Planning Process

Daily Plan

Daily Plans are the communication tool for the foreman to get the crews organized for the following workday. They help the construction team build work by breaking down IWP's into a more manageable scope that account for a days' worth of work. Daily Plans are broken down into three unique phases: Planning, Execution, and Approval.

Quantity claiming from one side and recording actual hours by signing off the craft time sheets on the other side, drive our accurate progress, cost and subsequently, our future forecast of remaining work.

Daily Plan Workflow

Each and every day Foreman play a role in creating, executing, and completing a daily plan. Although foreman is involved in all phases of a daily plan, execution is a foreman's most important responsibility. See below for the foreman's role in daily plan process.

Responsible Person	Actions	Completed By
Field Engineer / Superintendent collaboration	• Create and import plan from IWP, input, and review WBS codes and activity components • Sync daily plan to execution phase • Add 'planner notes' for daily work scope	Before 3PM of previous shift
Foreman	• Add any additional safety notes for work scope	At beginning of the shift
	• Execute daily plan	During shift
	• Ensuring crew signs out • Claim quantities • Confirm crew hours are charged to correct WBS • Submit daily plan, and sync to approval stage	At end of the shift
	• Review next day plan with Superintendent	At end of the shift
Field Engineer	• Review with foreman that the daily plan has all correct WBS codes and activity components • Verify quantities	At end of the shift
Superintendent	• Add weekly notes from IWP (Safety, Quality, and Environmental) to daily plan	At beginning of the shift
	• Verify actual hours	At end of the shift

	• Approve plan before next shift and sync to payroll	

As the executer of daily plan, foreman needs to make sure the following requirements are met.

- Review and make any necessary changes to the executed plan submitted by the Superintendent and Field Engineer prior to the morning toolbox talk.
- Ensure that crew knows expectations and responsibilities for the day.
- Set a quantity-based goal for the crew. Examples would be LF of pipe, CY of Concrete or tons of steel installed.
- Inputting daily notes such as:
    - Obstacles that were encountered.
    - Missing Components for the work accomplished.
    - Accomplishments that were achieved (progress photos).
    - Delays in work (equipment breakdowns, operation shutdowns, and weather).
    - Notes describing productivity discrepancy.
    - Additional safety concerns that arise due to work scope change.
- Claim installed quantities for the work that was accomplished for that day.

Daily Plan Mobile

OVERVIEW

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. In the **User Name** field, enter the email address provided by your manager.



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

Daily Plan Mobile

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

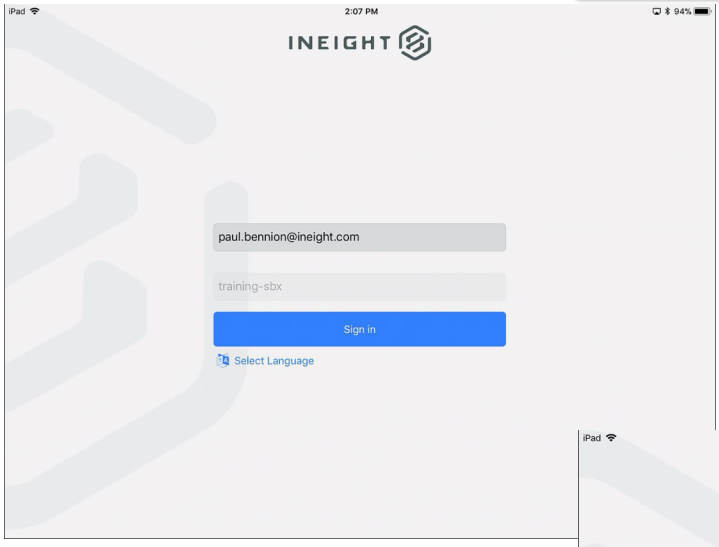
When you are using Kiosk Mode, a sync occurs automatically when you sign out.

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

Kiosk Workflow

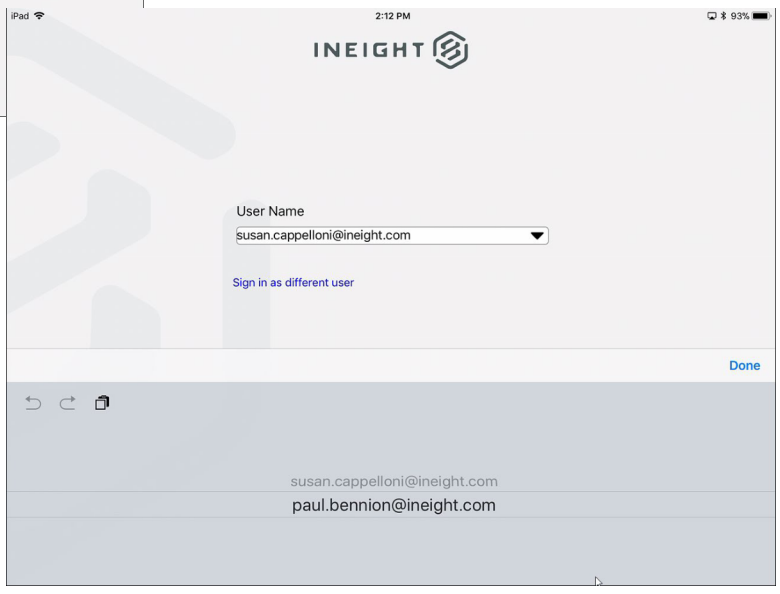
When a previous user logs out, the new user is presented with a login screen that includes a hyperlink to **Sign in as different user.**





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.



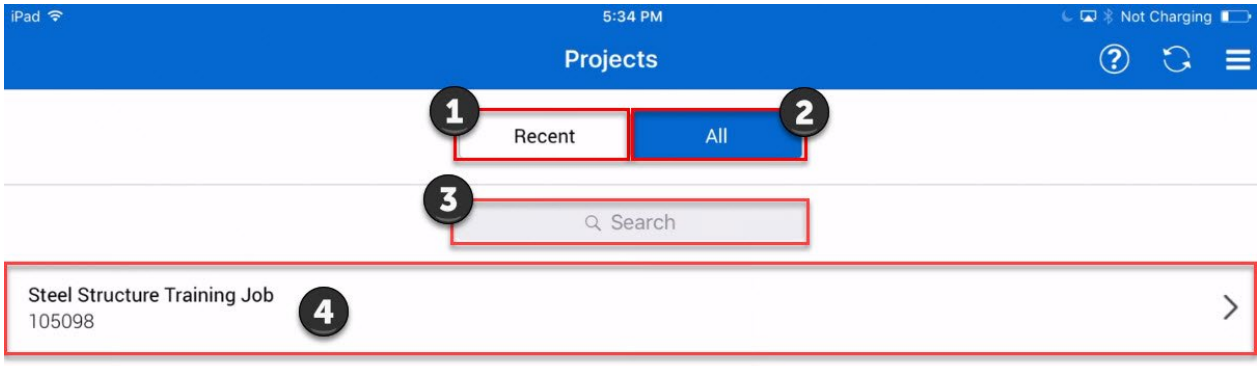
Daily Plan Mobile

Project List

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.



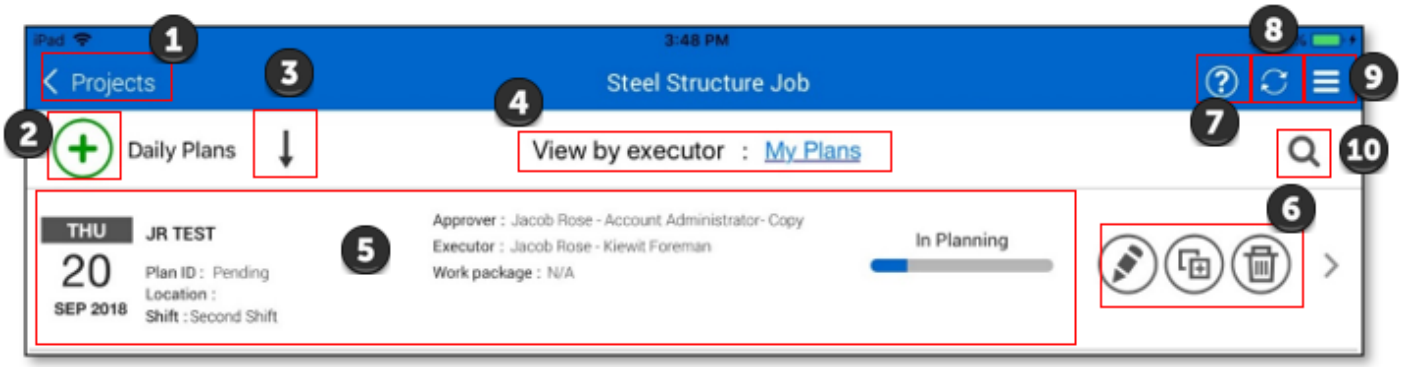
Daily Plan Mobile

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.



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

Daily Plan Mobile

DAILY PLANNING

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



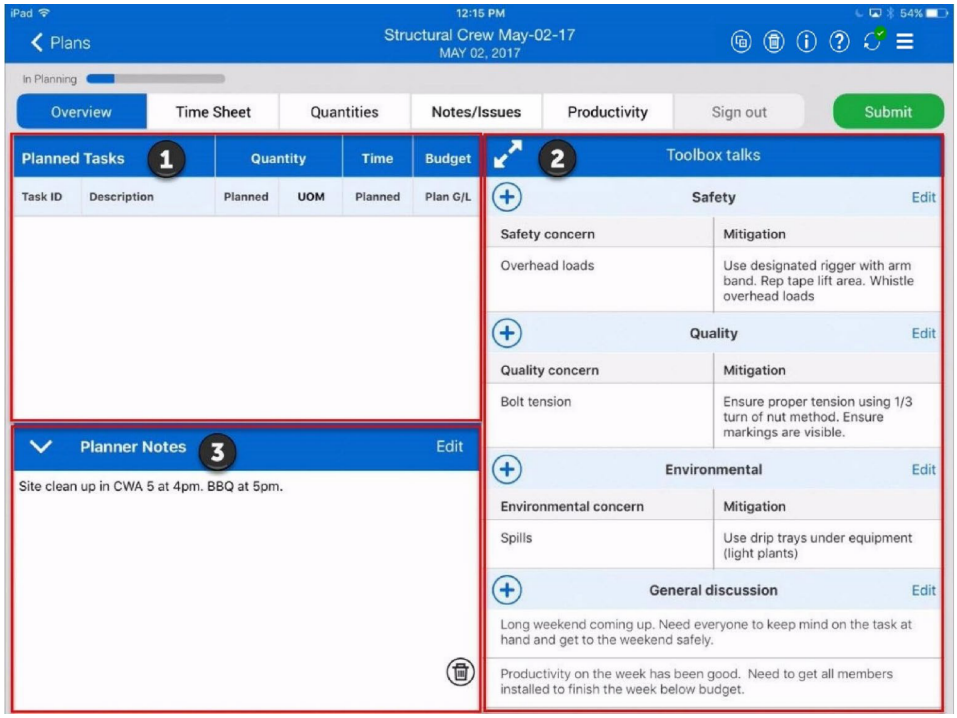
TIP	While in the Planning Phase, the screen is highlighted with a blue accent. When in the Execution Phase, this changes to green. This helps to remind yourself which phase of the process you are in.

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

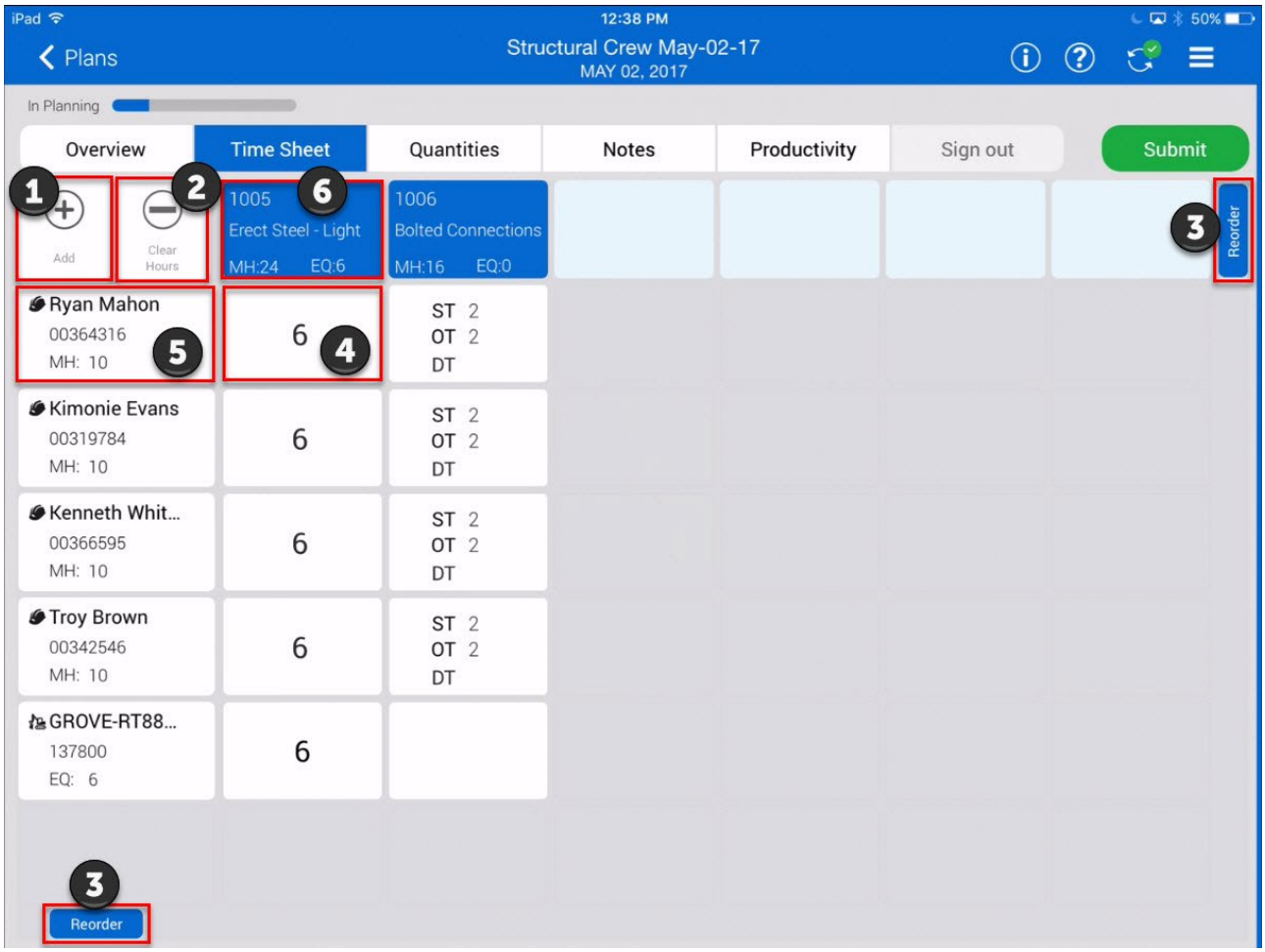
Daily Plan Mobile

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.

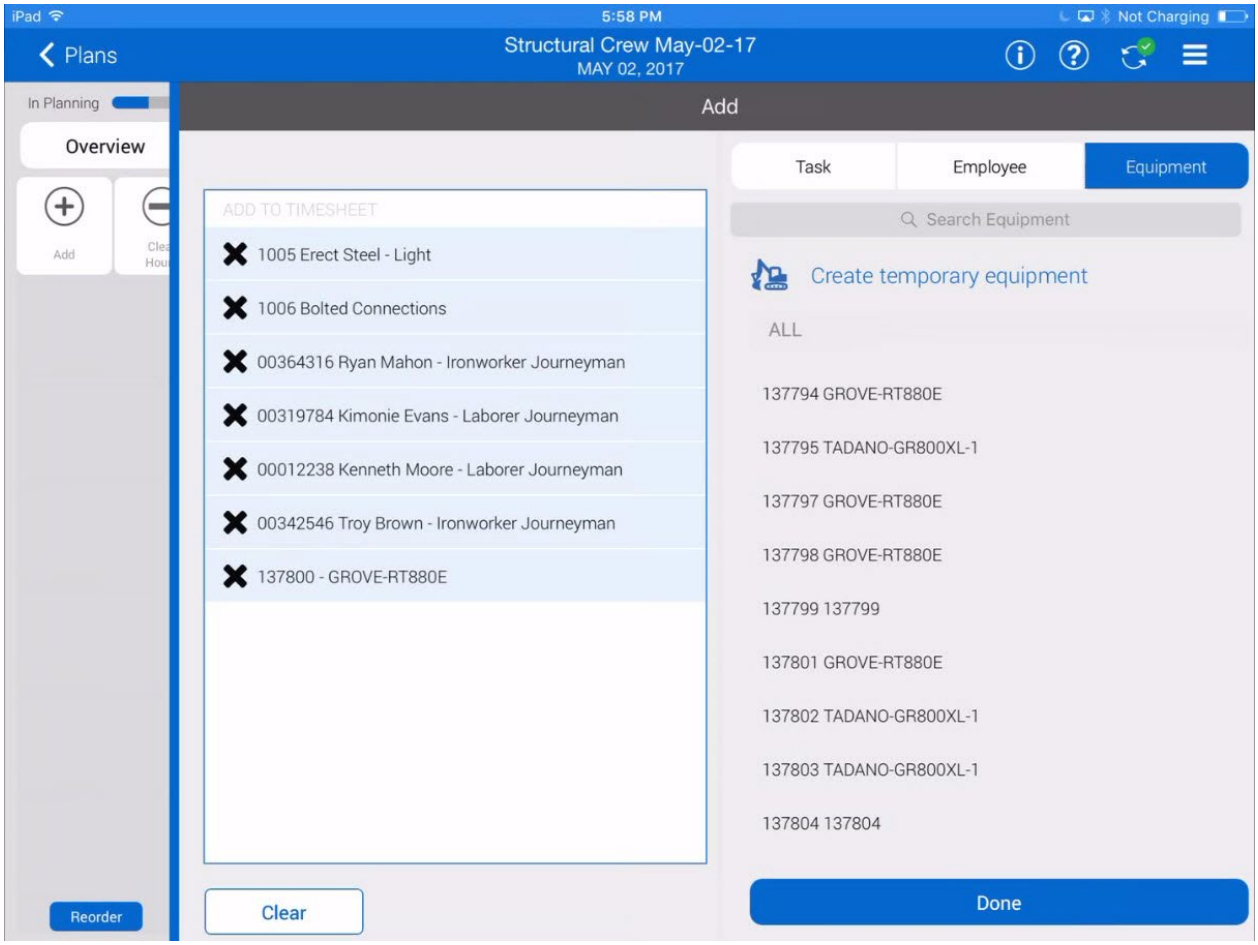
Overview – Time Sheet Tab

	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.



Daily Plan Mobile

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

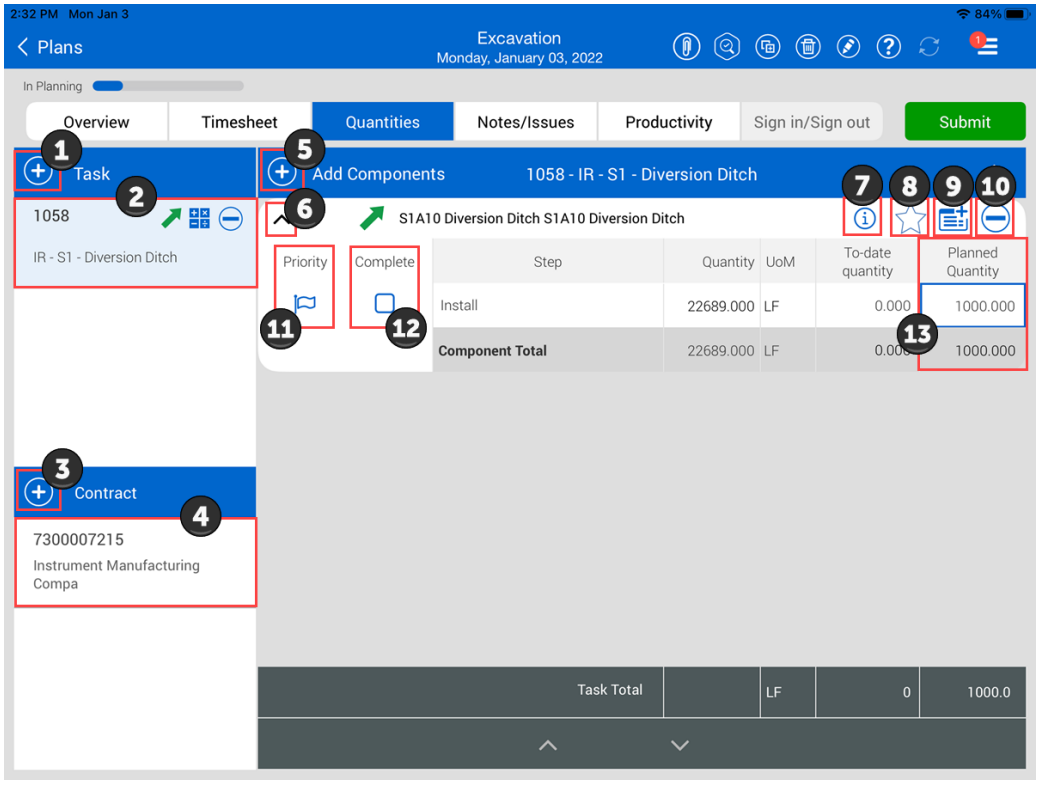
Daily Plan Mobile

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.

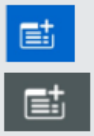


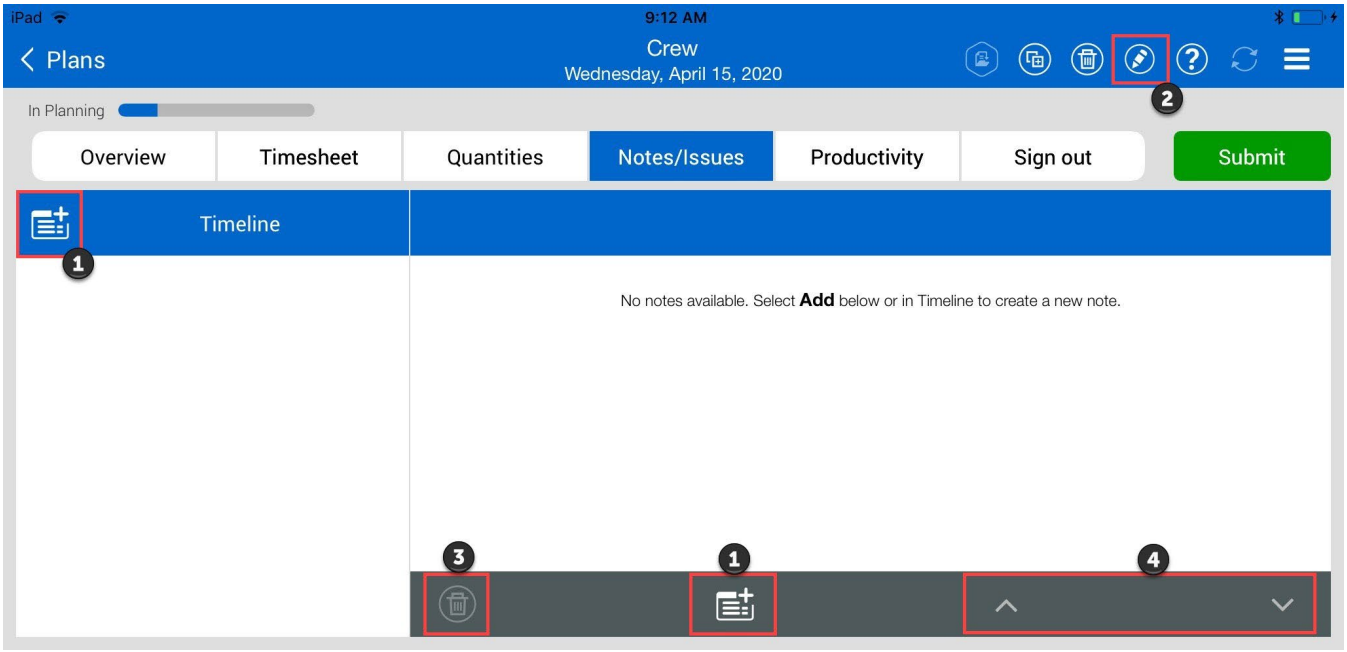
Daily Plan Mobile

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



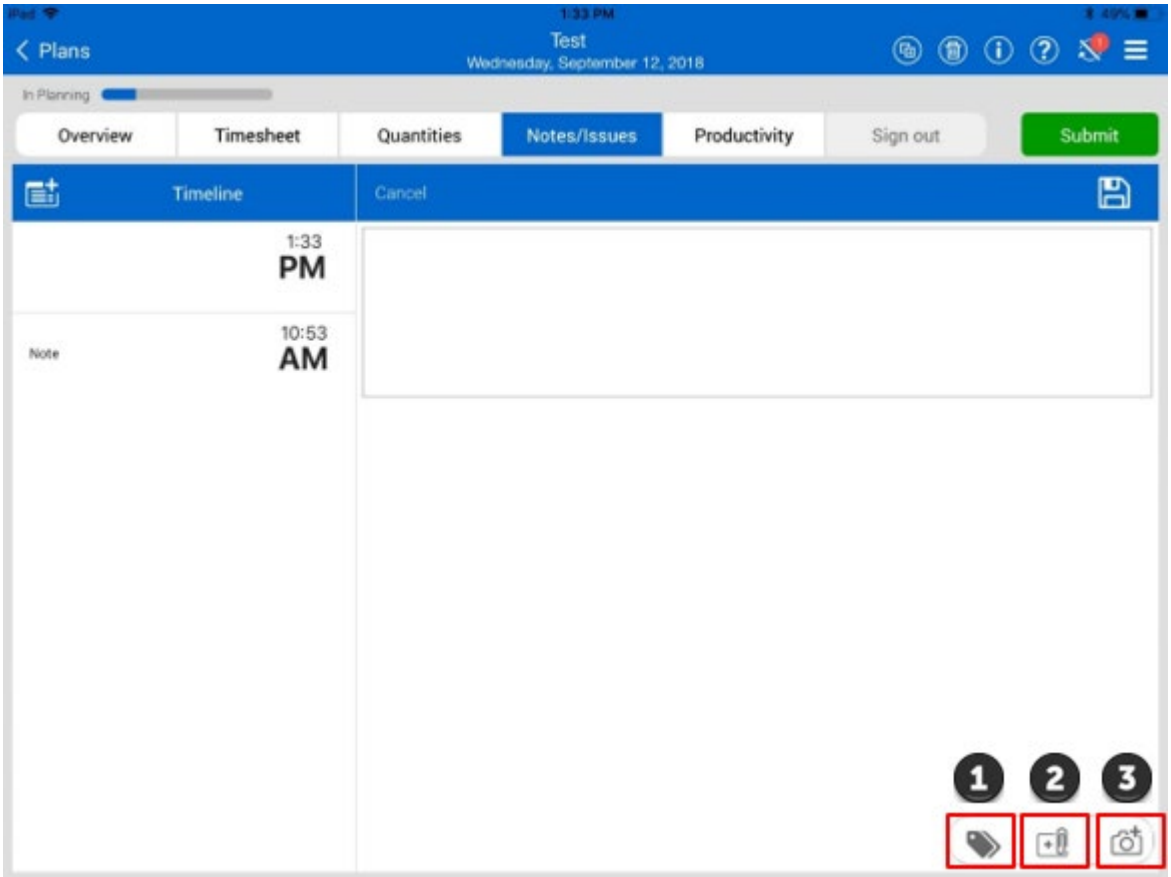
Daily Plan Mobile

Notes/Issues

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
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.



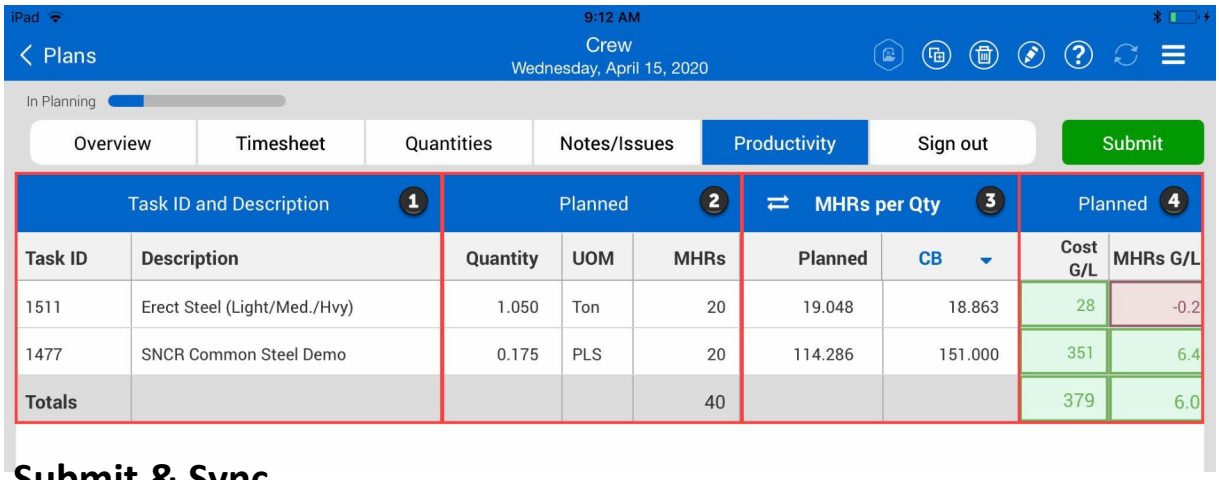
Daily Plan Mobile

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

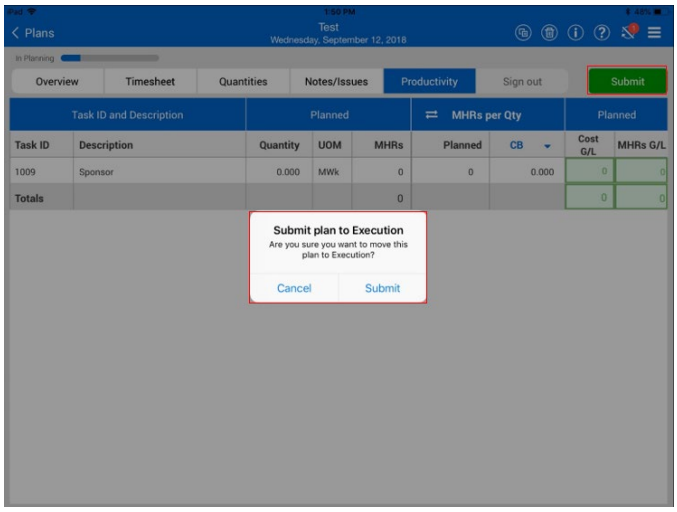
	Title	Description
1	Task ID and Description	Indicates the tasks planned for the crew to perform that day.
2	Planned	Displays the plan information you entered in the Quantity tab (quantity, unit of measure, and man-hours).
3	MHRs per Qty	Compares the planned values to the current budget values.
4	Planned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



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.



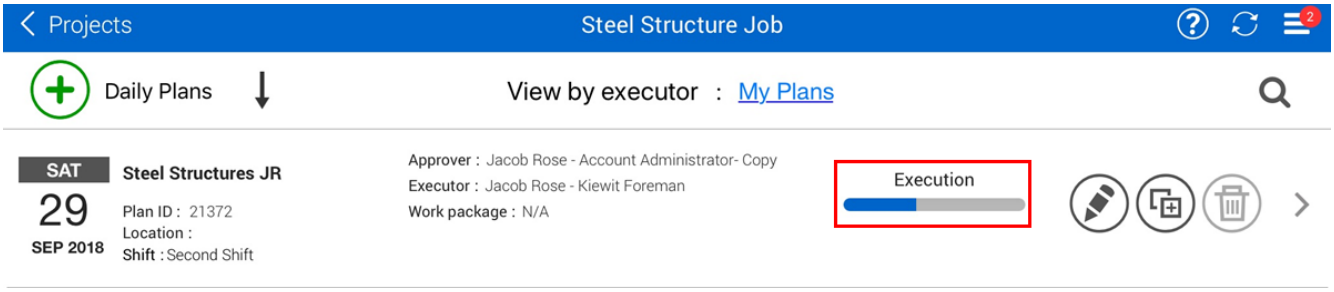
Daily Plan information will reside in the sync platform until you hit the sync button. Once you tap on the Sync button, the Daily Plan information becomes available in the InEight Progress web application for review by the superintendent or engineer.

Daily Plan Mobile

DAILY EXECUTION

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.



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:

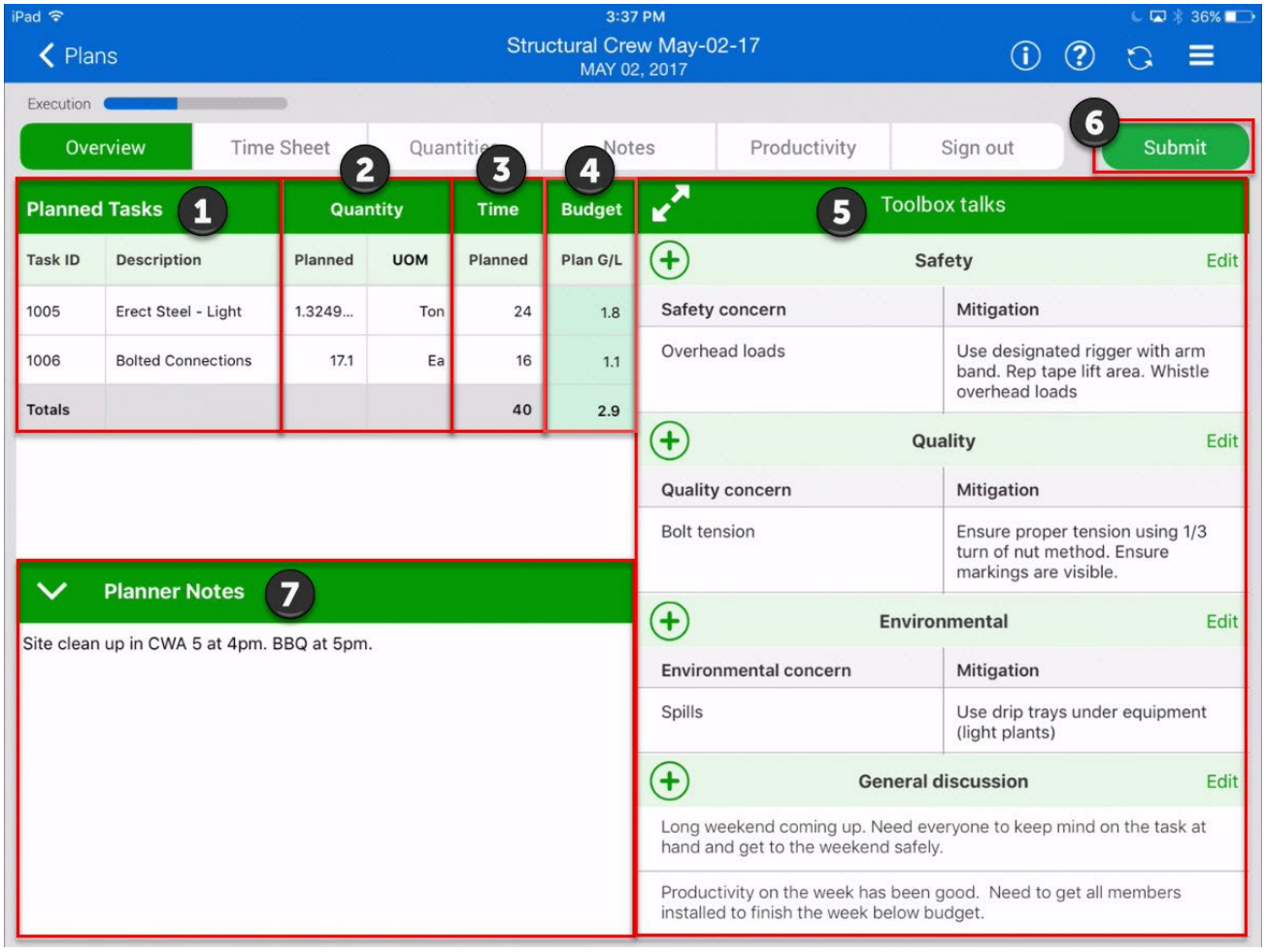
- Planned tasks
- Planned quantity for each task
- Planned budget
- Tool Box Talks (Safety, Quality, Environmental, and General Discussion)
- Planner notes

Daily Plan Mobile

INEIGHT

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.



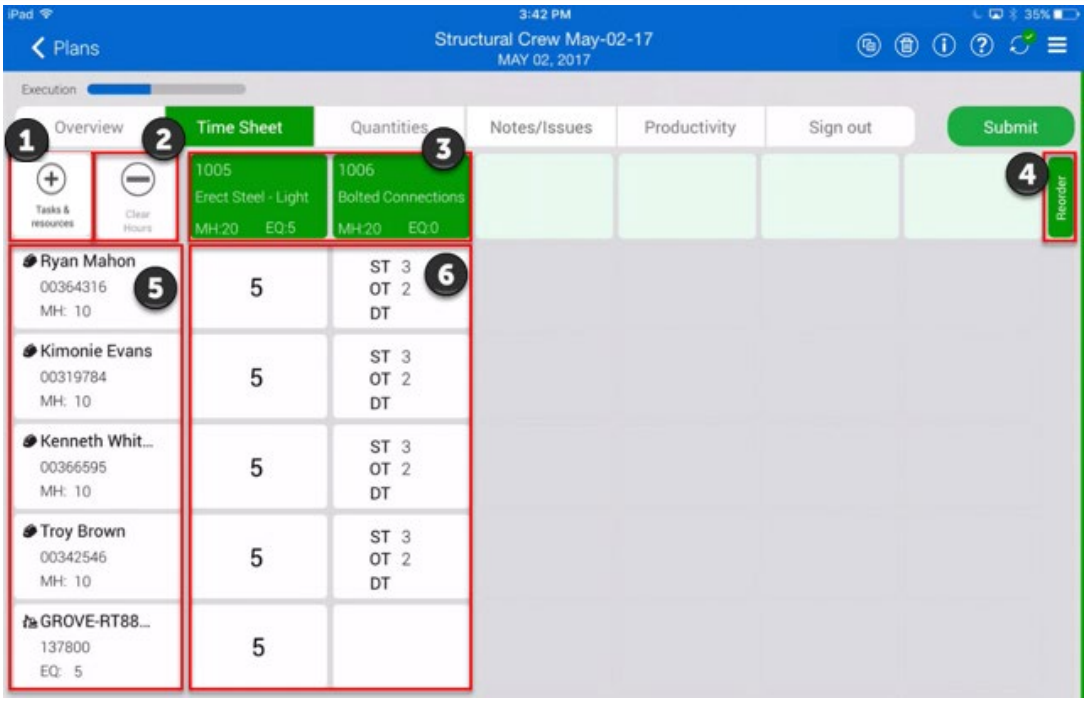
Daily Plan Mobile

Time Sheet

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

Time Sheet Tab

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



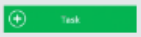
- To enter hours for equipment and crewmembers, you click on the hour box under each task and next to the crewmembers' name
- A window appears where you can enter ST (Straight Time), OT (Over Time), or DT (Double Time)

Daily Plan Mobile

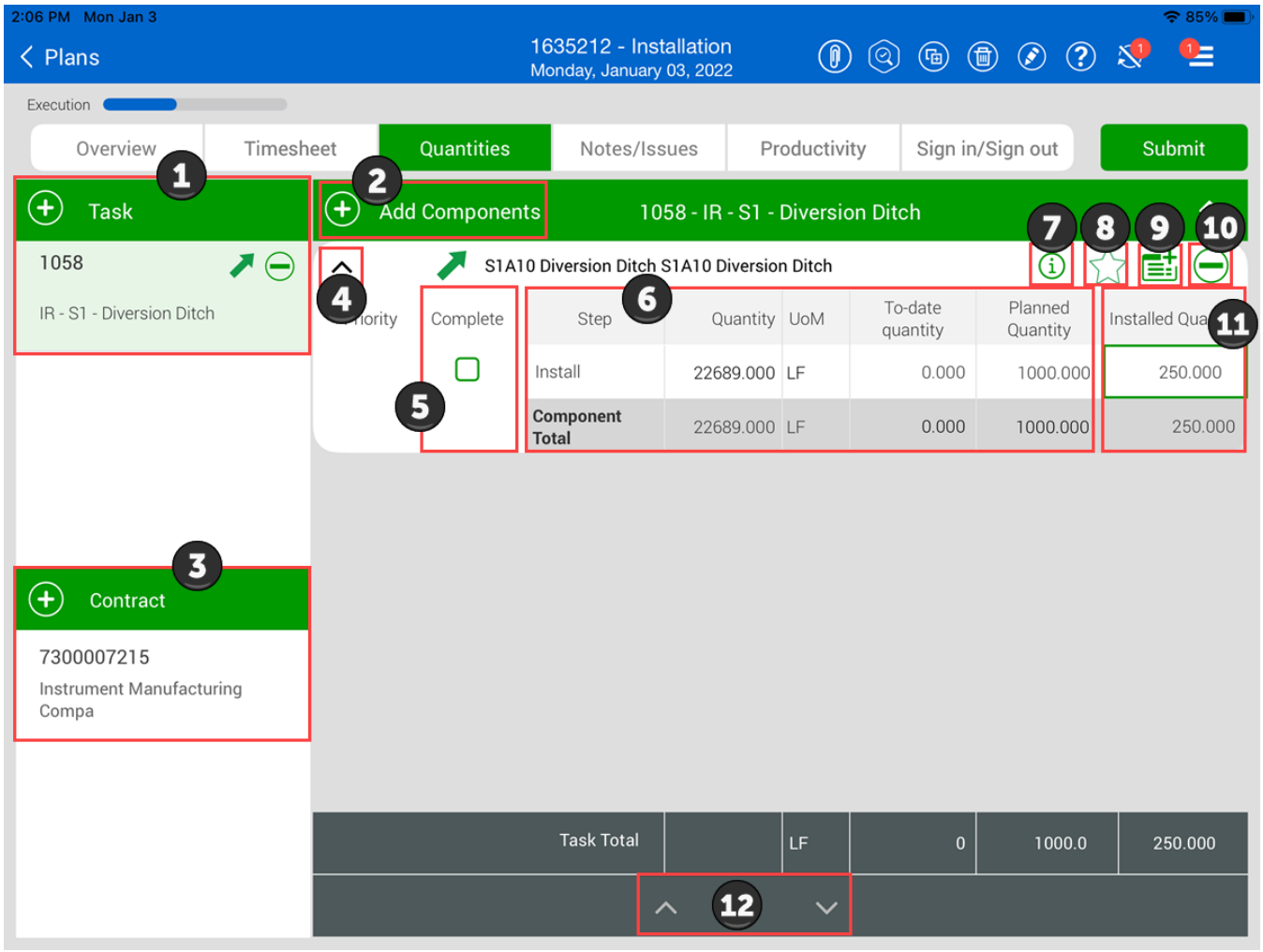
Quantities

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

Overview – Quantities Tab

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

Daily Plan Mobile



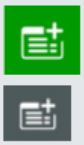
Daily Plan Mobile

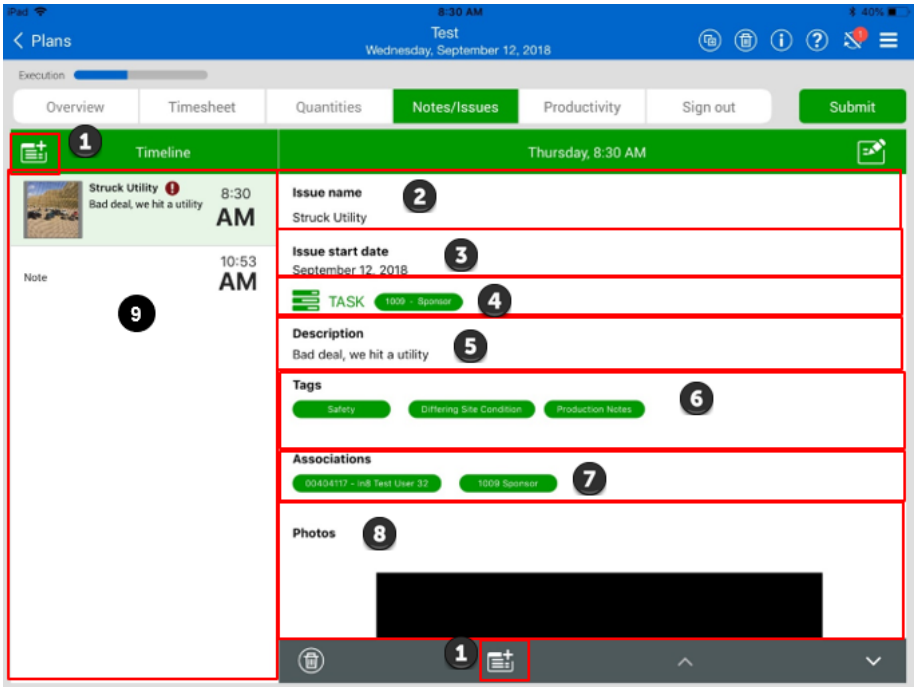
Notes/Issues

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.



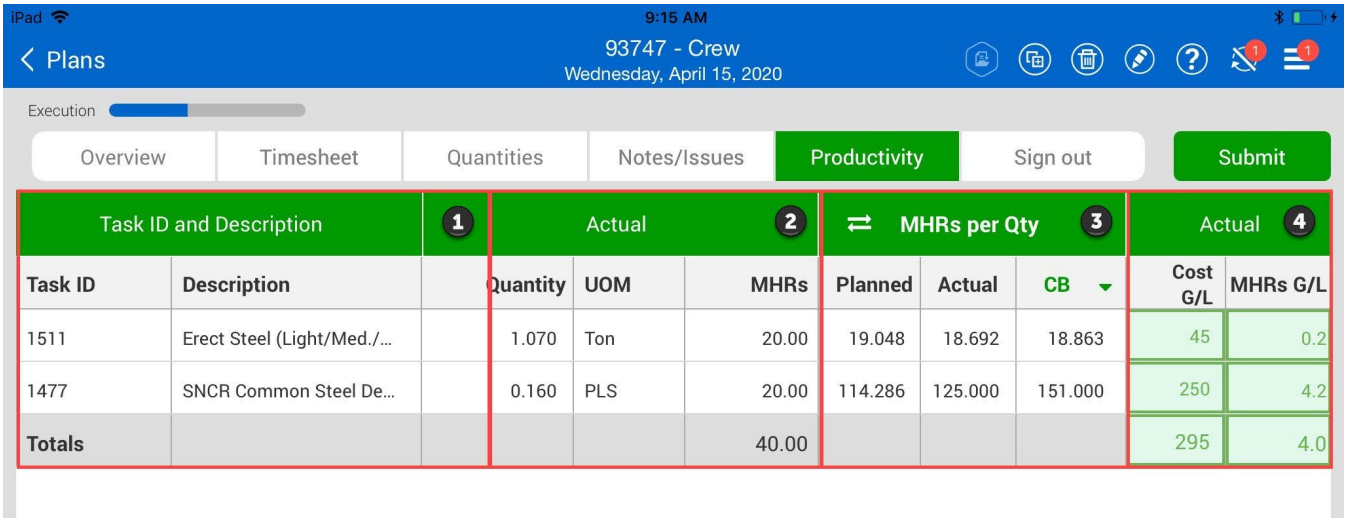
Daily Plan Mobile

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.



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.

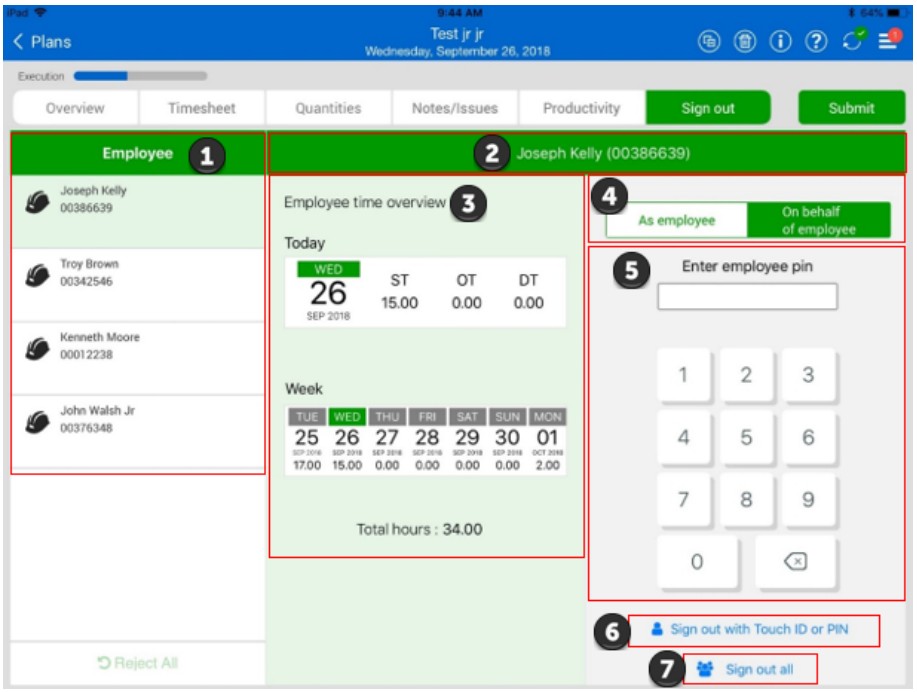
The employee will be able to review the hours input by the Foreman before signing the card. At this point, they can agree or disagree with the hours and negotiate the hours before signing out.

Daily Plan Mobile

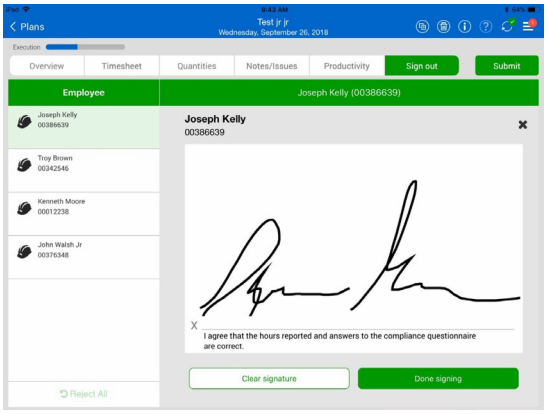
INEIGHT

Overview – Sign out Tab

	Title	Description
1	Employee	Displays all the employees including the foreman on a specific daily plan.
2	Employee Name	Displays the name of the employee selected to sign out.
3	Employee Time Overview	Displays a summary of hours for the day and week entered for that employee.
4	As Employee/On Behalf of Employee	There are two options for signing out: the employee can sign out, or the foreman with permissions can sign out for the employee.
5	Employee Pin	Where employees enter their pin numbers.
6	Touch ID Signout	User can use iPad thumb-print to sign out rather than entering pin.
7	Sign out all	Allows a foreman or executor to sign out all employees by signing out only once.



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



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.