



# **Progress Syncing**

## **Administrator Guide**

## Changelog

This changelog contains only significant or other notable changes to the document revision. Editorial or minor changes that do not affect the context of the document are not included in the changelog.

Rev	Date	Description
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## Introduction

This guide is intended to be used by system administrators to understand syncing of Progress data between mobile devices and the web and aid users in diagnosing syncing issues.

## Mobile sync scenarios

When users on different devices and with different roles try to sync, their syncs may have conflicting data. The following three general scenarios determine which data is retained or removed:

- If a user with the executor role syncs during the execution phase, existing data in the web database is deleted, and the latest mobile data is retained.
- If a user with the approver role syncs during the execution or awaiting approval phases, existing data in the web database will merge with the latest mobile data. Where there are conflicts, mobile data will overwrite web data.
- If a daily plan is graduated to a later phase on the web, and the plan is synced from mobile in an earlier phase, the web data will overwrite the mobile data and be downloaded to the mobile device.

## When and where syncing happens

There are several occasions when syncing happens at various locations in the application. The following sections go through when and which data gets synced in the applications.

### Project list

#### Initial sync

When a user first selects a project from the list, all the following data is synced in this order:

1. Project daily plan configuration is downloaded.
2. Project copy plan configuration is downloaded.
3. All images are uploaded.
4. All the project's daily plans are downloaded.
5. Master data is downloaded.
6. Un-synced master data is downloaded.

#### Refresh sync

When a user manually syncs the project list by using the sync button or pulling down on the page, all data that is different from the previous sync time is downloaded.

## Plan list

### Create or copy

When a user creates or copies a plan that has a work plan associated, all associated components and Document integration packages for the work plans are automatically downloaded.

### Refresh sync

When a user manually syncs the plan list by using the sync button or pulling down on the page, all project data that is different from the previous sync time is downloaded. The following data is synced in this order:

1. All images are uploaded.
2. All pending plans are downloaded.
3. UoM list is updated from the web.
4. Level list is updated from the web.
5. Project daily plan configuration is downloaded.

## Plan details

### Refresh sync

When a user manually syncs a plan by using the sync button or submitting the plan, all plan data that is different from the previous sync time is downloaded. All images from the plan are uploaded and pending changes are synced. If there are no pending changes, the latest changes from the web are downloaded.

**NOTE:**

Syncing an individual plan from the details page does not download master data, but only syncs the selected plan.

If you manually sync from the plan details page and go back to the plan list, other plans' pending changes are also synced.

### Waiting for approval

When you move a plan to waiting for approval, the approver will be notified to sync with options to sync later or sync now. If the approver chooses to sync now, all un-synced master data and daily plans are downloaded.

## Language change

If you change the language and sync a plan, master data will be downloaded.

## Approval-related validations

When you approve a daily plan, validations are performed on both the mobile device and on the web server, based on project settings.

### Mobile validations

After approval, the following are checked for on the mobile device:

- At least one task or work order, or one resource exists
- Inactive and temporary tasks (based on project settings)
- Inactive and temporary resources (based on project settings)
- Signoff (based on project settings)
- Inactive and temporary components
- Whether components' install quantity exceeds forecast quantity
- Closed work orders
- Tasks with As-built set to Quantities, with hours

### Web server validations

After approval, the submitted plan is checked on the web server for whether it has any of the following:

#### Errors

- Inactive components
- Inactive employees
- Inactive equipment
- Inactive cost items
- Negative hours (based on project settings)
- Temporary tasks (based on project settings)

#### Warnings

- Inactive shifts
- Inactive note tags
- Inactive reason codes
- Inactive employee payroll indicators
- Inactive premiums