# QUICK GUIDE
# MOBILE OVERVIEW
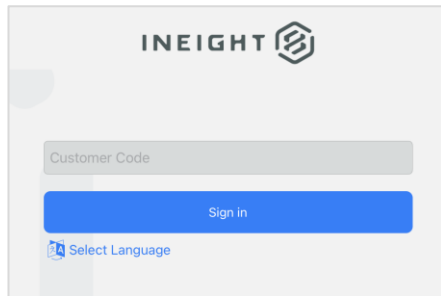
InEight® PROGRESS

## ⬡ INSTALL & SIGN IN

1. Download the **Progress Mobile app** to your device.

   InEight Progress
   InEight Inc
   OPEN
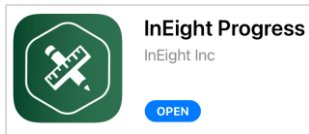
2. Sign in using the Customer Code for your organization.

   INEIGHT

   Customer Code

   **Sign in**

   Select Language

   • You can find your Customer Code in the URL of your InEight web application.

   Daily Plan  ×  +
   ← → C  🔒 bayhill-na.ds.ineight.com/AppPlan/D
   ☰  ⌂  Steel Structure Training Job 2 | 1...
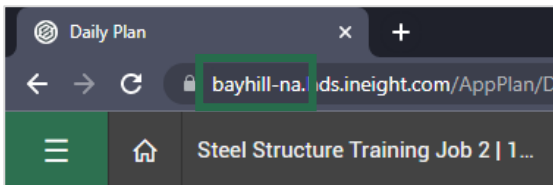
## ⬡ SET UP PROJECT ACCESS

1. Open Suite administration > **Roles and permissions**.

   SUITE ADMINISTRATION
   User management
   Roles and permissions
   Application integrations
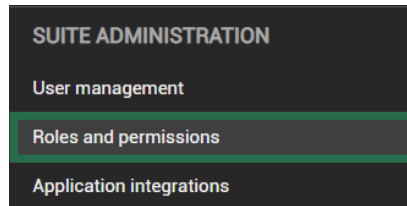
2. Select your role and click the **Edit role** ✎ icon.

3. Scroll to the **Progress** section.

a) If you are an **executor**, select the following:

   Daily planning                    ☐ Select all
   ☑ ⊚ View daily plans assigned to me
      ☑ ⊕ Add daily plans assigned to me
      ☑ ✎ Edit daily plans assigned to me
      ☑ ⊗ Delete daily plans assigned to me ⚠
      ☐ Approve daily plan man hours to me
      ☐ Approve daily plan quantities to me
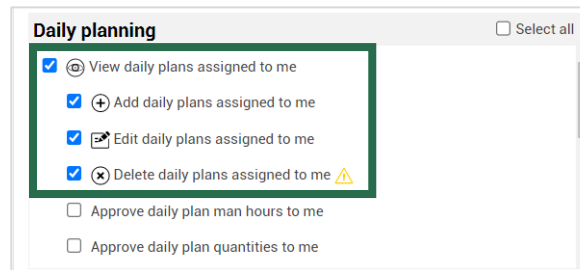
b) If you are an **approver**, select the following:

   Daily planning                    ☐ Select all
   ☑ ⊚ View daily plans assigned to me
      ☑ ⊕ Add daily plans assigned to me
      ☑ ✎ Edit daily plans assigned to me
      ☑ ⊗ Delete daily plans assigned to me ⚠
      ☑ Approve daily plan man hours to me
      ☑ Approve daily plan quantities to me
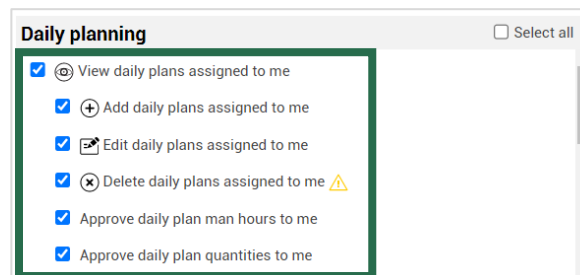
4. Click **Save**.

5. Open Suite administration > **User management**.

   SUITE ADMINISTRATION
   User management
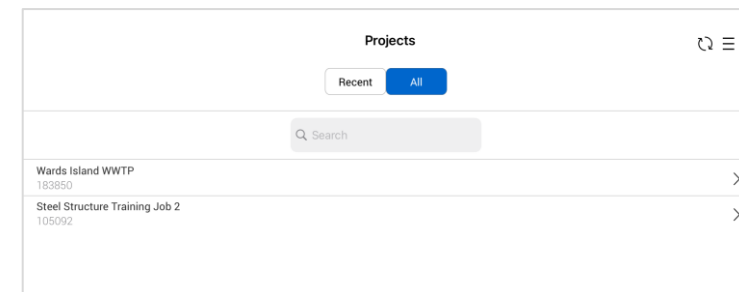   Roles and permissions
   Application integrations
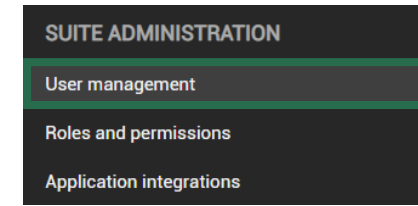
6. Select a user and click **Edit user** ✎ icon.

7. Open the **Roles** tab.

8. Click **Add role**.

9. Select the correct **role** and **project** from the drop-down menus.

   * Role                          * Organization/Project
   Foreman            ▼            Wards Island WWTP | 183850   ✕ ▼

   **NOTE:** A role must be assigned at the **project level** for projects to appear in the Progress Mobile app. Roles only assigned at the organization level will not appear in Progress Mobile.

10. Click **Save**.

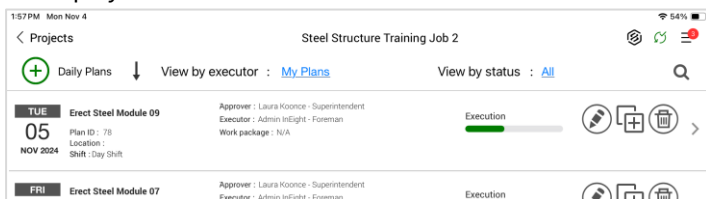   • On the Progress Mobile app, you can now see your assigned projects.

   Projects                         ↻ ☰
   Recent  **All**
   🔍 Search

   Wards Island WWTP                          ›
   183850
   Steel Structure Training Job 2             ›
   105092

## ⬡ TROUBLESHOOTING

1. In the Progress Mobile app, open a project. Recent daily plans that have been submitted to Execution will be displayed.
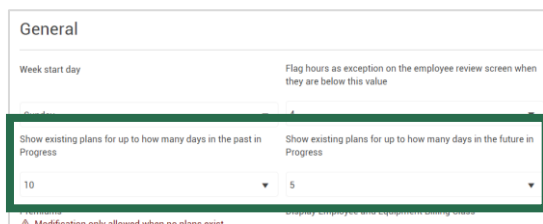


2. If you don't see a daily plan, check the following:

   ✓ Has the plan been submitted to **execution**?

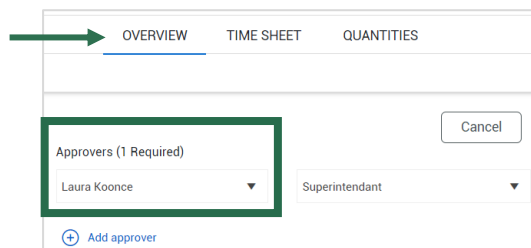   *Open the daily plan on Progress Web and* **Submit** *to execution.*

   ✓ What is the **date** of the daily plan?

   *Check Date Settings:* Project Settings > Progress > General

   

   ✓ Who is the assigned **executor/approver**?

   *Open the daily plan on Progress Web and check the executor and/or approver on the Overview tab.*

   

✓ Are you assigned to this **project**?
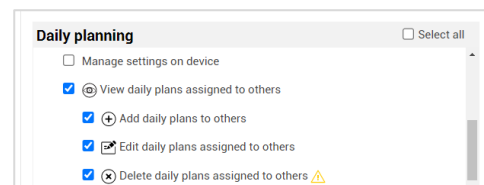
   *See*: SET UP PROJECT ACCESS

✓ Do you have permission to view daily plans **assigned to others**?

   *If you are attempting to view a daily plan that is assigned to another user, you may need to switch to a new executor under* **My Plans**.

   

*Configure permissions to access daily plans assigned to others:* Suite administration > Roles and permissions > Progress > Daily planning



## ⬡ SYNCING

To sync Progress Mobile with Progress Web, click the **Sync** [icon] icon.

You can use Progress Mobile online or offline. An Internet connection is only required to perform a sync.

> **Note:** Different data is synced from the Projects List, Plans List, and Plan Details pages. Syncing an individual plan from the details page does not download Master Data, but only syncs the selected plan.

**SYNC ICONS:**

| Icon | Description | Icon | Description |
|------|-------------|------|-------------|
| 🔄 | App is online but has not been synced. | ◎ | App is currently syncing. |
| ⊘ | App is offline. | 🔄 | Latest sync was successful. |
| ⚠ | Unsynced changes. | ✖ | Latest sync was unsuccessful. |

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