EMERY SAPP & SONS

INEIGHT HOW TO: DAILY PLANS [iPAD]

A. LOGGING IN TO THE PROGRESS APP

Upon opening the Progress app users will be presented with a login screen. To log in, they must use their Emery Sapp & Sons email address. The company code will be 'emerysapp'. 📓 From there, log in is the same as logging into their work email.

B. STARTING A NEW PLAN

Jobs available to be selected are located on the recent tab or the all tab of the Projects screen. Just like they were on HeavyJob, projects are assigned to users individually. If the desired job is not available, contact the branch Cost Control team or Grant Sherwood, our Field Applications Specialist.

🚨 **TERMINOLOGY ALERT** 🚨

InEight uses the term '**Daily Plan**'
the same way HeavyJob used '**Timecard**'

To start a new plan;

1. Select the green circle with a plus sign that says 'Daily Plans' in the upper left corner
2. Date - REQUIRED
    a. Date the work was executed on
3. New Plan Name - REQUIRED
    a. Enter the scope of work being executed (ie. storm, dirt, paving, etc.)
4. Location - Optional
    a. Enter where on the project this work is being executed
5. Shift - REQUIRED
    a. Leave on Day Shift unless told otherwise
6. Approver - REQUIRED
    a. Select the Project Manager
7. Executor - REQUIRED
    a. Select the Field Supervisor entering the daily plan
8. Work Plan/Package - Not using at this time
9. Skip Planning - TOGGLE ON
    a. We are not using planning at this time
10. Select 'Add' and the user will be taken to the overview for the new plan

C. TIMESHEET ENTRY

Each plan has six tabs at the top (Overview, Timesheet, Quantities, Notes/Issues, Productivity, Sign in/Sign out) and is designed to provide users with an easy workflow. Don't worry about the Overview tab, it simply provides a summary of the entire daily plan.

Proceed to the Timesheet tab

SELECT TASKS & RESOURCES

This button is located the upper left corner of the screen with a circle plus above it.

🚨 **TERMINOLOGY ALERT** 🚨

'**Tasks**' are the same as **'Phase Codes'** or **'Cost Codes'**

1. Select the Tasks being executed
2. Select Employee Resources
3. Select Equipment Resources
4. Hit 'Done'

All tasks and resources can be found by scrolling the list of options or by using the search bar. After a few daily plans users will be able to open the 'Recent' dropdown to access their frequently used tasks and resources.

If the desired task or resources are unavailable to be selected, a temporary task, employee or equipment may be created

- If creating a temporary item, **the ID field is not required**
  - Temporary task
    - Name = description of work being done
    - EW-0001 is no longer available
    - If the temporary task is not extra work, please contact Cost Control first
    - Any additional information about the extra work should be added to notes
  - Temporary Employee
    - Name = must be the name HR would use, **NO NICKNAMES**
  - Temporary Equipment
    - Name = Enter the equipment number
      - If equipment number is not available, describe as best you can

This grid you just created should feel very familiar to HeavyJob

🚨 **ATTENTION SUPERVISOR** 🚨

Move the **Executor** to the top of the timecard by clicking **'Reorder'** at the bottom left

ENTERING TIME

To enter time;

1. Select the box for the employee/task hours are being entered for
    a. Each line will be titled 'Straight Time'
        i. Enter hours in the green box
        ii. The **dozer icon** is used to **link equipment**
            1. Linking equipment will automatically add hours to the equipment
        iii. The **dollar bill icon** is used to **select pay class**
    b. Additional lines of 'Straight Time' may be used for;
        i. Adding non-operating time
            1. i.e. inspections, grease time
        ii. Assigning additional pay classes
            1. i.e. employee has PF + SKL on one daily plan
        iii. Linking additional equipment
            1. I.e. employee operated Skidsteer + Backhoe on one daily plan
    c. Select 'Done'

🚨 **ATTENTION SUPERVISOR** 🚨

We round our time to the ½ hour. **.25 or .75 should never be used.**

Follow this process for each employee on the time card

- For user convenience, there are buttons to;
    - **Apply hours to selected employees** or
    - **Apply hours to all employees for the task**

🚨 **ATTENTION SUPERVISOR** 🚨

Notice the **link between operator and equipment** is show using a **color coding scheme**.

⚠️ **WARNING** ⚠️

If there are multiple lines of 'Straight Time' the total labor hours may not show correctly. To fix, tap the hour tile to open it, then close it again. InEight has been notified of the glitch.

EQUIPMENT NON-USE CODES

🚨 **ATTENTION SUPERVISOR** 🚨

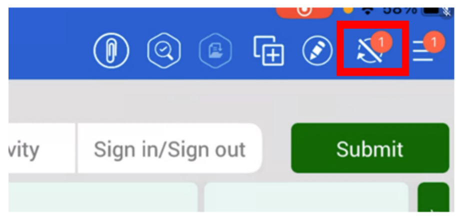
Total equipment hours are shown next to sum sign underneath the equipment number

To add equipment non-use hours;

1. Open any hours tile on the equipment row
    a. Non-use codes should automatically populate
2. Add enough hours to total at least 8 hours for that equipment for the day and hit ‘Done’
3. Similar to HeavyJob, you can enter the non-use hours on any task column

The hours tile where the non-use hours were entered will show operated hours and ‘other’ hours for the non-use hours.

Select the ‘sync’ button often as this will prevent any lost work if something happens to your internet connection or the iPad before you submit your time



D. PRODUCTION ENTRY & NOTES

Proceed to the Quantities tab

A list of tasks selected for the daily plan are listed on the left hand side. As you select a specific task, the production details will open up under components on the right hand side.

🚨 **ATTENTION SUPERVISOR** 🚨

At this time, ‘**Tasks**’ and ‘**Components**’ both represent **the task being executed**

To enter production quantities;

1. Select the task on the left
2. Enter the installed quantity for the day on the far right
    a. Entering more than 100% of the plan quantity is unavailable at this time
        i. If you need more than 100% of the plan quantity, add them to the notes with some detail
            1. Notes can be added here by clicking on the comment box with a plus sign inside of it (directly above installed quantity)
3. Follow this process for each task
    a. A green arrow indicates that installed quantities have been entered

- The last person to turn in quantities on a task may select the complete box
    - This action takes the quantity to 100% for that task
- Saving must occur for quantities to be submitted
- Cost control will approve all timecards submitted before 9am the following day
- To date quantity will not show unapproved production

Proceed to the Notes/Issues tab

ATTENTION SUPERVISOR

We are **not using Issues** at this time

Notes can be added in multiple locations on the daily plan. Regardless of where it is entered, all notes are aggregated on the notes tab.

To enter a note on this tab;

1. Select the comment box with the plus (+) sign in the upper left corner and click 'Note'
2. Type or use speech-to-text to enter whatever note will give PMs a better idea of what you did that day.
3. Things that can help with notes
    a. Pre-defined tags
    b. Associations
        i. Ties your note to a specific task, employee, or piece of equipment
    c. Photos
        i. Add a photo from the iPad photo library OR take a photo
4. **Hit the SAVE DISK after you are done entering the note. If you do not hit the save disk, the note is gone.**

E. PRODUCTIVITY & ANSLYSIS

Proceed to the Productivity tab

On this tab you will find;

- Task ID and Description
    - This will be a list of the tasks executed on this plan
- Actual
    - This will be a list the actual quantities executed and the MHRs used
- MHRs per Qty/Qty per MHRs
    - Supervisors can choose to look at 'Qty per MHRs' or 'MHRs per Qty' by clicking on the arrows pointing opposite directions
        - *The Planned column can be ignored at this time*
    - The Actual column shows the executed production

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        - CB means ‘Current Budget’

    - MHRs G/L
        - On the right you will see your MHRs Gain/Loss for the day

F. SUBMITTAL & CORRECTIONS

Proceed to the Sign in/Sign out tab

We do not currently plan on using the Sign in/Sign out function, HOWEVER, this tab will can make the life of a field supervisor much easier.

1. Click the table icon in the upper left corner to the left of Employee
    a. This opens a Timesheet summary
2. All employees on the plan will be listed
3. All available per diem options will be listed
    a. Per diem may be selected for all employees on this screen
4. Employee/equipment hour totals for the plan will be listedd on the far right

🚨 **ATTENTION SUPERVISOR** 🚨

This is the easiest way to enter per diem for the entire crew

To submit time,

1. Select the green ‘SUMBIT’ button in the upper right corner
2. A small window will open verifying that you want to submit, hit ‘Submit’ in that window
    a. The screen will turn purple and a sync will initiate
        i. When complete, a green check appears in the sync button and your plan has been submitted
3. iPads will store the plan for 30 days
    a. After 30 days, PMs/Cost Control will have to pull plan information for you
4. To copy a daily plan
    a. On an existing plan, select the two squares with a plus on the right side
    b. Select or deselect desired content to be copied
    c. Select ‘Copy’ to be taken to step 1 of creating a daily plan
5. To edit an existing daily plan
    a. Select the pencil inside a circle icon
        i. The following may be edited from this screen
            1. Plan date
            2. Plan description
            3. Location
            4. Shift
            5. Approver

6. Executor

ii. This is the only editable content after the plan has been submitted

🚨 **ATTENTION SUPERVISOR** 🚨

To make additional changes after submitting a plan, call Cost Control or the PM
If the plan has not been approved, they can reject it for changes to be made

🚨 **ATTENTION SUPERVISOR** 🚨

If a user has logged out by accident, the PIN to sign back in is the users's Employeee number

G. COLOR CODED WORKFLOW

COLOR	STATUS	DESCRIPTION
Blue	Planning	🚫Not being used at this time🚫
Green	Execution	Field Supervisor entry
Purple	Awaiting Approval	Submitted to Cost Control/PM for Approval
Gray	Approved	Approved by Cost Control/PM for Payroll