

CONNECTED ANALYTICS



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NAVIGATION AND STANDARD DASHBOARDS

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1.1 STANDARD DASHBOARDS

InEight Explore is available to all users in an organization that have been assigned the applicable role or permissions and is a separate application from those used in any given project level. You do not have to be signed in to a project to access Explore. The information provided is not in real time for any given project.

There are multiple out-of-the-box dashboards available in Explore, with each having its own refresh schedule as determined with the product groups:

- Advanced Work Package
- Change issue
- Control audit
- Connected analytics
- Contract
- Control
- Core project
- Design deliverable tracker
- Design project delivery
- Estimate
- Manhour curves
- Material tracking
- Model tracked issue
- Operations
- Package milestone
- Portfolio
- Project controls
- Project performance
- Schedule
- Work planning

NOTE Explore is accessible from the Main menu on the top navigation bar for any project. You do not have to be assigned to a particular project to access or use the Explore dashboards.

1.1.1 DASHBOARD MANAGEMENT

This Explore settings page lets administrators hide dashboards at the organization level, control the dashboard refresh schedule, and initiate a dashboard refresh on demand. You must have the role of Organization Admin (or above) and the required permissions to view and access the Dashboard Management page.

Explore settings	Select all
Access explore settings	

1.1 STEP BY STEP 1 – DASHBOARD MANAGEMENT

- 1. To manage dashboards, click the **Main menu** icon (**E**), and then select an organization.
- 2. Under Organization Settings, go to > Settings > Explore > Dashboard Management.

					DASHBO	ARD MANAGEMENT				Save 🚺 🗧 🖸
Dashboard		Modified date	Modified by	Visibility	Last successful refresh	Refresh status	Schedule status	Next refresh	Average refresh time	Refresh schedule
Advanced Work Packaging Dashboard	ł	06/02/2021 2:10:35 PM	Anitha Dooshety	Θ	06/04/2021 10:13:45 AM	Success	Active	06/05/2021 5:00:00 AM	1h, 41m	🖽 Set schedule
Change issue dashboard		05/26/2021 11:05:18 PM	System	\odot	06/02/2021 7:52:00 PM	Success	Disabled		30m	Set schedule
Connected analytics utilization		05/24/2021 5:17:43 PM	System	\odot	06/04/2021 2:02:40 AM	Success	Active	06/05/2021 2:00:00 AM	16m	Set schedule
Contract dashboard		05/24/2021 5:18:57 PM	System	\odot	06/04/2021 3:54:21 AM	Success	Active	06/05/2021 1:00:00 AM	42m	🗂 Set schedule
Control Audit Dashboard		05/26/2021 2:48:06 PM	karen loftus	\odot	05/30/2021 5:37:47 AM	• Failed	Active	06/06/2021 5:00:00 AM	35m	🖽 Set schedule
Core Project Information		05/24/2021 5:20:06 PM	System	\odot	06/04/2021 11:58:56 AM	Success	Active	06/05/2021 6:00:00 AM	1h, 38m	Set schedule
InEight Compliance forms dashboard		05/26/2021 11:05:18 PM	System	\odot	06/02/2021 7:51:36 PM	Success	Disabled		13m	Set schedule
Manhour curves		05/24/2021 5:18:16 PM	System	\odot	06/04/2021 2:48:07 AM	Success	Active	06/05/2021 12:00:00 AM	57m	🗂 Set schedule
Material tracking dashboard		05/24/2021 5:19:31 PM	System	\odot	06/04/2021 3:47:41 AM	Success	Active	06/05/2021 3:00:00 AM	25m	🖽 Set schedule
Operations dashboard		05/26/2021 11:05:17 PM	System	\odot	05/31/2021 3:44:15 PM	• Failed	Disabled		17m	Set schedule
Package milestone dashboard		05/24/2021 5:16:08 PM	System	\odot	06/03/2021 9:35:50 PM	Success	Active	06/04/2021 9:00:00 PM	27m	Set schedule
Portfolio Dashboard		05/28/2021 9:43:46 AM	System	\odot		• Failed	Disabled			🗂 Set schedule
Project performance dashboard		05/27/2021 2:47:15 PM	System	\odot	06/03/2021 10:23:21 PM	Success	Active	06/04/2021 10:00:00 PM	53m	🖽 Set schedule

The page shows a list of the organization dashboards where you can:

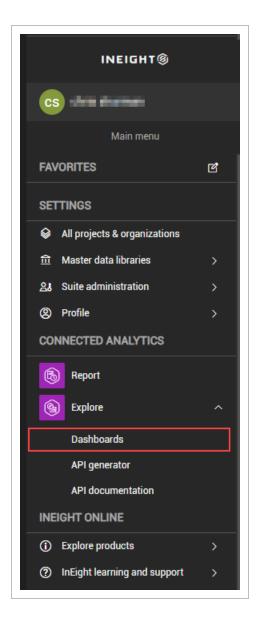
- Set whether the dashboard is shown or hidden
- See the dashboard refresh status. If the status is Failed, click the link to view the error message
- See the average refresh time to help when adjusting schedules and to avoid having multiple dashboards refresh at the same time.
- 3. To define the refresh schedule, click **Set schedule**. The Dashboard refresh slide-out panel opens. At the top it shows the number of times per day that the dashboard can be refreshed.

Next refresh	
06/05/2021 5:00:00 AM	Dashboard refresh 1 of 1 daily refreshes available
	Refresh schedule
06/05/2021 2:00:00 AM	Frequency
06/05/2021 1:00:00 AM	Daily
06/06/2021 5:00:00 AM	Time zone (UTC-07:00) Mountain Time (US & Canada)
06/05/2021 6:00:00 AM	Time
06/05/2021 12:00:00 AM	4 ▼ 00 ▼ AM ▼ ⊗
06/05/2021 3:00:00 AM	
06/04/2021 9:00:00 PM	
06/04/2021 10:00:00 PM	
06/04/2021 11:00:00 PM	

- 4. Set the Refresh schedule toggle to view and make changes to the settings.
 - You can click **Refresh now** to manually refresh the selected dashboard. A manual refresh does not count towards the available number of daily scheduled refreshes.
- 5. Click **Save** to set the refresh schedule.

1.1 STEP BY STEP 2 – NAVIGATE TO EXPLORE

- 1. From the home landing page, click the **Main menu** icon (**E**).
- 2. Click **Explore**, and then select **Dashboards**.



1.1.2 OPERATIONS DASHBOARD

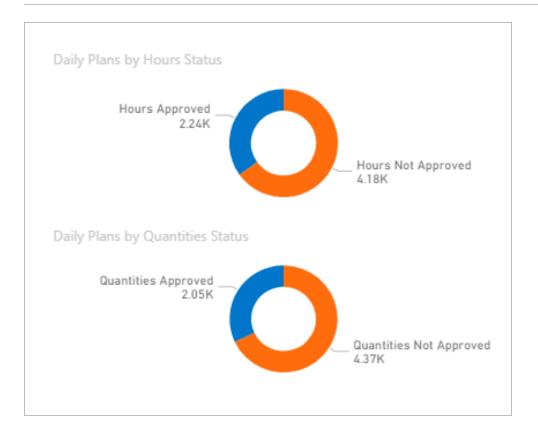
The Operations dashboard is a system-created standard dashboard available to all users and focuses on the "front office" statistics. This dashboard is permanently listed as an available dashboard; it cannot be deleted. In a later lesson, you will learn how to create a dashboard specific for your needs.

NOTE To make a dashboard your default, or primary, dashboard, click the **ellipses** of the dashboard you want, and then select **Set as Default**.

	♥ Dashboards ♥							() ()
Explore	*							√ Filters
All (27) -	Search Q							,O Search
	ß	Daily Plan Summary - C		Plans Created Per Day Plans - In P 24 57				
🖻 🊸 🖪 🛞 <	13	Daily Flatt Suttitiary - C	nganization	24 51	1 2,55	т 1,07	1,00	Plan Date
Created by: System	* Project		Top 10 Projects - Daily Plans by	Status		Daily Plans by Hours Status		is (All)
Material tracking dashboard Last data refresh: 03/12/2020 12:08 AM Created by: System	All	\sim	Plan Status CApproved Awaiti	ng Approval Execution Final - Processin	ig complete 🔵 in Planning	Hours Approved		Filters on all p
nat test Last data refresh: 03/11/2020 08:49 PM Created by: Natalie Takacs	Plan Stat	Lui -	2X 0.4K				Heura Not Appre	IsActive
OGC - Quantity Reports Last data refrech: 03/12/2020 02:56 AM Created by: jakob sjuts-ptr	All	 ∑ R …	1.2K 0.5K					
Operations dashboard (Default) Last data refresh: 03/12/2020 02:56 AM Created by: System	Plan Dat		0K 0.4K 103445 - 10336	0.3K	2PK1 103671 - 103505 -	Guantities Approved	»	
Operations Dashboard - Catle Last data refresh: 03/12/2002 02:56 AM Created by: Catle Williams	(a. mar)	2019 - 3/12/2020	Van RiversL The Nuga National Bentwi North Cemet Project Platform	y -IIIR1 70 National Edge C	hildre Center LACMTA Iospital Blue - IY Line	2205	Quantities Not Ap	oproved
Operations- my org New! Last data refresh: 03/12/2020 02:56 AM Created by: Natalie Takacs	<			III_Upd	Misc Sys Re			
Package milestone dashboard Last data refresh: 03/12/2020 10-43 AM	Project		Plan ID Shift L 72642 SHIFT123	cation Status Re Execution	Asion Quantities Status 0 Quantities Not Approved	Hours Status Executor	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	oprover 1 _A
Created by: System	•	esting!! - !!! R1 HD Platform Replacement !!!.Updated	72805 SHIFT123	Final - Processing complete Final - Processing complete	0 Quantities Approved	fours Approved fours Approved		skolat sjola skolat sjola
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Project performance dashboard			71901 RRST SHIFT	Final - Processing complete		fours Approved		outham m
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All available projects under your organization can be viewed in the Operations dashboard. Users can only see projects they have access to, as is the case for all of Explore.

The Explore color scheme for charts uses a blue tone to represent positive or well-favored data. Orange color is used to represent negative or ill-favored data, typically indicating it is something that someone needs to act upon.

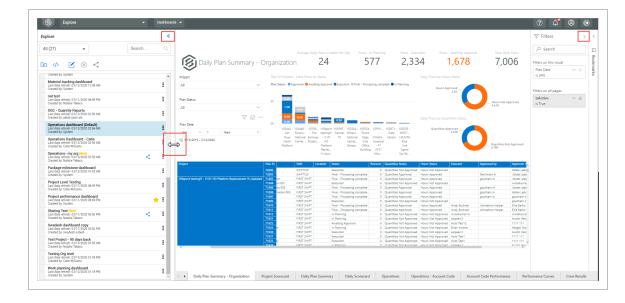


1.1 STEP BY STEP 3 – OPERATIONS DASHBOARD

1. From the Dashboards page, select the **Operations** dashboard.

Ex	plore		<
A	ll (9)	Search	Q
[+	□		
	Change issue dashboard Last data refresh: 03/11/2020 05:42 PM Created by: System		÷
	Connected analytics utilization Last data refresh: 03/11/2020 09:37 PM Created by: System		
	Contract dashboard Last data refresh: 03/12/2020 01:18 PM Created by: System		1
	InEight Compliance forms dashboard Last data refresh: 03/12/2020 01:16 PM Created by: System		1
	Manhour curves Last data refresh: 03/11/2020 11:35 PM Created by: System		
	Operations dashboard (Default) Last data refresh: 03/12/2020 02:36 AM Created by: System	2	~ :
	Package milestone dashboard Last data refresh: 03/12/2020 10:13 AM Created by: System		:
	Project performance dashboard Last data refresh: 03/11/2020 07:38 PM Created by: System		
	Work planning dashboard Last data refresh: 02/18/2020 05:44 AM Created by: System		:

2. Expand or contract the size of the windows by moving the **handles** shown to the left or right.



• Select the **blue arrows** to collapse the side panel

• You can also click the blue arrows again to expand it



- 3. Under the Project drop-down title, click the (Select a Project) drop-down.
 - You can also scroll to search for a project or type in a project name in the search bar to select a project
- 4. In the search bar, type [your project name].
- 5. Ensure the box in front of your project name turns from an outline to completely filled in to select it.

All		~
Oto	5091	

- The summaries, graphs, and data presented here are specific to this project and the data is considered live
- You should see the project Daily Plan Summary Organization dashboard shown below
- If the report is blank, it may be that the time period shown is too restrictive

Project		Top 10 Projects - D	aily Plans by Status			Daily	Plans by Hours Status	
All	\sim	10						
		8						
Plan Status								
All	\checkmark	6						
	78					Daily	Plans by Quantities Status	
Plan Date	0	4						
Last \checkmark 1	Days ~							
m 10/8/2019 - 10/8/2019	Select	2						
	Days	0						
	Weeks	U I						
Project Plan ID Plan Name Shift		uantities Status He	ours Status Executor Ap	proved by Approver	1 Approver 2			
	Months							
	Months (Calendar)							
	Years							
	Years (Calendar)							

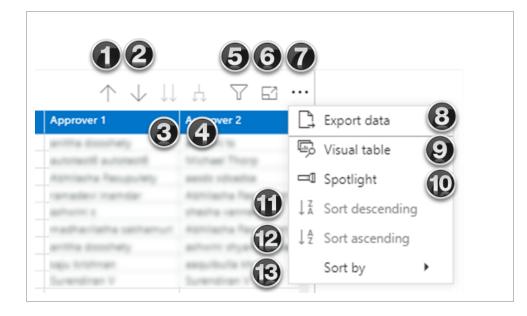
All dashboards contain options for the graphs, charts and tables displayed. Individual charts will use some combination of these functions:

Overview - Operations Dashboard Graph, Chart & Table Options

	Term	Definition
1	Drill Up	Drill up to next account code in hierarchy.
2	Drill Down	Drill down to next account code in hierarchy.
3	Go to Next Level	Go to the next level in the account code hierarchy.
4	Expand Level	Expand all down one level in the account code hierarchy.
5	Filter	Pares back data that affects the visual.
6	Focus Mode	Expand one visual in the dashboard.

Overview - Operations Dashboard Graph, Chart & Table Options (continued)

	Term	Definition
7	More Options	Opens options 8-13.
8	Export Data	Export data only to Excel (not visuals).
9	Show Data	Shows data/chart in a larger view.
10	Spotlight	Focuses dashboard on one specific visual.
11	Sort Descending	Sort data in descending order.
12	Sort Ascending	Sort data in ascending order.
13	Sort By	Allows you to sort by column.



NOTE The Filter option identifies the specific filters in use for the chart. In this case, CalendarDate and IsActive is True.

_			
	Filters and	slicers affecting this vis	sual
			Jinda
	CalendarD	ate	Jinda
	2/4/2019 -	Jinda	
ved			Jinda
	IsActive	Jinda	
	is True		Jinda
	15 11 0 0		Jinda
- L.		aannin argemaanaa	unda
		ashwini shyamsundar	ashwini shyamsunda

1.1.2.1 OPERATIONS DASHBOARD CURRENT VISUALS

The default view in this dashboard is the Daily Plan Summary – Organization. On this tab, preset headers are as follows:

- Average Daily Plans Created Per Day
- Plans In Planning
- Plans Execution
- Plans Awaiting Approval

• Total Daily Plans

Daily Plan Sur	mmary - Oi	rganizatio	Average Daily Plans Created Per D	Plans - In Planning 723	Plans - Execution F 2,895	Plans - Awaiting Approval 1,622	Total Daily Plans 7,564
Project		Top 10 Projects	- Daily Plans by Status		Daily Plans by	r Hours Status	
All	\sim	Plan Status 🏼 🗎 A	pproved OAwaiting Approval OExecuti	on ●Final - Processing complete ●In	Planning Ho	urs Approved 2.31K	
Plan Status		2K 0.5K	_				
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		0.6K	0.5K		Daily Plans by		76
Plan Date		ок	0.3K				U BU
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			Platform	Design Office - FY Building 2017 Misc	Build	$\uparrow \downarrow$	Guantities Not Approved 5.42K
Project	Plan ID e	Shift	Location Status	Revision Quantities Status	Hours Status Executo	or Approved by	Approver 1 App
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	71751 71754 71755 71756 71757 71756 71762 hours and 71763 rtegration 71764 71765 71776 71770 71770	Middle Shif Middle Shif	Approved Approved Escution Approved Approved Approved Approved Approved Approved Approved Approved	Ourantise Approved Quantise Approved Quantise Approved Quantise Not Approved Quantise Not Approved	Hours Approved Hours Approved Hours Nat Approved Hours Approved	azhvini shyamsundar azhvini shyamsundar azhvini shyamsundar azhvini shyamsundar azhvini shyamsundar azhvini shyamsundar azhvini shyamsundar azhvini shyamsundar azhvini shyamsundar azhvini shyamsundar	ashwini shyamsundar ashwini shyamsundar
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DAILY PLAN SUMMARY - ORGANIZATION SELECTION OPTIONS

The following table provides an explanation of each of the values in the Daily Plan Summary - Organization.

Overview - Daily Plan Summary Dashboard Graph, Chart and Table Options

	Term	Definition
1	Project	The specific projects being used for the analysis.
2	Plan Status	Defined at the organizational level, such as Approved, Awaiting Approval, Execution, Final - Processing Complete and In Planning.
3	Plan Date	The window of time designated for the graphs.

In addition to the default Daily Plan Summary – Organization tab, eight additional report/chart options are available to view and/or personalize.

Overview - Other Operations dashboard Reports/Charts

	Term	Included Graphs
1	Project Scorecard (G/L or PF)	 Top 10 Executors by Approved Top 10 Projects by Approved Approved Hours & Approved by Project Bottom 10 Executors by Approved Bottom 10 Projects by Approved
2	Daily Plan Summary	 Daily Plans by Status Top 10 Daily Plans by Location Daily Plans by Executor & Status Daily Plans by Hours Status Daily Plans by Quantities Status
3	Daily Scorecard	 Approved G/L by Executor Top 5 Executors by Approved G/L Approved Hours & PF by Executor and Approver Bottom 5 Executors by Approved G/L
4	Operations (G/L or PF)	 Planned, Approved, Earned MHrs by Location Top 5 Cost Items by Approved Planned, Approved, Earned MHrs by Executor Planned, Approved, Earned MHrs by Approver Bottom 5 Cost Items by Approved
5	Operations - Account Code (G/L or PF)	 Planned, Approved, Earned MHrs by Account Code Top 5 Account Codes by Approved Planned, Approved, Earned MHrs by Executor Approved Hours & Approved by Account Code Bottom 5 Account Codes by Approved
6	Account Code Performance	 Approved G/L by Daily Plan ID Approved Hours and PF by Daily Plan ID Planned, Approved, Earned MHrs, Approved and Planned G/L by Plan Date
7	Performance Curves (G/L or PF)	Cumulative Approved
8	Crew Results	 Approved G/L Top 5 Cost Items by Approved G/L

Overview - Other Operations dashboard Reports/Charts (continued)





On pertinent Dashboard reports, changing between Production Factor (PF) or Gain/Loss (G/L) reports is as simple as changing the dashboard toggle button. To use this function, click and drag the **toggle** button.

PF CG/L	PF G/L
Planned, Approved, Earned MHrs with G/L by Executor	Planned, Approved, Earned MHrs with PF by Executor
● Planned H ● Approved ● Earned M — Approved — Planned G/L (● Planned Hours ● Approved Hours ● Earned MHrs (CB — PF (CB Qty CB

1.1.3 PROJECT PERFORMANCE DASHBOARD

The Project Performance dashboard is a system-created standard dashboard available to all users and focuses on the field relevant performance statistics. This dashboard is always listed as an available dashboard; it cannot be deleted. In a later lesson, you will learn how to create a dashboard specific to your needs.

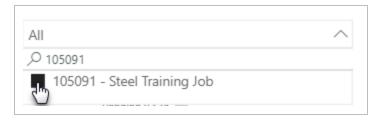
All available projects under your organization can be viewed in this Project performance dashboard.

1.1 STEP BY STEP 4 – PROJECT PERFORMANCE DASHBOARD

- 1. From the Dashboards page, click the **Project performance dashboard**.
- 2. Under the Project Drop-down title, click the (Select a project) drop-down.
 - Note you may also scroll to search for a project or type in a project name in the Project search bar to select a project
- 3. In the search bar, type [project name].

Multiple selections	~
P 105091	
🔲 105091 - Steel Training Job	

4. Click [project name] to select it.



- The summaries, graphs and data presented here are specific to this project and the data is considered live
- You should see the Project Performance dashboard shown below

1	Project Perfo		To-Date Total Cost								Ine	ere aren't any filters	to displa
1	Project Perfo			Current Budget Co	st Current Estimate Cost	Foreca	ist Cost	Forecast Remainin	ng Cost	Percent Complet			
		rmance	-1.7bn	60.8br	ו 268.4bn	236	.4bn	241.0	bn í	1237.1	%		
Pro	oject	Date		Earned Cost v	. Actual Cost		Earned MHr	s vs. Actual MHrs					
A	11	∨ Last	∨ 3 Months		ost	Cost		s CB Earned MHrs	CE Earned M	His			
Ch	hange Order Type	11/3	4/2019 - 2/3/2020	8bn			25bn				_		
A	IL	\sim		Rin			20bn		/				
Sta	atus			WUTT			15bn						
м	fultiple selections	\sim		4bn									
							10bn		/				
Acti	ive Change Orders by Status			2bn			Sbn	/					
				0bn			0bn	/			_		
				Dec 2019	Jan 2020 Feb 2020		Dec 201	9 Jan 202	0 1	eb 2020			
				CBS		Accourt	it Code						
				All	~	All			\sim				
				CBS	Description	CE % Complete	CB Percent Complete	CE Final Cost	CE CPI	Forecast Final Cost	CE F		
Cha	ange Order Details					(Cost) 0.0%	(Cost)	3,806,505.25	0.00	3,806,505.25			
Acti Cha	Total Budget Total Budget	Total Contract (Cost Description Type	Stat 0.10 0.2	Direct Cost Add-On Do Not Use or Delete (must = \$0)	0.0%	0.00%	908,649,68	0.00	856.225.35			
	Cost Adjustment MHr Adjustment	Adjustment		0.2	Price % Add-On	0.0%		81.242.57	0.00	91,100.55			
	rightonen			0.4	Job Financing	0.0%	0.00%	583,608.58	0.00	538.048.77			
				0.5	Indirect Cost Escalation	0.0%		302,940.38	0.00	299,359.69			
				0.6	Direct Cost Escalation Indirect Cost Add-On	0.0%		843,345.95 1,535,323.10	0.00	818,168.88 1,507,058.55			
					Job Management & Equipment	0.0%		2,865,412.96	0.00	2,820,987.21			
				0.8			0.00%	866,982,25	0.00	525.940.77			
				0.9	General Expense	0.0%							
				0.9		37.7%	272.05%	124,469,483,477.70	24.371.52	95,706,601,095,14			
				0.9		37.7% 26.6%	272.05% 238.37%	124,469,483,477,70 38,770,192,768.03	7,661,183.94	-53,169,353,209.63	66,1		
¢				0.9		37.7%	272.05% 238.37%	124,469,483,477.70	7,661,183.94	-53,169,353,209.63	66,1		

The Export data to Excel function only		
Export data		×
Which data would you like to export?	,	
Summarized data		
_ O Underlying data		
File format:		
.xlsx (Excel)		
① Data exports with all applied	d filters.	
 For large data models, only exported. <u>Learn more</u> 	a limited number of	rows can be
	Export	Cancel

PERFORMANCE HEADER VALUES

The following table provides an explanation of each of the header values at the top of the Project Performance dashboard.

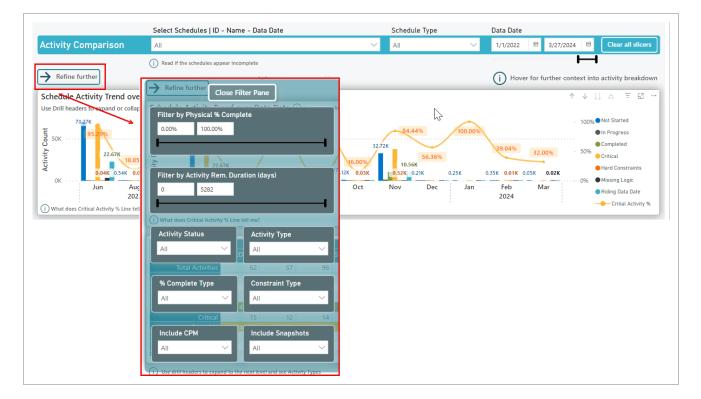
	Term	Definition
1	To-Date Total Cost	\$ spent to date
2	Current Budget Cost	Current Budget total \$
3	Current Estimate Cost	Current Estimate total \$
4	Forecast Cost	Total cost (to date) + Forecast remaining cost
5	Forecast Remaining Cost	Forecasted remaining \$
6	Percent Complete	Quantity complete to date/Forecast T/O quantity



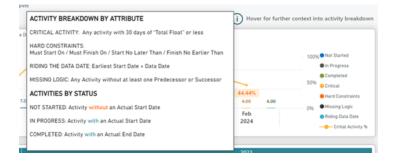
1.1.4 SCHEDULE DASHBOARD

The Schedule dashboard lets you compare schedule and activity comparisons, perform float analysis, view resources, risk information and metric quality assessments.

To access, click on the schedule dashboard from the dashboard list. The **Refine further** icon opens a collapsible filtering pane with additional filtering criteria. To apply filters and close the side out, click the **Close Filter Pane**.



Click any of the Information icons placed throughout the tabs of the dashboard to provide you with additional context to the data that is being shown.



Preset tabs are as follows:

- Activity Comparison
- Schedule Comparison
- Float Analysis
- Resource Overview
- Risk Overview
- Risk Analysis
- Opportunity Analysis
- Event Register
- Mitigation Details
- Schedule Quality

1.2 EXPLORE PERMISSIONS

To access dashboards and APIs, you must be assigned a role with applicable permissions, which are defined by a system administrator. Permissions are pre-assigned to roles that are based on functional areas, such as project management, construction management, field office, operations, finance, compliance, and administration that let you run reports tagged with the same permission assigned to one of the roles. For more details, refer to Roles and Permissions in InEight Platform. Permissions are configured in Suite Administration > Roles and permissions > Permissions > **Explore**.

Permission Name	Description	Level
View shared dashboards and embedded	Allows users to see only dashboards and embedded content that has been shared with them individually. This will hide all standard dashboards for users with this permission.	Base user

Permission Name	Description	Level			
content only					
View dashboards and embedded content	ashboardsare allowed to the projects users are assigned to in Platform),ndcustom dashboards that have been shared with them, add/editnbeddedexternal content, and view external content that has been shared				
View estimate dashboard	Allows users to view the Estimate dashboard and any other custom derivatives of this dashboard that have been shared with them.	Base user			
Edit and delete custom dashboards	Allows you to edit and save custom versions of the standard dashboards, this permission does not give sharing access. This permission is necessary for you to be added as a collaborator on a dashboard that is shared. Allows users to edit and save custom versions of the standard dashboards, this permission does not give sharing access. This permission is necessary for a user to be added as a collaborator on a dashboard shared with them.	Base user			
User level sharing	Allows users to share your custom dashboards and embedded content with other individual users.	Base user			
Project level sharing	Allows users to share their custom dashboards and embedded content with all the users on a project, users can only do this for projects they are assigned to in Platform.	Project Admin			
Organization level sharing	Allows users to share their custom dashboards and embedded content with all the users in an organization, users can only do this for organizations they are assigned to in Platform.	Org Admin			
Reporting APIs	Allows a user to access to all the data in the reporting APIs for the selected products.	Base user			
Access Explore settings	Allows users to access and utilize all the functionality on the Organization Settings > Explore page. This page allows users to control the visibility of dashboards for the whole organization, as well as the dashboard refresh schedules, and execute ad hoc	Org Admin			

Permission Name	Description	Level
	refreshes. This permission also grants users access to see every custom dashboard built in the environment when in the Explore application.	

1.3 DASHBOARD FOLDERS

In Explore, you can create folders to organize the various types of dashboards you create. This can help to easily identify dashboards you may refer to on a weekly basis versus monthly basis or dashboards you create for an executive level versus a field operations level. In a later lesson, you will learn how to modify and create these additional dashboards.

1.3.1 FOLDER CREATION

The following Step by Step walks through the two ways you can create a dashboard folder.

1.3 STEP BY STEP 1 – CREATE DASHBOARD FOLDERS

OPTION 1:

1. From the Dashboards page, click the Add Folder 庄 icon to add a folder.

A	All dashboards		
ç	Add folder	Search	م ۱
	Change issue dasht Modified on: 04/24/201 Created by: System	ooard 9 12:51:25 AM	☆ I

- A dialog box opens and prompts you to name the folder
- 2. In the Save Folder As field, type **Example Folder**, and then click **Save**.

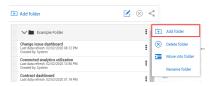
Save folder as	×
Example Folder	3
Cancel Save	

• The new folder will now show on the left panel as shown below.

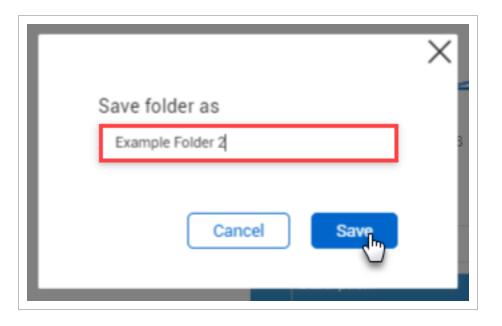
A	II dashboards		•
G	Ð	Search	٩
	✓ 💼 Example Folder		I
	✓ 🖿 Others		:
	Change issue dashboard Modified on: 04/24/2019 12:51:2	5 AM	☆ 🛿

OPTION 2:

- 1. Click the three Ellipses Context menu icon to the right of the new Example Folder.
 - A slide-out panel opens
- 2. Click Add Folder.



3. In the Save folder As field, type **Example Folder 2**, and then click **Save**.



• A sub-folder has been created

All dashboards		•
Œ	Search	٩
🗧 🥆 🍃 Example Folder		:
🗄 🗸 🖿 Example	e Folder 2	:

Besides adding folders, you can edit, share, move, set as the default dashboard or delete the dashboard via this same Context menu icon.

Example Folder 2		
Operations dashboard Last data refresh: 05/11/2020 02:54 AM Created by: System		
Ops Dashboard - KL Last data refresh: 06/11/2020 02:54 AM Created by: Karen Loftus	1	Edit dashboard
All Products () Created date: 06/08/2020 01:52 PM Created by: Natalie Takacs	- 1	Sharing
Change issue dashboard Last data refresh: 05/10/2020 05:39 PM Created by: System	:	Move into folder Move out of folder
Connected analytics utilization Last data refresh: 05/17/2020 10:43 PM Created by: System	-	Set as default
Contract dashboard Last data refresh: 06/10/2020 08:40 PM Created by: System	: @	Print
Contract Dashboard - KL Last data refresh: 05/10/2020 08:40 PM Created by Karen Loftus	: 🗵) Delete dashboard

1.3.2 MOVE DASHBOARDS TO A FOLDER

The following steps walk you through how to move a dashboard into a folder.

TIP

1.3 STEP BY STEP 2 – MOVE A DASHBOARD INTO A FOLDER

- 1. From the Dashboards page, click the **three-ellipses Context menu** icon of the Operations dashboard.
- 2. Click Move into Folder.

[+	• <> 🗹 🛞 <		Daily P
	Created by: System		Project
	Material tracking dashboard Last data refresh: 03/12/2020 12:08 AM Created by: System		All
	nat test Last data refresh: 03/11/2020 08:49 PM Created by: Natalie Takacs		Plan Status
	OGC - Quantity Reports Last data refresh: 03/12/2020 02:56 AM Created by: jakob sjuts-ptr		All
	Operations dashboard (Default) Last data refresh: 03/12/2020 02:56 AM Created by: System		Edit dashboard
	Operations Dashboard - Catie Last data refresh: 03/12/2020 02:56 AM Created by: Catie Williams		Move into folder ^{:0}
	Operations- my org New! Last data refresh: 03/12/2020 02:56 AM Created by: Natalie Takacs	-	Print

• A dialog box opens with a drop-down list to select the folder for which you want to move the dashboard into

Move dashboard Operations dashboard into folder	×	
Canal	d into folder	vlove dashboard Operations dashboard in
Canaal		
Cancer	cel Save v	Cancel

3. Click the drop-down arrow, and then select **Example Folder**.

Move dashboard Operations dashboard into folder		×
n 📂 Example Folder	^	5 0 .
🔨 📂 Example Folder 2		
🔨 📂 Others		
rk tract Cost Description Ivee Do Not Use or Delete (m		50)

- 4. Click Save.
 - The Operations dashboard will now be located within the Example folder





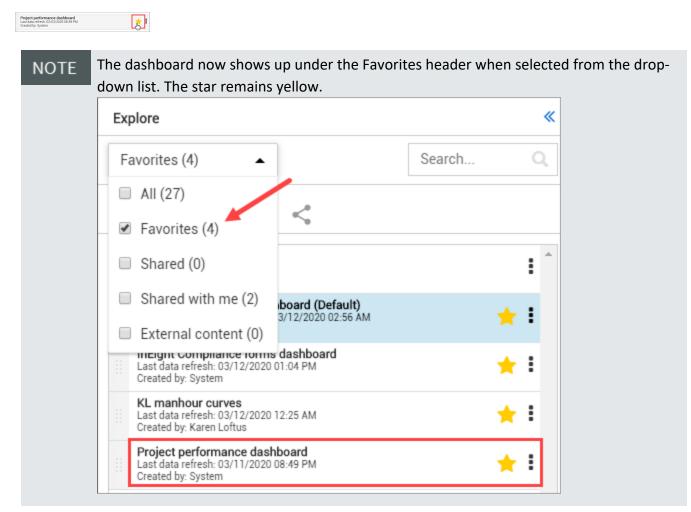
You can use the same Context menu icon to remove a dashboard from a folder.

Ex	plore			*	
A	II (22) 🔹	Search		Q,	
[+]	Add folder		\otimes	<	
	A 🗃 Example Folder			-	
	Example Folder 2				Daily Plan Surr
	Operations dashboard (Default) Last data refresh: 02/04/2020 02:36 AM Created by: System		*		Edit dashboard
	Change issue dashboard Last data refresh: 02/03/2020 05:33 PM Created by: System				
	Connected analytics utilization Last data refresh: 02/03/2020 09:50 PM Created by: System				-
	Contract dashboard				

1.4 DASHBOARD FAVORITES

You can mark one or more dashboards as your favorite by clicking the **Favorites** icon on the right side of any dashboard. This can be done on the two system-created dashboards or any dashboards you create. This is a convenient way to access dashboards that you use often.

Click the Favorites icon next to the Project Performance dashboard.



1.5 DASHBOARD SHARING AND COLLABORATION

The concept behind sharing a dashboard evolved as a means to save time and energy for those working together who share similar data needs. Sharing a dashboard may be a perfect option when the original dashboard doesn't need to be edited by the person who is viewing the shared dashboard. Collaboration goes a step further by granting the person with whom the dashboard is shared,

permission to collaborate on and edit the dashboard. Think of collaboration as a subset of sharing, meaning you cannot collaborate on a dashboard until the dashboard is able to be shared. Only system dashboards that you personally have edited and renamed can be shared.

To share a system dashboard you must first save it as your default dashboard, re-save and re-name the dashboard, and then you can share or collaborate.

The word "Default" after the dashboard name represents your default dashboard, and Sharing is grayed out and unavailable as it is a default dashboard setting.

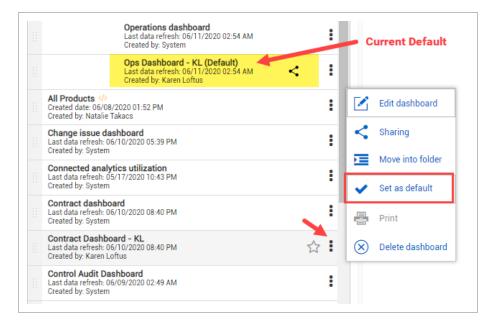
1.5.1 SET A DASHBOARD AS YOUR DEFAULT

Initially, no single dashboard in InEight Explore is considered your default dashboard. Until you choose to share a dashboard, or collaborate with others, does it become an important function.

In order to share or collaborate with others on a dashboard <u>you initiate</u>, it must first be set as your default dashboard.

To set or change a dashboard as your default:

1. Click the 3-dot ellipses on the right side of your desired dashboard.

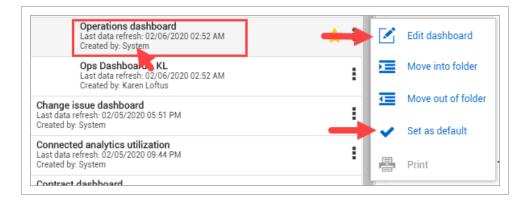


- 2. Select Set as default.
 - You have now set (or changed) your default dashboard

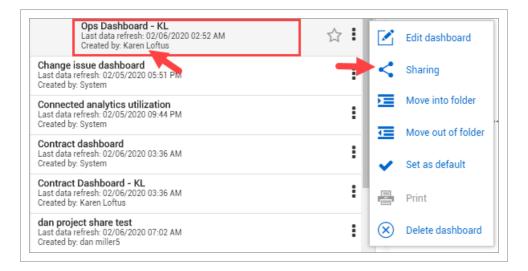
1.5.2 SHARE A DASHBOARD WITH OTHERS

After a dashboard is shown as your default, the Sharing option becomes available to you.

The Operations Dashboard below does not have the Sharing option available as it is a System dashboard and it has not yet been set as the default and re-named.



Conversely, the personalized, re-named dashboard called Ops Dashboard – KL has the Sharing option available.



1.5 STEP BY STEP 1 – SHARE A CUSTOMIZED SYSTEM DASHBOARD

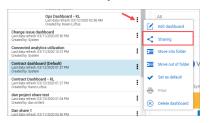
- 1. Select a system dashboard to share.
- 2. Click the 3 dot ellipses on the right side of the system dashboard name.
- 3. Click Set as Default.

Last	rations dashboard data refresh: 02/06/2020 02:52 AM ied by: System			Edit dashboard
Change issue dashboard Last data refresh: 02/05/202 Created by: System	d 0 05:51 PM	:		Move into folder
Connected analytics util Last data refresh: 02/05/202 Created by: System		:	▣	Move out of folder
Contract dashboard Last data refresh: 02/06/202 Created by: System	0 03:36 AM	:	 ✓ ▲ 	Set as default Print
Contract Dashboard - K	L (Default)			

- 4. Click the 3 dot ellipses again.
- 5. Click Edit Dashboard.
- 6. Make edits and go to File > Save As.
- 7. Re-name the dashboard.
- 8. Click Save.

Save this das	shboard as	×
Ops Dashboard	1 - KL	- 1
	Cancel Save	

9. From the newly named dashboard, click the **Sharing** option.



10. Select with whom you would like to share the dashboard by selecting an option from the drop-down list. Options include:

- Organization
- Project
- Person

ashboard Ops Dashboard KL	
Person	-
Organization Users who have access to the organization	
Project Users who have access to the project	
Person Users who have access to the system	
Projects	
No shares selected	
Organizations	
No shares selected	
urrent selections	

• For example, if you choose to add a person, you can begin typing the name of a person's email address to be guided to select an individual. A similar concept is

available for Project and Organization

Dashboard Ops Dashboard KL Person	•
paul.be	Q,
Paul.bennion@ineight.com	\$
Users	Can edit
No shares selected	
Projects	
No shares selected	
Organizations	
No shares selected	
Current selections	

11. Click Share.

- A Dashboard Shared notification will briefly appear on the top of your screen
- Now, the Shared icon is visible to the right of the dashboard name

 Ope Dashboard - KL.
 Cashboard - KL.

 Landsau winker, Northon
 Cashboard

 Deskage milestone dashboard Landsau winker, Northon
 You are sharing this dashboard

 Tate dama winker, Northon Dashboard
 Tate dama winker, Northon Dashboard

12. NOTE Elevated permissions are required to share at the project and org level.
 NOTE Use caution when using the Organization option, as all individuals will see this new dashboard option upon their next sign-on to Explore.

With each new log in to Explore, newly shared dashboards will show the yellow **New!** tag next to the dashboard name. Afterward, the New indicator will not show. Hovering over the **Share** icon indicates if the dashboard is being shared with you, or if you are sharing the dashboard with others.

A black **Share** icon indicates a dashboard is shared by you.



A blue Share icon indicates a dashboard is shared with you.

 Collaboration - Catie Testing Last data refresh: 01/31/2020 04:02 AM Created by: Catie Williams	This dashboard is being shared to you
 collaboration Test Last data refresh: 01/31/2020 12:46 AM Created by: Natalie Takacs	

Click the blue **Sharing** icon to view the Sharing details for that specific shared dashboard. Click **Close** to return to the dashboard.

While you cannot edit others' dashboards, you can save your own copy of it and make your own modifications to it. When changes are made by you, others whom you share the dashboard with will also see your changes.

1.5.3 COLLABORATE ON A SHARED DASHBOARD WITH OTHERS

Collaborating on a dashboard gives the person with whom the dashboard is shared not only the permission to view it, but also to edit the file. Any changes made will be visible to all parties who have access to the shared dashboard.

Using the process above, once you have gotten to the step of selecting who the dashboard will be shared with, in our example, we'll be sharing the dashboard with just one person.

Checking the **Can Edit** box and then clicking **Share** provides the person, project or organization the ability to collaborate with you on the shared dashboard.

Parthand W	
Dashboard Ops Dashboard - KL	
Person	•
	Q,
Type a person's name	
SHARE WITH	
Users	Can edit
Paul.bennion@ineight.com	_[m⊝
Projects	5
No shares selected	
Organizations	
No shares selected	
Current selections	
⊖ Remove all sharing	Cancel

1.5.4 REMOVE SHARING

For any dashboard you create and share, you may also remove sharing. By hovering over the **Sharing** icon, you can identify the reports you have shared with others.

1.5 STEP BY STEP 2 – REMOVE SHARING

1. Click the black **Sharing** icon.



2. Either select **Remove all sharing** to remove all people from sharing mode, or the click the **Remove Sharing** red circles next to the names of those to remove.

Dashboard Ops Dashboard - KL Person	-
Pelion	•
Type a person's name	
SHARE WITH	
Users	Can edit
Paul.bennion@ineight.com	
Natalije.Takacs@INEIGHT.COM	2 😔
Projects	
No shares selected	
Organizations	
No shares selected	
Current selections	

- This change is instantaneous
- · A dialog box will briefly appear to confirm the removal has occurred

1.5.5 EMBED EXTERNAL CONTENT

Embedding external content in InEight Explore means you can expose dashboards you have on your Power BI service or Tableau server in the InEight Explore application.

While your organization is still responsible for maintaining security and maintenance of the dashboards and data behind them, you can have all your dashboards in one place and it eliminates the need to bounce around different windows to look at dashboards that may contain more than just InEight Application data.

1.5 STEP BY STEP 3 – SET-UP ADDING EXTERNAL CONTENT

- Explore
 Context the Add External Content tech.

 Explore
 «

 All (28)
 Search...

 Explore
 (*)
- 1. Click the Add External Content icon.

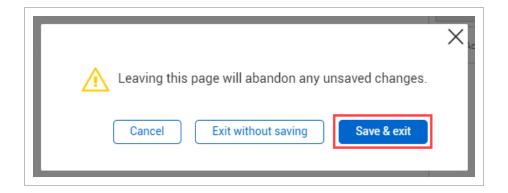
- 2. In the dialog box, add the **name** for the new report, in addition to the **Source** for the external content.
- 3. Click Save.

Name	Source
	https://www.ineight.com
	Hint: please provide a url beginning with https://
managed by InEigh operation of links r	of external links including the sites or tools the links relate to ("links") are not supported or t. InEight is not responsible for content on or access to links. Issues with content or need to be referred to the link owner. InEight assumes no legal liability or responsibility limitation non-infringement) as to the operation, use or content of links. Cancel

- TIP Click the **Instruction** icon to be taken to the Guide for embedding content in Explore.
- The resulting saved report appears alphabetically in your list of reports. The External Content identifier is also shown.

[+	∢> 🗹 ⊗ <		
	Last data refresh: 03/12/2020 03:02 PM Created by: dan miller5	:	*
	Embed Test	:	
	InEight Compliance forms dashboard Last data refresh: 03/12/2020 03:02 PM Created by: System	★ I	

- Clicking on this dashboard takes you to the https:// Source page shown above
- 4. Before leaving the page, and in the event you need to save this new report, click the **Save** & Exit button.



5. This allows you to type in a **dashboard name**, and then click **Save**.

	\times
Save this dashboard as	
DB with Embedded External Content	
Cancel Save]

6. Search for the resulting dashboard, again alphabetically.



1.5.5.1 DELETING AN EMBEDDED DASHBOARD

As with other dashboards, dashboards with embedded external content can be deleted.

1.5 STEP BY STEP 4 – DELETE AN EMBEDDED DASHBOARD

- 1. From the list of dashboards, click on the desired dashboard to delete.
- 2. Click the Delete Dashboard icon.



3. You will be asked to confirm the deletion. Click Yes.

	\times
Are you sure you want to delete Embed Test 2?	
Yes No	

1.5.6 SHARE EXTERNAL CONTENT

Sharing embedded content allows you to have one place to view all reporting and ensures that everyone in your organization is looking at the same reporting.

1.5 STEP BY STEP 5 – SHARE EXTERNAL CONTENT WITH OTHERS

1. To share external content that you have already embedded into Explore, click the **Sharing** icon, and then the **vertical ellipses** for the external content.

Control Audit Dashboard Last data refresh: 06/09/2020 02:49 AM Created by: System	:		Edit external content
dan project share test Last data refresh: 06/11/2020 09:22 PM		<	Sharing
Created by: dan miller5 ddd Last data refresh: 06/11/2020 09:22 PM Created by: dan miller5			Move into folder Set as default
Embedded content Created date: 06/12/2020 05:54 AM Created by: Karen Loftus	☆ :	\otimes	Delete external content
Embedded sharing Created date: 03/20/2020 09:27 AM Created by: Natalie Takacs	< 1		

2. Then in the dialog box, select the appropriate Organization, Project or Person from the drop-down list to apply sharing.

Dashboard Ops Dashboard - KL	
Person	
Organization Users who have access to the organization	
Project Users who have access to the project	
Person Users who have access to the system	
Projects	
No shares selected	
Organizations	
No shares selected	
Current selections	

3. When a dashboard is shared with you, if you already have a Power BI login, click **Sign-In**.



Please sign in to view this report



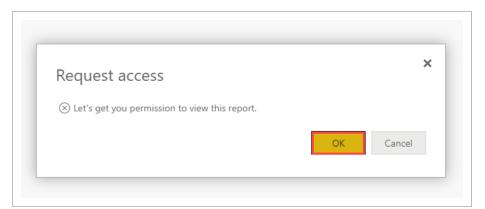
4. To request access to a shared report, click the Request access button.



To view this report, ask the author for access



5. Depending on your authorization level, you may get another dialog box to request access. Click **OK**.



6. You can add a personal note, and then click **Send request**.

Request access	×
Submit a request below.	
Add a note (optional)	
	Send request Cancel
	Caricer

NOTE Clicking the **Sharing** icon of any dashboard that has been shared with you results in a dialog box indicating the source, owner and created date for the share.

Sharing det	ails
Source	https://app.powerbi.com/reportEmbed?reportId=ab983255-5899-47d5- 8707-112da38ea971&groupId=ca9a65a5-7bd5-4a27-84ad- 530f05854209&autoAuth=true&ctid=bd552577-889f-46d7-9b56- f1220279c9c0&config=eyJjbHVzdGVyVXJsIjoiaHR0cHM6Ly93YWJpLXd lc3QtdXMtcmVkaXJIY3QuYW5hbHIzaXMud2luZG93cy5uZXQvIn0%3D
Owner	Natalie Takacs
Created date	03/20/2020 09:27 AM
	Close

1.6 DASHBOARD EXAMPLES

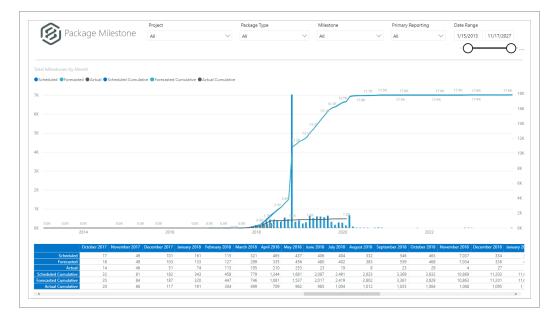
The Package Milestone dashboard lets you see information about user-defined milestones in the procurement process over time. A second tab details bid package information at the line item level with the ability to link back to InEight products.

1.6 STEP BY STEP 1 – PACKAGE MILESETONE DASHBOARD

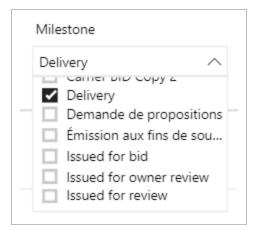
1. From the Dashboards page, click the **Package Milestone dashboard**.



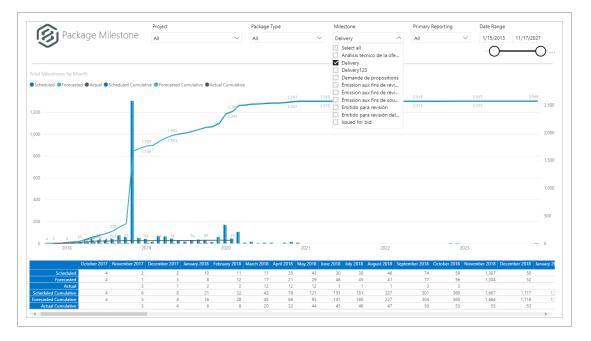
- 2. Select a Project drop-down title.
 - Note you may also scroll to search for a project or type in a project name in the search bar to select a project
- 3. Click Select All.
- 4. Close the Dashboards panel.
 - The summaries, graphs and data presented here are specific to this project
 - You should see the updated Package Milestone dashboard as shown below



5. From the Milestone drop-down list, deselect all but the Delivery item.



6. The graph now changes:



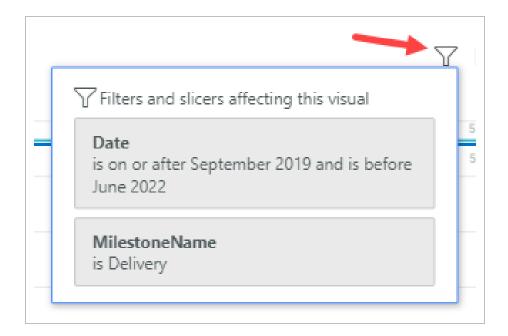
- 7. Change the Date Range to a shorter period of time.
- 8. Click the light blue colored **Forecasted Cumulative column for the tallest month**. Your report should look like something like this:



- 9. Click the **Focus** \square icon for a better view of the graph.
- 10. Click < Back to Report to return to the main view.



- 11. Click the **Filter**, icon, on the upper right side of the graph.
- 12. Notice now the two filters that appear, Date and MilestoneName. Click **outside the box** to close the dialog box.



PACKAGE MILESTONE HEADER VALUES

The following table provides explanation of scheduled, forecasted, actual and cumulative (scheduled, forecasted and actual) packages at user-defined milestones.

Term	Definition
Project	Identifies the project.
Package Type	Identifies the project options.
Milestone	Identifies the user-defined step in the project.
Date Range	Dates, as selected in the calendar.

Project		Package Type		Milestone		Primary Reporting	9	Date Range	
All	\sim	All	\sim	Delivery	\sim	All	\sim	9/30/2019	6/11/2022
									\sim

Click the **Schedule Detail** tab at the bottom of the page.

S	Packag	e Milestone Graph	\checkmark	Package Type All	\checkmark	Delivery		te Range /30/2019 6/1	1/2022	
ate	Package Id	URL	Description	Status	Package Type	Milestone	Discipline	Scheduled Completion	Forecasted Completion	^
		projectId=54#/addBidPackage/overviewPackage/3939		review				-		.
		/AppContract/Packages? projectId=3#/addBidPackage/overviewPackage/4046								
					Permanent material					
nuary 2020	4276	/AppContract/Packages? projectId=3#/addBidPackage/overviewPackage/4276	Anchor Bolts / Embeds	Issued for owner review	Permanent material	Delivery	Concrete	01/28/2020	1/28/2020	
		/AppContract/Packages? projectId=75#/addBidPackage/overviewPackage/4351	Thiru-bld	Issued for owner review				01/29/2020		-
		/AppContract/Packages? projectId=10889#/addBidPackage/overviewPackage/436 1								
		/AppContract/Packages? projectId=10889#/addBidPackage/overviewPackage/436 2								
		/AppContract/Packages? projectId=3#/addBidPackage/overviewPackage/4363								
		/AppContract/Packages? projectId=3#/addBidPackage/overviewPackage/4364								
		/AppContract/Packages? projectId=3#/addBidPackage/overviewPackage/4368								
		/AppContract/Packages? projectId=3#/addBidPackage/overviewPackage/4371								
		/AppContract/Packages? projectId=3#/addBidPackage/overviewPackage/4366		Issued for owner review	Permanent material	Delivery				
		/AppContract/Packages? projectId=3#/addBidPackage/overviewPackage/4367		Issued for owner review	Permanent material	Delivery				
		/AppContract/Packages? projectId=82#/addBidPackage/overviewPackage/685				Delivery				
		/AppContract/Packages? projectId=54#/addBidPackage/overviewPackage/3895	Heat Exchangers - Plate and Frame							
		/AppContract/Packages? projectId=54#/addBidPackage/overviewPackage/3910	Fuel Gas Ball Valves							
ebruary 2020				Issued for owner review	Permanent material		Piping		2/15/2020	~

• In this view, line item level detail is available with the ability to link back to other InEight applications. Filtering, sorting and adjusting column width are options available for further ease in analysis.

PREVIEWING META-DATA

Right-click on any header, and then select Visual table to view the meta-data further.



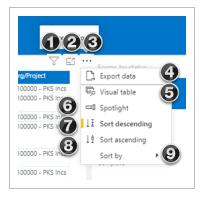
Detailed data will appear:

ate, Package Id, URL, Description, Status, Package Type, Milestone, Discipline, Scheduled Completion, Forecasted Completion, Actual Date, Available Float	Remain 🔨
ctober 2019, 170, /AppContract/Packages?projectid=73#/addBidPackage/overviewPackage/170, HV/MV Terminations and Transformer Oil Fill, Letter of Intent/Award, Subcontract, Delivery, Subcontracts, 10/01/2019, 10/1/2019, 0	
ctober 2019, 171, /AppContract/Packages?projectid=73#/addBidPackage/overviewPackage/171, Fiber Optic Cable Gland and Termination, Letter of Intent/Award, Subcontract, Delivery, Subcontracts, 10/01/2019, 10/1/2019, , 0	
ctober 2019, 174, /AppContract/Packages?projectId=73#/addBidPackage/overviewPackage/174, Lube Oii Flushing, Letter of intent/Award, Subcontract, Delivery, Subcontracts, 10/01/2019, 10/1/2019, 0	
ctober 2019, 1057, /AppContract/Packages?projectId=73#/addBidPackage/overviewPackage/1057, Site/Yard FW/Fitting Coating, Issued for review, Subcontract, Delivery, Subcontracts, 10/01/2019, 10/1/2019, 0	
ctober 2019, 3823, /AppContract/Packages?projectId=1#/addBidPackage/overviewPackage/3823, TestPane, Issued for owner review, Engineered equipment, Delivery, Building, 10/01/2019, 10/1/2019, 12/	
ctober 2019, 3824, /AppContract/Packages?projectid=1#/addBidPackage/overviewPackage/3824, Tesrt, Issued for owner review, Engineered equipment, Delivery, Building, 10/01/2019, 10/1/2019, 30	
ctober 2019, 3833, /AppContract/Packages?projectId=3#/addBidPackage/overviewPackage/3833, testing spanish 1, Issued for owner review, Permanent material, Delivery, , 10/01/2019, 10/1/2/019, 10/1/2/2019, 39	
ctober 2019, 3838, /AppContract/Packages?projectid=229#/addBidPackage/overviewPackage/3838, bid1, Issued for owner review, Freight, Delivery, , 10/01/2019, 10/1/2019, , 22	
ctober 2019, 3843, /AppContract/Packages?projectid=1#/addBidPackage/overviewPackage/3843, 18-10-HVT_Test, Issued for owner review, Engineered equipment, Delivery, Building, 10/01/2019, 10/1/2019, 0	
ctober 2019, 3836, /AppContract/Packages?projectId=234#/addBidPackage/overviewPackage/3836, TestTooltip, Issued for owner review, Engineered equipment, Delivery, , 10/06/2019, 10/6/2019, 14	
ctober 2019, 3842, /AppContract/Packages?projectid=3#/addBidPackage/overviewPackage/3842, Test KT 17/10, Proposal received, Engineered equipment, Delivery, Change Orders,Contract Allowances and Back charges, 10/06/2019, 10/6/2019, 0	
ctober 2019, 3835, /AppContract/Packages?projectId=3#/addBidPackage/overviewPackage/3835, Test_Bidpackage_Milestonestatus, Letter of intent/Award, Rental Agreement, Delivery, , 10/07/2019, 10/7/2019, 0	
ttober 2019, 3854, /AppContract/Packages?projectid=3#/addBidPackage/overviewPackage/3854, smoke OCT30 project, Issued for owner review, Professional services, Delivery, , 10/08/2019, 10/8/2019, , 0	
ttober 2019, 3825, /AppContract/Packages?projectld=12342#/addBidPackage/overviewPackage/3825, ferfef, Issued for owner review, Engineered equipment, Delivery, , 10/09/2019, 10/9/2019, , 8	
taber 2019, 3826, /AppContract/Packages?projectId=3#/addBidPackage/overviewPackage/3826, Test, Issued for owner review, Buyout reserve, Delivery, , 10/09/2019, 10/9/2019, , 16	
ttober 2019, 3827, /AppContract/Packages?projectId=1#/addBidPackage/overviewPackage/3827, TestIag_20px, Issued for owner review, Engineered equipment, Delivery, Building, 10/09/2019, 10/9/2019, , 0	
ctober 2019, 3828, /AppContract/Packages?projectid=3#/addBidPackage/overviewPackage/3828, 20px_test, Issued for owner review, Engineered equipment, Delivery, Building, 10/09/2019, 10/9/2019	
ctober 2019, 3829, /AppContract/Packages?projectid=3#/addBidPackage/overviewPackage/3829, US Testing_251, Issued for owner review, Engineered equipment, Delivery, , 10/09/2019, 10/9/2019, , 8	
ctober 2019, 4096, /AppContract/Packages?projectid=3#/addBidPackage/overviewPackage/4096, T-Line Procurement - OH Cable and OPGW, Issued for owner review, Permanent material, Delivery, Electrical, 10/09/2019, 10/9/2019, 108	~

Press **<Back to report** to return to the default view.

While some dashboard graphs offer the ability to Drill Up, Drill Down, Go to the Next Level of the Hierarchy, and Expand all down one level in the Hierarchy, most other graphs include the following options:

	Term	Definition
1	Filter	Filters and slices data in a visual.
2	Focus mode	Expand one visual in the dashboard.
3	More options	Opens additional options.
4	Export Data	Export data only to Excel (not visuals).
5	Show as a Table	Shows data/chart in a larger view.
6	Spotlight	Focuses dashboard on one specific visual.
7	Sort descending	Sort data in descending order.
8	Sort ascending	Sort data in ascending order.
9	Sort by	Allows you to sort by status or form.



1.7 API DOCUMENTATION

1.7.1 API DOCUMENTATION OVERVIEW

From the home landing page, click the **Main menu** icon (**E**), and then click Explore > **API Documentation**.

INEIGHT®	
CS Chris	
Main menu	
FAVORITES	ď
S100000 - PKS Inc	>
SETTINGS	
All projects & organizations	
	>
路 Suite administration	>
Profile	>
CONNECTED ANALYTICS	
Report	
Explore	^
Dashboards	
API documentation	
INFIGHT ONLINE	

A new browser window opens to the InEight Knowledge Library <u>Explore Resources tab</u>. In the API Documentation section under the InEight product are the documents that represent each data endpoint InEight offers for self-service reporting.

To access a report, in the API Documentation section, click the + icon for the product to expand the list, and then select a file name. The document opens in a new browser window. Each API document

includes an Overview of the selected API, a table of Relationships and Dependencies, Details, Supported Filters, API Fields and Field Descriptions, along with a Sample and Data Validation when applicable.





CUSTOM DASHBOARDS

InEight Inc. | Release 24.9

2.1 CUSTOM DASHBOARDS

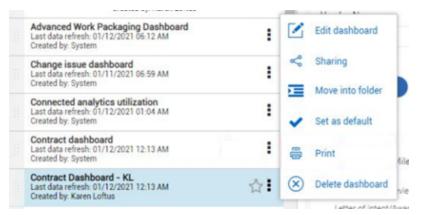
In Explore, you can edit the standard dashboards in order to create new custom dashboards and visualizations by modifying standard dashboards to meet the needs of your project. You cannot create dashboards from scratch, but you can edit the standard dashboards and save them as new custom dashboards.

2.1.1 EDIT DASHBOARD

The following steps walk you through how to edit an existing dashboard to create a new dashboard.

2.1 STEP BY STEP 1 – EDIT A DASHBOARD

- 1. From the Dashboards page, click the **Context menu** ellipses next to the Operations dashboard.
- 2. Select Edit dashboard.



- 3. The Visualization and Fields slide-out panels open on the right side of the screen.
 - A yellow New page icon appears next to the page number at the bottom of the screen
- 4. Click the **New page** icon to add a new tab.



• Your screen will now look something like this

Explore	 Dashboard 				(?)	¢ " ⊗
plore	«	File Y View Y	Ask a question B Explore	✓ A Text box Q Shape	is 🗸 📼 Buttons 🗸 📑 Visu	al interactions \sim . C
NI (27) 👻	Search Q		\forall Filters \diamond >	bookmarks \times	VISUALIZATIONS >	FIELDS
• • 🗹 😣 <			,O Search	Report bookmarks		,∕⊂ Search
Example Folder	: -		Filters on this page	Add Default State (G/L)		→ ■ AccountCode → ■ Calendar
			Add data fields here	PF State	🔄 🔳 📕 Py 📑 🐴	> Costitem
Example Folder 2 Operations dashboard	:		Filters on all pages	Account Code Page P Account Code Page G		→ ■ DailyPlanSum → ■ PlanProjectPro
Last data refresh: 03/12/2020 02:56 AM Created by: System	* 1		IsActive is True	Account Code Perfor Account Code Perfor	Values	 Project
Change issue dashboard Last data refresh: 03/11/2020 05:50 PM Created by: System	:		Add data fields here	Project Scorecard GL Project Scorecard PF		
Connected analytics utilization Last data refresh: 03/11/2020 10:31 PM Created by: System	:			Curves GL On	DRILL THROUGH	
Contract dashboard (Default) Last data refresh: 03/12/2020 01:27 PM Created by: System	☆ I			Curves PF On	оя о —	
Contract Dashboard - KL Last data refresh: 03/12/2020 01:27 PM Created by: Karen Loftus	< 1				Keep all filters On ——	
dan project share test Last data refresh: 03/12/2020 03:02 PM Created by dan milers	1					
Dan share 1 Last data refresh: 03/11/2020 05:50 PM Created by: dan miller5	1					
ddd Last data refresh: 03/12/2020 03:02 PM Created by: dan miller5	:					
InEight Compliance forms dashboard Last data refresh: 03/12/2020 03:02 PM Created by: System	* I					
KL - Contract Dashboard Last data refresh: 03/12/2020 01:27 PM Created by: Karen Loftus	:					
KL manhour curves Last data refirsh: 03/12/2020 12:25 AM Created by: Karen Loftus	* 1					
man hours Last data refresh: 03/12/2020 02:56 AM Created br: Karen Loftus				Learn how to create and edit		
Manhour curves		د > rend الله Account Code PF Trend الله Cost Item PF Trend الله Project PF Trend الله Project GL Trend الله Exe	cutor PF Trend Page 1	bookmarks		

- 5. Double-click on the default page name and type in **man hours**.
 - Your tab will now look like this:



6. From the drop-down menu, click File > **Save as**.

«	File ~	Dashboards ▼ View ~		
Q	Þ	Save as Save a copy of th	his report	
		10		×
		ual	Save this dashboard as	
		1000	Ops Dashboard KL	

7. In the dialog box, name the custom dashboard, and then click **Save**.

2.1.2 DASHBOARD CUSTOMIZATION

From the Visualizations and Fields slide-out panels, you can add chart, graph and card visualizations to your dashboard and populate them with the appropriate data fields.

You cannot change the data source for the dashboard. The dashboard comes pre-connected to a dataset you may use to edit or add visualizations and filters.

Visualizations and Field slide-out panels are utilized for the following unique purposes:

	Term	Definition
1	Filters slide-out panel	Various ways to cut the data using selections from the Fields slide- out.
2	Bookmarks slide-out panel	Customizable saved dashboard views to quickly access frequent dashboards.
3	Visualizations slide-out panel	Charts, Graphs, and Cards selection for dashboard tab.

Overview - Filters, Bookmarks, Visualizations and Fields Slide-Out Panels

Overview - Filters, Bookmarks, Visualizations and Fields Slide-Out Panels (continued)

	Term	Definition
4	Charts/Graphs	Various charts, graphs, an PowerApps for PowerBI.
5	Fields, Format, Analytics	Format provides page information. Fields allows for adding value data fields and drill through capability. Analytics modifies the lines (min, max, average, etc.) shown in the selected chart or graph.
6	Fields slide-out panel	Contains data fields to add to your visualizations to report on in your dashboard.
7	Data Fields	Data from InEight Project Suite to add to fields such as Axis, Legend, Values, etc. under the Visualizations slide-out panel.

\forall Filters \bigcirc \diamond $>$	Bookmarks 2	< Visualizations 3	Fields 6
✓ Search	Report bookmarks		✓ Search
Filters on this page	☐ Add ☐ View		✓ AccountCode ✓ Calendar
Add data fields here	PF State		∨ ፹ CostItem
Filters on all pages	Account Code Page P Account Code Page G	<u> </u>	 ✓
IsActive is True	Account Code Perfor Account Code Perfor	✓ Search	∨ ⊞ Project
Add data fields here	Project Scorecard GL Project Scorecard PF	✓ Page information	1
	Curves GL On Curves PF On	 Page size Page background 	_
		\checkmark Page alignment	
		\checkmark Wallpaper	
		✓ Filter pane	
		\checkmark Filter cards	

The following Step by Step walks you through adding a graph visualization to your dashboard reporting on Project Progress and man hours.

2.1 STEP BY STEP 2 – CREATE A GRAPH

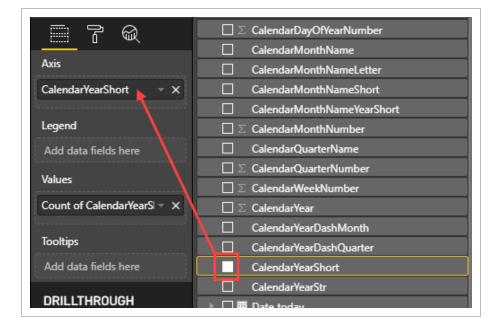
- 1. Under the tab you created in Step by Step above, on the Visualizations slide-out panel select the Line chart visualization.
- 2. To make more space, hide the **Dashboards** slide-out panel, **Filters** slide-out panel and close **Bookmarks**.

File v Vee v		 	Add data fields here Add data fields here	A Taxt box 2 Shap BOOKMARKS Report bookmarks Add D Vow Default State Add D Vow Default State Account Code Page (1 S. Account Account Code Page (1 S. Account Account Account Account Acco	■ ■ ■ ● ● ● ● ● ● ■ ■ ● ■	al Interactions ∨ () Refresh FELDS >
Operations data for a first of the second se			a The	Project Scorecard PF On Curves GL On	Legend	

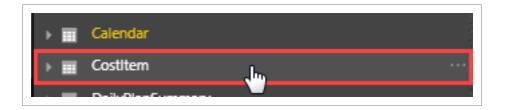
3. Enlarge the Fields slide-out panel by sliding the **left border** toward the left to increase the Fields selection area.

VISUALIZATIONS >	FIELDS >
	𝒫 Search
	AccountCode
Image: A state of the state	⊿ <u> </u>
💽 📰 📰 Py 📑 🔩	▶ 🗌 CalendarDate
ו ••	$\Box \Sigma CalendarDayOfMonthNumber$
	$\Box \Sigma$ CalendarDayOfYearNumber
	CalendarMonthName
Ar	CalendarMonthNameLetter
CalendarYearShort - X	CalendarMonthNameShort
C	CalendarMonthNameYearShort
Legend	$\Box \Sigma$ CalendarMonthNumber
Add data fields here	CalendarQuarterName
·/	$\Box \Sigma$ CalendarQuarterNumber

4. Under the Fields slide-out panel, navigate to the Calendar and click the **CalendarYearStr check box**, and the selection will populate in the Axis.



5. Close the Calendar Field and scroll down and open the **CostItem** Field side arrow.



6. In the Search bar under Fields type C B-.

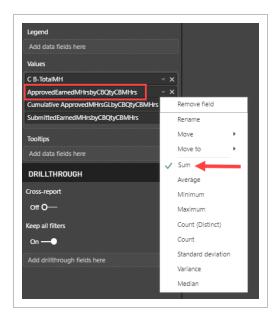
FIELDS	>
Р с b	
a 📰 Costitem	
C B-Currency	
□ ∑ C B-TotalCost	
<mark>(</mark> H ₂ ∑ <mark>CB</mark> -TotalMH	
□ ∑ CB-TotalQty	

- 7. Select the C B TotalMH check box to add it to the Values section of the Visualizations slide-out.
- 8. Clear the Search bar and close the CostItem field.
- 9. Open the Daily Plan Summary Field and select **ManHoursApprovedDate**. Modify the Date Hierarchy to match this:

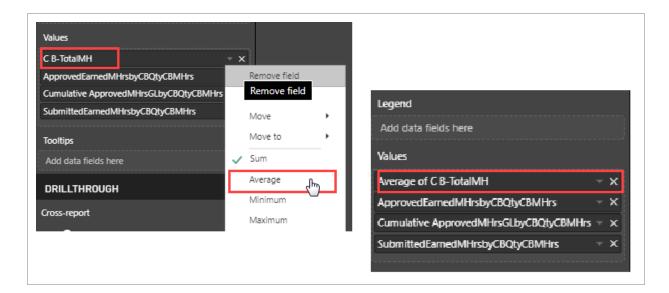
ManHoursApprovedDate
🔺 🔄 🎦 Date Hierarchy
Year
Quarter
Month
Day

- 10. Close the DailyPlanSummary field.
- 11. Expand the graph size by pulling the lower right corner of the graph downward.
- 12. Open PlanProjectProgressand select the following fields:

- a. ApprovedEarnedMHrsbyCBQtyCBMHrs
- b. Cumulative ApprovedMHrsGLbyCBQtyCBMHrs
- C. SubmittedEarnedMHrsbyCBQtyCBMHrs
- On the dashboard on the left, the graph displays your submitted earned man hours and compares that against approved earned man hours
- 13. By clicking each **Values** drop-down fields, you will see each is intuitively using the mathematical sum function.



14. On the C B-TotalMH drop down, change the selection from Sum to **Average**. Notice how the field name changes.



15. Open the Filter slide-out.

VISUALIZATIONS	>
	Ŧ
<u> </u>	
Axis	
ManHoursApprovedDate Year	× × ×
CalendarYearShort	∀ X
t	
Legend	
Add data fields here	
Values	
Average of C B-TotalMH	∀ X
ApprovedEarnedMHrsbyCBQtyCBMHrs	∀ X
Cumulative ApprovedMHrsGLbyCBQtyCBMHrs SubmittedEarnedMHrsbyCBQtyCBMHrs	s = x - x
Submitted an edwin is by cool y cowins	~ ~
Tooltips	
Add data fields here	
DRILLTHROUGH	
Cross-report	
Off O-	
Keep all filters	
0n —	
Add drillthrough fields here	

Expand the CalendarYearStr field by clicking on the drop down. Using Basic filtering, select years
 2018, 2019 and 2020 to abbreviate the reporting years chart.

is 2	018, 2019, or 20	20
Filt	er type 🛈	
Ba	asic filtering	•
R)	
	2017	LUC
\checkmark	2018	365
1	2019	365
\checkmark	2020	366
	2021	365
	2022	365
	2023	365
	2024	266

17. Right-click inside your chart and select Visual table.



• Your chart should look similar to this:

		7 E ·	∽ ⊽ Filters	> VISUALIZATIONS >>	FIELDS
K Back to re	port		Filters on this visual		
 Average of C B- OK 	TotalMH ApprovedEarnedMHrsb	Cumulative Appro SubmittedEarne	ApprovedEarnedMHrsby is (All)		> Search
-50K			Average of C B-TotalMI is (All)	🔄 📰 🔳 Py 📑 👒 🗔 📟	 Costitem
-100K			CalendarYearStr is 2018, 2019, or 2020	<u> </u>	BillyPlanSummary Imap ProjectProgress
-150K			Filter type ① Basic filtering	Axis CalendarYearStr ~ X	AccountCodeDescription AccountCodeDisplay AccountCodeDisplay AccountCodeld
-200K	2018	1019 2020	2017 505 2018 365 2019 365	Legend Add data fields here	ApprovedEamedMHrsbyCBQtyCBMHrs ApprovedEamedMHrsbyCBQtyCBMHrs running total in Cal Σ ApprovedEamedMHrsbyCBQtyCEMHrs
	¥ -	dEarnedMHrsbyCBQtyCBMHrs Cumulative A	☑ 2020 366 ☑ 2021 365	Values	ApprovedEarnedMHrsbyCBQtyCEMHrs running total in Cal D ApprovedEarnedMHrsbyCEQtyCBMHrs
2018 2019 2020	0.00 0.00 0.00	0.00 0.00 0.00	□ 2022 365 □ 2023 365	Average of C B-TotalMH × X ApprovedEarnedMHrsbyCBQtyCBMHi × X	ApprovedEamedMHrsbyCEQtyCBMHrs running total in Cal S ApprovedEamedMHrsbyCEQtbyCBMHrs
			Require single selection	Cumulative ApprovedMHrsGLbyCBQt	ApprovedEarnedMHrsbyCEQtyCEMHrs running total in Cal ApprovedHours
			Cumulative ApprovedMI is (All)	Tooltips Add data fields here	ApprovedHours running total in CalendarDate X ApprovedMHrsGLbyCBQtyCBMHrs ApprovedMHrsGLbyCBQtyCBMHrsIndicator
			SubmittedEarnedMHrsby is (All)	DRILLTHROUGH	ApprovedMHrsGLbyCBQtyCEMHrs ApprovedMHrsGLbyCBQtyCEMHrsIndicator
<		>	Add data fields here	Cross-report Off O-	Approved/HirsGLbyCEQtyCBMHrs Maproved/HirsGLbyCEQtyCBMHrsIndicator Approved/HirsGLbyCEQtyCBMHrsIndicator Xapproved/HirsGLbyCEQtyCBMHrs

- 18. Click < Back to Report.
- 19. In the upper left corner, note the View options available in the drop-down. Change the Show smart guides toggle to **On**.
 - Doing so makes a vertical bar appear each time it bisects a point in the graph
 - Clicking on the bisected point brings up the data, as shown below

File 🗸	View V			
	🗔 Fit to page			
	Fit to width Fit to width			
	111 Actual size			
Average o	High-contrast colors	> mulative Approved	MHrsGLbyCBQtyCBMHrs and SubmittedEarnedMHrsb	
Average -	🗄 Show smart guides 🦲		IrsGLbyCBQtyCBMHrs SubmittedEarnedMHrsbyCBQtyCB	
		Off		
	🖽 Snap to grid 💽	Off		
-50K	🔒 Lock objects 💽	Off		
-304	Selection pane	Off		
	🗍 Bookmarks pane 🌘	Off		
	⊖ Sync slicers pane ●	Off		
-100K		2	2019 Average of C B-TotalMH 0.00	
-150K			ApprovedEarnedMHrsbyCBQtyCBMHrs 0.00 Cumulative ApprovedMHrsGLbyCBQtyCBMHrs -171,42 SubmittedEarnedMHrsbyCBQtyCBMHrs 0.00	6.84
-200K	2018	2019	2020	

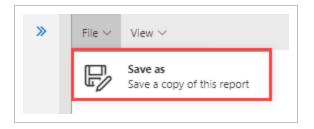
20. From the View drop-down, turn the Bookmarks Pane toggle to On.

2.1.3 SAVE DASHBOARD

There are two ways to save a dashboard.

First, if you are leaving a newly created report where you have modified data, you will receive a pop-up where you can confirm your desire to save your change.

Click the **File > Save As** drop down.



If Yes in selected, save with a new dashboard name and click **Save**.

Save this dashboard as	×
man hours	
Cancel Save	

• Your dashboard will appear on the left slide-out panel alongside your other dashboard

🔨 📂 Example Folder	
🗸 🖿 Example Folder 2	:
Operations dashboard Last data refresh: 12/18/2019 08:09 AM Created by: System	☆ :
Change issue dashboard Last data refresh: 12/17/2019 08:10 PM Created by: System	☆ :
Connected analytics utilization Last data refresh: 12/18/2019 12:12 AM Created by: System	☆ :
Contract dashboard Last data refresh: 12/18/2019 01:36 PM Created by: System	☆ :
Contract dashboard - KL Last data refresh: 12/18/2019 01:36 PM Created by: Karen Loftus	★ I
dan project share test Last data refresh: 12/18/2019 01:03 PM Kew! Created by: dan miller5	☆ :
ddd Last data refresh: 12/18/2019 01:03 PM Created by: dan miller5	☆ :
InEight Compliance forms dashboard Last data refresh: 12/18/2019 01:03 PM Created by: System	☆ :
man hours Last data refresh: 12/18/2019 08:09 AM Created by: Karen Loftus	☆:
Manhour curves Last data refresh: 12/18/2019 03:43 AM Créated by: System	☆:

Alternatively, if you are leaving an existing report where you have modified data, you will receive a pop-up where you can confirm your desire to save a copy of your change.

Click the **File > Save As** drop-down.

Add a name for the new dashboard and click **Save**.

File \checkmark View \checkmark	
Save Save this report	
Save as Save a copy of this report	Save this dashboard as Coperations - 1 year

2.1.4 DASHBOARD PRINTING

To print a dashboard, select the **three dot ellipses** next to a dashboard you created.

Advanced Work Packaging Dashboard Last data refresh: 01/12/2021 05:12 AM Created by: System	:		Edit dashboard	ľ
Change issue dashboard Last data refresh: 01/11/2021 06:59 AM Created by: System	:	% E	Sharing Move into folder	
Connected analytics utilization Last data refresh: 01/12/2021 01:04 AM Created by: System	1	-	Set as default	
Contract dashboard Last data refresh: 01/12/2021 12:13 AM Created by: System	:	8	Print	63
Contract Dashboard - KL Last data refresh: 01/12/2021 12:13 AM Created by: Karen Loftus	☆:	\otimes	Delete dashboard	prie

- The dashboard print settings will default the orientation to Portrait. At times, selecting Landscape will provide a more full page view
 - TIP To determine what fields are in a given report, click the Report, look at the Fields pull-out, and open the yellow colored drop-down. Search through the listing for the field(s) with a solid check-box.

2.1.5 ADD A BOOKMARK

From an edited dashboard, you are able to further personalize your dashboard by adding a new field. In our example, Approver 1, Ajay GK is a frequent approver. We want to quickly view projects specific to him. We will do that by adding a new field onto the dashboard then adding a new Bookmark tied to him. That way, we can quickly see that view as easily as the default mode, or by clicking on other default Bookmarks. Let's see how we did it.

2.1 STEP BY STEP 3 – ADD A BOOKMARK

1. Ensure you are in the Edit dashboard mode of a saved, renamed dashboard.

InEight Compliance forms dashboard Modified on: 04/29/2019 10:58:36 PM Created by: System	Propert V
KL Ops Dashboard Modified on: 11/21/2019 10:14:21 AM Created by: Karen Loftus	🟠 🚦 📝 Edit dashboard
man hours KL Modified on: 10/14/2019 12:35:16 PM Created by: Karen Loftus	☆ i ⊗ Delete dashboard
Manhour curves Modified on: 11/06/2019 03:06:19 PM Created by: System	☆ i Sharing

2. Close the Dashboard pane by clicking the double blue arrows.

	«
★ Favorites	•
All dashboards	•
C= Search	0

- 3. Search the Fields pane drop-down lists to locate the field to add, in our case under the DailyPlanSummary, we selected **Approver 1**.
- 4. Drag that field onto the dashboard.



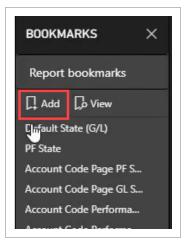
5. Using the gray colored handles that surround each attribute, move and re-size it and/or other attributes until the dashboard fits to your liking.

		Average Daily Plans Created P	ar Day Plans - In Planning	Plans - Execution	Plans - Awaiting Approval	Total Daily Plans
😥 Daily Plan Summary	y - Organization	1	0	1	0	1
\checkmark			U	61		
roject	Top 10 Projects - Daily Plans		Approver 1		Daily Plans by Hours Status	
Approver 2	Plan Status CApproved CAw	aiting Approval Execution	Ajay GK		Hours Approved	
			Aravindhbabu M bhavna gupta			
an Status	5		Bhuvaneshwari Siva			
×			nagarajan sathasivan			Hours Not Approved
			Nazeer Siddique-PK vinodkumar m			
		1		1	Daily Plans by Quantities Status	
an Date	0	402 PK90 - Project Time	-			
Last V 1 Days V	- First	ProKu Project Center				
11/21/2019 - 11/21/2019	Project Ledcor Prog We	eb Testing Project -			Quantities Not Appr1	
		Time				
		Test Pr				
oject Plan ID Plan Name Shift	Location Status Revi	sion Quantities Status	Hours Status Executor	Approved by App	vrover 1 Approver 2	
90 - ProKumar 34659 testplan-TSD Swing Shift			Hours Not Approved jensunil silu		araian sathasivan	
testplan-ISD Swing Shift	- curt us Execution	 Quantities Not Approved 	Hours Not Approved Jensunii silu	amutnu hag	arajari satriasivari	

6. Highlight the desired Approver 1, in our case Ajay GK.

Approver 1	
Ajay GK	
Aravindhbabu M	_
bhavna gupta	
Bhuvaneshwari Siva	
nagarajan sathasivan	
Nazeer Siddique-PK	
vinodkumar m	1

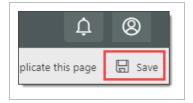
7. On the Bookmarks pane, click the **Add** icon, which will place a re-nameable bookmark at the bottom of the Bookmark pane.



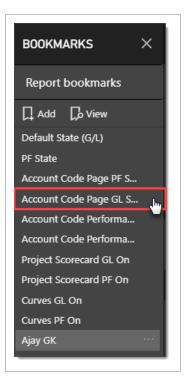
8. Double-click the new Bookmark to re-name it.



9. Save your dashboard by clicking the Save icon.



10. Toggle to another bookmark on the Bookmarks tab.



11. Then **toggle back** to your newly added Bookmark. Not only will that Approver 1 be selected, but all reports and data are filtered to those projects where he is the Approver 1.

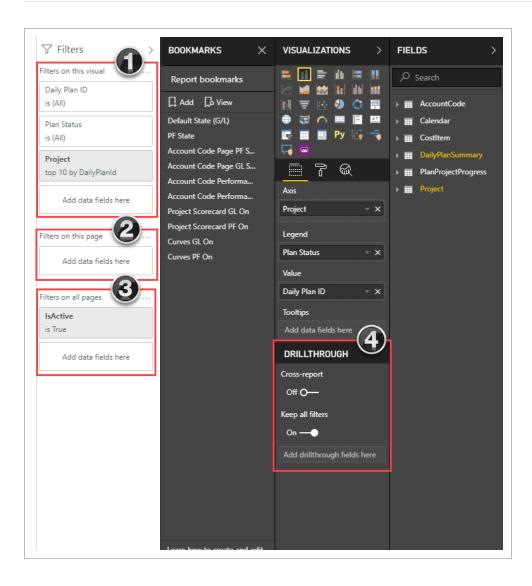
Daily Plan Summary								Report bookmarks
C Daily Dian Cummers		Average Daily Plans Created Per Day	Plans - In Planning	Plans - Execution	Plans - Awaiting Approval	Total Daily Plans	- Add data fields here	Add 🕞 View
An Data An Data An Data An Data An Data An Data An Data Yest An D	Top 10 Projects - Daily Plan Plan Status @ Approved @ / 5 0 25082LedorPro ProjectCodorPro		Approver 1 Aby OK A Anisol Additional Bhowenerhand Shad Bhowenerhand Shad Bhowenerhand Shad Bhowenerhand Shad Bhowenerhand Shad Shadbart All Anisol Additional International Nasae Saddiga - K' vielediumar m		Daily Plans by Charatters Storas	Heurs Net Approved	Filters on all pages IsActive is True Add data fields here	Default State (S/L) PF State Account Code Page DF S Account Code Page GI S Account Code Performa Account Code Performa Project Scorecard PF On Curves GL On Curves PF On Ajay GK

2.2 DASHBOARD FILTERING

The dashboards in Explore have advanced filtering abilities to make viewing easier and more customized.

You can filter the information on your dashboards on four different levels:

Filter	Definition
Visual Level	Filters a single visual on a dashboard. You can select the date range, account codes, approvers, etc. that you want shown.
Page Level	Filters all the visuals on a single page. You can use this to filter by areas on the project, date range, executor, etc.
Report Level	Filters all pages in a report. You can use this to filter a report by project, date range, remaining MHrs, etc.
Drillthrough	Used to focus on one aspect of the project. Any other page or visual that contains this drillthrough value can be redirected to this drillthrough page for a more focused and up-close view.



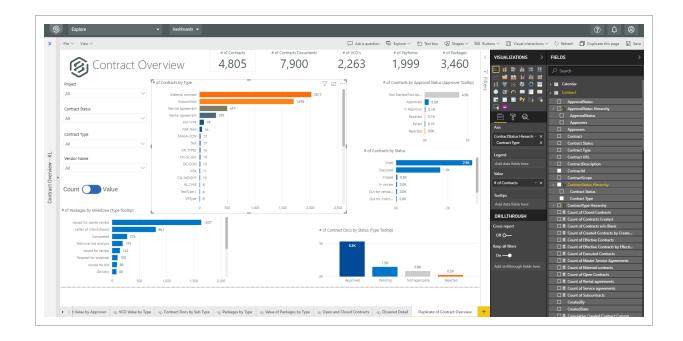
Drilling down on report data to the meta-data level, can assist in your analysis. Most of the visualizations on the dashboards display data at a summary level. Drilling down into the visualizations allows you to see the data at the detail level.

To enable us to view filtering and drill down data better, complete these preliminary steps.

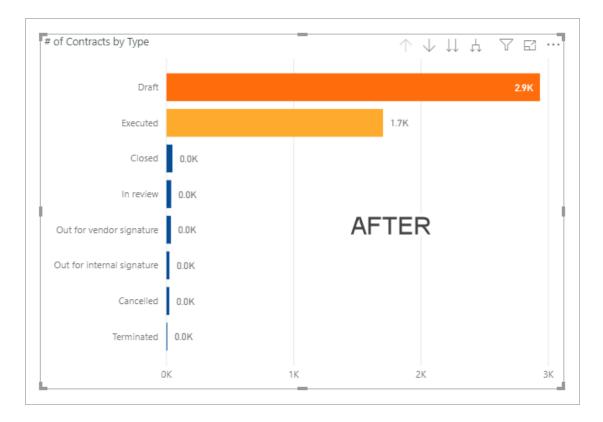
2.2 STEP BY STEP 1 – FILTER A DASHBOARD, PART 1

- 1. Navigate to the Contract Dashboard, and then select Edit Dashboard from the Context Menu (...) icon.
- 2. Save your new dashboard using File > Save As appending the Contract Dashboard file name with your initials.
- 3. Close the **Dashboards** and **Bookmarks** slide-out panels to give yourself more room to work.
- 4. Select a Project.
- 5. Select a Contract Status of All.
- 6. Select a Contract Type of All.
- 7. Select a Vendor Name of All.
- 8. Right-click on the Contract Overview tab, and then select Duplicate Page.
- 9. On the duplicate page, delete the following charts:
- # of Contracts by ERP Sync Status
- # of VCO's by Status
- # of Payforms by Request Status
- 10. By either:
 - Clicking the ellipses, and then selecting Remove, or
 - Clicking on the chart, and then pressing the Delete button on your keyboard
- 11. Expand the width of the Fields panel.
- 12. Expand the # Contracts by Type chart.

13. Click on each remaining chart to view Fields used.



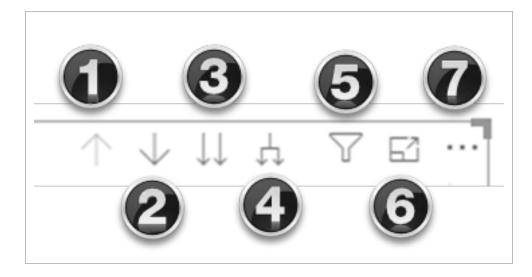
14. On the # Contract by Type chart, click the **Contracts** Field panel, and then add **Status Hierarchy > Contract Status**. Notice how the chart changes.



15. Specifically, with the field added, you now have greater ability to filter the data.

2.2.0.1 FILTERING OPTIONS

#	Filtering Option
1	Drill Up
2	Drill Down
3	Go to Next Level in the Hierarchy
4	Expand all Down one level in the Hierarchy
5	Filter
6	Focus Mode
7	More Options



Navigate to the dashboard that you just created and select **Edit dashboard** from the Context menu icon.

1		Edit dashboard
1	\otimes	Delete dashboard
:	Ø	Sharing
	\ominus	Remove sharing
		Move into folder
:	Ē	Move out of folder
1	~	Set as default
:	-	Print

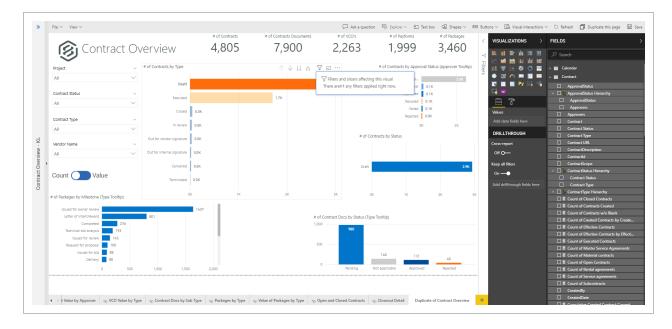
• Note the four types of filters:

Filter Type	Definition
1. Visual Level	Filters on an individual visual.
2. Page Level	Filters on every visual on the report page.
3. Report Level	Filters on all pages in the report.
4. Drillthrough	Filters on a single entity in the report.

NOTE For the remainder of this section, data will be represented by the **Number of Contracts**. Alternatively, by moving the toggle in the other direction, all data would be shown by **Contract Value**. Similar functioning toggles exist in other types of reports for ease in viewing data in an alternate format.

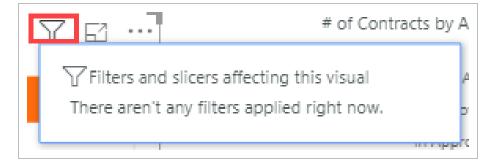


Having followed the previous steps, your screen should now look similar to this:

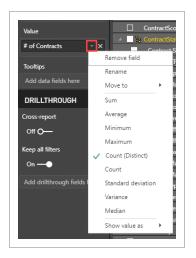


2.2 STEP BY STEP 2 – FILTER A DASHBOARD, PART 2

- 1. Open the **Filters** panel.
- 2. Click on the # of Contracts by Type stacked bar chart.
- 3. Click on the **Filters** icon and notice you have no filters applied right now.



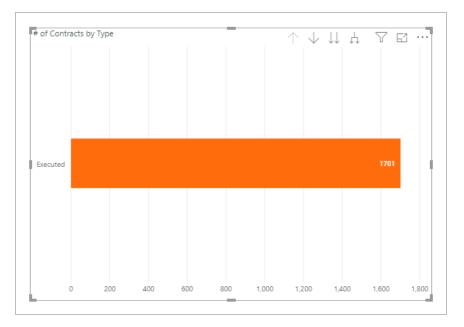
4. Under the Visualizations slide-out panel, click on the **# of Contracts** drop-down to view details of that filter.



5. On the Visual Filters, click on the **Contract Status** drop-down, select **Executed** to apply the filter.

is E	xecuted	0
Filt	er type 🛈	
Ba	asic filtering	•
λ)	
=	Select all	
	(Blank)	
	Cancelled	22
	Closed	47
	Draft	2934
\checkmark	Executed Am	1701
	In review 💟	37

Notice how this chart changes



- 6. Change the Contract Status to Select All.
- 7. Collapse the Contract Status filter.

Contract Status	Collapse
Filter type ①	

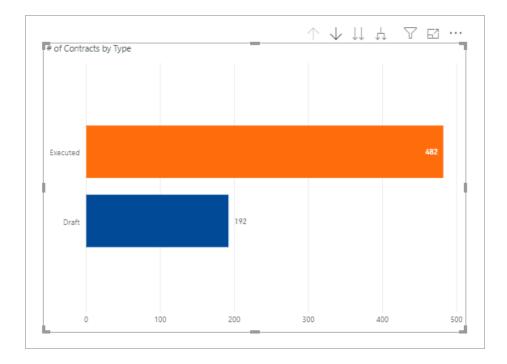
- 8. Under the filter Contract Type, select 2 options from your drop-down.
- 9. Within the chart, right-click and select Visual Table.

[‡] of Contracts by Type				$\uparrow \downarrow \downarrow$	ι ή	Y	63
Draft							1370
Executed				741			
Out for vendor signature	26						
In review	22						
Out for internal signature	16		Sho	w Next Level			
Cancelled	н		Expa	and to next le	evel		
Closed	6		Visu	al table		1	
Terminated	3		Grou		•		
	D	500		1,0	000		

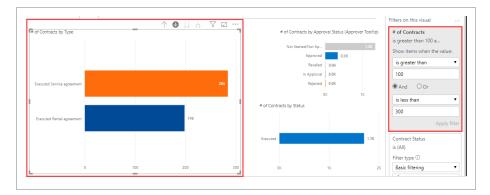
- The # of Contracts by Type chart now only appears, with the actual data for those two contract types shown.
- 10. Add a third Contract Type, and see how the chart and data changes again.
- 11. Click Back to Report.

Sack to report	# OF CONTRACTS	BY TYPE						
Draft								1370
Executed					741			
Out for vendor signature	26							
In review	22							
Out for internal signature	16							
Cancelled	11							
Closed	6							
Terminated	3							
	0	200	400	600	800	1,000	1,200	1,40
Contract Status	# of Contracts							
Draft	1370							
Executed	741							
Out for vendor signature	26							
In review	22							
Out for internal signature	16							
Cancelled	11							
Closed	6							
Terminated	3							

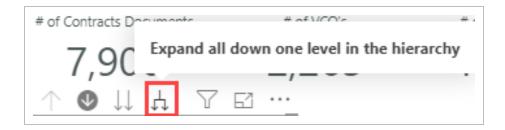
- 12. Close the Contract Type filter.
- 13. Click **File > Save** to save this dashboard.
- 14. Open the **# of Contracts** filter.
- 15. Show items that are greater then 100 and less than 300.
- 16. Click Apply Filter.
 - The newly filtered chart appears. In this case, Executed is greater than 300. Why do 482 Executed Contracts appear? Let's drill down further to find out



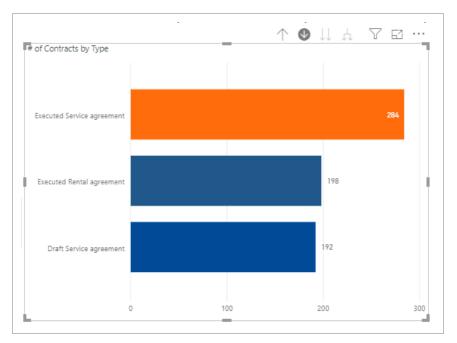
- 17. Click the **Drill down** icon.
- 18. Then click on the orange **Executed** row.
 - The chart changes to Executed Service Agreements and Executed Rental Agreements, both under 300



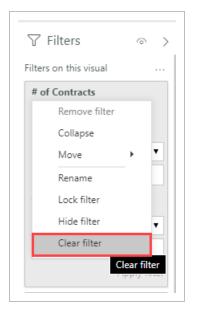
19. Click the Expand All Down One Level in the Hierarchy button.



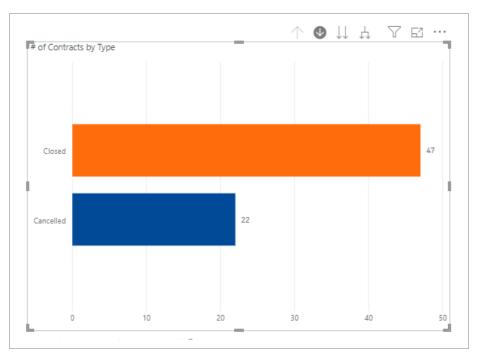
 Now the chart changes to all Executed Contract Types greater than 100 and less than 300



- 20. Right-click on the image and click **Drill up**.
- 21. Right-click on the # of Contracts Filter and select Clear filter.

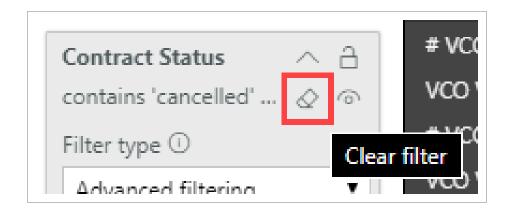


- 22. Under the Contract Status filter, change the drop down from Basic Filtering to Advanced filtering.
- 23. Under Show Items when the value > contains type in **cancelled or contains closed**.
- 24. Click Apply filter.



The chart now shows only Cancelled or Closed statuses

25. Click the Contract Status Clear filter icon.

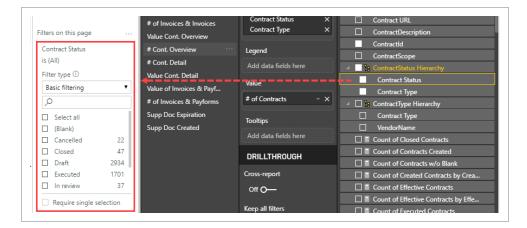


26. Click File > Save.

2.2.0.2 PAGE FILTERING

Two options of page filtering exist in Explore. The first is filtering on just this page (tab.)

From the Contract Fields panel, drag the checked Contract Status field onto Filters on this Page.



Select **Closed** from the Basic Filtering drop-down list.

- # of VCO's # of Pavform # of Packad 𝛛 Filters 47 79 22 22 3,460 Contract Overview ● 11 ↓ 7 ⊡ … O And Or E of Contracts by Typ # of Contracts by Approval Status (A Project All contains closed Contract Statu Contract Type Contract Type is (All All # of Contracts by Statu: Add data fields here AI Filters on this page Count 🕥 Value Contract Status is Closed Type Too Filter type 🕕 Basic filtering # of Contract Docs by Status (Type Tooltij Q Select al (Blank) Cancelled 22 47 Draft 2934 Executed 1701 37 In review Require single selection
- Now all reports on this page only show contracts that have been Closed

Select the **Remove Filter X** icon.

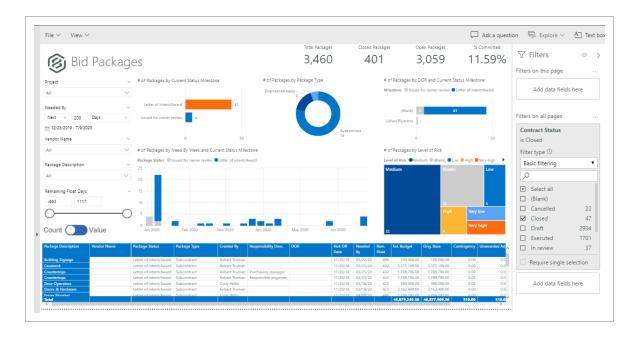
2.2.0.3 FILTER ON ALL PAGES

The second type of page filter applies a filter across all pages (tabs).

Drag the same **Contract > Contract Status** data field onto Filters On All Pages.

Filters on this page	# of Invoices & Invoices Value Cont. Overview	Contract Type X	ContractDescription
Add data fields here	# Cont. Overview	Legend	ContractId ContractScope
	# Cont. Detail Value Cont. Detail	Add data fields here	ContractStatus Hierarchy Contract Status
Filters on all pages	Value of Invoices & Payf	Value # of Contracts X	Contract Status Contract Type
Add data fields heContract S	atus of Invoices & Payforms		ContractType Hierarchy Contract Type
	Supp Doc Created	Tooltips	VendorName

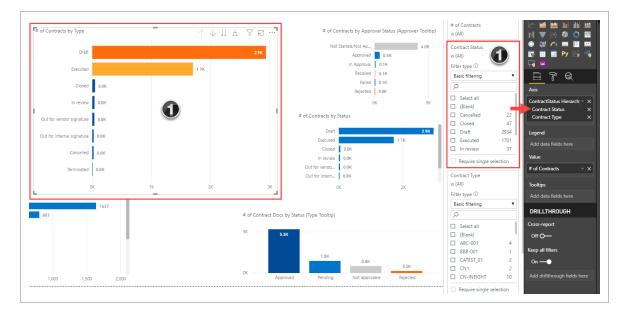
Again choose the option of **Closed** from the drop-down list. Nothing will look different on this tab, only when you select another tab will the change be obvious. For example, this is the Bid Packages tab, where all charts only represent Closed projects.



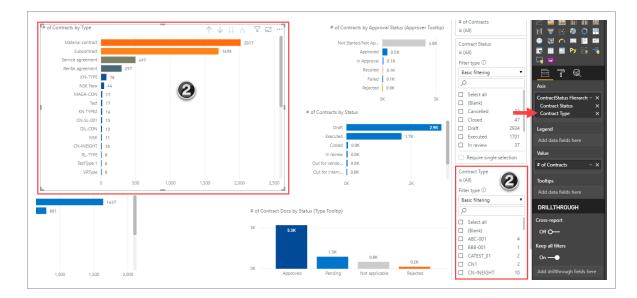
2.2.0.4 GO TO THE NEXT LEVEL IN THE HIERARCHY

The final icon when filtering is the **Go to Next level in the Hierarchy** icon. When in a report and this icon is clicked, the table filters down to the next level in the Hierarchy as shown in this Visualization:

Initially, data will be represented by Contract Status.



When the **Go to Next level in the Hierarchy** icon is selected, the chart will change to # of Contracts by Contract Type.

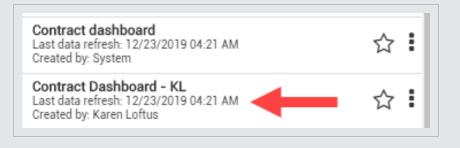


TIP

Throughout the Explore dashboard, there are multiple instances where you can hover over a data-point to obtain a Type Tooltip pop-up showing drill down data.

Contract Type		# of Dack	ages by Type	
All	\sim			Permanent mate
Vendor Name				
All	~	7		
		0		
	-lus			
Count 🕖 Va	alue	115		
		Engineer		49
# of Packages by Milestone	(Type Tooltip)			Profession
Issued for owner review	v			
Letter of intent/Award		68		16
Completed	276			
Completed				
Technical bid analysis	s 193			
Technical bid analysis	v 143			
Technical bid analysi Issued for review	v 143 il 100			
Technical bid analysis Issued for review Request for proposa	v 143 il 100 d 88			

NOTE Last Data Refresh: A time-stamp in the dashboard list indicates when the data in that dashboard was last refreshed. This helps minimize the confusion about why some records may or may not be present in your dashboard.







EXPLORE MOBILE

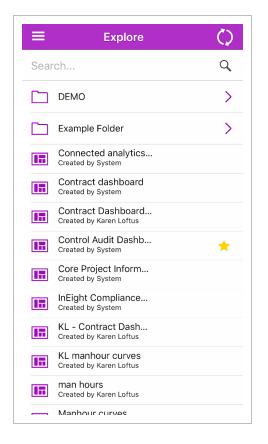
InEight Inc. | Release 24.9

3.1 MOBILE APPLICATION

The Explore mobile application gives you access to your reports and the ability to view dashboards from a mobile device. This added convenience lets you analyze reporting data from anywhere, which allows you to make informed and timely decisions.

After you log in to the application, the screen opens to show an alphabetical listing of the dashboards.

• All folders and favorites added in the web application also show in Explore mobile.



The following step-by-step shows how to pull up the Explore mobile dashboard.

3.1 STEP BY STEP 1 – PULL UP A DASHBOARD

- 1. Tap the Refresh icon to sync any changes you made in the web application.
- 2. Scroll through the list of dashboards and folders or use the Search function at the top to find the dashboard you need.

- 3. Tap a dashboard to open it.
 - The screen will turn from portrait to landscape.

3.1.1 MANIPULATE A DASHBOARD

In the dashboard, you can refresh the screen, zoom in and out, select different tabs, and modify filters to personalize your view.

<			С	ore Pro	jec	t Info	orm	ation			(i	
🛞 Pr	oject D	etails				Active Pr 4,9			Projects	Total Proj 5,01		Active Emp	oloyees K
Org Name, Projec All roject Start &		Status V All		\sim		Inactive Em			nployees 9K Project	Assigned Equ 541		Assigned	
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! RandonData.unique	!-New Project eName(7) nnns-! Rando :Name(4)-! RandonDat :Name(5) sds-! Randon	a.uniqueName(Pacific Ocean	A	lantic Ocean		8
000001111100000nd	tesf-NONE245 usdusdusdsdisdisidsid-'	Test Project_Edit							Bing	SOUTHA © © 2020 Tom Tom © 2	0		ndian Ocean Tems
Project ID	External Project ID	Project Name	Project Status	Org Name	Start Date	End Date	Duration (Days)	Notes			Country	Region	City 🔨
!!Report testing!!!!! RandomData.uniq µeName(7) nnns	External project ID 991456454124123	New Project ![RandomData.uniqueName (7)]	Closed Active	dec org_123_90_890 SA1000-Kiewit	11/3/2019 2/3/2020	12/31/2022		Project;ldssaddsa 9876540-98765p;					Phoe
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You cannot share or edit dashboards in the mobile application.

- Tap the **Information** icon to show additional information about the dashboard, such as the owner of the dashboard and last data refresh time.
- Tap the **ellipses**, and then the **Favorite** icon to make the dashboard a favorite. This also makes the dashboard a favorite in the web application.
- Tap the **Menu** icon. You can toggle between the dashboard and your account information or sign out of the mobile application.

NOTE The Sharing icons are visible but can only be activated in the web application.