



InEight

SCHEDULE

Learner's Guide



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TAKING NOTES IN THIS DOCUMENT

This document is a PDF interactive document. It allows you to take live notes, then save it as you would in a normal document. Below are the step to begin this process.

At the top of the document are the PDF editing tools. For the use of the class, you will focus on the writing tool.

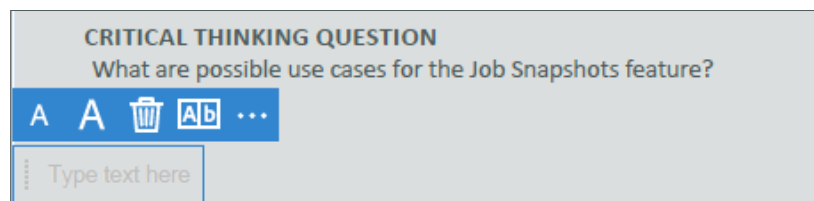
1. Select the writing tool.



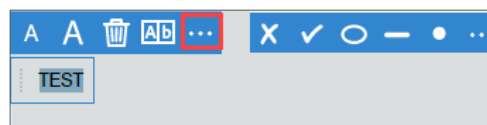
2. Now select the Add Text tool.



3. Scroll and select the area where you want to begin your notes. Begin typing.



4. The text box can be moved anywhere on the page or copied/pasted in the document.
5. The editor can expand for more options on your text as well. By selecting the eclipse, the options will expand for more choices.



6. Use the up/down document arrows or the NEXT button to forward through the document.
7. To save this document with your notes, select File > Save As...



Additional information for the lessons covered in this course can be found under:

[LEARN.INEIGHT.COM /SCHEDULE](https://www.ineight.com/schedule)

We encourage you to follow along on this site, while in class.

These materials are provided to you by the InEight Learning and Development Team. For us to continue providing you the most effective training, we ask that you provide your feedback to a short survey at the end of the course:

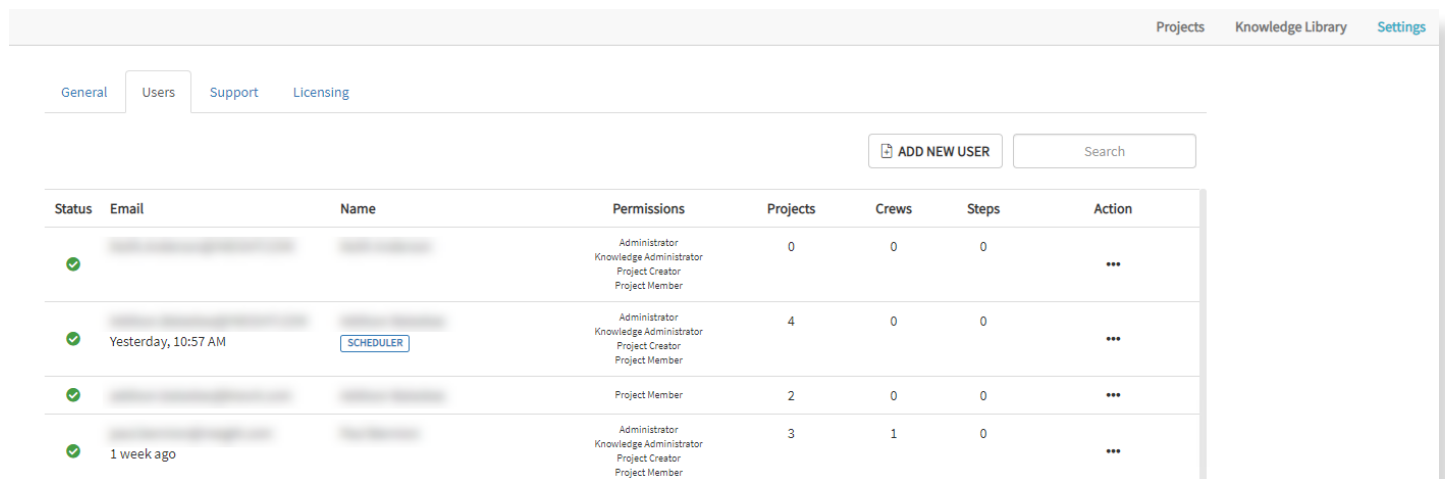
<https://www.surveymonkey.com/r/XLPFRR9>

Thank you in advance for your feedback.

ACCESS, USERS, & PERMISSIONS

LESSON ONE

OBJECTIVES: In this lesson, you will learn how to access InEight Schedule via a web browser and set up new user accounts .



Status	Email	Name	Permissions	Projects	Crews	Steps	Action
✓			Administrator Knowledge Administrator Project Creator Project Member	0	0	0	...
✓	Yesterday, 10:57 AM	SCHEDULER	Administrator Knowledge Administrator Project Creator Project Member	4	0	0	...
✓			Project Member	2	0	0	...
✓	1 week ago		Administrator Knowledge Administrator Project Creator Project Member	3	1	0	...

PROJECT CREATOR

The Project Creator role is typically a planner or scheduler at an organization. The user can create projects and has full rights to their projects, including the ability to:

- Create / delete their own projects
- Use Knowledge Library and Smart Planning to inherit projects and subnets
- Use Productivity Rates
- Assign contributors to project for markup
- Manage markup process
- Manage Review and consolidation process
- Contribute to other projects when assigned as a project contributor

PROJECT MEMBER

The Project Member role serves as a contributor to projects assigned to them by the administrator or project creator. The Project Member role can encompass a wide range of organizational roles, including but not limited to Project Managers, Sponsors, Supervisors, Foreman, and/or Subject Matter Experts (SME's). You can also assign external contributors to an org role.

ADMINISTRATOR

The Administrator role in Schedule can also be considered the Super User. This role has full rights to everything



in the customer instance of Schedule. The typical person in a company that will have these permissions is a senior planner who is a super user or a Planning/Scheduling leadership role.

In addition to the permissions described for the Project Creator and Contributor Role the Administrator can do the following:

- Manage the Knowledge Library (Projects, Productivity Rates, Knowledge Tags, Risks)
- Create, delete, and modify any project
- Access to the System Settings to add users to the instance

KNOWLEDGE LIBRARY ADMINISTRATOR

The Knowledge Library Administrator role is primarily responsible for creating and updating Knowledge Library tags, projects, deliverable rates, and Register Items.



KNOWLEDGE LIBRARY CPM SCHEDULES

LESSON TWO

OBJECTIVES: In this lesson, you will navigate to the Knowledge Library and observe how to set up basic CPM schedules.

KNOWLEDGE LIBRARY

The Knowledge Library is where the Master Data for Schedule is stored. Knowledge Library CPM Schedules include historical or template projects that can be leveraged for rapidly creating new plans and benchmarking plans. This information will be globally accessible across the system. Additionally, the data stored here also aids in driving the Schedule Inference Engine.

[CPM Schedules](#)[Activity Productivity Rates](#)[Knowledge Tags](#)[Register](#)[Resources](#)[Machine Learning](#)

CPM SCHEDULE

Critical Path Method, or CPM, are the schedule activities with the longest path to completion.

ACTIVITY PRODUCTION RATES

Productivity rates allow schedulers to establish productivity factors for activities and thus scale durations accordingly.

KNOWLEDGE TAGS

Knowledge Tags connect the data between the Knowledge Library, Projects, and Activities.

REGISTER

The Project Register houses all events pertaining to the project. These events are used to notify schedulers of potential project risks, opportunities, issues, changes, and ideas.

RESOURCES

Administrators will establish the base pool of resources for the organization. Once set up, schedulers can pull these into projects for use with the resource management functionality and analytics.

MACHINE LEARNING

InEight Schedule Machine Learning allows Inference Engine suggestions to be automatically tuned and calibrated by the selections you choose.

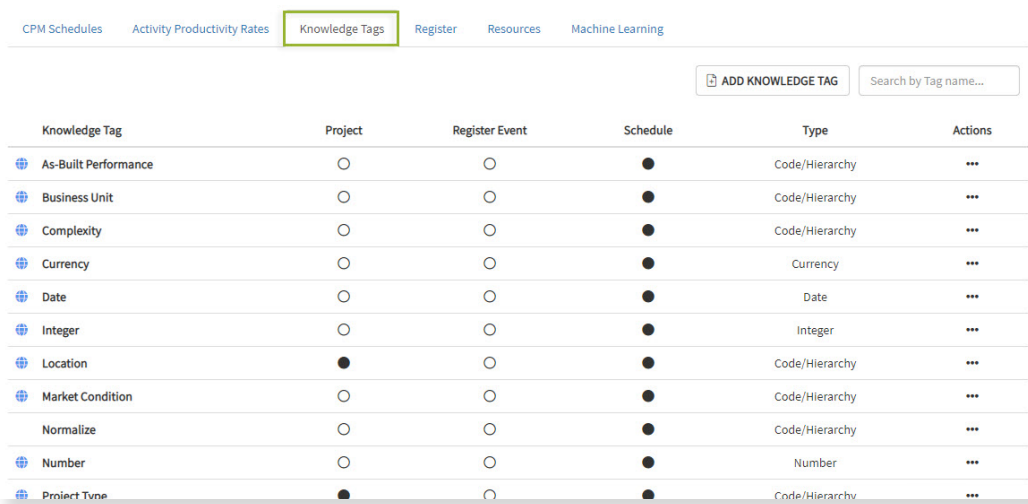
KNOWLEDGE LIBRARY TAGS

LESSON THREE

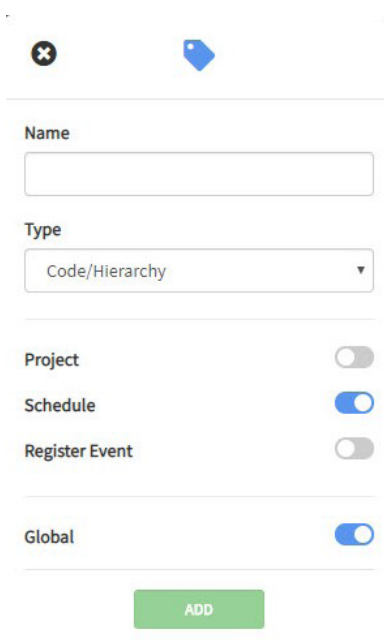
OBJECTIVES: In this lesson, you will observe how to set up Knowledge Library tags for your project.

KNOWLEDGE TAGS

Knowledge Tags connect the data between the Knowledge Library, Projects, and Activities .



Knowledge Tag	Project	Register Event	Schedule	Type	Actions
As-Built Performance	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Code/Hierarchy	...
Business Unit	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Code/Hierarchy	...
Complexity	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Code/Hierarchy	...
Currency	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Currency	...
Date	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Date	...
Integer	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Integer	...
Location	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Code/Hierarchy	...
Market Condition	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Code/Hierarchy	...
Normalize	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Code/Hierarchy	...
Number	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Number	...
Project Type	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Code/Hierarchy	...



Name

Type

Code/Hierarchy

Project

Schedule

Register Event

Global

ADD

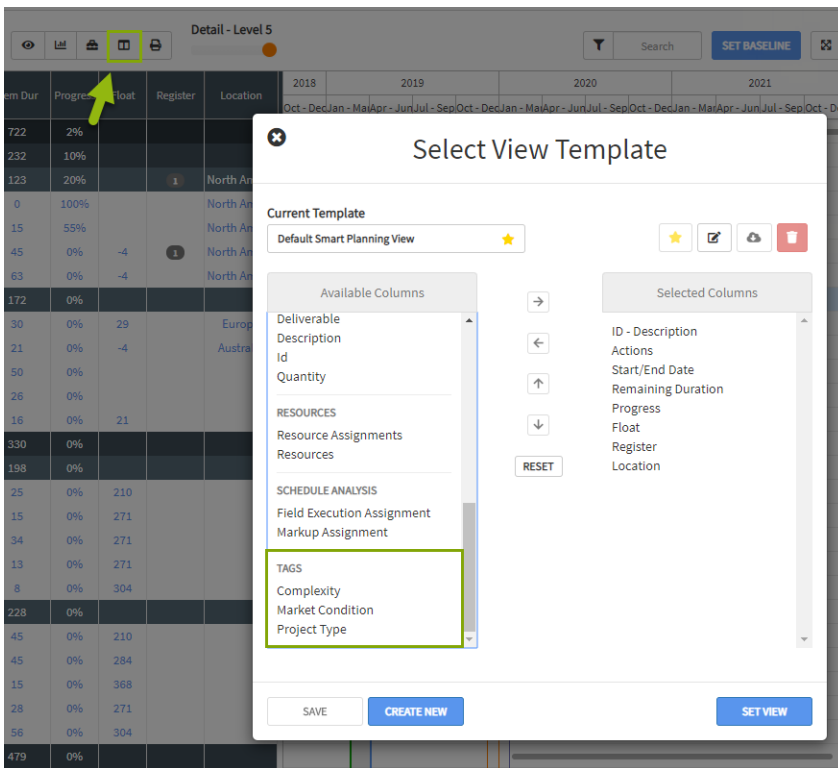
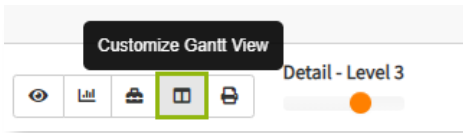
Assigning Knowledge Tags to planning packages and activities aid in associating projects of similar scope, cost, duration, location, discipline etc. for Schedule to generate suggestions and benchmarks.

Knowledge Tags will appear in the Iris based on what is set up in the Knowledge Library & the Project Configuration Knowledge Tags Register. Some tags have inherited values. These are rolled down from a superior level .

Note: Knowledge Tags in the Knowledge Library are accessible globally, while Knowledge Tags at the project level are only available in that project.

Note: The process of associating Knowledge Tags to activities is fundamentally the same for planning packages.

From your Gantt Chart, you can view and filter your assigned Knowledge Tags. Assign additional tags with the Customize Gantt View icon.



PROJECT CONTRIBUTORS

LESSON FOUR

OBJECTIVES: In this lesson, you will learn to add users to your project as Contributors.

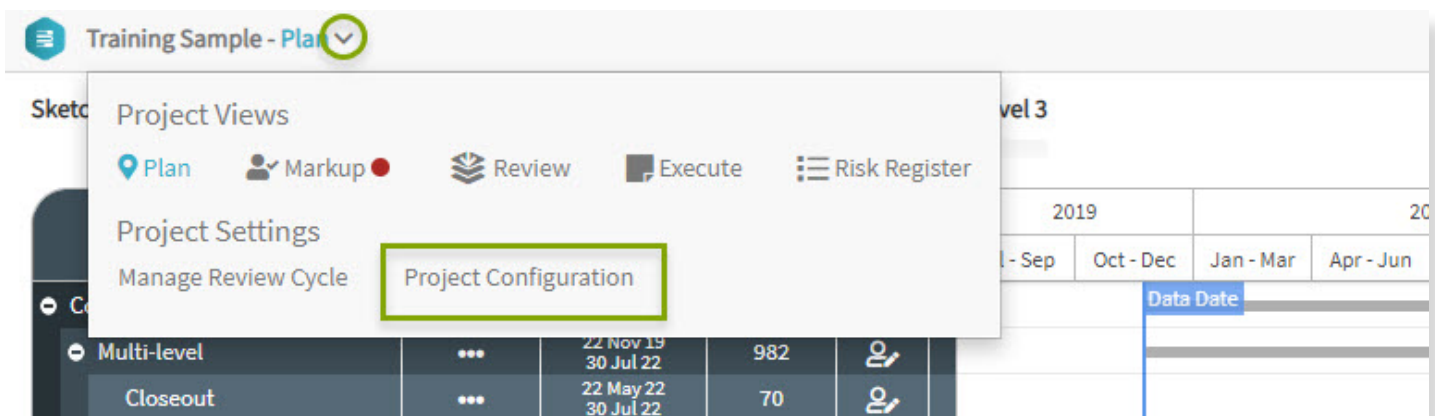
PROJECT CONTRIBUTORS

Project Contributors are users assigned to the project and are specific to each project. Users can be assigned different contributor roles project to project:

- Markup Role - grants access to markup & review cycles on a project. Toggling this on will allow this user to be assigned to activities for markup.
- Field Execution Planner Role - grants access to the Short Interval Planning (SIP) section of InEight Schedule. Users in this role can be assigned to activities for field execution planning.
- Scheduler Role - has all access and privileges of the Markup & Field Execution Planner roles. Additionally, schedulers can adjust items in the Planning view: details in the Iris, logic in the Gantt chart, resources, etc.

PROJECT CONFIGURATION SETTINGS

On the Contributors tab, both external and internal users can be added to the project. Existing users can be removed or have their access level altered.



LEARNER ACTIVITY: Your employees have been added to Schedule as Users. Select the project they are going to be contributors on and add them with the Scheduler Role.

SCHEDULE OVERVIEW & NAVIGATION

LESSON FIVE

OBJECTIVES: In this lesson, you will (log in to InEight Schedule and) navigate the different views, menus, and settings.

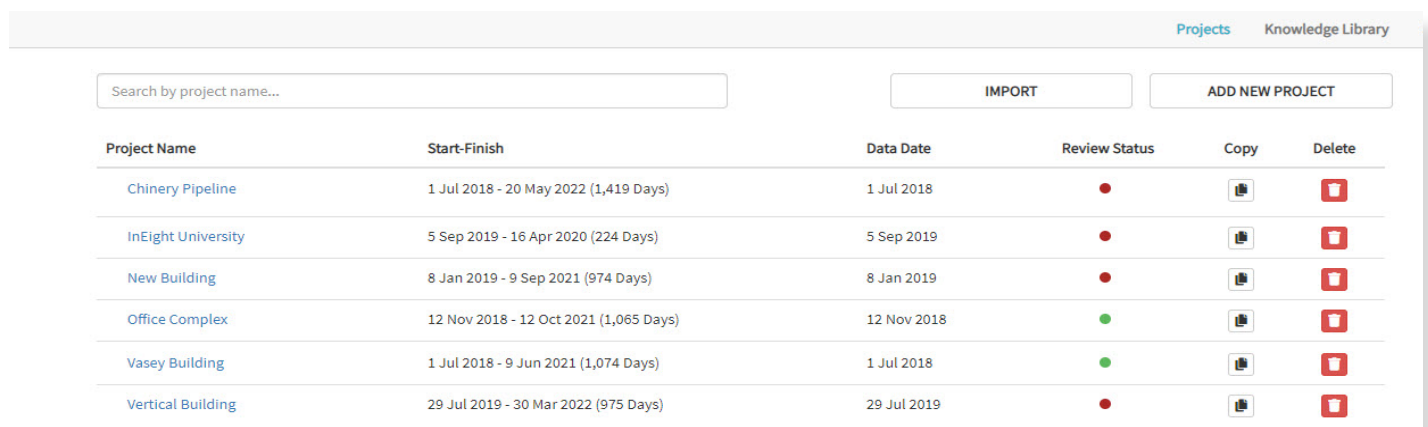
WEB-BASED ACCESS

- North American users can access InEight Schedule at my.basisplanning.com
- Global users can access InEight Schedule at apac.basisplanning.com

Note: Use Google Chrome for full functionality.

PROJECTS REGISTER

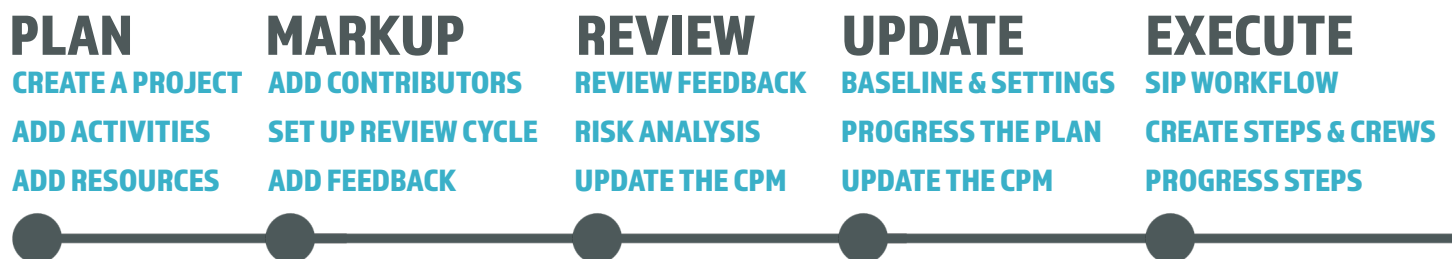
Create and manage your projects from the Project Register.



Project Name	Start-Finish	Data Date	Review Status	Copy	Delete
Chinery Pipeline	1 Jul 2018 - 20 May 2022 (1,419 Days)	1 Jul 2018	●		
InEight University	5 Sep 2019 - 16 Apr 2020 (224 Days)	5 Sep 2019	●		
New Building	8 Jan 2019 - 9 Sep 2021 (974 Days)	8 Jan 2019	●		
Office Complex	12 Nov 2018 - 12 Oct 2021 (1,065 Days)	12 Nov 2018	●		
Vasey Building	1 Jul 2018 - 9 Jun 2021 (1,074 Days)	1 Jul 2018	●		
Vertical Building	29 Jul 2019 - 30 Mar 2022 (975 Days)	29 Jul 2019	●		

SCHEDULE WORKFLOW

Applied, realistic workflows will be iterative. However, this training will focus on providing you the information needed to create a schedule and bring it to execution- which changes today's workflow to look more like this -



CREATING A PROJECT


LESSON SIX



OBJECTIVES: In this lesson, you will observe how to create a project.

Who can create a project? Project Creators only. Project Administrators can manage roles from the Users tab of the Organizational Settings.

DETAILS


Details Context Outline

Project Name

Start Date

- OR -

End Date

Estimated Duration

Calendar Working Days

- Sunday
- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday

Include Cost Estimation

Estimated Cost (In Millions)

\$

PREVIOUS
NEXT



CONTEXT

✕
Details — **Context** — Outline

Add some context to your project to help Schedule make more informed suggestions.

Knowledge Tag

- Location
- Project Type
- Region (North America)

PREVIOUS
NEXT

OUTLINE

✕
Details — Context — **Outline**

Fast track the building of your plan by starting with an outline structure.

Knowledge Library Project

NONE ▼

PREVIOUS
CREATE

Need help creating or importing a project? Click on the link below to watch a video - **[LEARN.INEIGHT.COM/SCHEDULE > CREATE A PROJECT](https://learn.ineight.com/schedule/create-a-project)**

SKETCH MODE

LESSON SEVEN



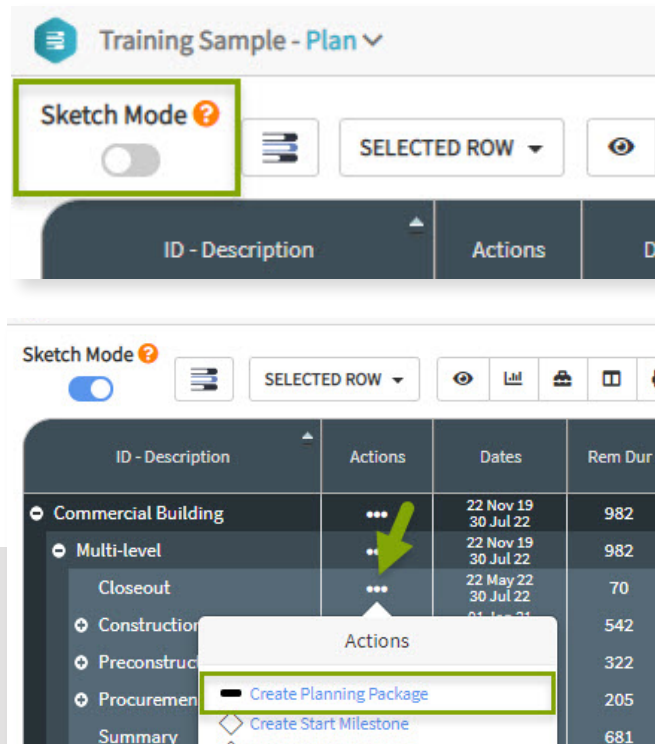
OBJECTIVES: In this lesson, you will create a planning package in Sketch Mode.

Once created, you will view your project from the Plan View where you can build or import planning packages.

PLANNING PACKAGES

Planning packages are Work Breakdown Structure (WBS) elements which are a hierarchal summary of activities, groupings of activities, milestones, or sub-packages that make up the hierarchal project structure.

Note that if an outline was selected during project creation, associated planning packages are automatically imported from the Knowledge Library.



SKETCH MODE

Sketch Mode collapses project details to offer a traditional or “sketched out” view of your project. This high-level view makes it easy to carry your plan forward into a full schedule.

Note: Whichever planning package the actions icon is selected from, the new planning package will be created as a subordinate.

Need help with Sketch Mode? Click on the link - [LEARN.INEIGHT.COM](https://www.ineight.com) > **HIGH LEVEL PLANNING**

DISCUSSION QUESTION: Reflecting on your past/current projects, when would Sketch Mode most benefit your workflow?

LEARNER ACTIVITY: In Sketch Mode, create a planning package for the training project. (I.e. Pre-construction, Construction, or Closeout)



CRITICAL THINKING QUESTION: You've handed off the concrete schedule to your colleague, Dylan, who's new to scheduling. He's asked you to look at the plan before he continues scheduling. You notice that he's created three planning packages and started adding activities down to single day activities.

What feedback should you give Dylan?

- a. Great job – this will help immensely when we're in execution.
- b. Dial back the detailing – let's hold off on getting down to that level of planning.



PLANNING PACKAGES

LESSON EIGHT



OBJECTIVES: In this lesson, you will create sub-packages using the Detail Out function and subnets.

Aside from Sketch Mode, you can create planning packages using either the Detail Out function or by subnets connected to the Knowledge Library.

DETAIL OUT FUNCTION

The Detail Out function allows you to create activities or sub-packages in bulk.

SUBNETS

A sequence of planning packages and/or activities that can be merged from the Knowledge Library to your current project.

DELIVERABLES

Example: Tons of steel, number of documents in engineering.

Project WBS summary levels can be assigned with deliverables, to assist Schedule in making recommendations for task duration.

BENCHMARKING

Benchmarking is used to validate a schedule's duration and productivity values by comparing them to relevant historical data, specifically as-built information captured from past jobs in Schedule.

LEARNER ACTIVITY: Create two to three sub-packages for the planning package created in the previous lesson and assign deliverables and benchmarking each of your sub-packages.



Want to learn more? Click on the link below to watch a video -

LEARN.INEIGHT.COM > DELIVERABLES

CREATE ACTIVITIES

LESSON NINE

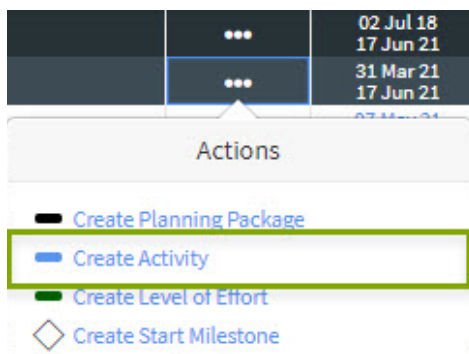


OBJECTIVES: In this lesson, you will create activities from scratch and via subnets. Then, you will assign logic, durations, knowledge tags, and benchmarks to activities.

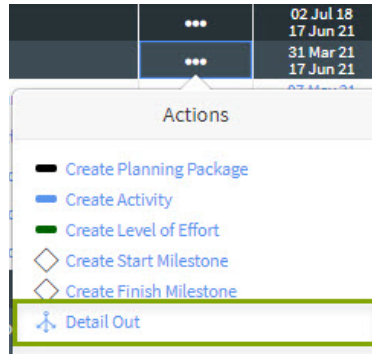
Like planning packages, there are several ways to create an activity:

- Individually from scratch
- In bulk- using the Detail Out function
- From a subnet

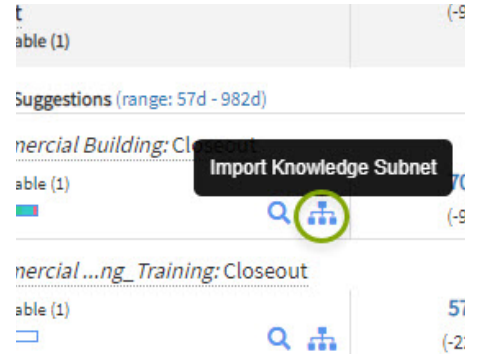
FROM SCRATCH



USING THE DETAIL OUT FUNCTION



OR FROM A SUBNET



Note: When creating activities via subnets, you will have the opportunity to preview the merged subnet before finalizing the import.

Like Planning Package Subnets, Activity Subnets are a sequence of activities that can be merged from the Knowledge Library to your current project.

LEARNER ACTIVITY: Using one of the three methods above, create activities for the training project.

Need help creating activities? Click on the link below to watch a video -

[LEARN.INEIGHT.COM/SCHEDULE](https://learn.ineight.com/schedule) > CREATE ACTIVITIES

DETAIL ACTIVITIES

LESSON TEN



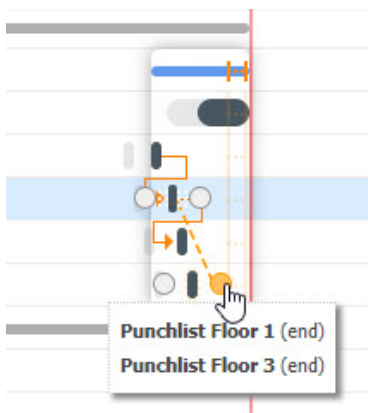
OBJECTIVES: In this lesson, you will assign logic and knowledge tags to your activities.

LOGIC

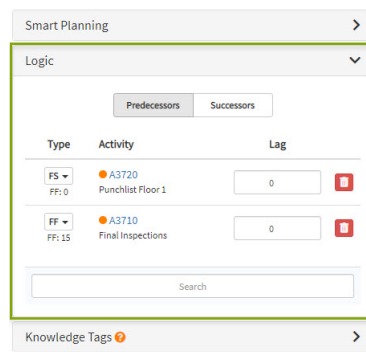
Logic is what links planning packages, activities, and milestones together throughout the schedule, for example:

- an activity finishes another starts
- two activities kick off at the same time
- multiple activities must be completed before another begins

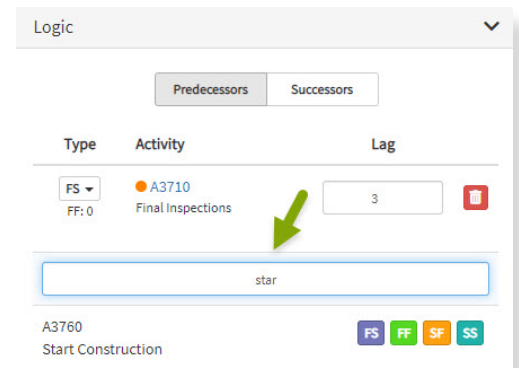
FROM THE GANTT CHART



FROM THE (IRIS) LOGIC SECTION



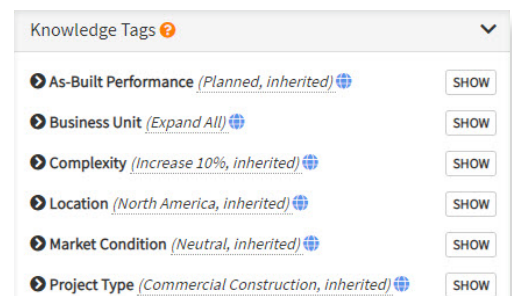
FROM THE SEARCH BAR



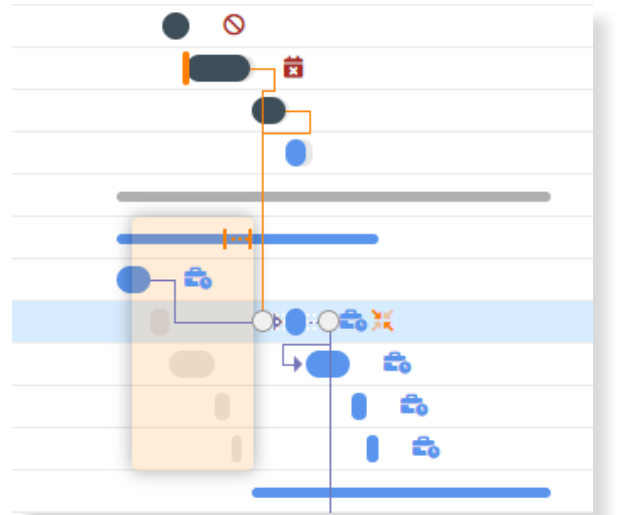
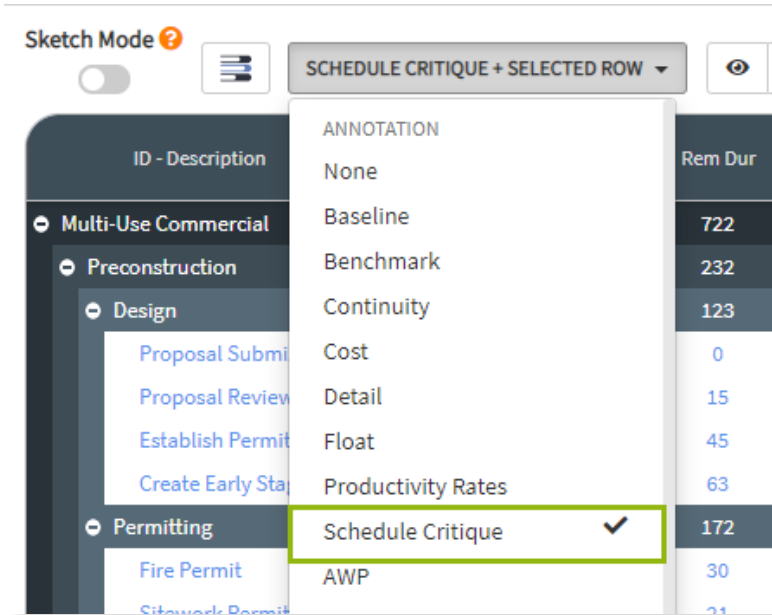
KNOWLEDGE TAGS

Knowledge Tags connect the data between the Knowledge Library, Projects, and Activities. Assigning Knowledge Tags to planning packages and activities aid in associating projects of similar scope, cost, duration, location, discipline etc. for Schedule to generate suggestions and benchmarks.

Note: The process of associating Knowledge Tags to activities is fundamentally the same for planning packages.



LEARNER ACTIVITY: Last year, your company successfully completed a project similar to the schedule you're building. You would like to use benchmark data to organize activities in the same order. Reference the sequence of activities from the completed project in the Knowledge Library for your planning packages.



As you assign logic and further add to your project schedule, look out for potential concerns by selecting the Schedule Critique option.

Icon	Description	Definition
	Missing Predecessor	The activity does not have any predecessor logic links and is not at the start of the project.
	Missing Successor	The activity does not have any successor logic links and is not at the end of the project.
	Lead or Lag	Predecessor and / or successor logic links contain lag.
	Insufficient Detail	The activity spans more than 10 % of the overall project duration.
	Incoming Bottleneck	The activity has 3 or more predecessor logic links.
	Logic Complexity	The activity has 3 or more predecessor logic links and 3 or more successor logic links.
	Hard Constraint	The activity uses a Must Start On / Must Finish On constraint.
	Negative Float	Total float is less than zero.

Want to do a quality check on your schedule? Click on the link to read more about this best practice - [LEARN.INEIGHT.COM/SCHEDULE](https://learn.ineight.com/schedule) > **SCHEDULE CRITIQUE OVERVIEW**

CREATE RESOURCES

LESSON ELEVEN



OBJECTIVES: In this lesson, you will resource load activities and planning packages in the Plan View.

PROJECT RESOURCES

Project resources include labor, construction equipment, construction rented equipment, equipment, installed equipment, installed material, supplies, and unique. These resource categories can be edited or deleted, except for labor.

Note: Resources are assigned to activities (activity level) but may also be set via work packages (summary level) in the schedule.

LEARNER ACTIVITY: Reflecting on the activities you’ve created in the training project, what resources do you need to add?

Now, create or select resources and assign resources to your activities.

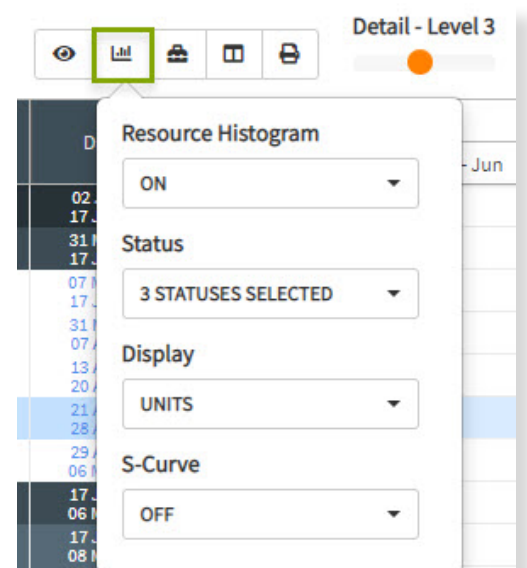
RESOURCE HISTOGRAM

Once a project has been resource loaded, InEight Schedule can generate a Resource Histogram.

The Resource Histogram is interactive and clicking on different bars/lines will filter the Gantt Chart to reflect only the activities and dates in which the selected resource(s) is used. To filter the Gantt Chart for multiple resources at the same time, use the filter icon.

The Resource Histogram will plot resource utilization over time depending on:

- Resource Settings Configuration Options
- The activity or summary level selected in the Gantt Chart
- The zoom slider selection



ASSIGN CONTRIBUTORS

LESSON TWELVE



OBJECTIVES: In this lesson, you will assign individuals to review and mark up their schedule.

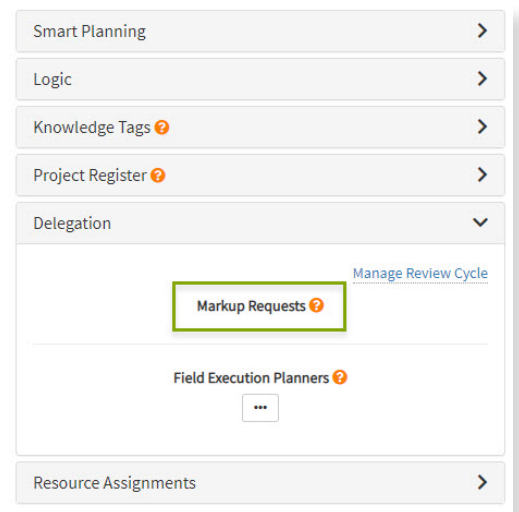
Now that you've created and detailed out your project plan, you're ready to get feedback. To allow for feedback, you need to assign contributors to your project.

MARKUP REQUEST

Invite contributors to your project using the Markup Request function within the Delegation tab (in the Iris).

Who do you normally ask to review your projects?

Are these reviewers internal, external, or a mix?



SET THE BASELINE

LESSON THIRTEEN

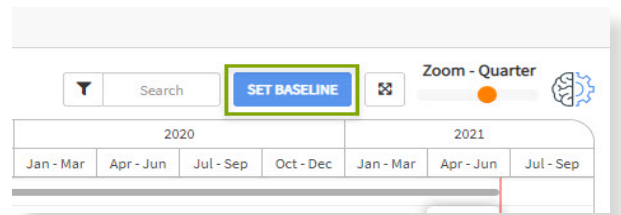


OBJECTIVES: In this lesson, you will observe how to set the baseline.

BASELINE

Setting the baseline schedule establishes the original schedule values prior to any changes due to progress updates or the markup & review cycle. This allows schedulers to compare the original schedule to how it has changed up to the data date.

Note: More details about baselining – see lesson 19.



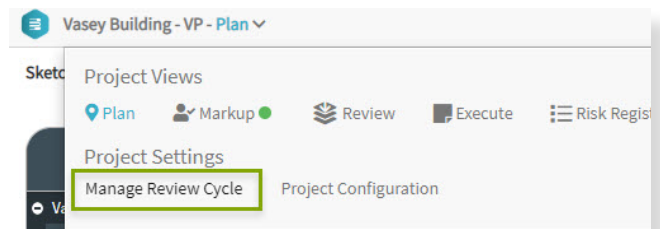
SET UP A REVIEW CYCLE

LESSON FOURTEEN



OBJECTIVES: In this lesson, you will set up and kick off a review cycle.

Once contributors are assigned, the review cycle can be initiated by clicking on the Manage Review Cycle link in the top right of the Delegation panel or go to the project settings view from the 1st level drop-down menu within a project and select Manage Review Cycle.



Projects

Start Review Cycle START REVIEW CYCLE

Start Review Cycle to solicit expert feedback from project team members

Message

Explain to your team members the purpose of the review cycle as well as what to focus on. This message will appear in popup at the start of Markup

Register Threshold

Difference in Schedule Duration and Team Member Markup that requires a Register entry +/- 50% ▼

Team Member Markup

No one has been assigned a Markup task yet.

Uncertainty

Export project uncertainty ranges generated from team member markup to a risk analysis tools - Oracle PRA (Pertmaster) or Deltek Acumen Risk EXPORT FORMAT ▲

PROVIDE FEEDBACK

LESSON FIFTEEN



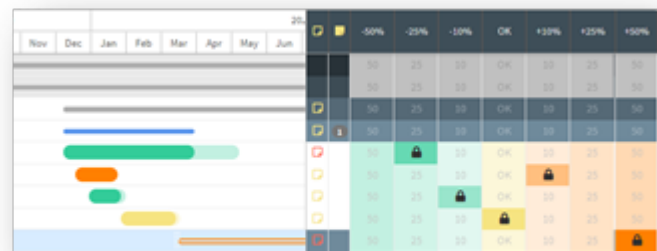
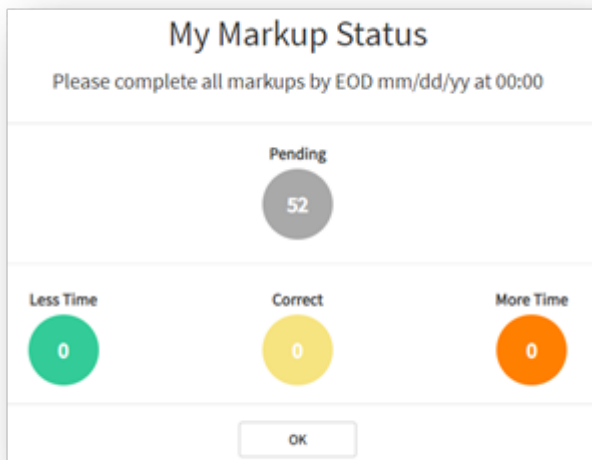
OBJECTIVES: In this lesson, you will navigate the Markup View to provide various types of feedback on the schedule.

Once the review cycle is in process, assigned contributors will log into the project, confirm they are in the Markup project view from the 1st level drop-down menu within a project, and provide feedback to sections of the schedule assigned to them.

In Markup View, you can provide feedback on a schedule via a scorecard or by creating a project register item.

SCORECARD

Expand a work package to view its details. You can give quick feedback on an individual detail basis or by the work package as whole. To give feedback on durations, select a column to either approve (OK) the scheduled time or suggest more/less time be considered.



LEARNER ACTIVITY: Your Scheduler has built out the Project schedule and has requested that you provide feedback on the activities you will be managing on-site. Use the Markup View Scorecard to provide feedback on the activities to which you've been assigned.



PROJECT REGISTER ITEMS

Click on a sticky note to create a project register item. Here, you can also see smart suggestions based on what you're reviewing in the project and by past project data in the Knowledge Library:

- Risk – Unknown site conditions
- Opportunity – Approval to reuse material
- Idea – Potential to double-shift

As you add feedback, notice the status bar at the top progresses toward 100% complete. With each markup made, you'll see your efforts reflected in the Completed column of the Gantt Chart.

CRITICAL THINKING QUESTION: Which of the following schedule events should you use in your feedback?

- a. Opportunities
- b. Ideas
- c. Change orders
- d. Risk
- e. Other

LEARNER ACTIVITY: During your review, you recognize the geographic area of the project has historically been difficult with getting the proper permits from the City. Add a risk event, noting a potential delay of 2 weeks due to City review and approval process.



Need to stay on top of your review cycle? Click the link to watch a video -

[LEARN.INEIGHT.COM/SCHEDULE](https://learn.ineight.com/schedule) > **MANAGE REVIEW CYCLE**

ANALYZE FEEDBACK

LESSON SIXTEEN



OBJECTIVES: In this lesson, you will analyze feedback by assessing uncertainty and events in the Review View.

You can review feedback from markup and apply a variety of intelligence rankings to run a risk assessment on your project.

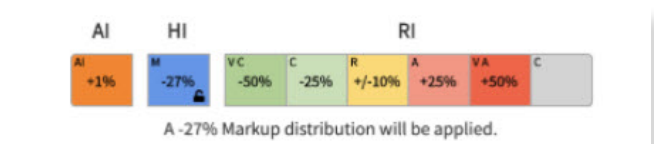
UNCERTAINTY

Uncertainty is an internal factor, such as quantity growth or productivity loss/gain. It evaluates duration/cost realism and plan confidence.

ID - Description	Start Date	Finish Date	Dur	Float	Uncert	Events	Regis
Commercial Building	22 Nov 19 22 Nov 19	30 Jul 22 30 Jul 22	982 982		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Multi-level	22 Nov 19 22 Nov 19	30 Jul 22 30 Jul 22	982 982		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Closeout	22 May 22 22 May 22	30 Jul 22 30 Jul 22	70 70	0 0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Construction	01 Jan 21 01 Jan 21	26 Jun 22 26 Jun 22	542 542		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Preconstruction	22 Nov 19 22 Nov 19	08 Oct 20 08 Oct 20	322 322		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Procurement	08 May 20 08 May 20	28 Nov 20 28 Nov 20	205 205		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1

FEEDBACK CONSENSUS

When selecting a line item for review, reviewers have three options for providing markup feedback. These options are available from the Iris:



- Inference Engine (AI) - is the suggested distribution
- Human Intelligence (HI)- allows you to leverage the feedback given during the Markup phase
- Risk Intelligence (RI) - allows you to assign designated uncertainty ranges to any line item

*Risk Intelligence ranges are standard out of the box as -50% to -25%, -25% to -10%, -10% to +25%, etc. You also have the option to manually input a custom range.

RISK ANALYSIS & REPORTS

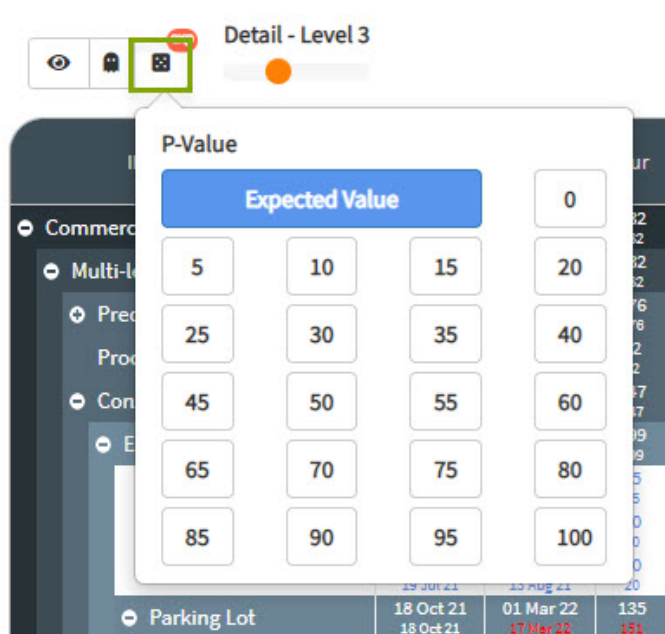
LESSON SEVENTEEN



OBJECTIVES: In this lesson, you will explore the different risk tools and settings available for schedule analysis and feedback.

P-VALUES

Probability Value, or P-Value, is a point in a distribution that indicates the chance of an outcome occurring. In context of risk, for example, a p-75 indicates a 75% chance of hitting or beating a schedule or cost targeted goal. P-values can also act as a risk lens which may be set in order to view instant feedback related to the effects that risks have on the planned schedule and/or cost structure.





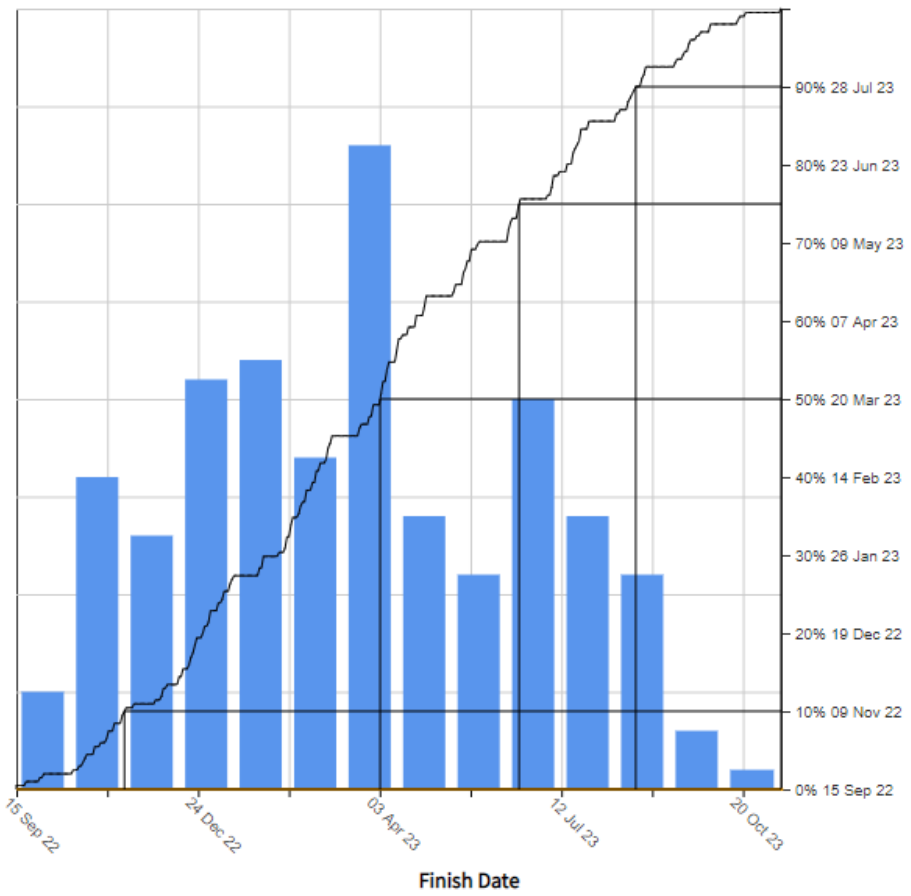
RISK HISTOGRAM

The Risk Histogram visualizes results from numerous iterations made using the distributions assigned to line items. Click on the Risk Histogram icon next to any line item to report against that point in the project.



Chinery Pipeline

Finish Date Start Date Duration

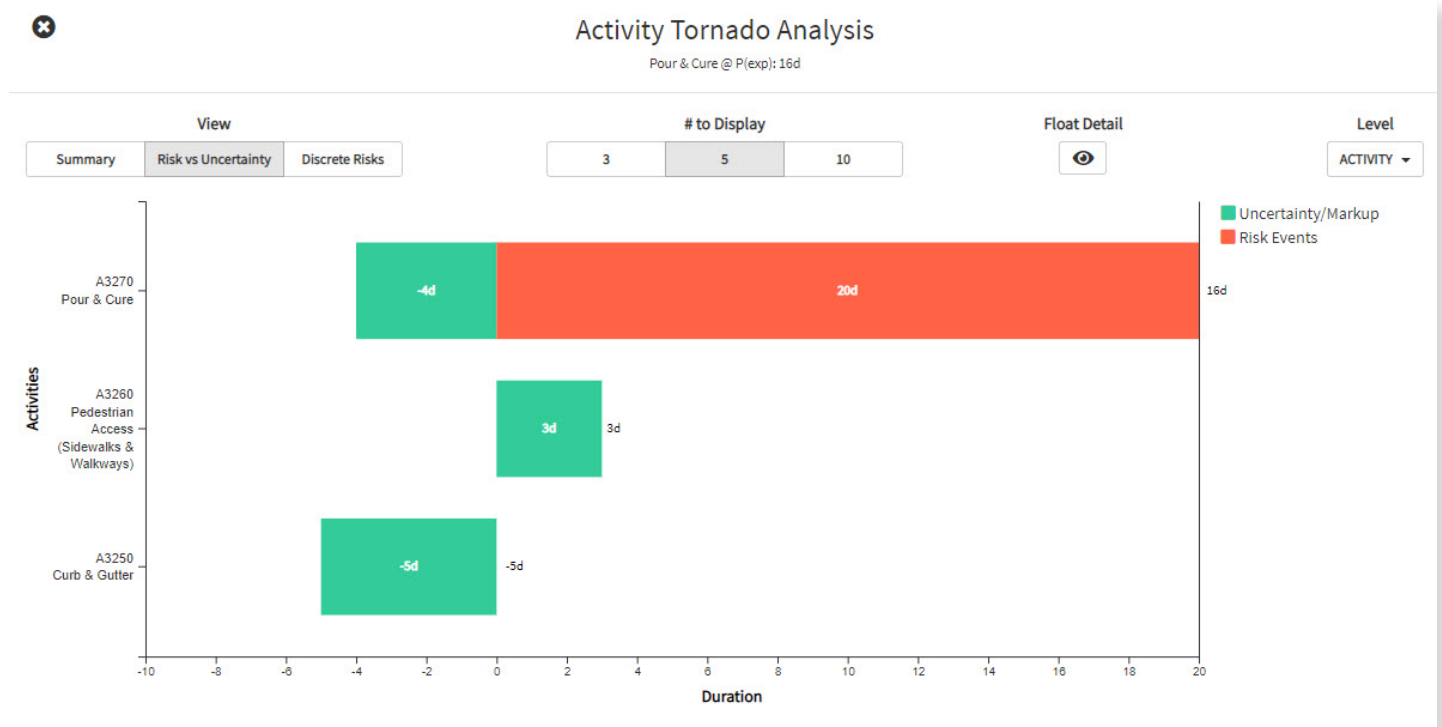


Deterministic (15 Sep 22 days)		0%
0%	Contingency	15 Sep 22 0 days
10%	Contingency	09 Nov 22 55 days
50%	Contingency	20 Mar 23 186 days
75%	Contingency	29 May 23 256 days
90%	Contingency	28 Jul 23 316 days
100%	Contingency	10 Oct 23 390 days



TORNADO ANALYSIS

Tornado Analysis identifies top contributors in a risk model and ranks them by most impactful. There are two main modes to choose from: Activity Mode and Risk Mode. Click on the Tornado Analysis icon to select a mode. Like the Risk Histogram, selecting a tornado icon at the top level will report on the total project.



UPDATING THE CPM

LESSON EIGHTEEN



OBJECTIVES: In this lesson, you will apply the feedback and deterministic values from your risk analysis to the CPM schedules.

Excavation
↓

AI	HI	RI					
+12%	-13%	VC	C	R	A	VA	C
		-50%	-25%	+/-10%	+25%	+50%	

A -13% Markup distribution will be applied.

Layer	Rem Dur	Constraint
Deterministic	53	
+17 BQ	70	SNET 23 Jun 19
-7 AP	46	
+5 CT	58	
-7 BH	46	

LEARNER ACTIVITY: Your team has reviewed the schedule and provided their feedback. You want to accept the markups but cannot push out the project’s end date. Select feedback to meet this constraint and accept into the CPM.

BASELINE & SETTINGS

LESSON NINETEEN



OBJECTIVES: In this lesson, you will explore baseline functionality, observe how to establish the data date and adjust Schedule settings.

After a schedule has been built out (and reviewed) for production use, Schedulers will set the Data Date and begin to progress the schedule. There are a variety of settings, columns, and functions to aid in this process.

SCHEDULE MODE

Planning vs. Scheduling

- Planning Mode: allows activities without predecessors to be scheduled throughout the project’s timeline
- Scheduling Mode: all activities will be scheduled against the project’s data date

The screenshot shows the 'SCHEDULE' settings page in the InEight SCHEDULE software. At the top, there is a navigation bar with a close button (X) and the InEight logo. Below this, the 'Project Start' is set to '1 July 18', the 'Data Date' is '01 Jul 2018', and the 'Project Finish' is '18 June 21'. The 'Schedule Mode' is currently set to 'Planning', with 'Scheduling' also available. A note states: 'Activities without predecessor logic or constraints will not snap back to the Data Date'. The 'Auto CPM' setting is 'On', with a note: 'Automatically perform CPM on any changes to the schedule'. The 'Out of Sequence Progress' setting is 'Retained Logic', with a note: '(Recommended) Relationships are maintained between the predecessor and successor for unworked portions of activities and continued after the predecessor has finished'. The 'Auto Progress' setting is 'On', with a note: 'Drag activities forward that occur before the Data Date'. At the bottom, there is a green 'SCHEDULE' button.

CRITICAL THINKING QUESTION: Dylan’s project had a weather delay – pushing out activities into the next week on the schedule.

What should Dylan do when he updates the schedule?

- Advance the data date ahead of time and update percent complete afterward.
- Update percent complete of activities and then adjust the data date afterward.

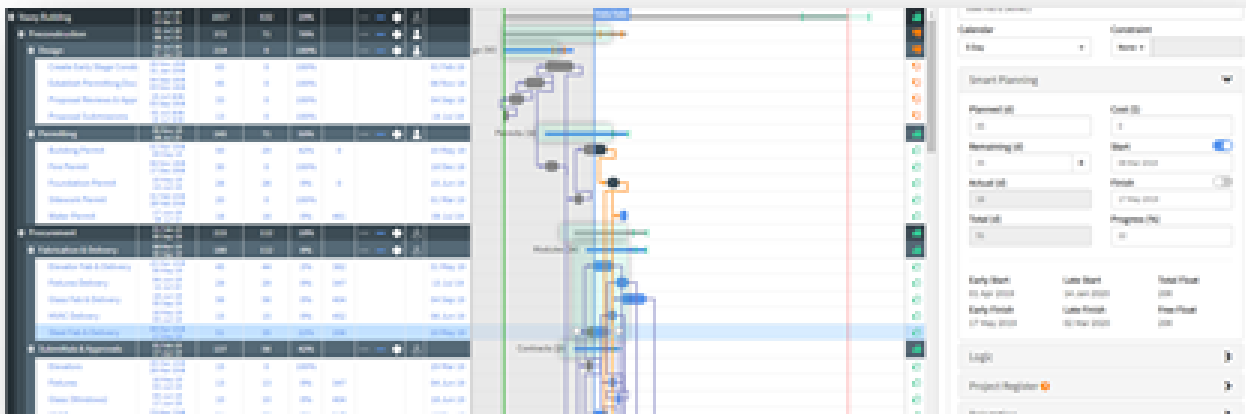
PROGRESS THE PLAN

LESSON TWENTY



OBJECTIVES: In this lesson, you will observe how to progress schedule activities using both the Iris and the Gantt chart, and adjust schedule activities as a result of the data date.

Activities can be marked as started by clicking the toggle next to start. As activities progress, they can be updated by changing the remaining duration, the finish date, or the progress (%) fields. Once a task is finished, the finish flag can be toggled to indicate this in the system.



CRITICAL THINKING DISCUSSION: How does your team adjust for progress now?

LEARNER ACTIVITY: Now that the data date has been progressed, adjust the percentage complete/remaining days for your subnets.

SIP WORKFLOW

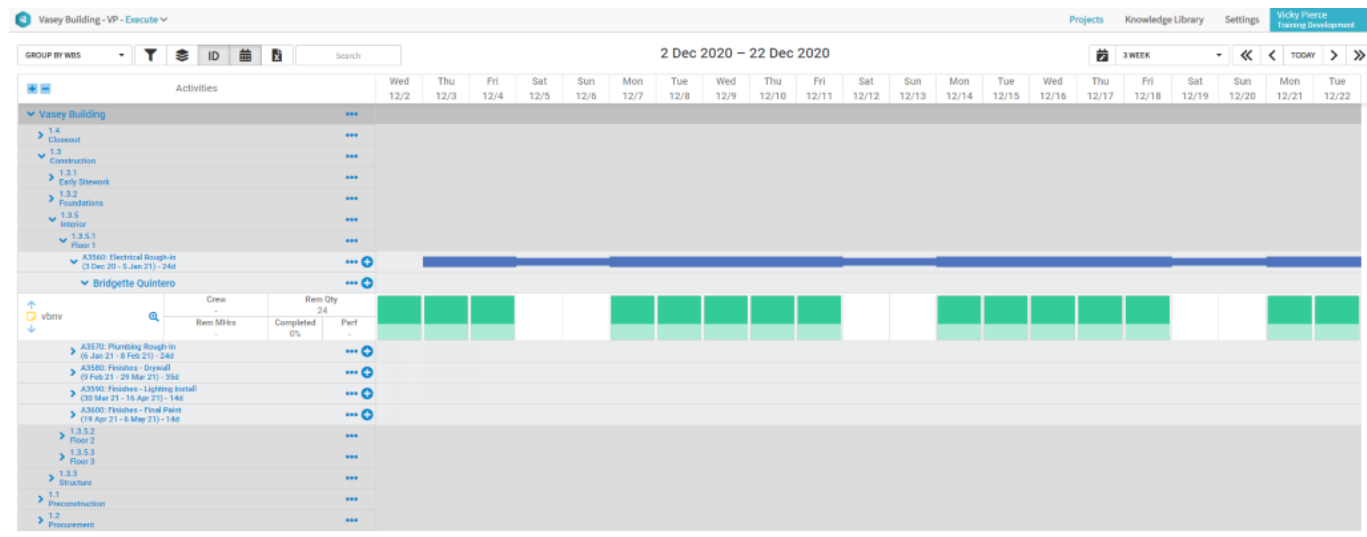
LESSON TWENTY-ONE



OBJECTIVES: In this lesson, you will explore the SIP process and walk through the setup of SIP to ensure steps and progress can be properly planned and tracked.

SIP

Short Interval Planning, or SIP, is collaborative workforce planning and crew coordination for a constraint-free execution that aligns with your broader project schedule.



LEARNER ACTIVITY: Assign yourself (same as markup) for field execution.

Want to learn more about interval planning? Click on the link below to watch -
[LEARN.INEIGHT.COM/SCHEDULE](https://learn.ineight.com/schedule) > **INTERVAL PLANNING FIELD EXECUTION PLANNER**

CREATE STEPS & CREWS





LESSON TWENTY-TWO




OBJECTIVES: In this lesson, you will create crews and activity steps in the Execute View.

Steps/Tasks are the daily breakdowns of CPM activities that allow workforce planners to sequence work and define crews by the intervals in which activities will be completed.

Vasey Building - VP - Execute ▾

GROUP BY WBS ▾   ID   Search

Activities				Wed 12/2	Thu 12/3	Fri 12/4	Sat 12/5	Sun 12/6
<ul style="list-style-type: none"> ▾ Vasey Building ⋮ ▸ 1.4 Closeout ⋮ ▾ 1.3 Construction ⋮ ▸ 1.3.1 Early Sitework ⋮ ▸ 1.3.2 Foundations ⋮ ▾ 1.3.5 Interior ⋮ ▾ 1.3.5.1 Floor 1 ⋮ ▾ A3560: Electrical Rough-in (3 Dec 20 - 5 Jan 21) - 24d ⋮ 								
<ul style="list-style-type: none"> ▾ Bridgette Quintero ⋮ 								
 vbv	Crew	Rem Qty						
	Rem MHrs	Completed	Perf					
	-	24	0%	-				
<ul style="list-style-type: none"> ▸ A3570: Plumbing Rough-In (6 Jan 21 - 8 Feb 21) - 24d ⋮ 								

Note: A tooltip 'Zoom to day before start date' is visible over the Friday bar for activity A3560.

LEARNER ACTIVITY: Filter to your assigned subnet and detail out a schedule activity with steps, or tasks. Then, create a few standard crews and assign to the project.



PROGRESS THE STEPS

LESSON TWENTY-THREE



OBJECTIVES: In this lesson, you will progress and adjust activity steps in the Execute View.

LEARNER ACTIVITY: Using detailed claiming, capture actuals for one day – quantities/hours - in the step details.

CRITICAL THINKING QUESTION: Dylan is running behind and needs to adjust the schedule.

What should he do to update the schedule?

- Push the tasks out a couple days.
- Replan the production of tasks.

LEARNER ACTIVITY: Your project's been delayed by a day. Click and drag your scheduled task(s) to adjust for the delay. *You cannot push out your end date.* Replan to meet your original deadline.

Then, add a note about what changed due to the delay.



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