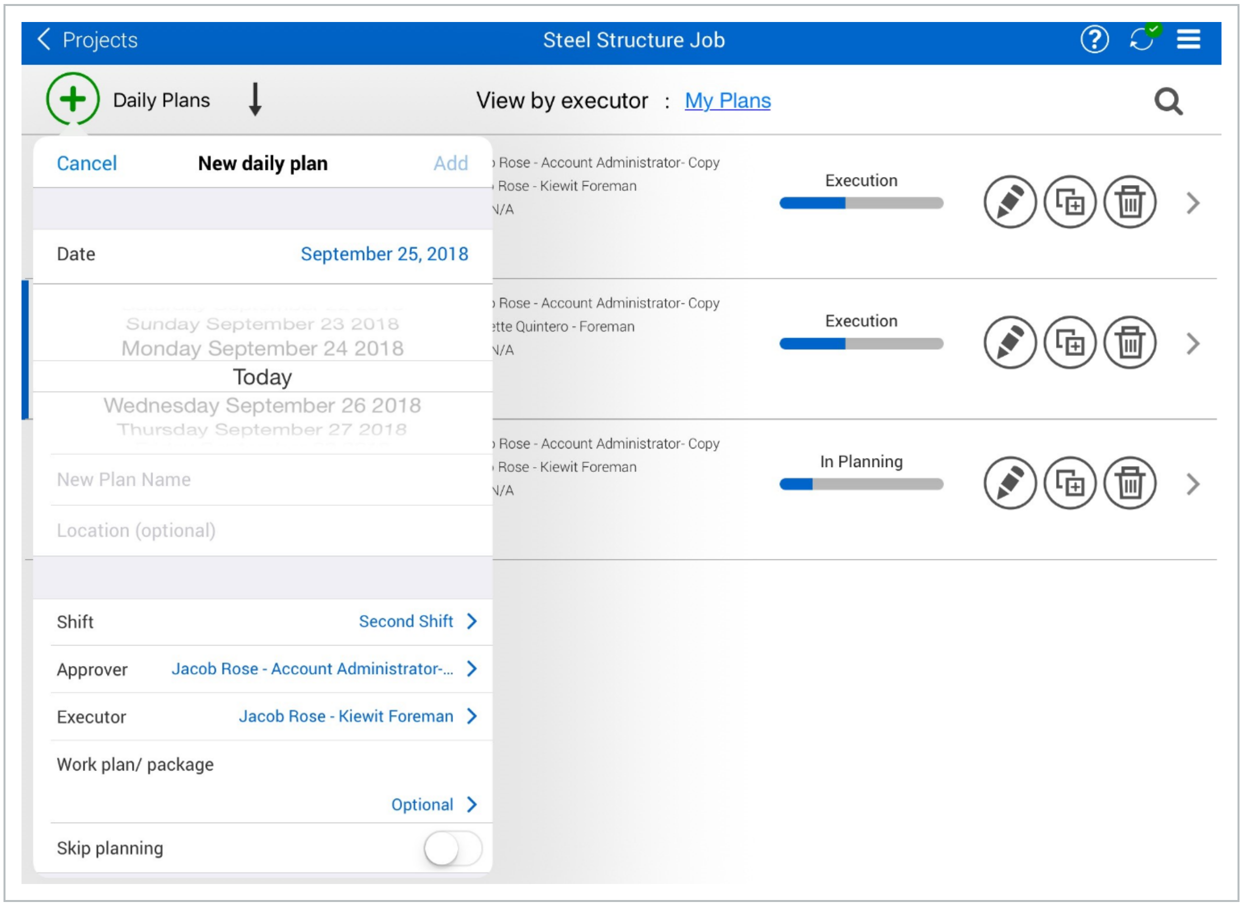


2.7.8 Create a Plan from Scratch Walk Through

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

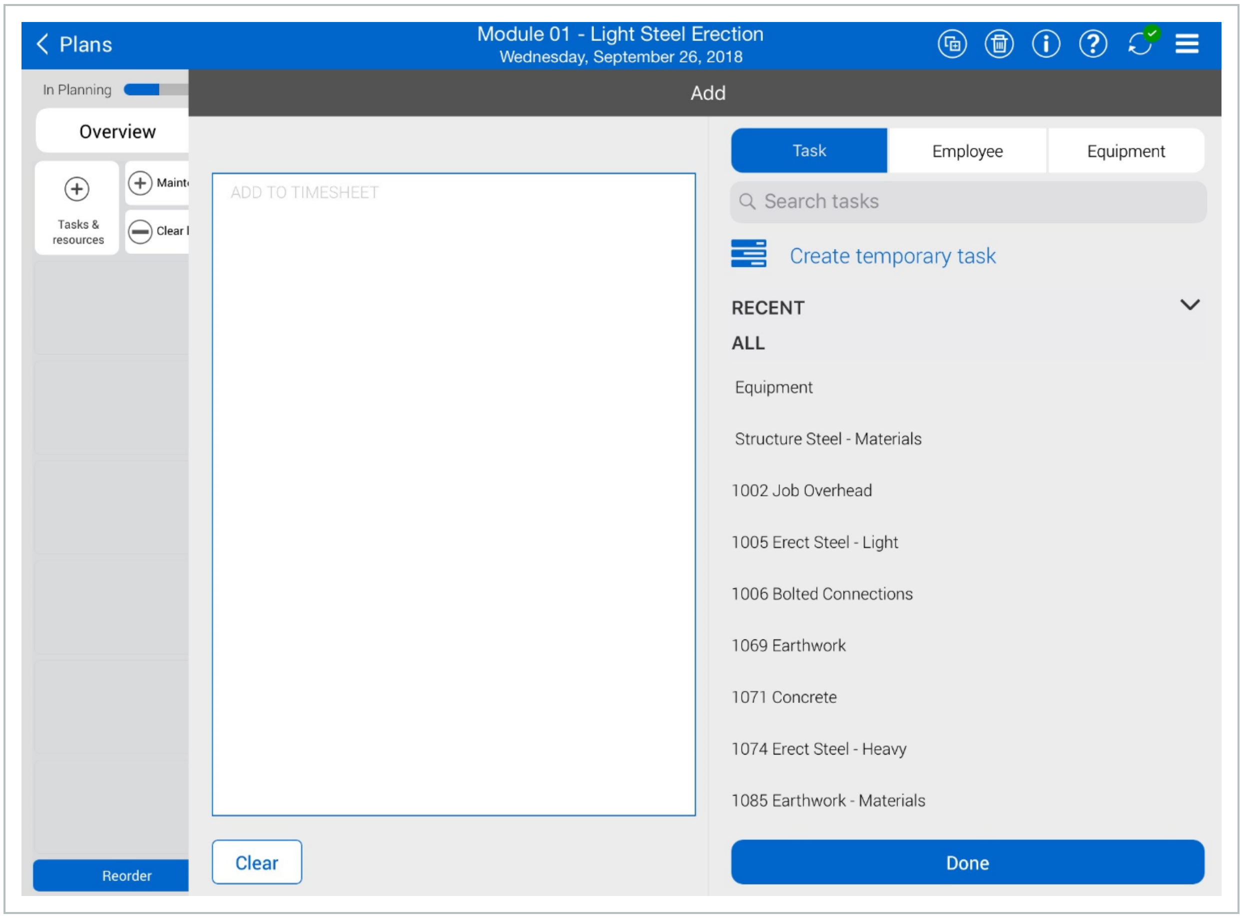
Create a Daily Plan from Scratch

1. Log into the **InEight Progress** mobile application.
2. Select a project from the Projects home page.
3. Tap on the **Add** ⊕ button to create a plan from scratch.

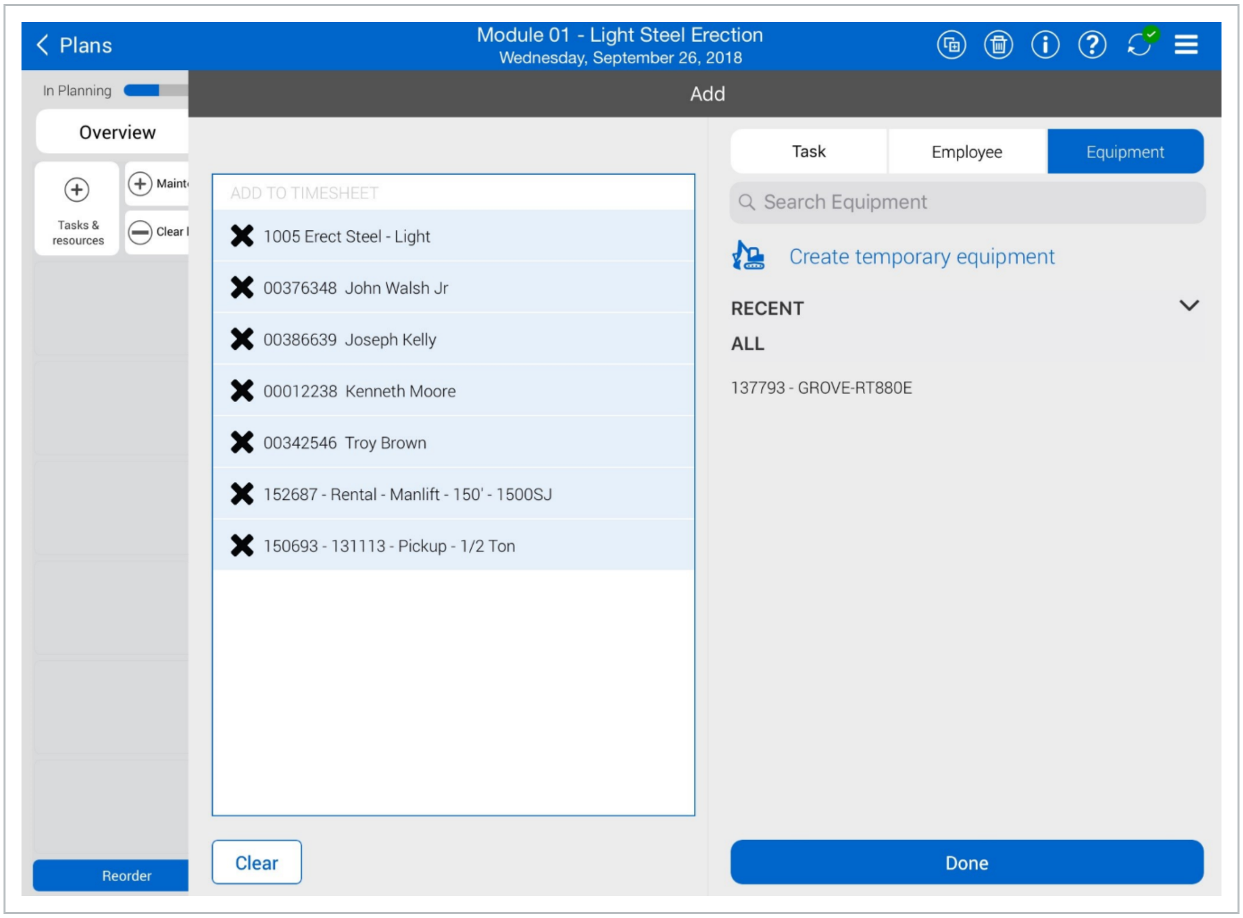


4. Choose a date for the daily plan.
5. Give a description in the Enter Plan Description field.
6. Enter a location in the Enter Location field.
7. Select a **shift** from the Job Shift menu.
8. Select an **Approver**.
   - Maximum of 2 selections. Usually an engineer and superintendent
9. Select an **Executer.**
   - Only one selection. Usually a foreman
10. Select **Work Plan/Package**.
11. Select a work plan or package for the daily plan and tap **Back**.
12. Tap **Add** to create a plan.

13. Tap the **Add** button in the Safety section of Tool box talks to add project safety concerns and mitigation.
14. Tap the **Quality** tab and add a quality concern and mitigation.
15. Tap **Done** to add the Tool Box Talk items to the Overview screen.
16. Tap on the **Time sheet** tab.
17. Tap on the **Add** button.
18. If not already selected, tap the **Task** button at the top.
19. Select a task (i.e. 1005 – Erect Steel Light).
    - You can perform a search to find the task or scroll through the list



20. Tap on the **Employee** tab, then tap select the employees you want to add.
21. Tap on the **Equipment** tab, then select the equipment you want to add.



22. Tap **Done**.
    - You will see the task, employee, and equipment appear on the Time sheet tab
23. Add employee time by tapping on the empty box next to an employee name.

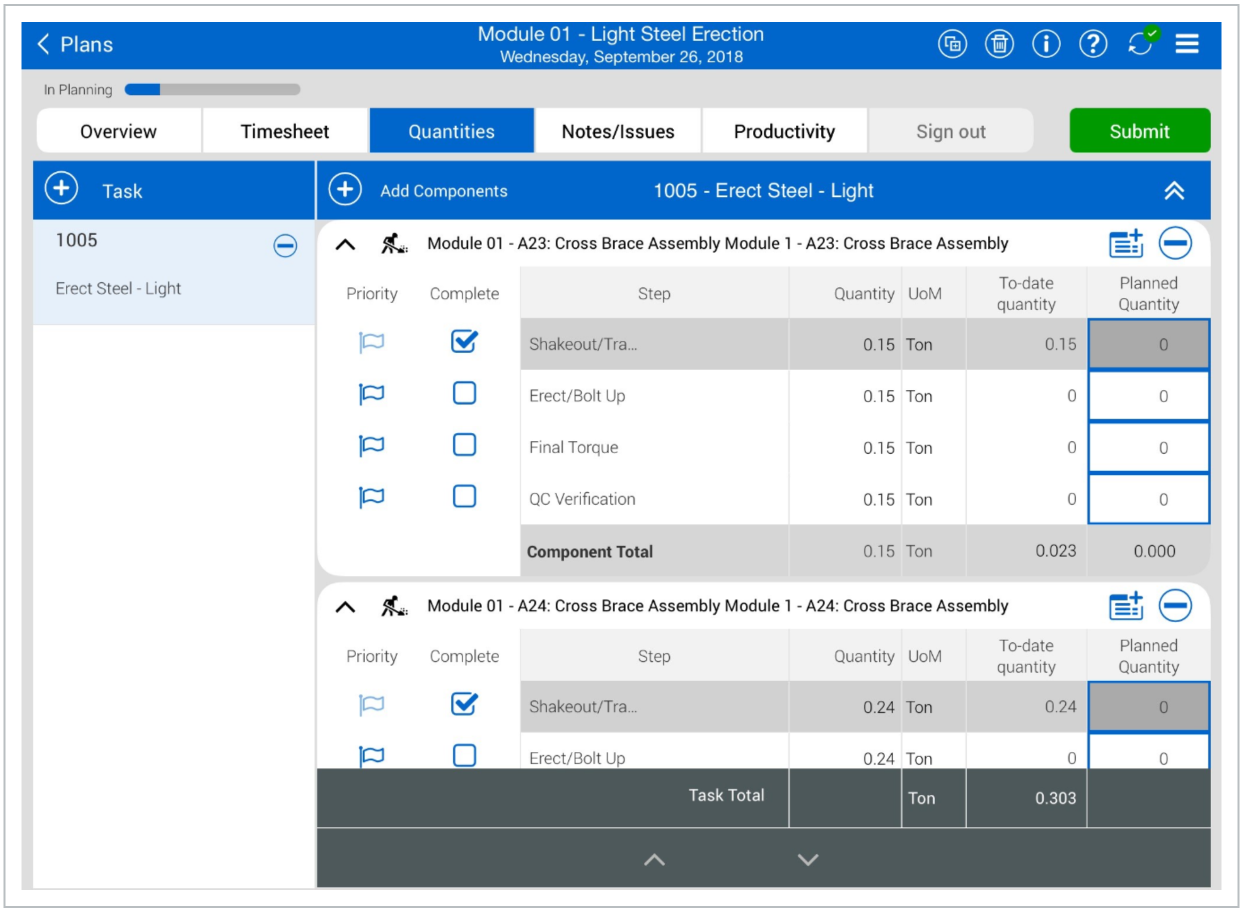
> Check the box for **"Apply hours to all employees for the task"** and then select **Done** to apply these hours to all of the employees selected for this daily plan.

> You can choose between straight time (ST), over time (OT), and double time (DT). Other premiums can be set within the project settings from the Progress web application.

24. Add equipment time by tapping on the empty box next to a piece of equipment.

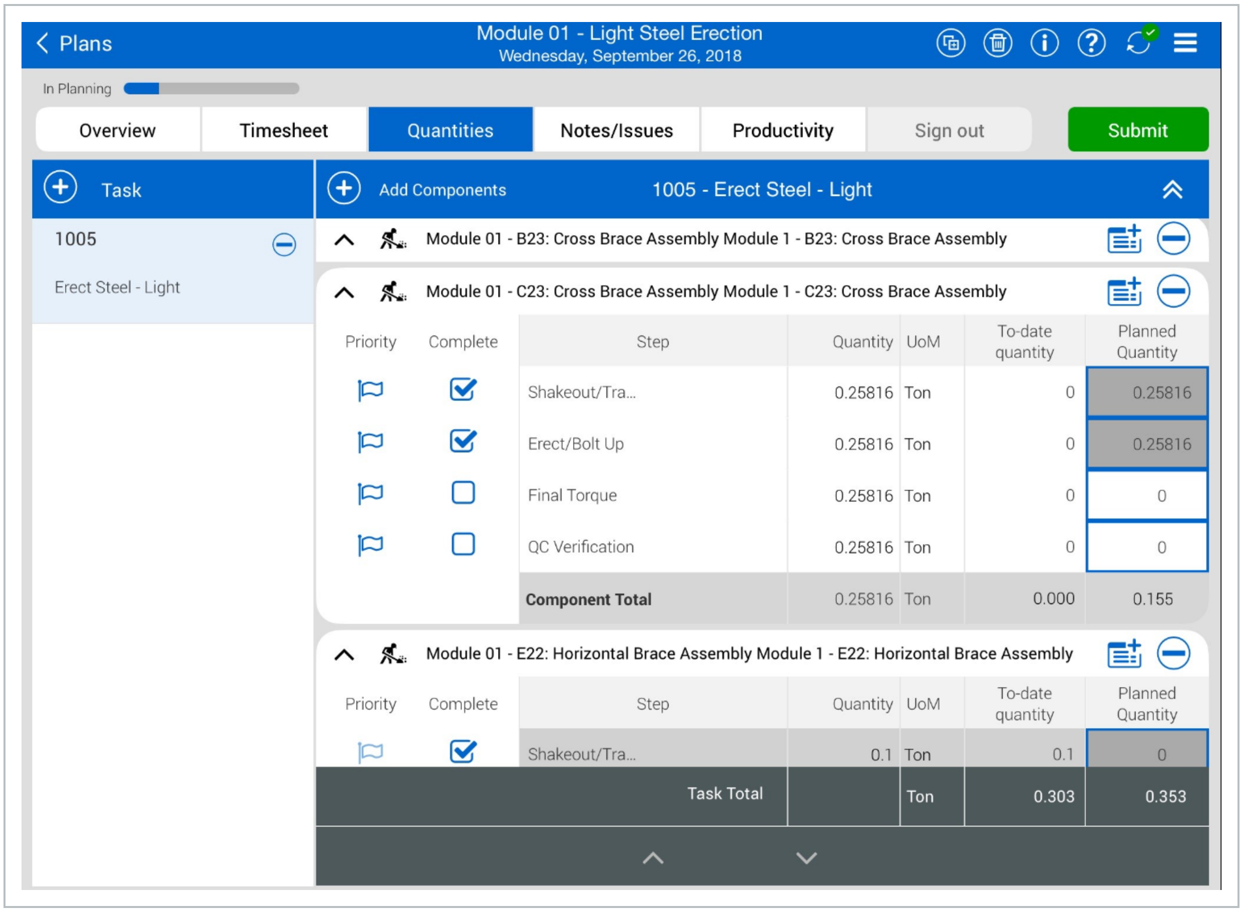
> Check the box for **“Apply hours to all equipment for the task”** and then select **Done** to apply these hours to all of the equipment chosen for your daily plan.

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



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

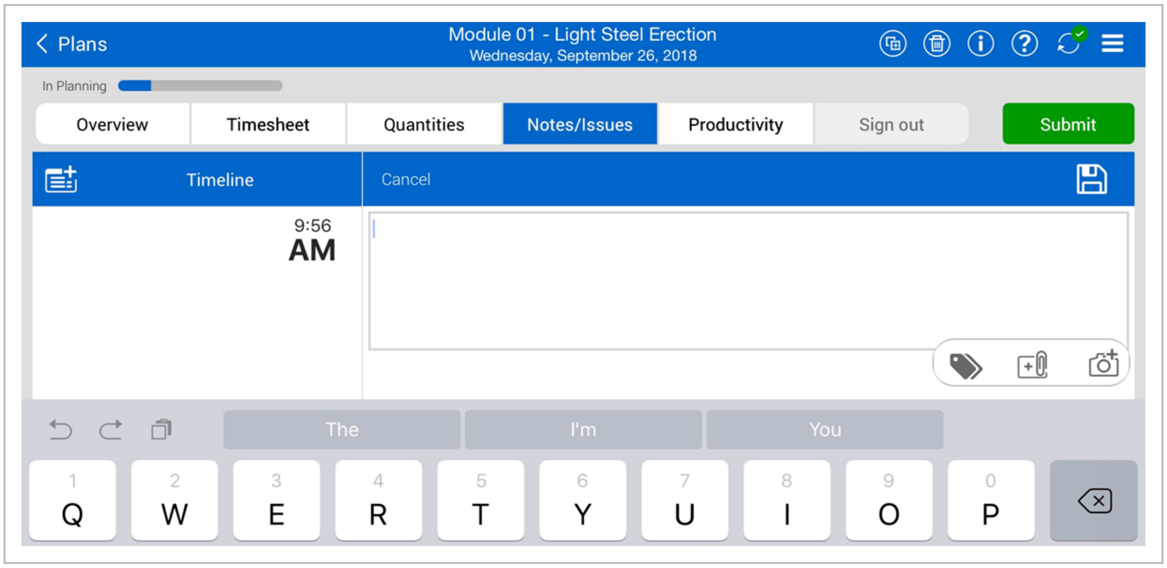
31. Check the check boxes in the Complete column as needed for your components or their broken down steps.
    - By checking these boxes you are communicating to your crew that you expect these steps or components to be completed in the daily plan



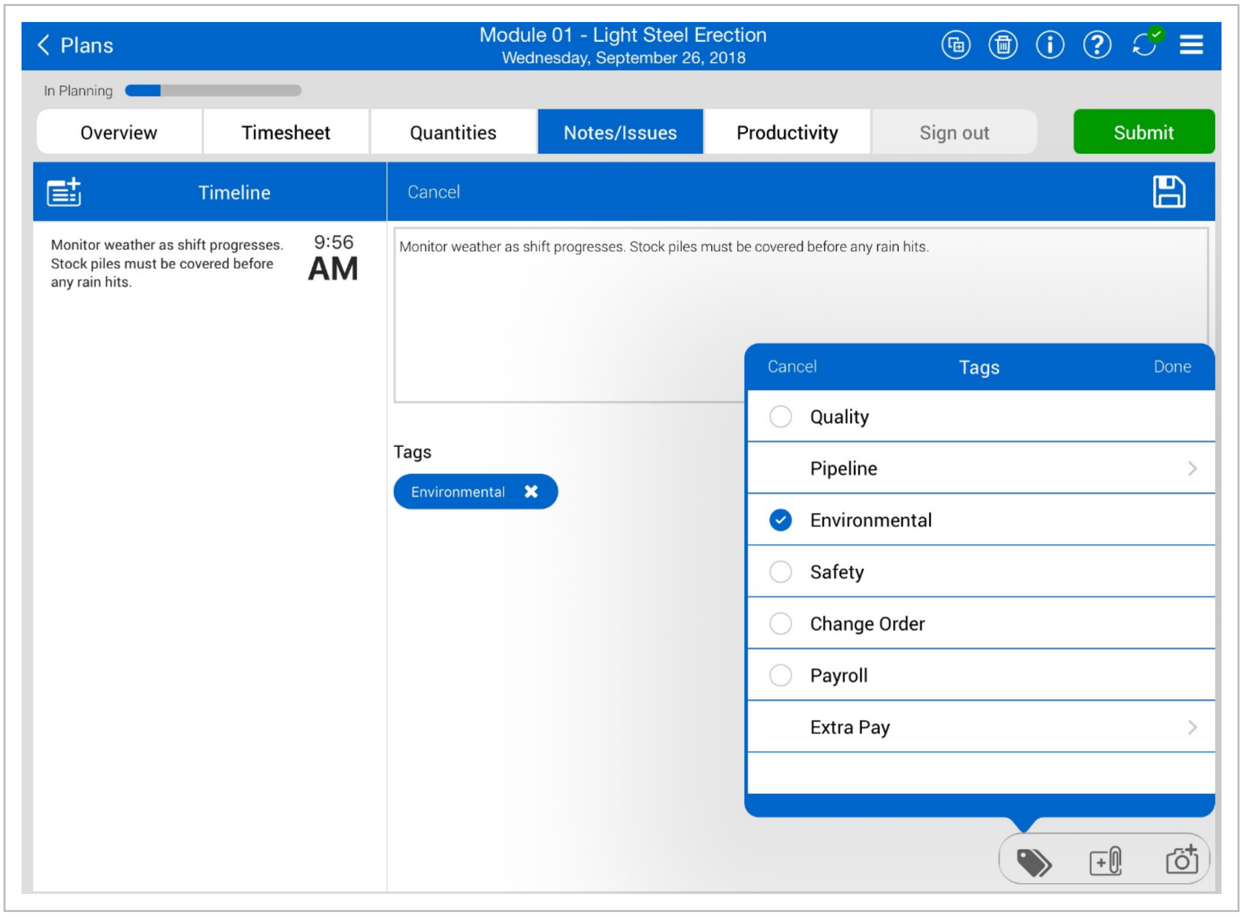
32. Tap on the **Notes/Issues** tab.

33. Tap on the **Add** button and select **Note** to add any project notes.

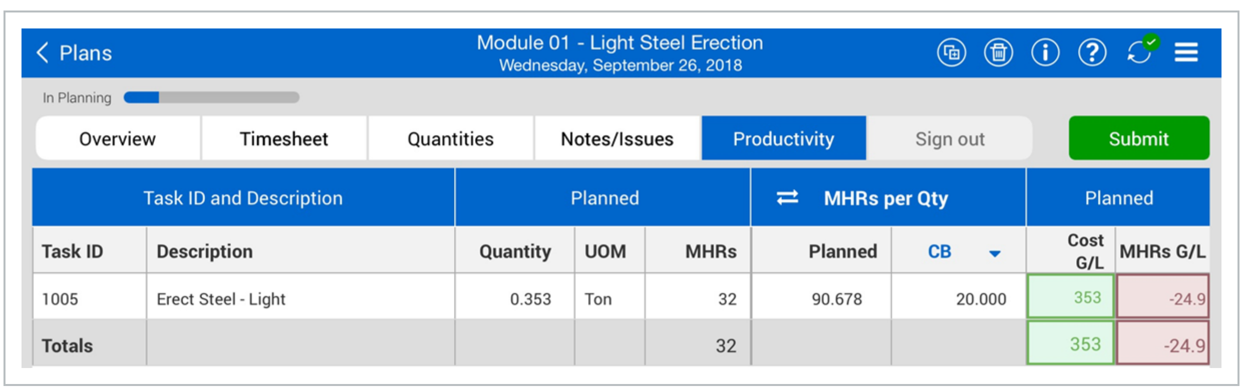
- Tap on the **textbox field** to bring up the keyboard on the iPad



34. Tap on the **Tag**  icon to add any tags.



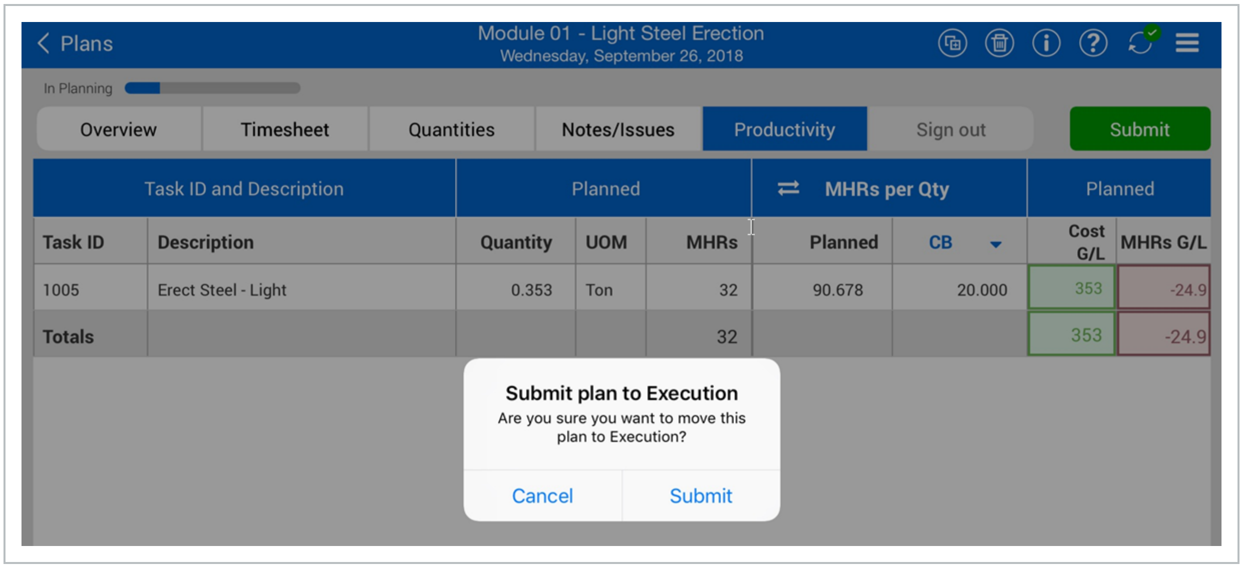
35. Tap on the **Camera** icon to take a photo, make markups, or add text.
36. Select **Done**.
37. Tap on the **Productivity** tab and review your daily plan.



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

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

39. Tap on the **Submit** button.
    - Once you tap Submit, a window appears asking if you are sure that you want to move the plan into execution
40. Tap **Submit** again.
    - The application will automatically sync after submitting a plan to execution



> Once you click submit, you will no longer be able to edit your plan. The only way to edit is to communicate with the engineer or superintendent to reject the plan or have them edit for you.

2.8 DAILY PLAN FROM COPY

Within Progress, you can create a daily plan by copying an existing plan. This will help you expedite the process in developing a plan if you have already performed similar work.

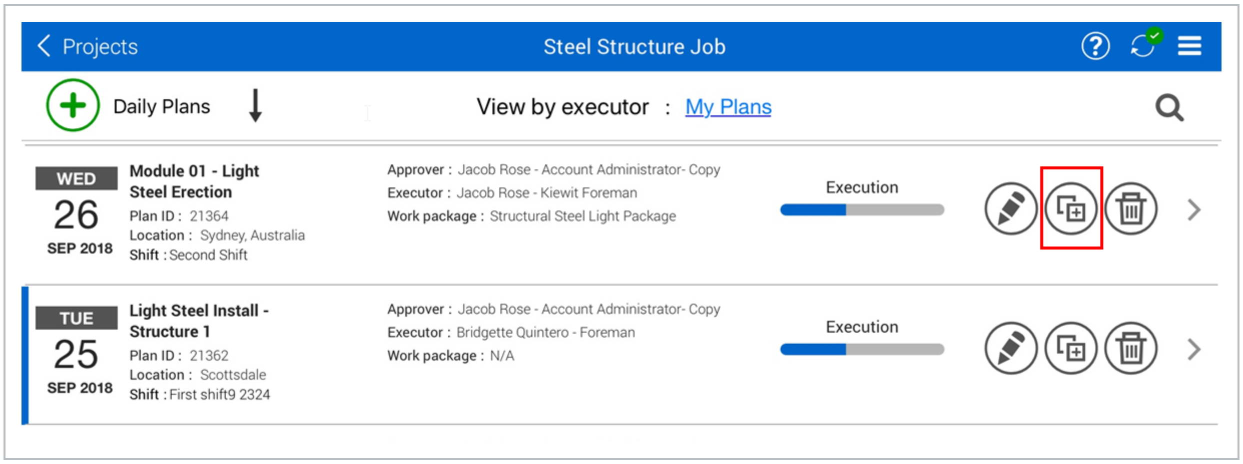
The copy of the Daily plan will be a mirror of the existing plan and you can edit the plan to tailor it to the new days objectives. For instance, if you have more crew members then when you last performed the work, you can add the new crew members to the Daily plan.

2.8.1 Create a Plan from Copy

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

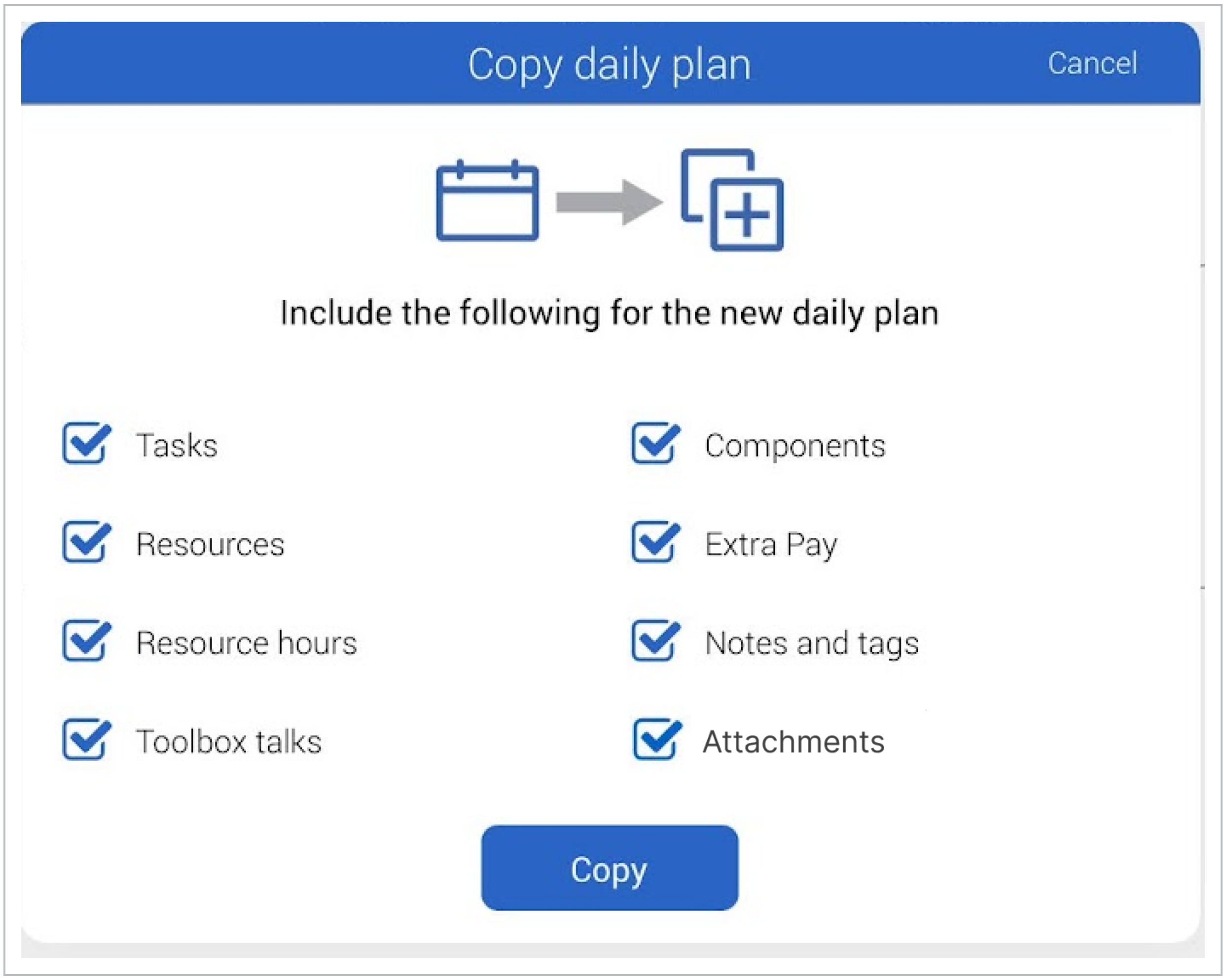
Create a Daily Plan from Copy

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



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

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



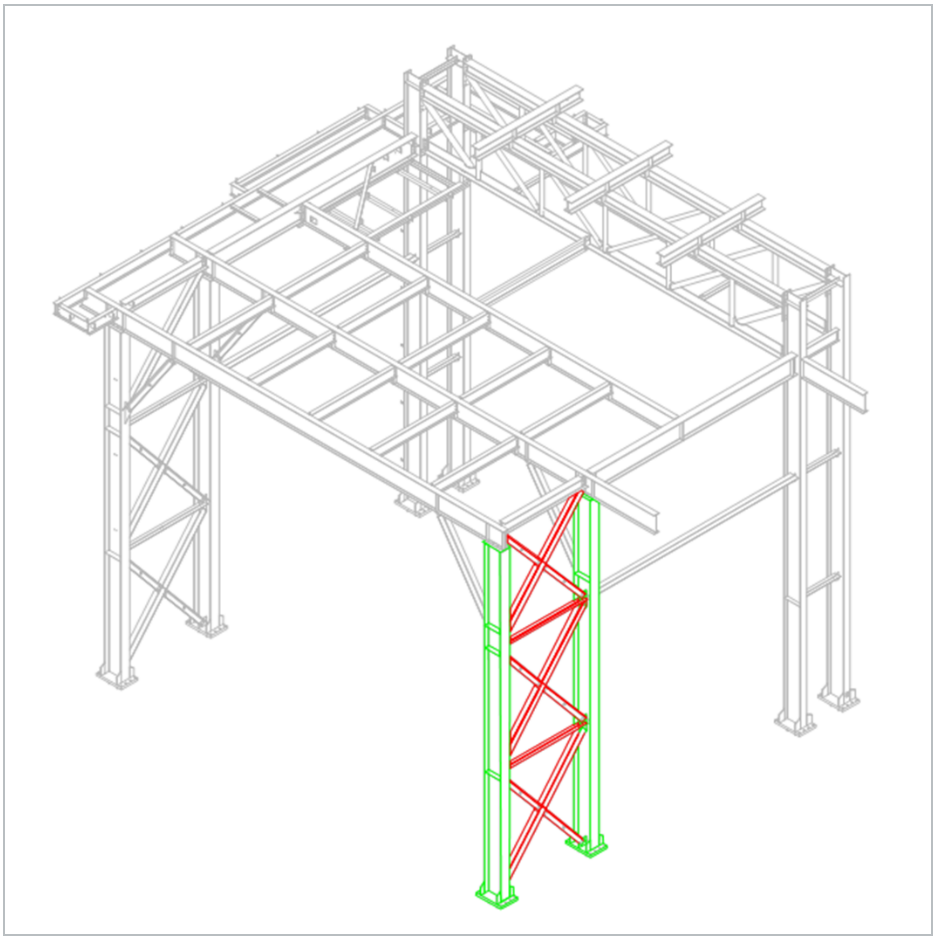
3. Tap **Copy**.
4. Edit the fields to reflect the new date.
5. Tap **Copy**.
6. Tap through each tab along the navigation bar and review that your content has been correctly copied over from the previous plan.

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

2.9 PLAN REVIEW

Scenario

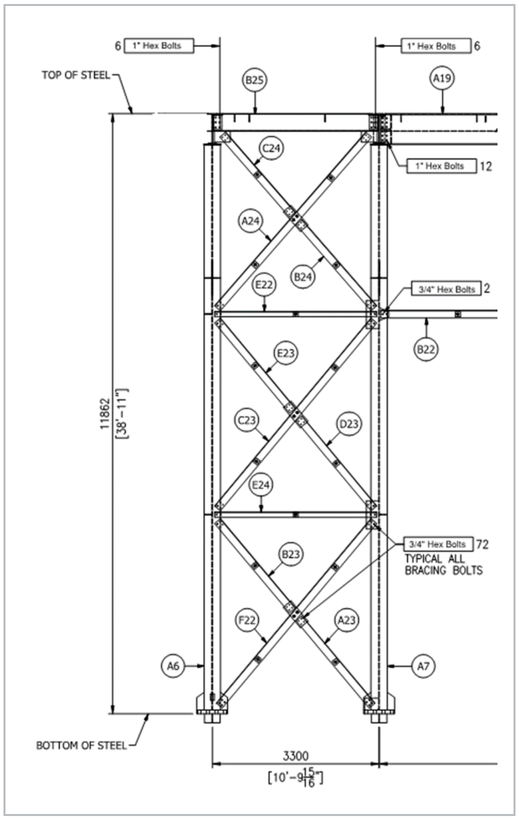
Your plan to install the horizontal and cross member assemblies (red columns) has been finalized and sent to the field for execution.



As a reminder, the steel members you will be installing are:

- *A23*
- *A24*
- *B23*
- *B24*
- *C23*
- *C24*

- *D23*
- *E22*
- *E23*
- *E24*
- *F22*



The plan will be to shakeout and transport the steel members by 1/2 ton pickup truck to the work area. You also plan to erect and bolt up members C23, D23, E23, and E24. You will use a JLG to help with erection.

After verifying the steel members with their respective drawings, it was noted that members E23 and E24 had dimensions that did not match the drawings. The foreman needs to create a note to communicate this discrepancy back to the approver. Instead of installing E23 and E24, the crew went ahead and installed B23, A23, and F22.

One of the crew did not show up for work today. He did not call in with a reason, therefore his absence will be unexcused and unpaid.

2.9.1 Overview

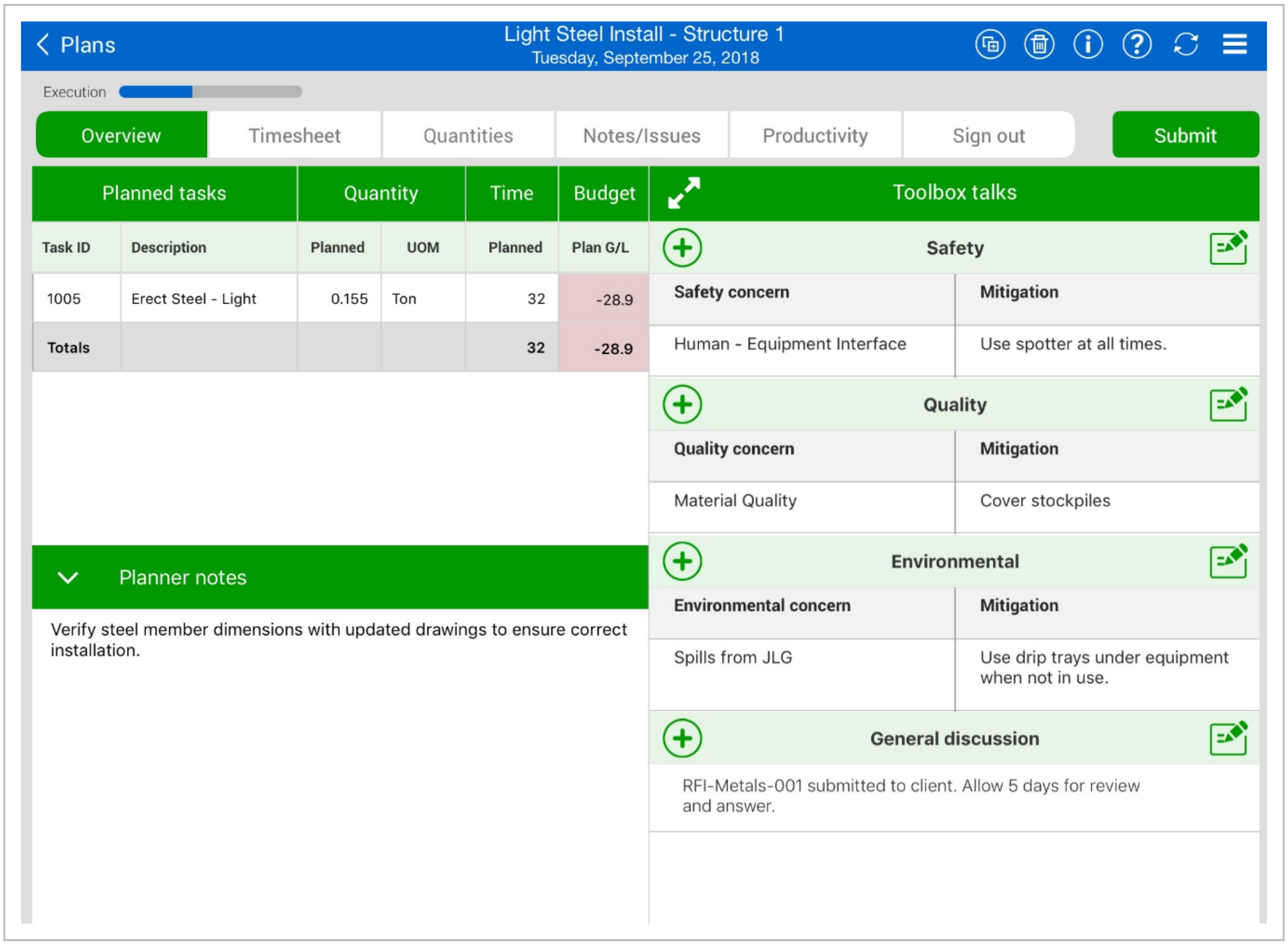
After the Daily Plan has been approved and synchronized, the plan is ready for execution in the field. During the morning meetings, the foreman can access the Daily Plan and review it with his crew before starting the operation.

When you access the Daily Plan for review, you first open to the Overview tab. You will notice that the plan color has now changed from blue to green. You can also tell what phase you are in by the bar in the upper left hand corner of your screen. Within the Overview tab, you can review the Tool Box Talks, Planner Notes, and Planned Tasks.

Moving to the Time sheet tab, you can note employees who are absent. You can also tell a crew member what their task is for the day, how many hours they must complete the task, and what equipment they have for their task.

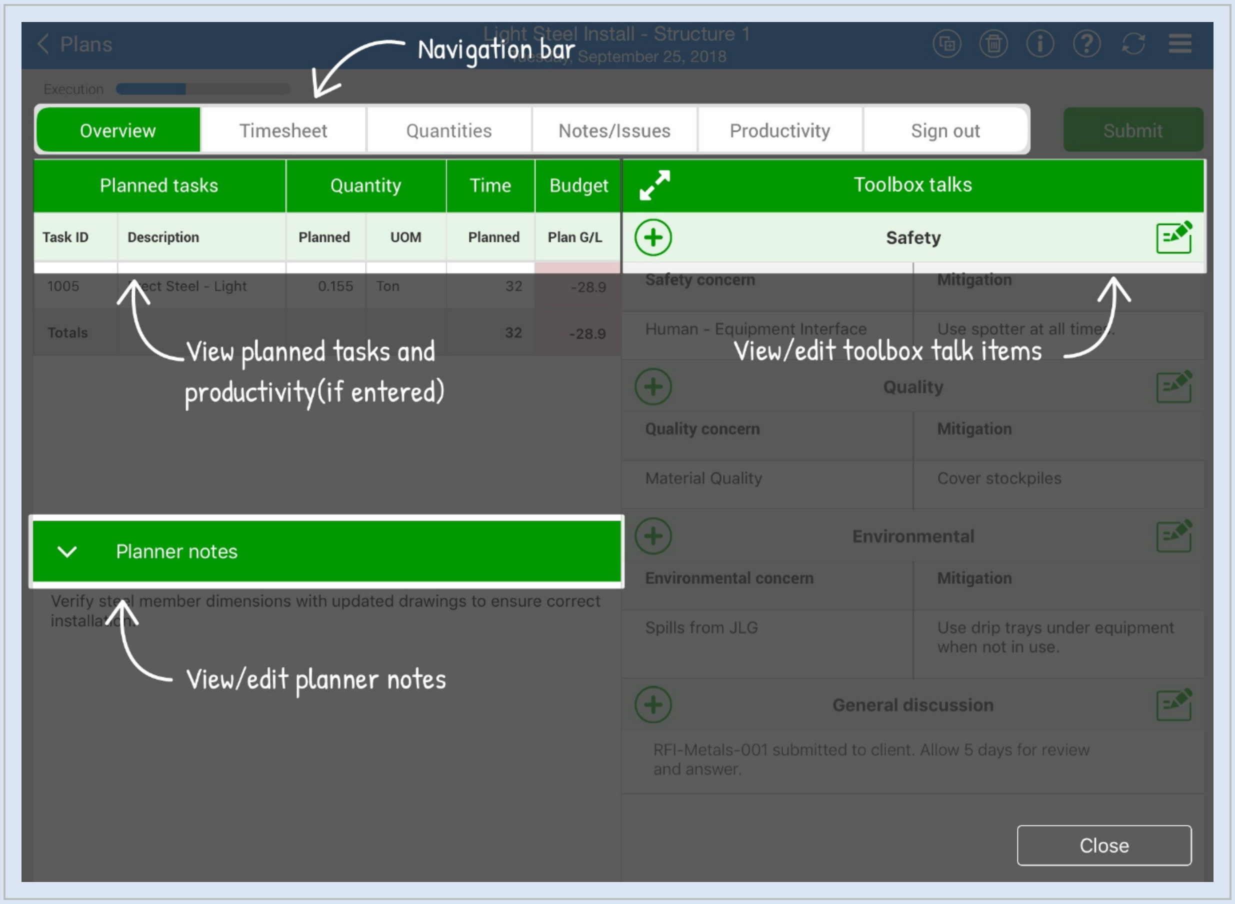
You also want to tell your crew what the planned quantities are. The Quantities tab provides you with planned quantities for your crew to accomplish. There is also a breakdown of steps to complete each planned task.

You can also review any additional information related to your tasks in the Notes/Issues tab.



In InEight Progress, from any screen, you can access the help screen by pressing the button. This is located in the upper right hand side of the application.

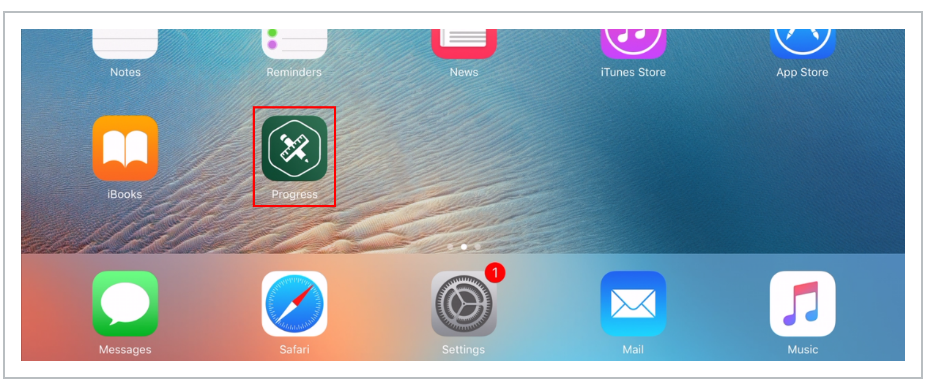
Once selected, the help screen will look like the following:



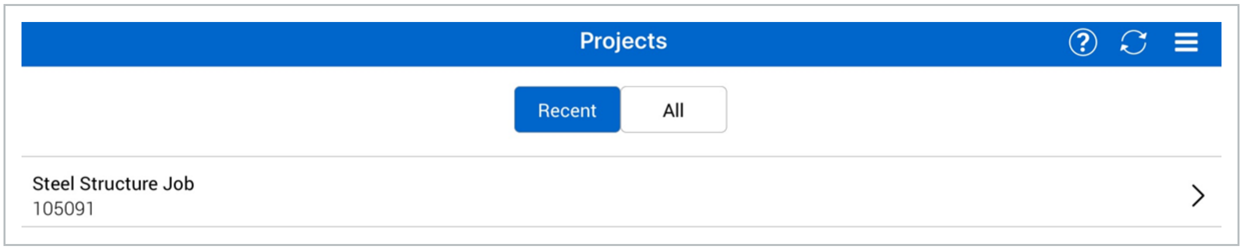
Simply select the close button at the bottom of your screen to close the help screen.

Review Daily Plan Overview Tab

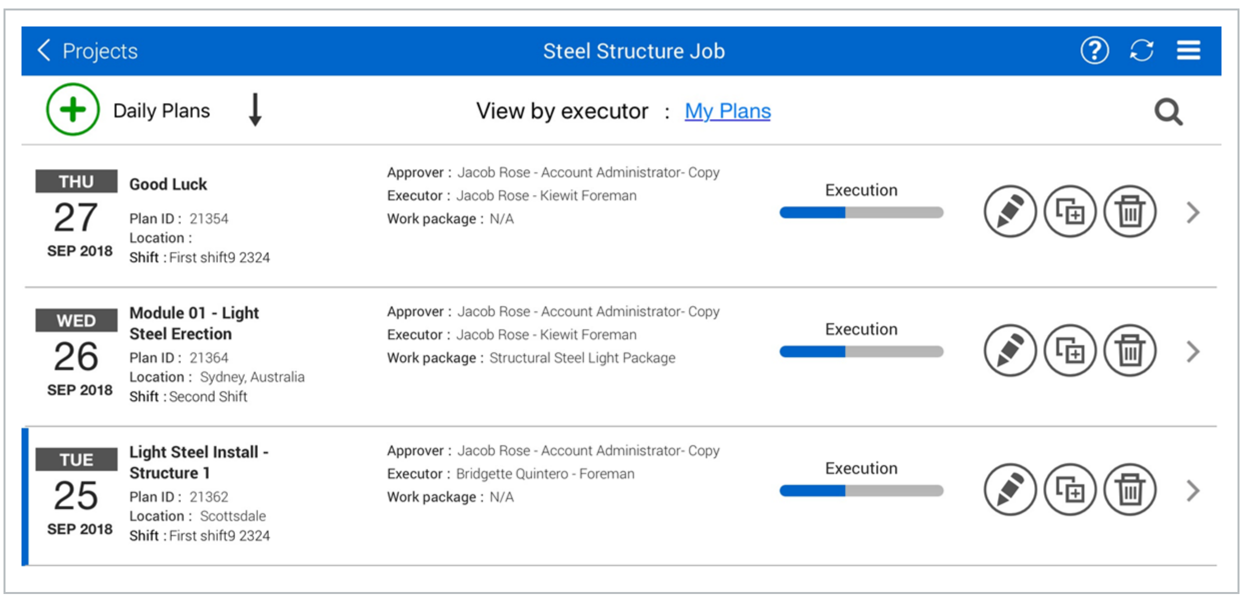
1. Launch the **InEight Progress** application through your mobile device.



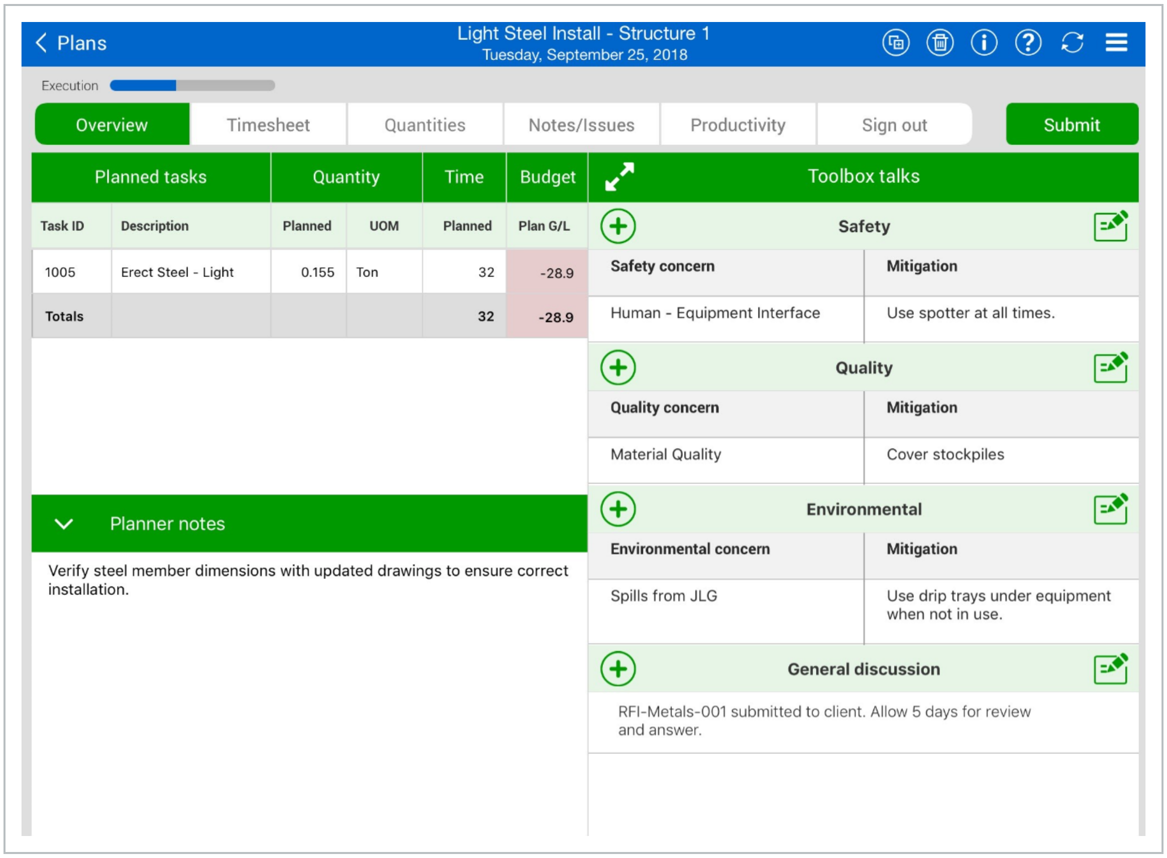
2. Log into **Progress** using your credentials.
    - This depends on your company and how they set up your log in information for you
    - After you log in, you will open to the Projects page where you will see all the projects that you have access to



3. Select a project.
    - Depending on how many projects you have access to, you may have more than one project to select from
    - The Daily Plans page of the project opens, where you will see all the daily plans created for the project
4. Select a daily plan.



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



2.10 INPUT ACTUALS

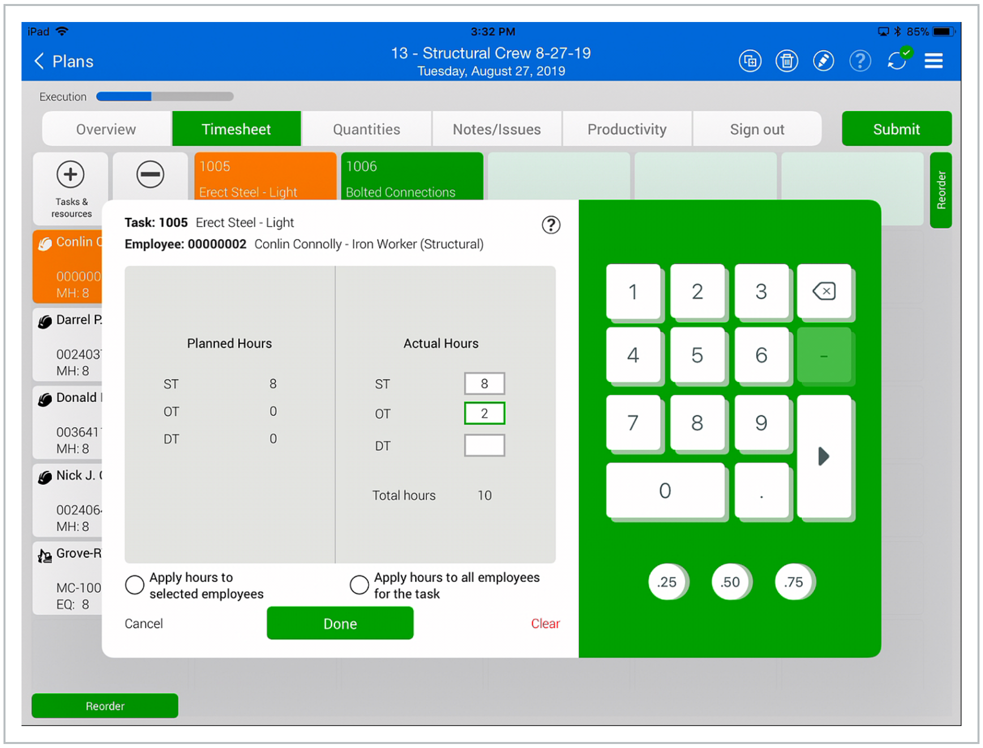
As the workday progresses, within Progress you can input the hours each crew member worked on a task, and the amount of quantity installed or completed. Inputting actuals for the Daily Plan takes place in the Time sheet and Quantities tabs.

2.10.1 Time sheet Tab

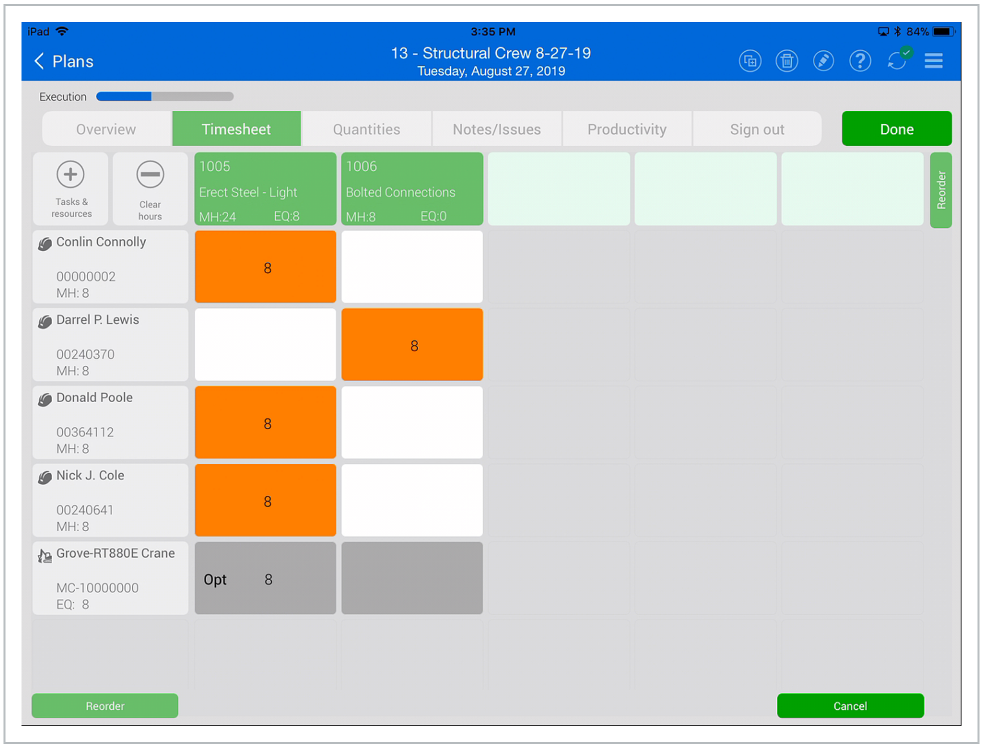
Within the Time sheet tab, you can enter the exact hours each crew member worked and the amount of hours the equipment was used.

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

If you have crew members that must work overtime or double time to meet the schedule deadline, on the Time sheet tab you can enter straight time, overtime, and double time. In addition, to account for fractions of an hour, there are buttons below the keypad (e.g., by 0.25, 0.50, or 0.75). If you enter overtime or double time, you will see the updated hours in the hour box.



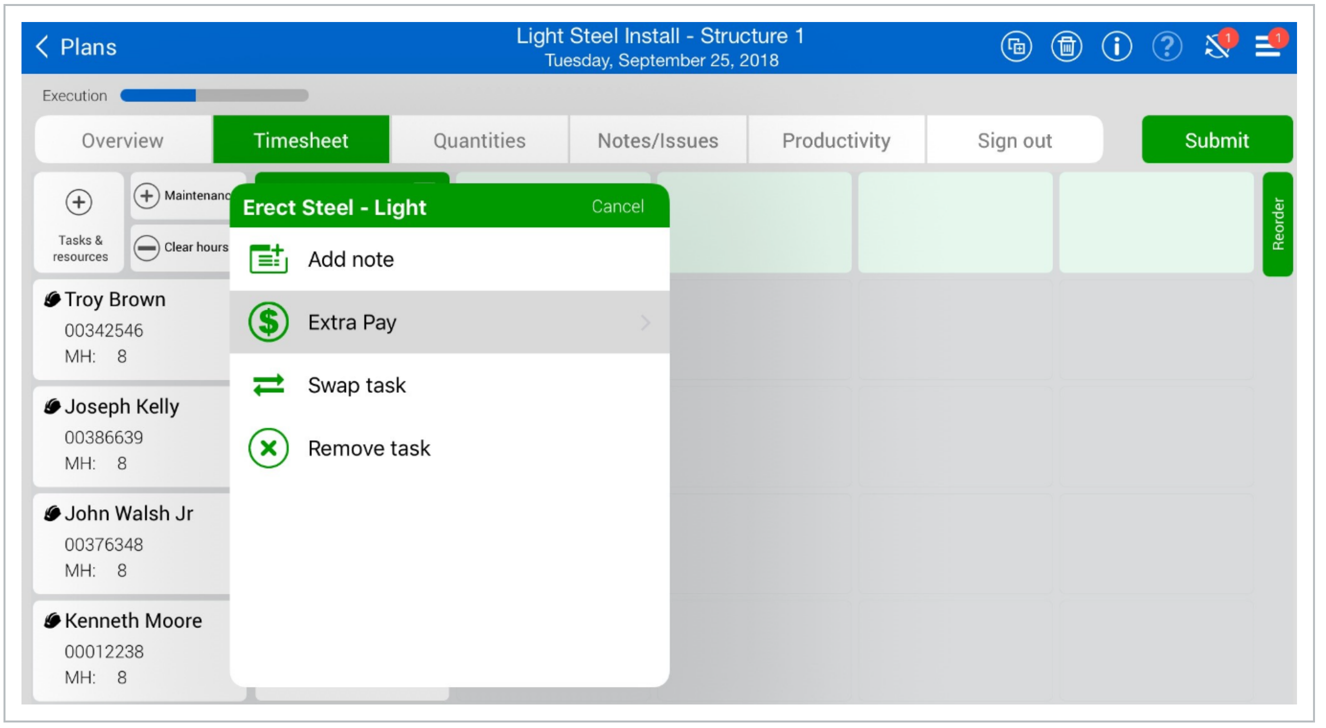
If everyone in your crew has worked the same hours, you can select the **Apply hours to all employees for the task** box. If you want to apply the same hours to some of the employees on the daily plan, you can select **Apply hours to selected employees** and select the hours boxes for all the employees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



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

If your plan for the day has changed and you need to replace the task for the day, you can do so by tapping on the task box and selecting Swap task. This allows you to leave any hours you have already entered and not have to start from scratch.

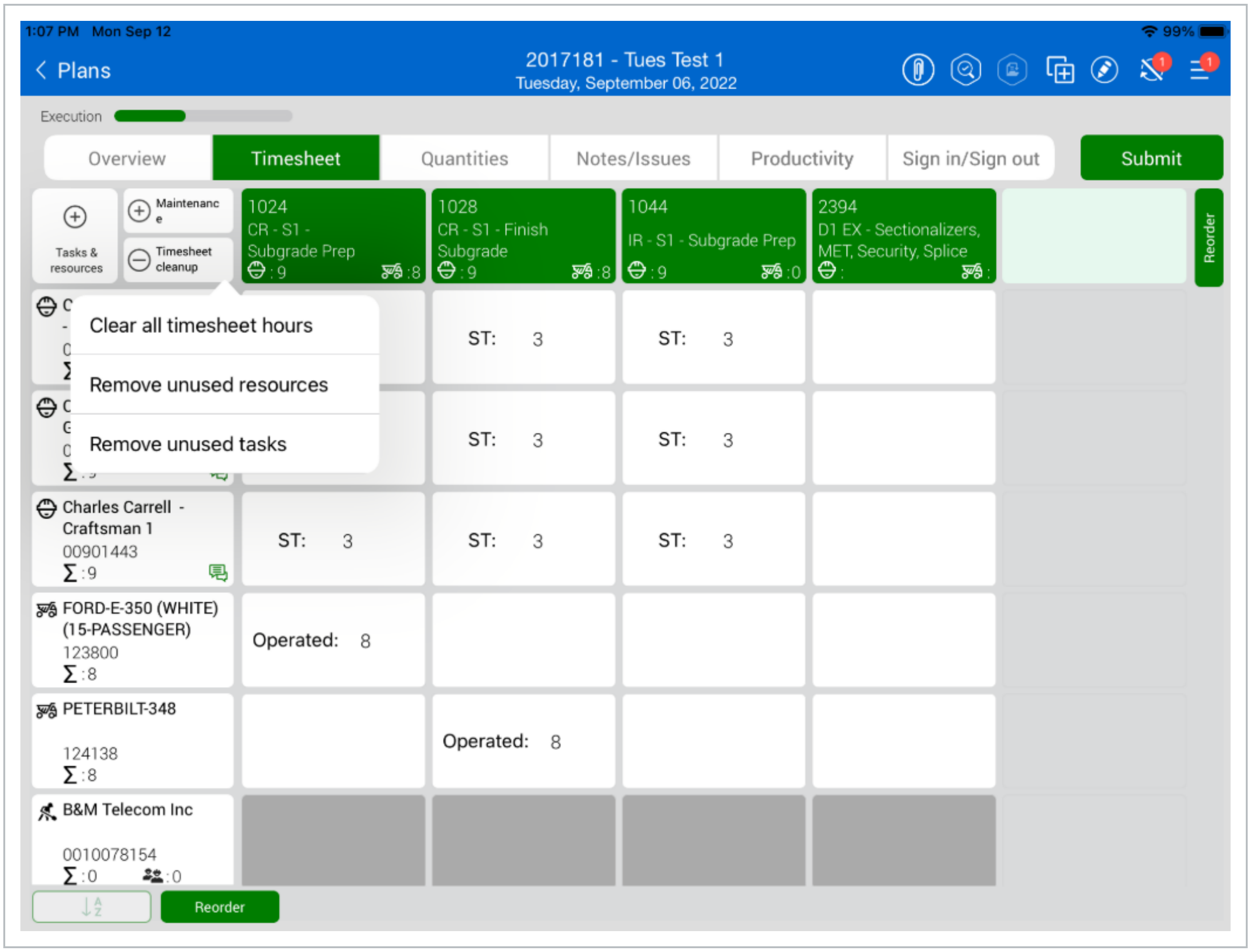
You can also add a note or define any extra pay from this screen.



2.10.1.1 Remove unused tasks and resources

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

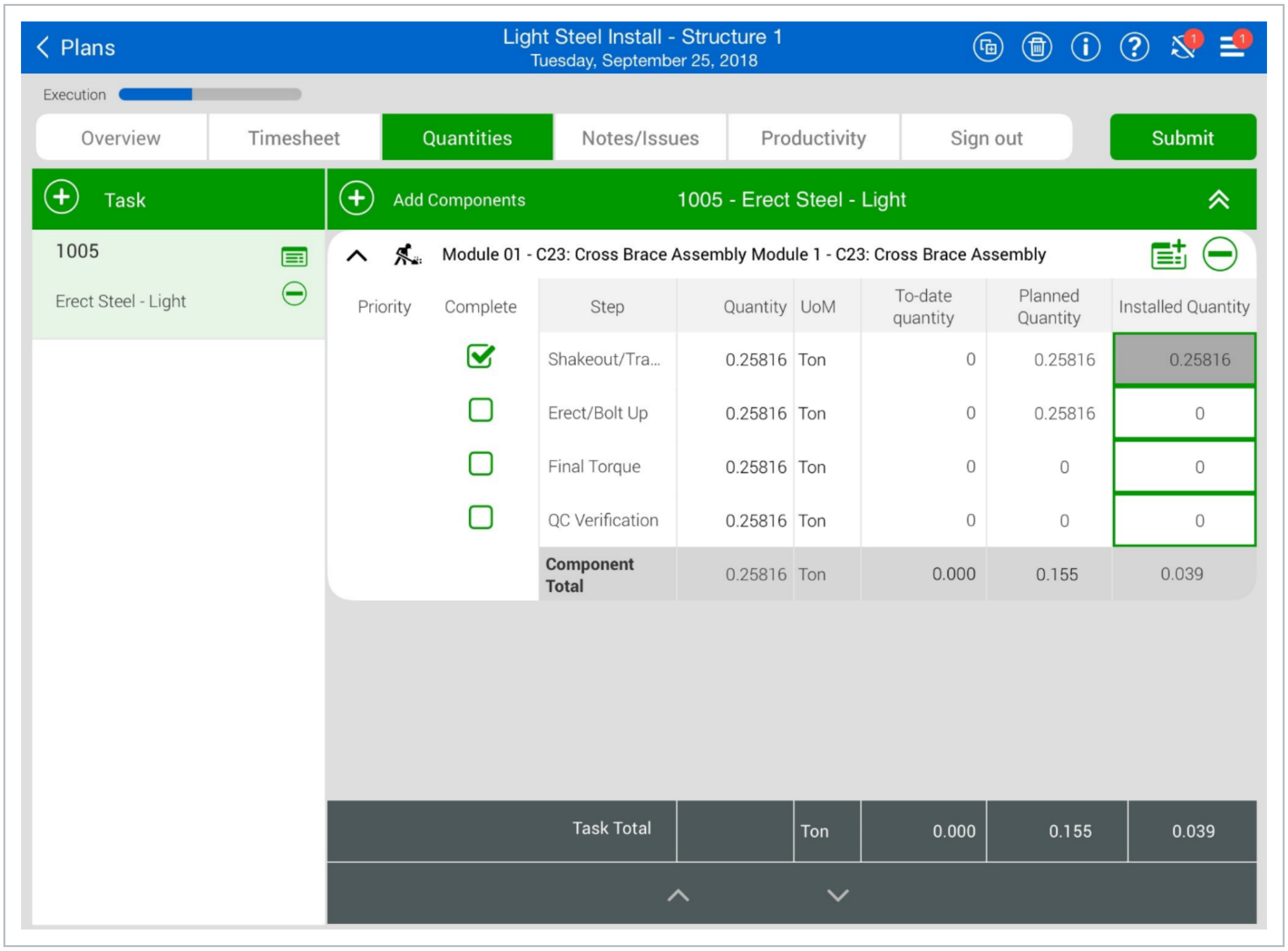
- Remove unused resources: All employees with no daily plan data associated with them are removed from the daily plan.
- Remove unused tasks: All tasks with no daily plan data associated with them are removed from the daily plan.



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

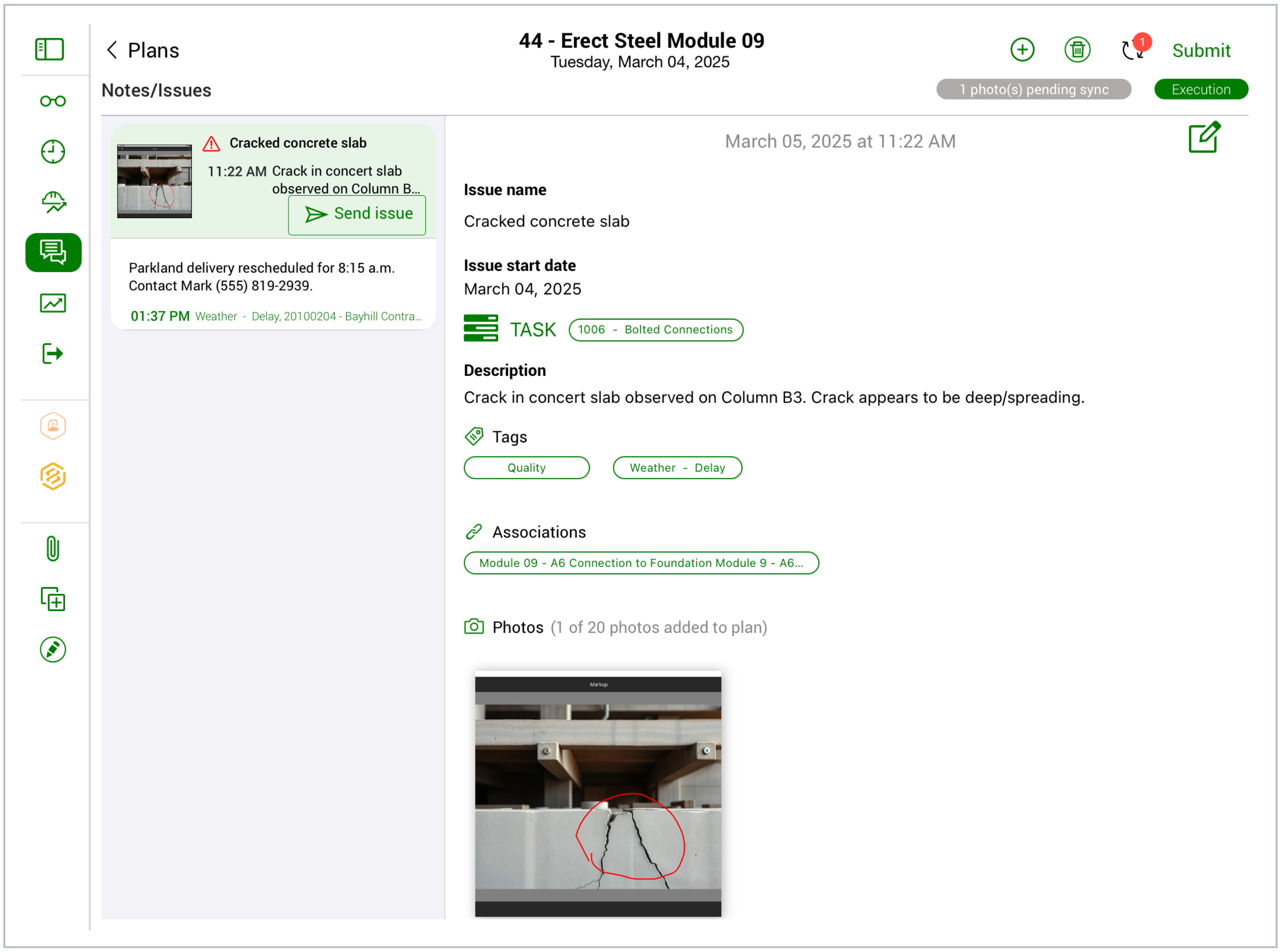
2.10.2 Quantities Tab

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



2.10.3 Notes/Issues Tab

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

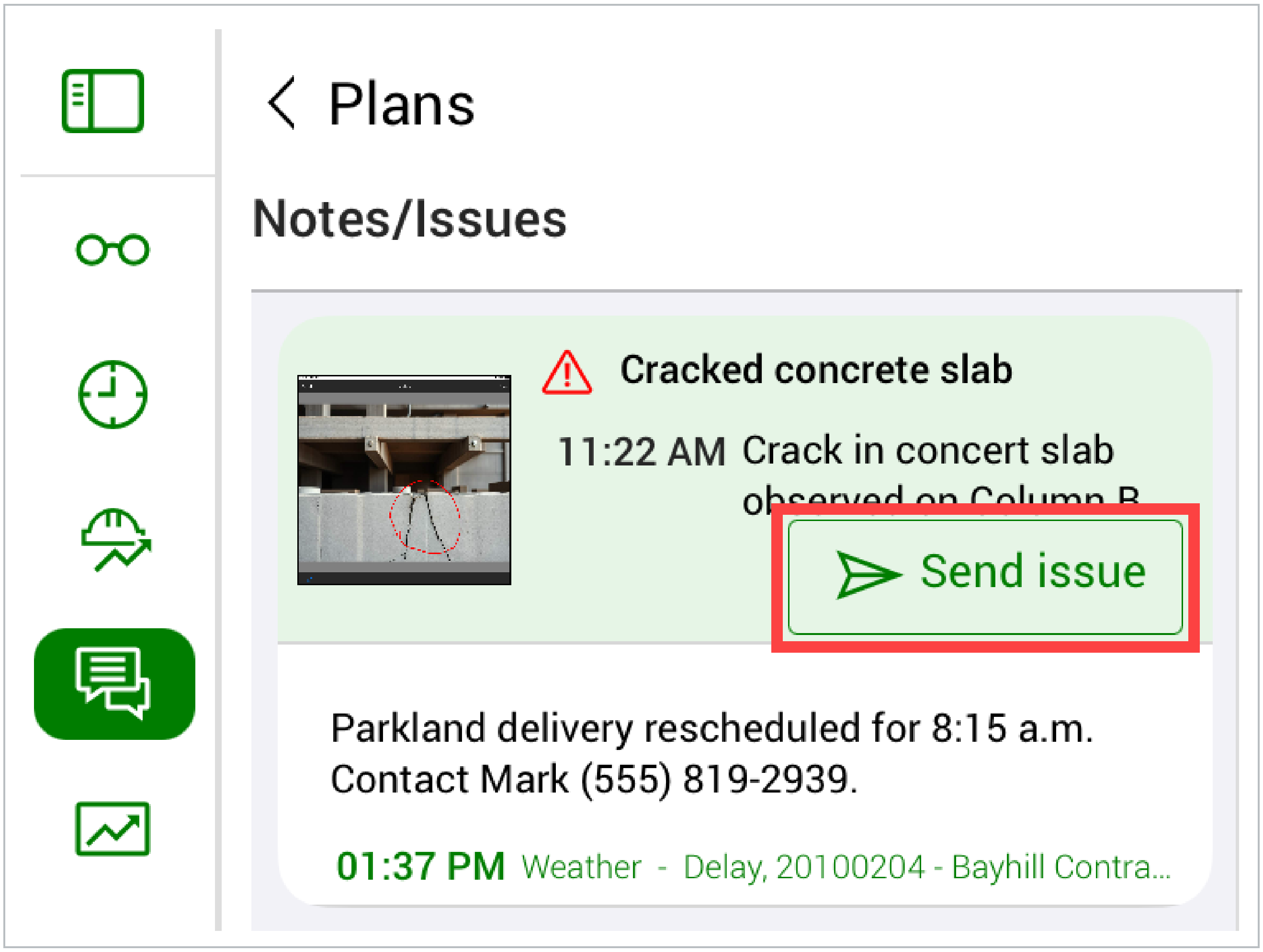


2.10.3.2 Send Issue to InEight Change

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

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

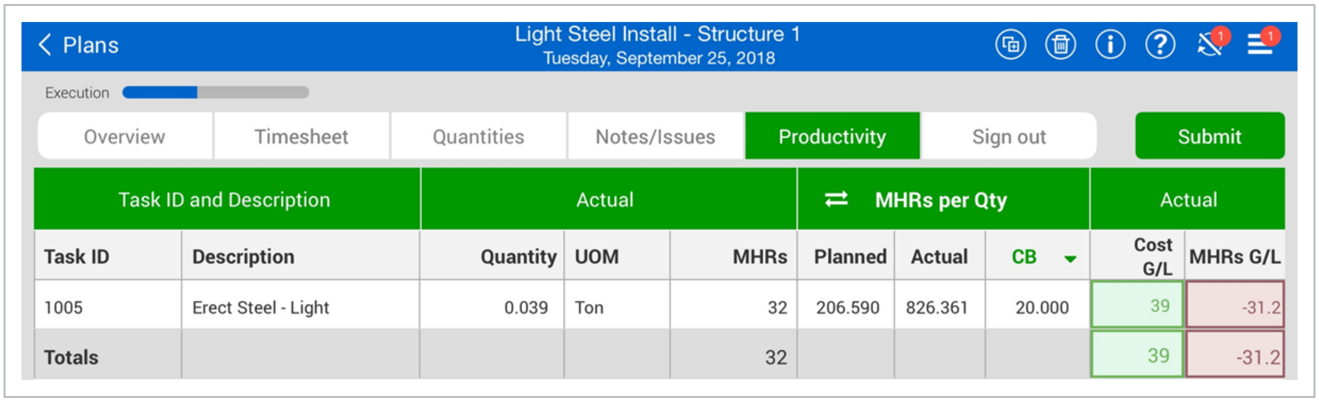
When the issue requires immediate attention, click **Send issue** to immediately send the issue to InEight Change for review.



2.10.4 Productivity Tab

After adding notes, you can review your tasks, quantities and hours claimed for the task and compare the actuals to the planned quantity and hours within the Productivity tab.

MHR G/L and ($) G/L are two productivity metrics used to determine performance against budget. By default, MHR G/L is always shown. ($) G/L will be shown if the appropriate setting is selected in the project settings. The setting is called “Display cost in daily plan productivity during execution phase?” and is in the Daily Planning section of the project settings.



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

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

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

- Actual total cost of labor = Sum of Total number of hours worked by the employee * Hourly rate of the employee
- Actual total cost of equipment = Sum of (Total number of equipment hours operated * Hourly Unit rate of the equipment)

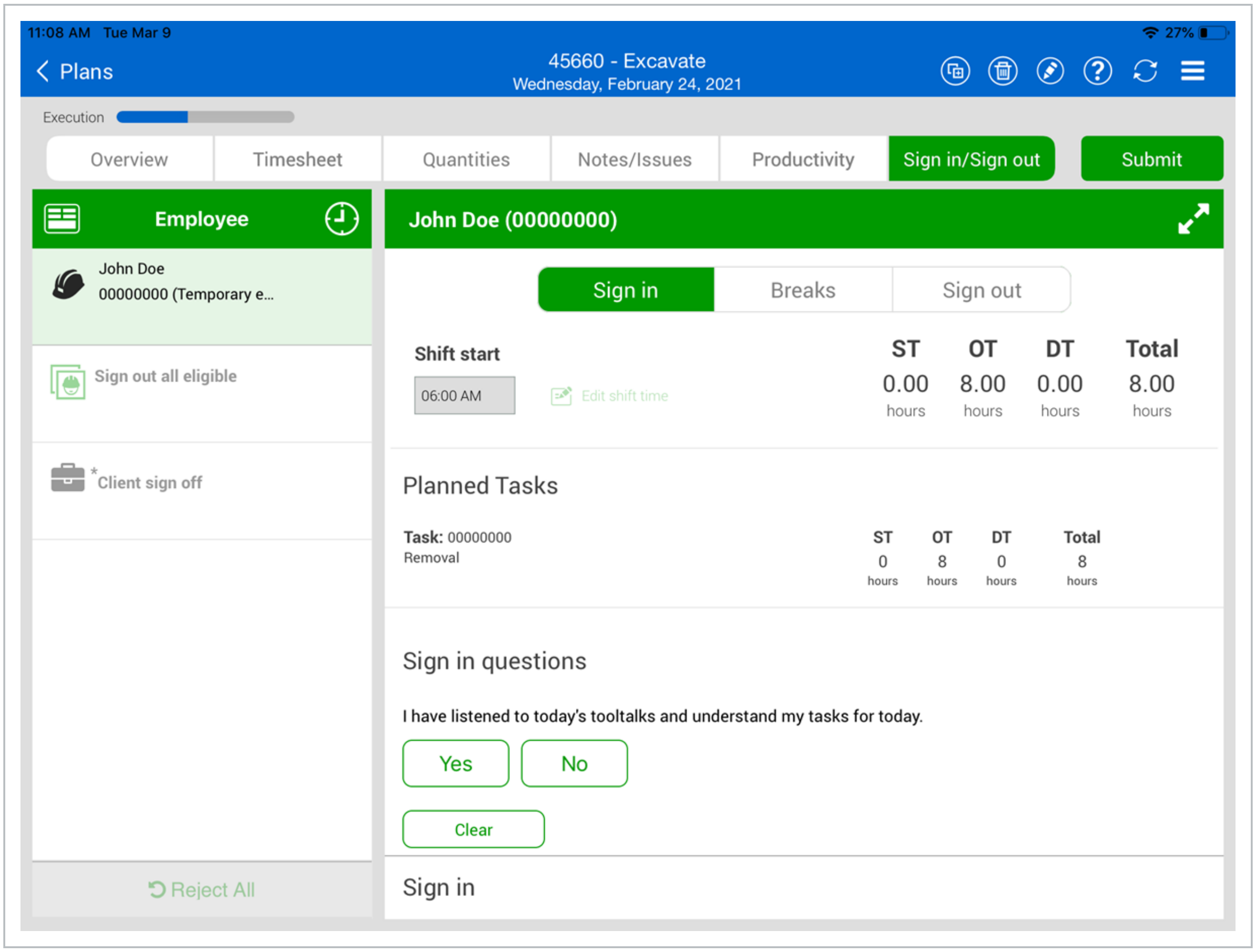
2.10.5 Sign In/Sign Out Tab

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

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

2.10.5.3 Sign In Subtab

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



Shift Start Time

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

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

Employee Sign-in

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

Sign-in on Behalf of Employee

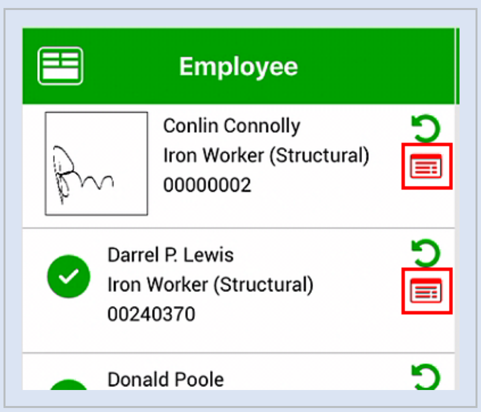
Depending on project settings you might also have the option to sign in on behalf of employees by using Touch ID or PIN. This project setting is recommended because crewmembers might forget to sign in when the crew iPad is not around, which prevents the daily plan from being submitted. As a field engineer,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

Questions

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

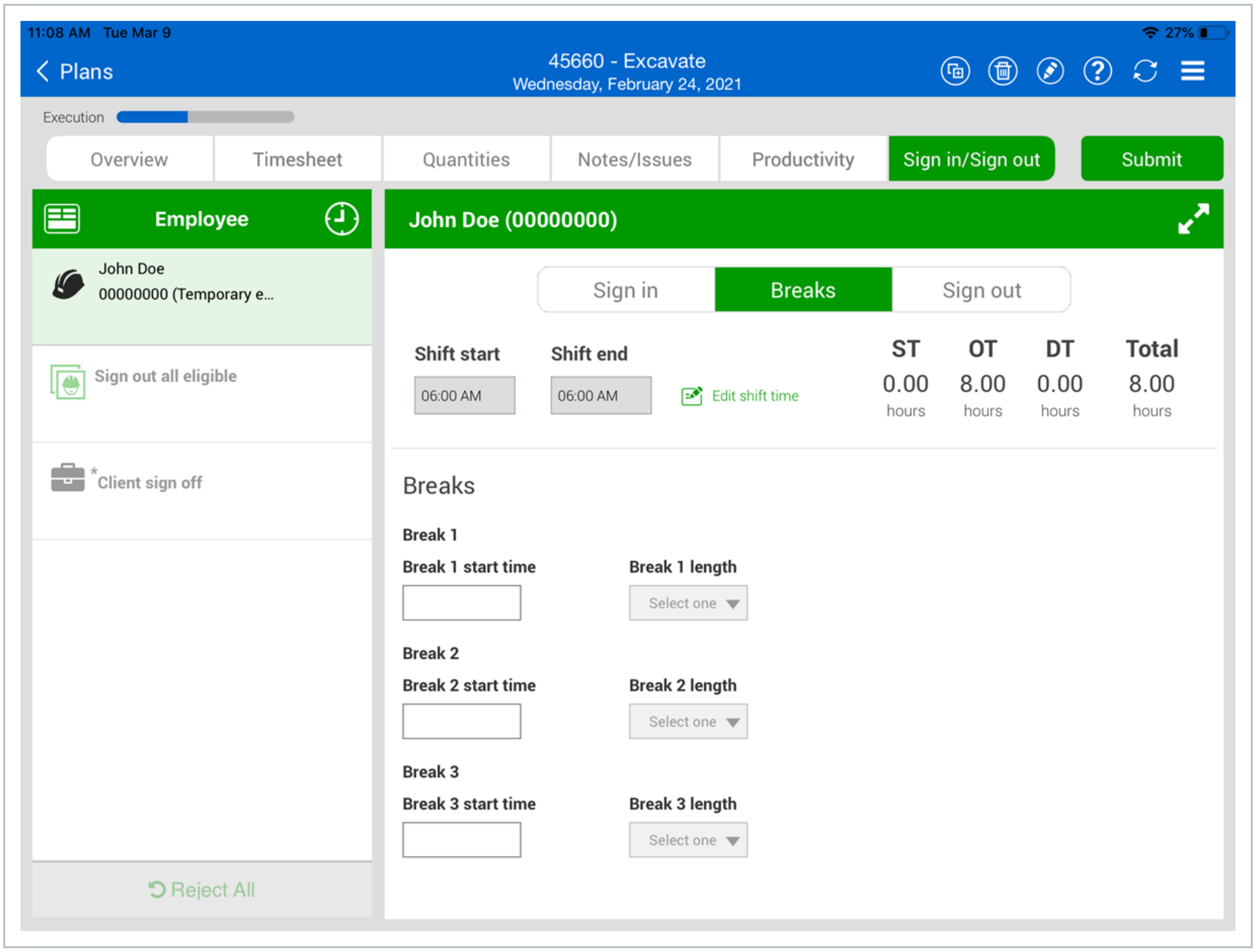
- For each question, you can answer yes or no
- If you give a non-compliant answer, a dialog box lets you put a note as to why you chose that answer
- You can tap **No Exceptions** if all answers are in compliance

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



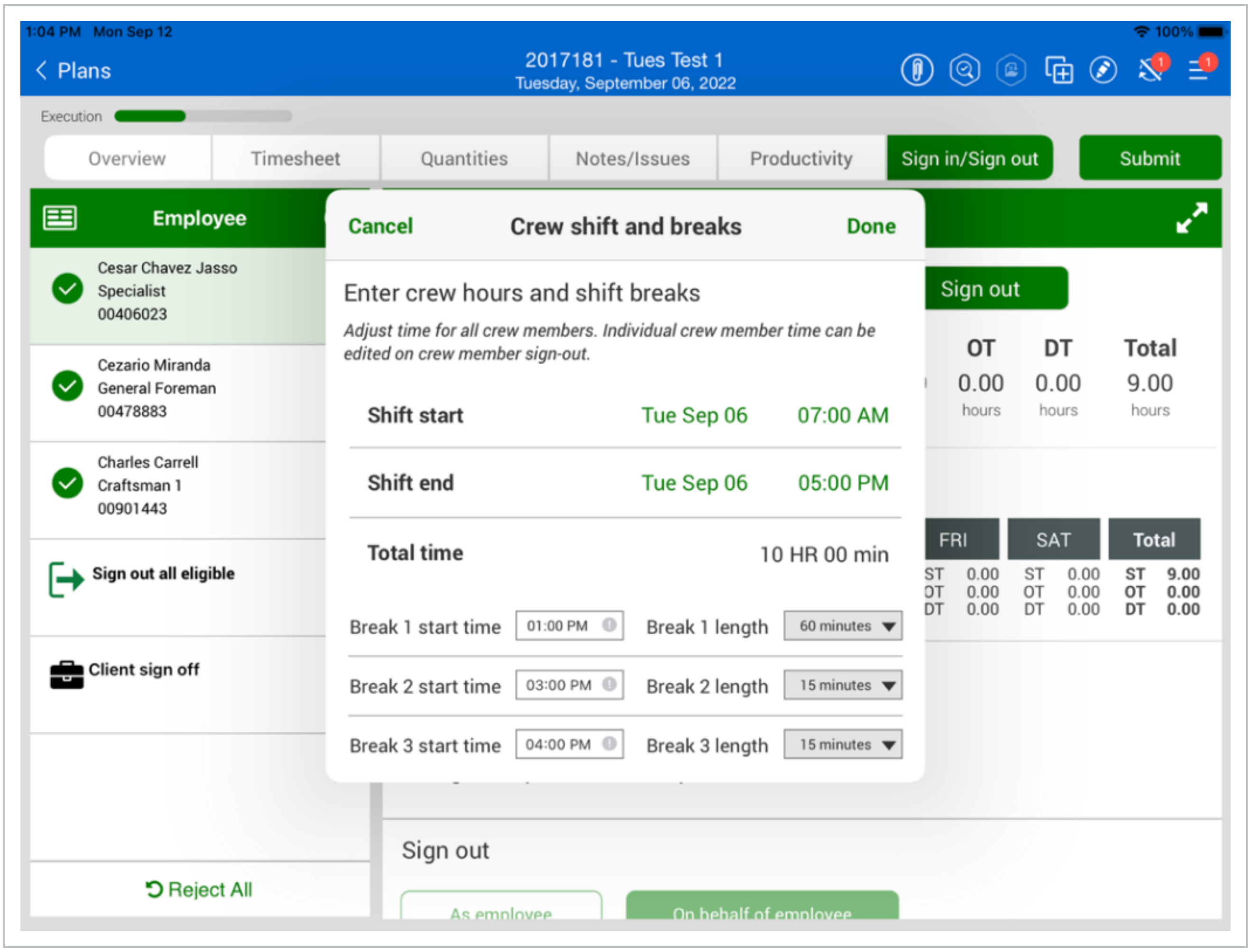
2.10.5.4 Breaks Subtab

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



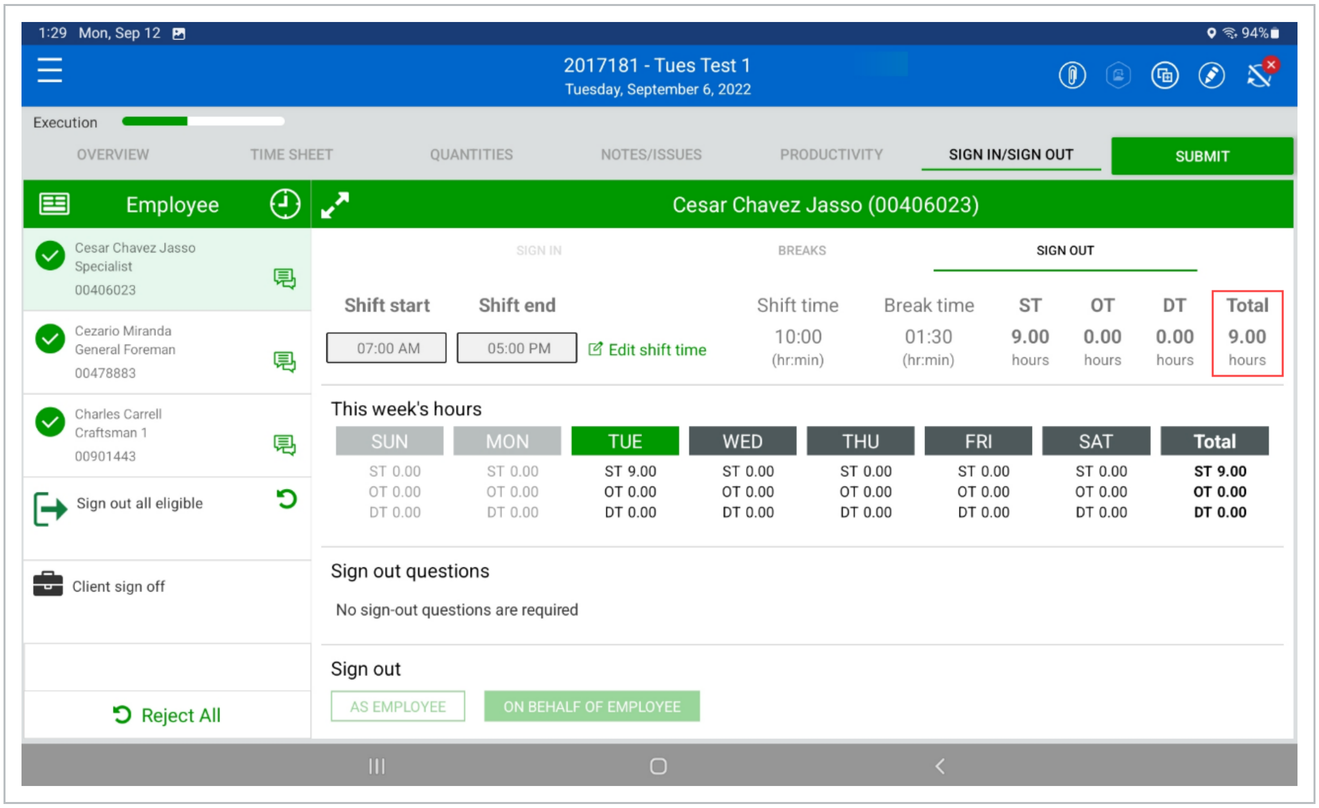
2.10.6 Crew Break Hours

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



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.



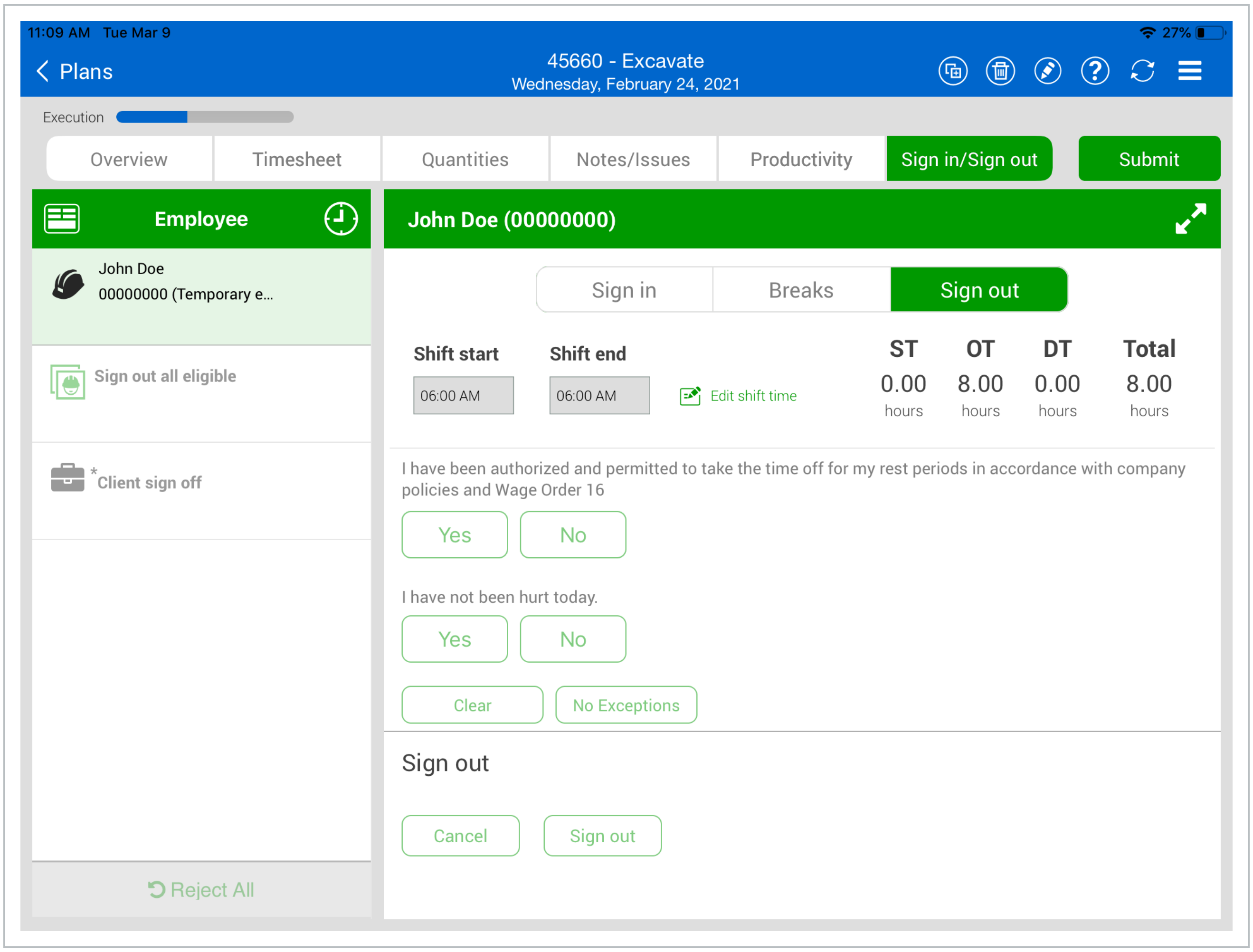
Shift Start/End Time

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.

2.10.6.5 Sign Out Subtab

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



Shift Start/End Time

You can enter shift hours for an entire crew or for an individual (exception from crew) from the Sign out subtab. To enter the hours worked for an entire crew, select the clock icon at the top of the list of crew members on the left side of the page.

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

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

2.10.6.6 Employee Sign-out

To sign out as an employee, tap on your name. You can review the hours input by the foreman before signing the card and, at that point, you can agree or disagree with the hours and negotiate them before signing out. Each employee must enter a PIN (personal information number) to sign out, which can be your birthdate or a number that the IT personnel has assigned. With the proper project settings enabled, there is also an option to sign out with a signature.

2.10.6.7 Sign-out on Behalf of Employee

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

2.10.6.8 Client Sign-out

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

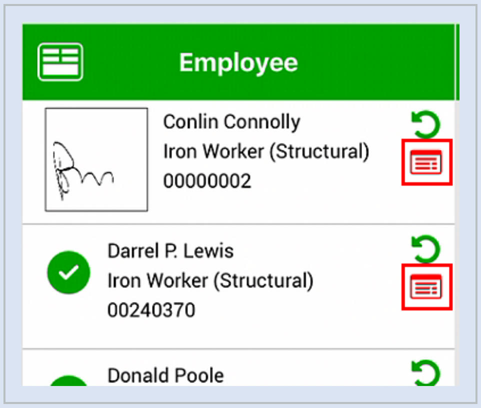
> The Client sign off is available until all employees are signed out.

2.10.6.9 Questions

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

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

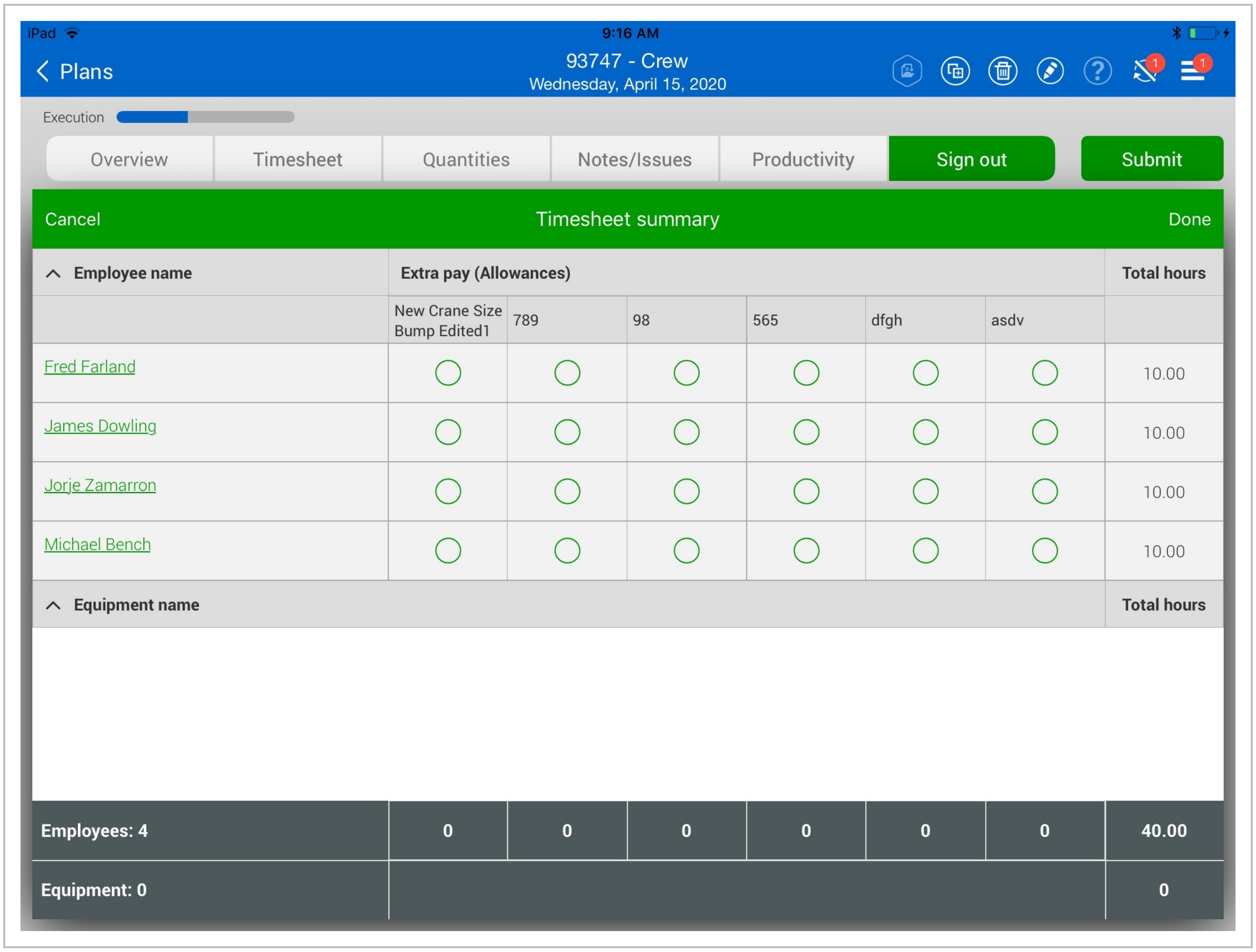
> Employees who provide an answer that is out of compliance must provide a note, and a red Note indicator is shown with the employee on the sign out tab.



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

2.10.6.10 Time sheet Summary

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

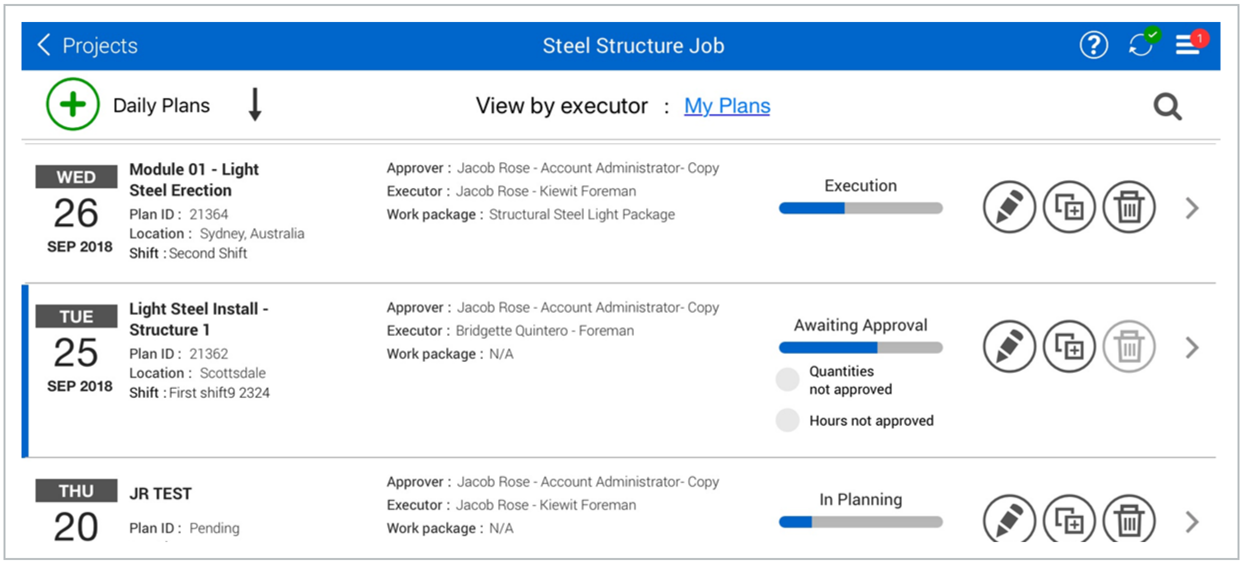


From this page, you can view, add and edit allowance allocations for each employee. As you do so, these changes will update automatically for each employee on the Time sheet and Notes/Issues tabs of the daily plan.

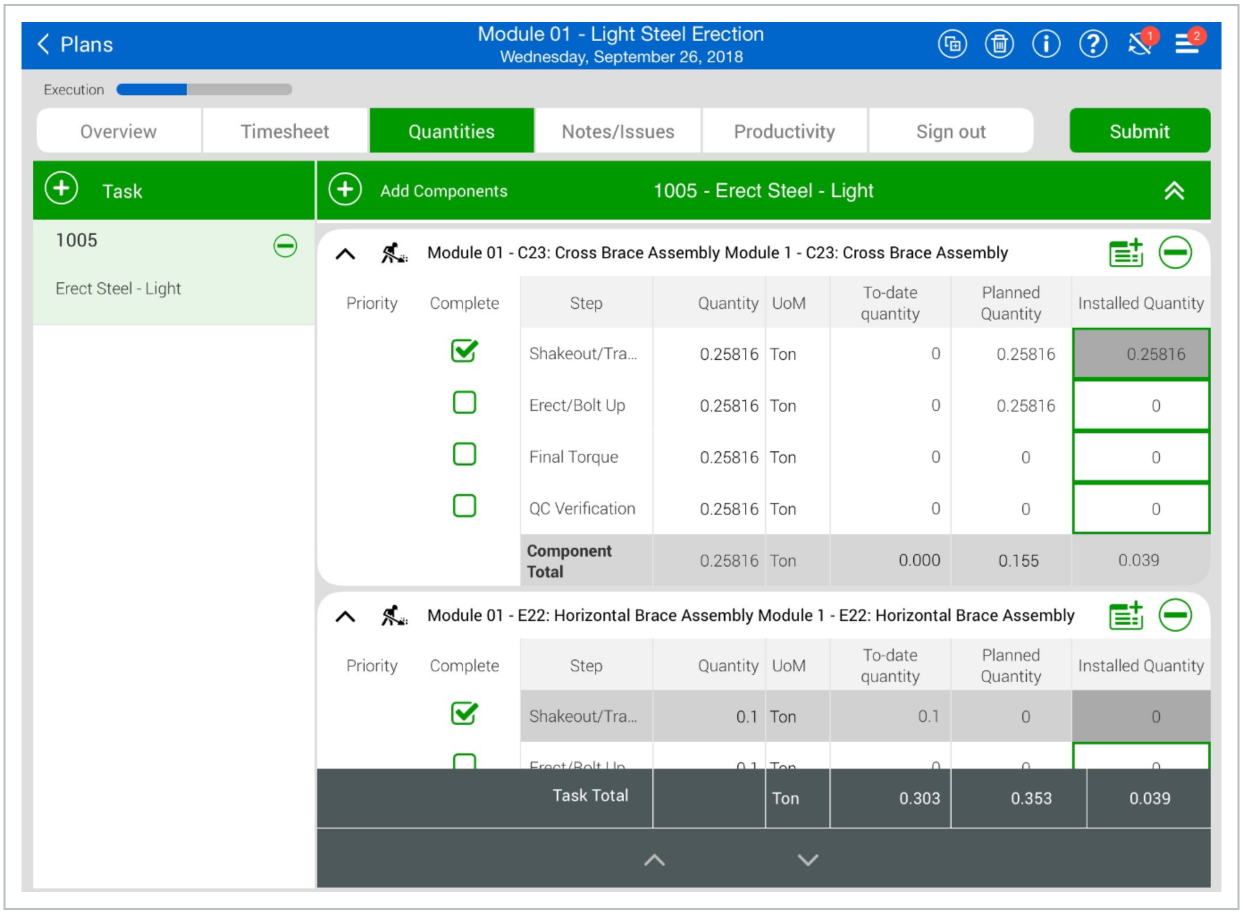
The following steps walk you through entering actuals into your daily plan in Progress.

Input Actuals

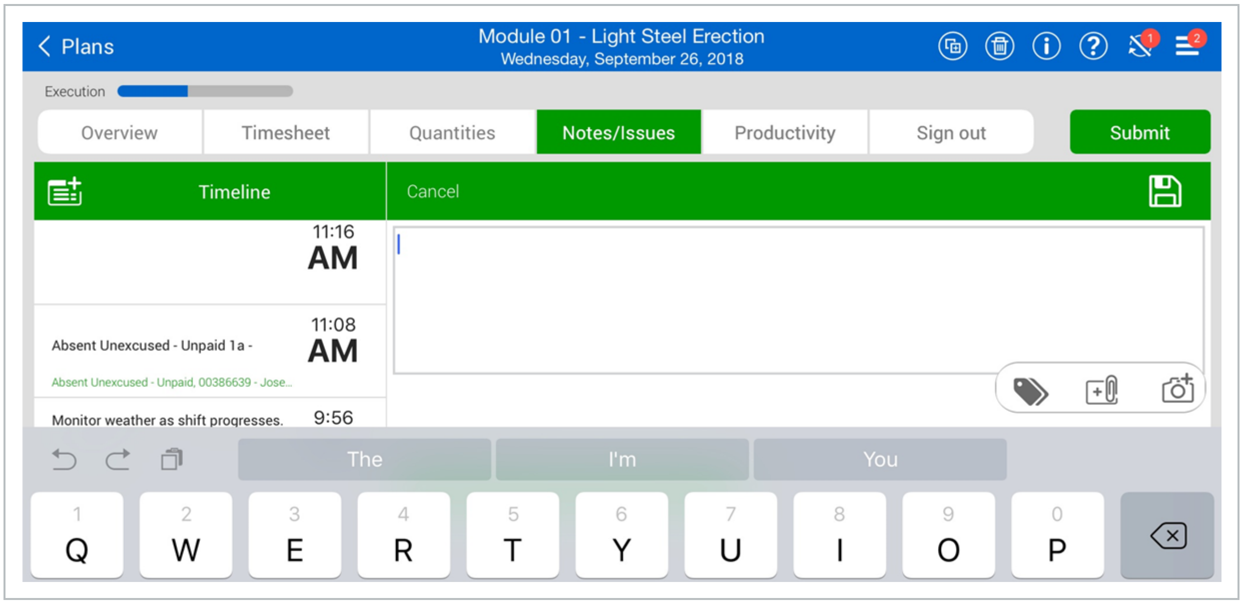
1. Open a daily plan from on of your projects.



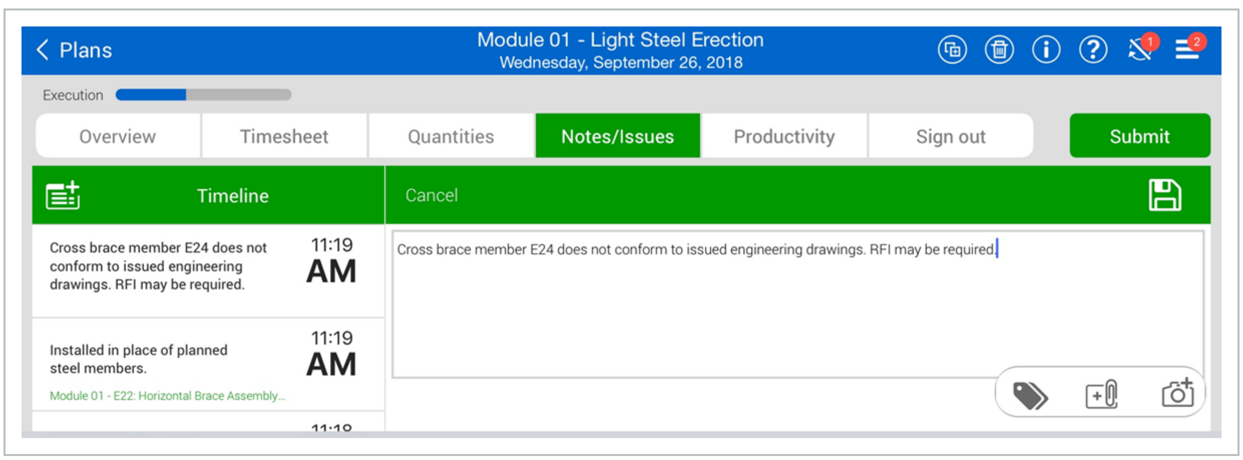
2. Tap on the **Time sheet** tab.
3. Input hours for all your employees and equipment.
4. Tap on the **Quantities** tab.
   - You will see the component assigned to the task from the planning phase
5. Check the check boxes in the "Complete" column wherever necessary for assigned components or their broken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



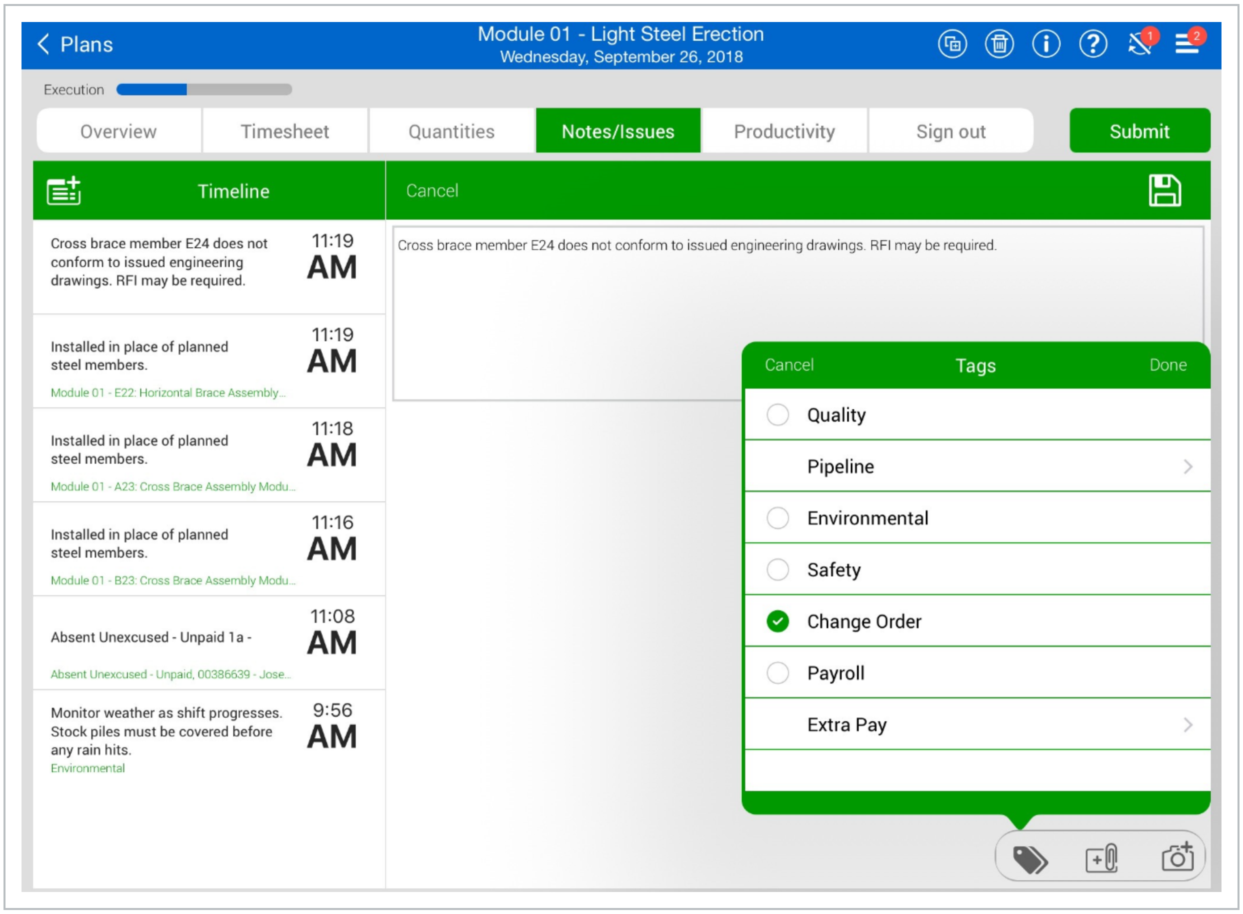
6. Tap the **Note**  icon to add a component note.
    - Tap in the text entry field and your device keyboard will automatically appear



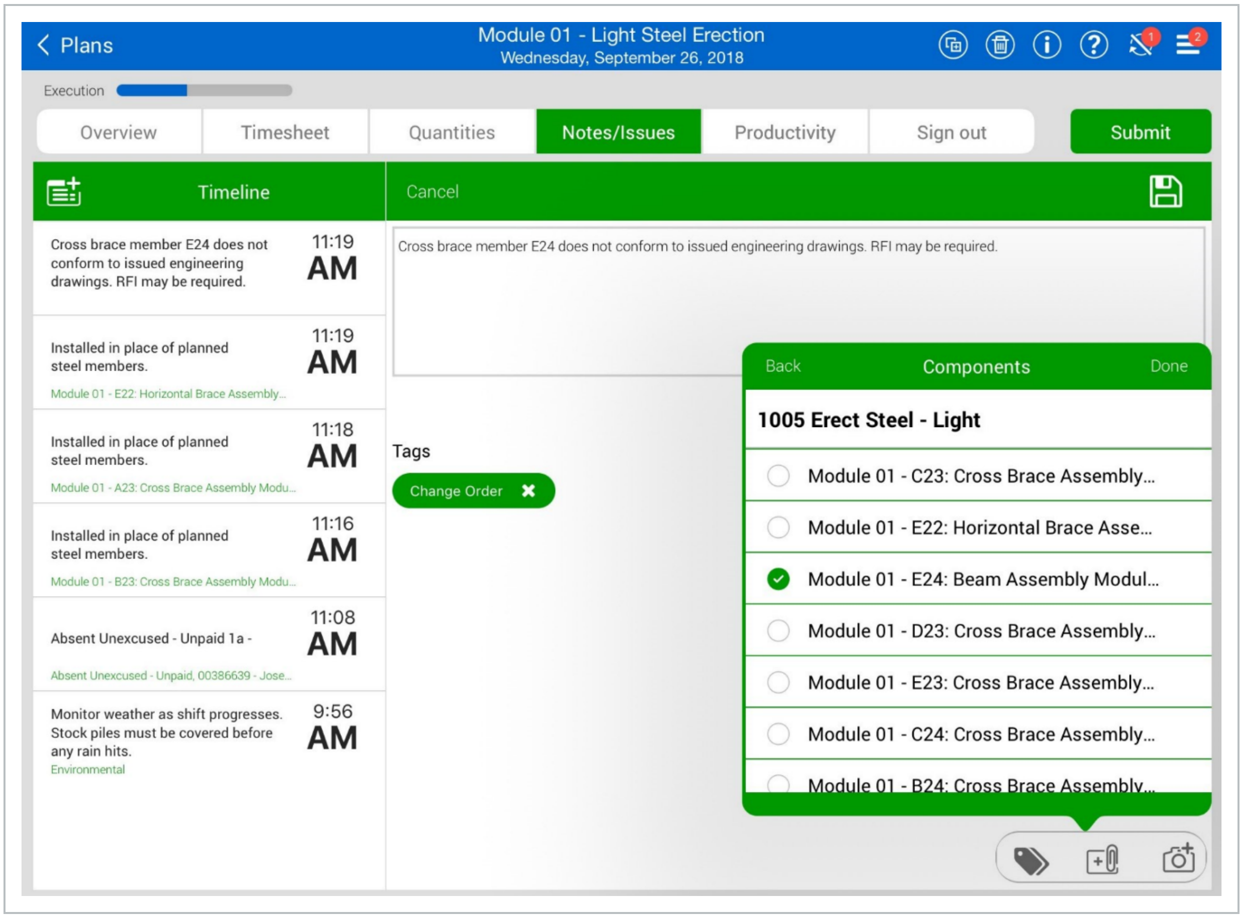
7. Tap **Save** to return to the Quantities tab.
8. Tap on the **Notes/Issues** tab.
9. Tap on the **Note**  icon to add a project note or concern.



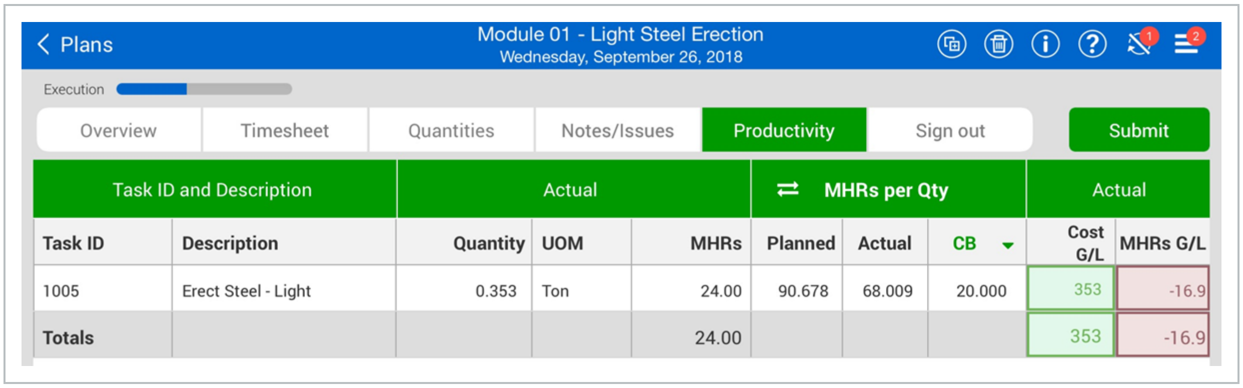
10. Tap the **Tag** icon and tag your note.
11. Select **Done**.



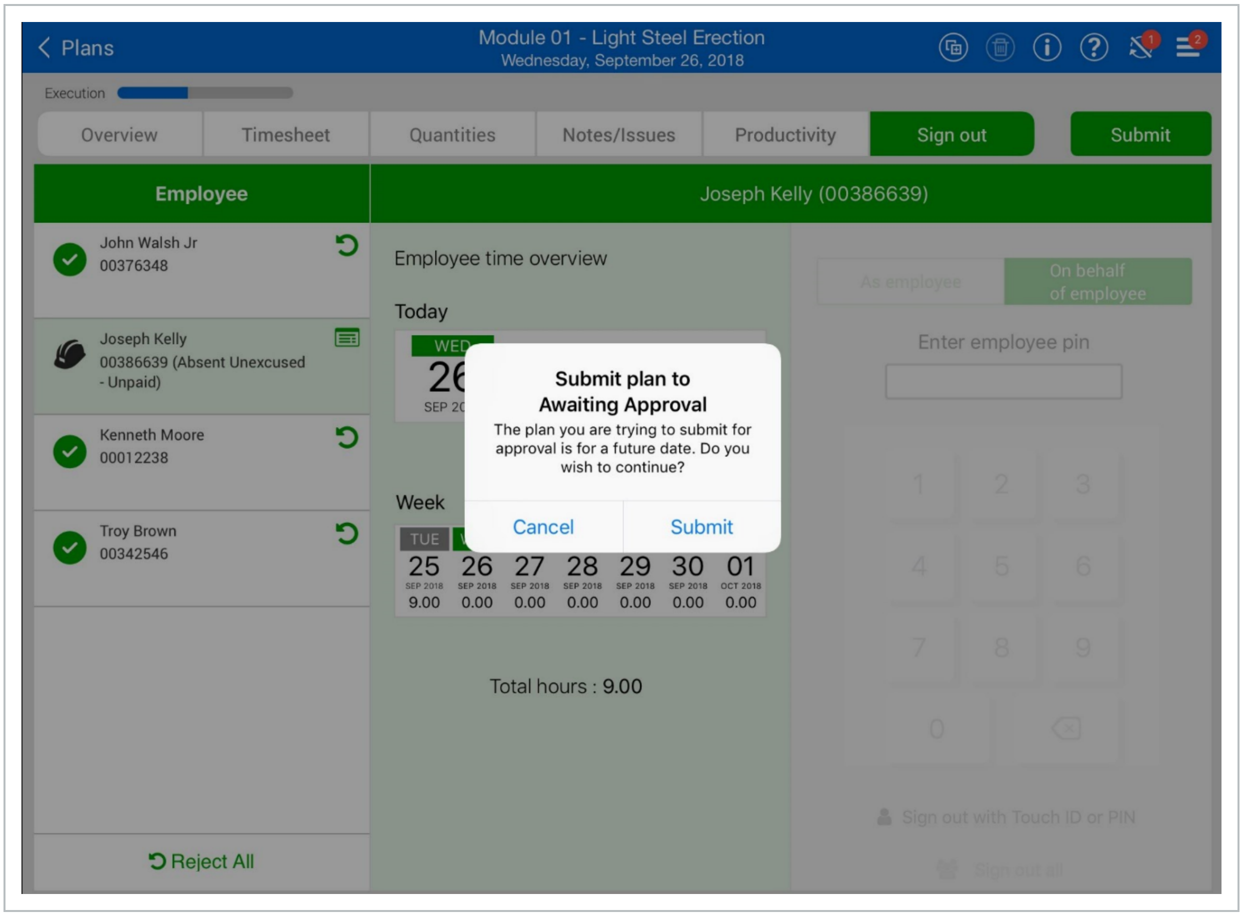
12. To associate the note with a component, tap the **Tag**  icon, then select **Components**.
13. Select a component.
14. Click **Done**.



15. Tap the **Camera** icon to add a photo to the note.
16. Tap **Use Camera** and take a picture using the iPad camera.
17. Make markups and add text.
18. Tap **Done** to add the picture to the note.
19. Review the **Productivity** tab.
    - Check to see if you are gaining or losing man hours and what your actuals are compared to the planned and budget columns



20. Tap on the **Sign In/Sign Out** tab, and then tap the **Sign Out** subtab.
21. Sign out each employee by selecting **On Behalf of Employee**.
22. Tap on **Sign out with Touch ID or PIN**.
23. Enter the ID number for your iPad.
    - The first name in the employee list is automatically highlighted and the list of compliance questions is shown
    - These compliance questions are usually set by management. They are set up in the project settings
24. Answer employee sign out questions.
25. Tap **Done**.
26. Repeat the sign out steps for all employees.
27. Tap **Submit** to submit the plan to the approval phase.
    - Progress will automatically sync when the plan is submitted. This sync must be successful for it to show up in the InEight Progress web application


Plans
Module 01 - Light Steel Erection
Wednesday, September 26, 2018
Execution
Overview
Timesheet
Quantities
Notes/Issues
Productivity
Sign out
Submit
Employee
Joseph Kelly (00386639)
John Walsh Jr
00376348
Joseph Kelly
00386639 (Absent Unexcused - Unpaid)
Kenneth Moore
00012238
Troy Brown
00342546
Reject All
Employee time overview
Today
Week
Submit plan to Awaiting Approval
The plan you are trying to submit for approval is for a future date. Do you wish to continue?
Cancel
Submit
TUE
25
26
27
28
29
30
01
9.00
0.00
0.00
0.00
0.00
0.00
0.00
Total hours : 9.00
As employee
On behalf of employee
Enter employee pin
Sign out with Touch ID or PIN