

SCHEDULE USER GUIDE



Release 25.11
Last Updated: 07 January 2026

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CHAPTER 1 – SCHEDULE OVERVIEW

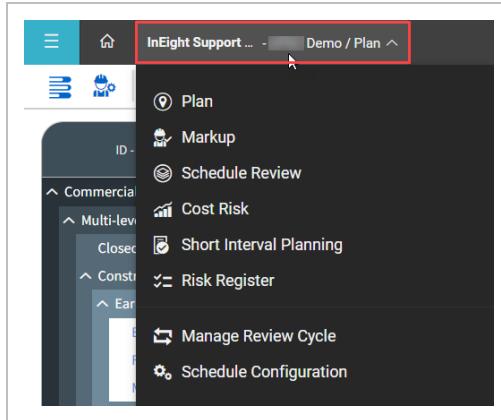
Overview of the Schedule And Risk Process

InEight Schedule is a (CPM) Critical Path Method planning and risk management tool. It provides multiple tools to support planning and risk management throughout the lifecycle of a project.

Schedule contains six primary schedule views: Plan, Markup, Schedule Review, Cost Risk, Short Interval Planning, and Risk Register. These views correspond to different processes of the Scheduling ecosystem:

Project View	Description
Plan	Create, detail, and plan out the CPM schedule.
Markup	Assess, critique, and provide feedback on the planned CPM schedule.
Schedule Review	Consolidate markups, conduct risk analysis, and update the CPM Schedule based on review.
Cost Risk	Consolidate markups, conduct risk analysis, and update cost based on review.
Short Interval Planning	Conduct short interval planning, detailing daily work for crews and short term plan to get the CPM Activities done.
Risk Register	Risk Matrix tracking all project events surfaced throughout the planning, markup, review, and execution phases of the Project Schedule.

To access each view, open a schedule and go to the menu bar at the top left of the screen.



Plan View

When you open a schedule, you land on the project's Plan view. In this view, you can see the schedule details (such as activities, work package groupings, dates, duration, and float) where you can create, detail and plan out the CPM schedule.

The screenshot illustrates the InEight Plan View interface. The left side shows a detailed activity list with columns for ID, Description, Actions, Start, Finish, and At Completion. The middle section is a Gantt chart with tasks represented by bars, some of which are highlighted in green. The right side displays schedule details, including a summary table for 'I-15 | Tropicana_Revised Project Baseline', a 'Default Calendar' section, and a 'Smart Planning' section with various project metrics and suggestions.

1 Contains customizable Gantt chart columns providing a summary view of schedule details including, but not limited to, activity/work package description, dates, durations, float, and cost.

2 This Gantt chart provides a visual layout of scheduled activities, work packages, and milestones over time. The Gantt chart also has integrated functionality allowing users to adjust dates, schedule logic, and schedule critiques.

3 The Iris contains the fine details of the schedule. Activities, work packages, and milestones that can be detailed out with specific constraints, tags, resources, reviewers, short interval planners, and events. Additionally, the Iris also houses the Smart Planning AI functionality which references and pulls in Knowledge Base information into project work packages and activities.

You can [import](#) or [export](#) a schedule in Plan view.

Gantt chart legend

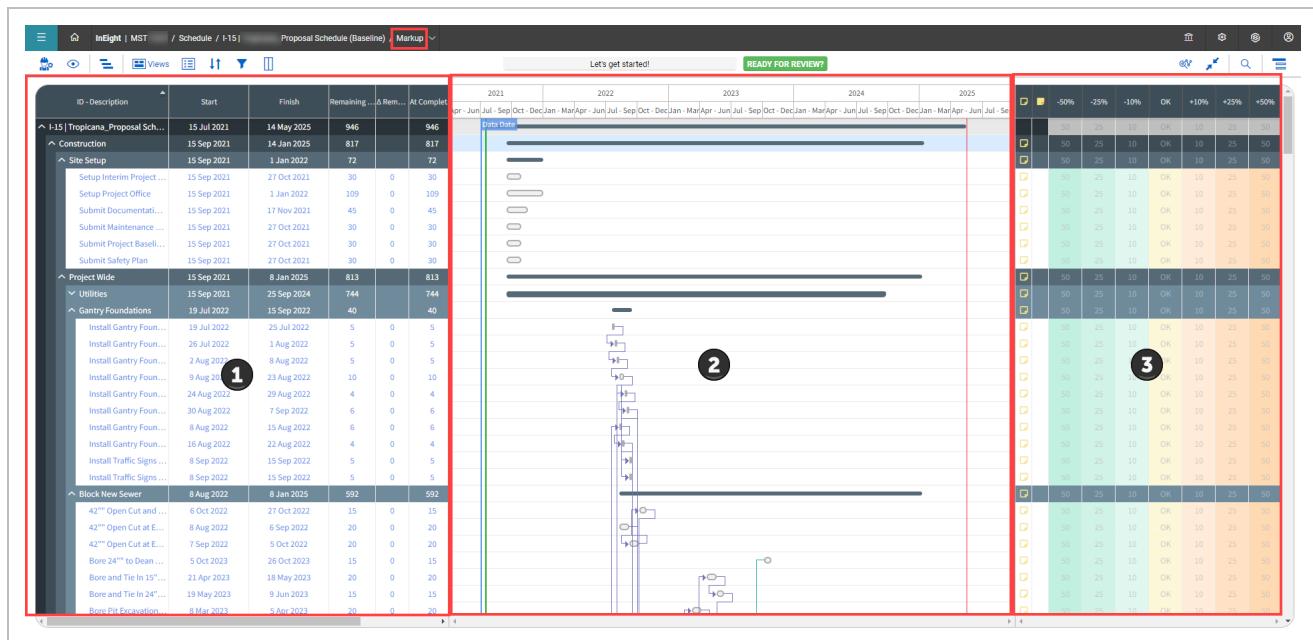
Vertical Bar Type	Description
Project start	The planned or actual project start dates
Data date	The point in time when the status of the schedule is recorded
Project finish	The planned or actual project finish dates

Horizontal Bar Type	Description
Dark grey	WBS
Light grey	Completed activity
Black outline, white center	Planning package
Orange	Baseline activity

Horizontal Bar Type	Description
Green	LOE
Blue	Non-critical activity
Red	Critical activity

Markup View

The Markup view is where project contributors assigned to activities and work packages can provide feedback on the current planned schedule. You can also assess, critique, and provide feedback on the planned CPM schedule.



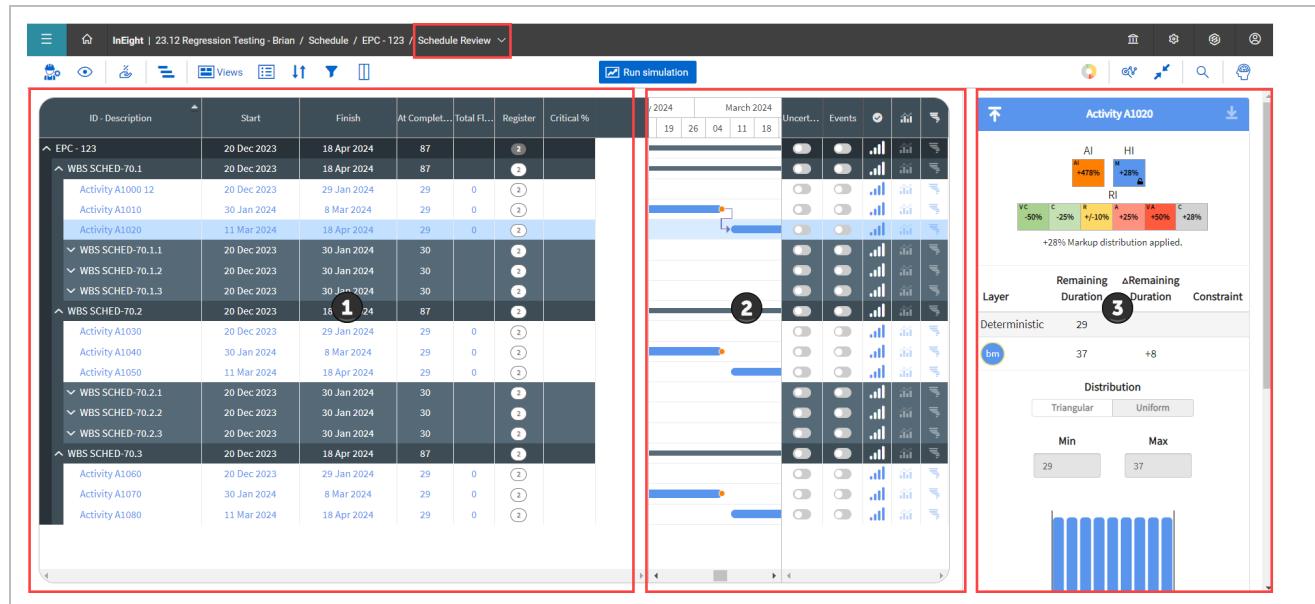
- 1 Gantt chart columns contain activity metadata: ID-description, dates, remaining duration, total duration, delta [change in] remaining duration, delta [change in] end date, and completed [markup status].
- 2 This Gantt chart provides a visual layout of how the schedule would be affected by the markups provided.

3 This section contains the markup score card. The score card is a quick way for project contributors to increase, decrease, or confirm the dates and durations for the schedule items assigned. Additionally, project events (such as risks, opportunities, and ideas) can be provided as feedback by contributors.

Schedule Review View

Project View	Description
Schedule Review	Consolidate markups, conduct risk analysis, and update the CPM Schedule based on review

After the project contributors have finished providing their markups, the Review view is where all the feedback is consolidated. Schedulers can take the information and can begin to conduct risk analysis on the schedule, adjust durations, and associate risk events.



1 Gantt chart columns show the original start and finish dates but can have the uncertainty and events from the markups switched on and off to show the changes and impacts to the schedule.

2 This Gantt chart provides a visual layout using bars that adjust dependent upon the uncertainty and risk applied. In the right-most columns of the Gantt chart are the icons to access the risk histogram and tornado charts.

3 The Iris in this view shows details regarding the markups provided, giving a quick glance at the distribution data from multiple contributor markups. Additionally, the Inference Engine, Human Intelligence, and Risk Intelligence data are housed here to aid in the review process.

With the feedback provided, users can adjust the schedule to reflect the appropriate markups and/or conduct risk analysis with the uncertainty and various events provided.

Cost Risk View

Project View	Description
Cost Risk	Consolidate markups, conduct risk analysis, and update cost based on review

The Cost Risk view is where all the feedback is gathered and consolidated for cost items. When you bring in your cost structure, you can begin to conduct risk analysis on the budget using uncertainty and risk events.

The screenshot shows the InEight Cost Risk View. On the left, there is a table of cost items with columns: ID, Description, Actions, Exclude, Likely Cost %, Max Cost, and Max Cost %. The 'Actions' column contains three dots, and the 'Exclude' column contains a switch. The 'Exclude' switch for the first item is highlighted with a red box and a circled '1'. The 'Exclude' switch for the second item is highlighted with a red box and a circled '2'. On the right, there is a 'WBS Sum Act' risk analysis interface. It shows a legend for risk categories: V (green), C (orange), R (yellow), A (red), VA (purple), and C (grey). Below the legend, it says 'No uncertainty distribution applied.' There are input fields for 'Min (\$)', 'Likely (\$)', and 'Max (\$)' with values 0, 0, and 0 respectively. There are also input fields for 'Min (%)', 'Likely (%)', and 'Max (%)' with values 100, 100, and 100 respectively. A blue bar chart represents the uncertainty distribution for the first item, with a circled '3' indicating the range from \$0 to \$1. At the bottom, there is a 'Register' section and an 'ADD EVENT' button.

1 Columns for Cost Item information that shows actual, remaining, and totals of items prior to simulations with the option to display risk adjusted amounts based on user selection.

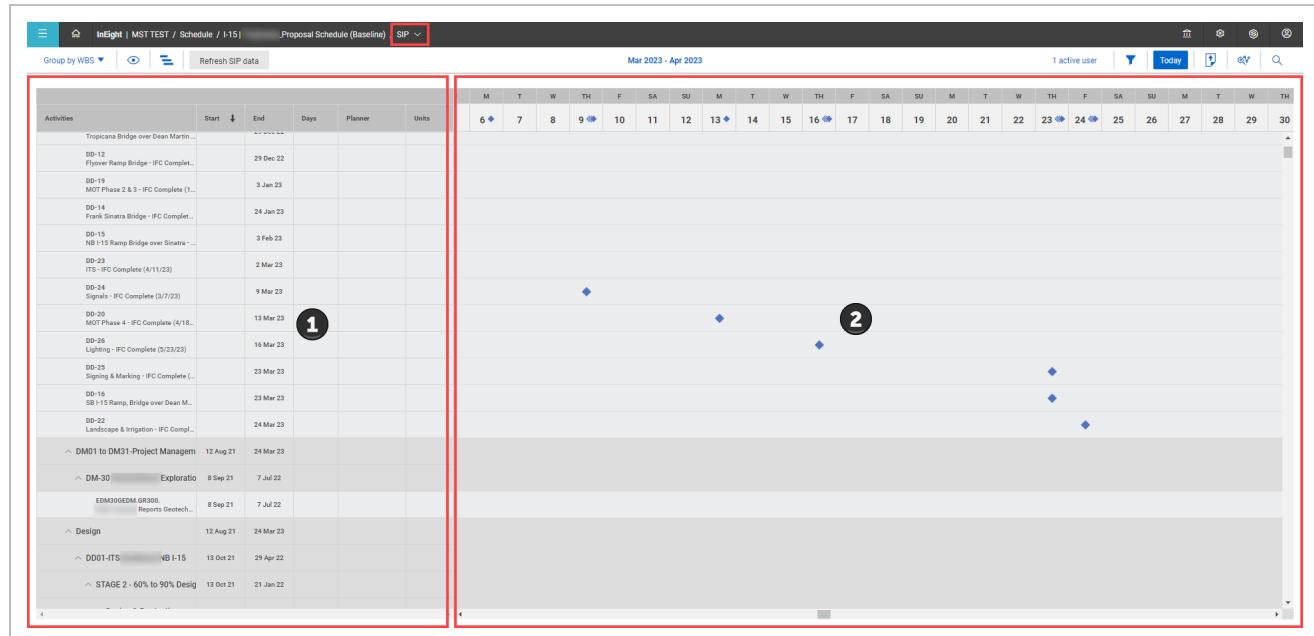
2 Provides toggles to turn on or off uncertainty or events and view events assigned to cost items. Users can also view the risk histogram and tornado chart post simulation runs.

3 The details are shown regarding markups provided, giving a quick glance at the distribution data. With the feedback provided, users can conduct risk analysis with the uncertainty and various events provided.

Short Interval Planning View

Project View	Description
Short Interval Planning	Conduct short interval planning, detailing daily work for crews and short term plan to get the CPM Activities done.

In the Short Interval Planning view, schedulers and field execution planners can plan out their day to day work. CPM activities brought in from the Planning view can be broken down into steps and tracked for progress. Crews can be established with specific production rates and goals.



1 Contains all work packages, activities, and steps listed with dates and durations.

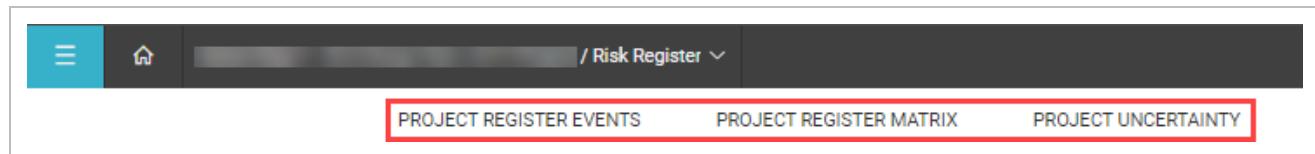
2 This visual represents how steps and crew activity are spread out over the coming weeks. Additionally, the original CPM dates have duration bars shown so users can

visually see when steps to complete an activity vary from the baseline CPM schedule dates.

Risk Register View

Project View	Description
Risk Register	Risk matrix tracking all project events surfaced throughout the planning, markup, review, and execution phases of the project schedule

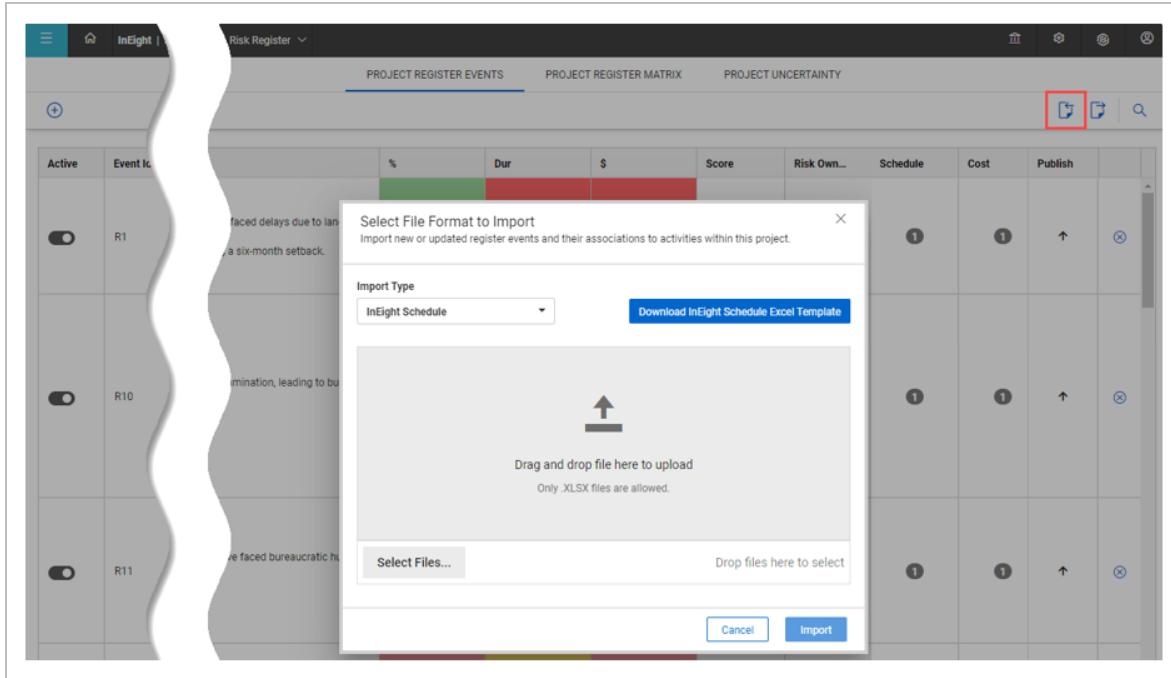
The Risk Register is where the schedule's risk events, matrix settings, uncertainty values are stored and set.



- The Project Register Events tab summarizes all events on the project. Events can be selected and deselected and edited in this register.

PROJECT REGISTER EVENTS																	PROJECT REGISTER MATRIX			PROJECT UNCERTAINTY		
Active	Event Id	Title	Type	Description	%	Dur	\$	Score	Risk Own...	Mitigation	Status	Markup	Schedule	Cost	Publish							
<input checked="" type="checkbox"/>	R1	Rapid river water	Threat	► crane on a barge	Extremely Low (...	Very Low (≤ 40d)	Very Low (≤ \$50K)	0	Gari...	Bring the cr...	Mitigated	1			x	o						
<input checked="" type="checkbox"/>	O1	Rent equipment for 50% off	Opportunity	► overbought!	Ultra Low (5%)	Ultra Low (≤ 7d)	Ultra Low (≤ \$...	1	Gari...	□	Unmitigated					u	o					

The Microsoft Excel import tool lets you import new or updated register events and their activity associations.



- The Project Register Matrix tab shows the attributes available for up to nine events created in the project. These are the default values available when entering data for an event.

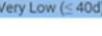
There is also an opportunity color column which shows a blue scale to help differentiate various opportunities. The Opportunity Color scheme shows throughout the application where opportunities are presented.

PROJECT REGISTER EVENTS		PROJECT REGISTER MATRIX		PROJECT UNCERTAINTY			
 							
Number of ranges 9							
Description	Probability	Schedule Impact	Cost Impact	Threat Color	Opportunity Color		
Ultra Low	5	7	1000				
Extremely Low	15	20	25000				
Very Low	25	40	50000				
Low	35	50	75000				
Medium	50	60	100000				
High	65	100	1000000				
Very High	75	120	5000000				
Extremely High	85	160	7500000				
Ultra High	95	180	10000000				

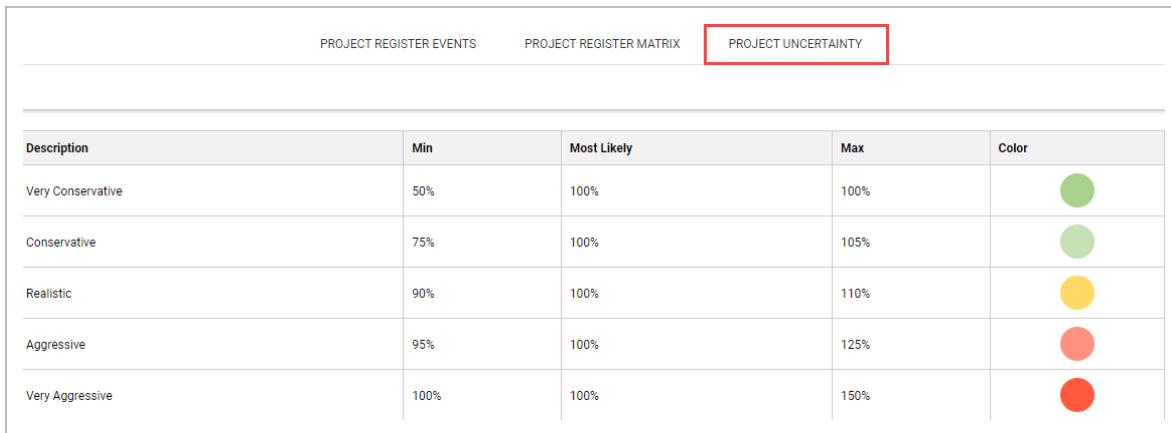
For example, in the Project Register Events page, the Opportunity in the second row shows three different color ranges that are associated with the Opportunity Description in the Project Register Matrix.

PROJECT REGISTER EVENTS		PROJECT REGISTER MATRIX		PROJECT UN	
 					
Active	Event Id	Title	Type	Description	
<input checked="" type="checkbox"/>	R1	MST Threat	Threat	Very Low (25%)  Very High (< 1%)  Medium (< \$100K) 	21
<input checked="" type="checkbox"/>	O1	MST Opportunity	Opportunity	High (65%)  Very Low (< 40d)  Medium (< \$100K) 	30

The Opportunity ranges one through nine (Ultra High to Ultra Low) and the blue color scale is also visible in the Mitigation page for opportunities.

Description		%	Dur	\$	Score	Risk Own...	Mitigation		
O1 - MST Opportunity									
Probability:	High (65%)		Duration Impact:	Very Low (< 40d)		Cost Impact:	Medium (< \$100K)		
									
 Add new value									
ID	Mitigation	%	Dur	\$	\$..	Cost	Owner	Start	End
M1	MST MIT2	High (65%) 	Very Low (< 40d) 	Medium (< \$100K) 	30				

- The Project Uncertainty tab shows the attributes which the Markup & Review Cycle Score Card apply. These are the default values the scorecard will use when markups are being conducted.



The screenshot shows a user interface for managing project registers. At the top, there are three tabs: 'PROJECT REGISTER EVENTS', 'PROJECT REGISTER MATRIX', and 'PROJECT UNCERTAINTY'. The 'PROJECT UNCERTAINTY' tab is currently selected and highlighted with a red border. Below the tabs, there is a table with the following data:

Description	Min	Most Likely	Max	Color
Very Conservative	50%	100%	100%	
Conservative	75%	100%	105%	
Realistic	90%	100%	110%	
Aggressive	95%	100%	125%	
Very Aggressive	100%	100%	150%	

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CHAPTER 2 – USER ACCESS

Schedule Navigation

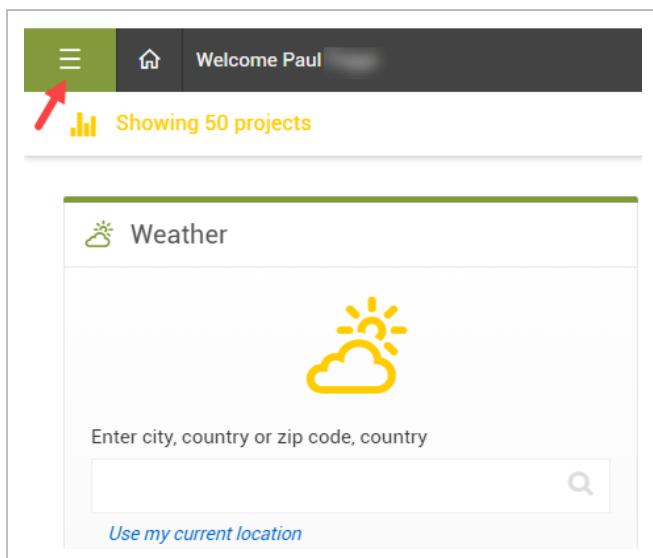
2.0.0.1 Main Menu

The Main menu navigation dynamically changes based on the selection of a project or an organization, your level of permissions, and the application you choose. One of the Main menu's functions is to let you connect and share data between all Eight applications involved in managing a project. This allows project management workflows to pass between job site, field office, and front office seamlessly in a consistent and standardized user interface. More information on the Main menu can be found [here](#).

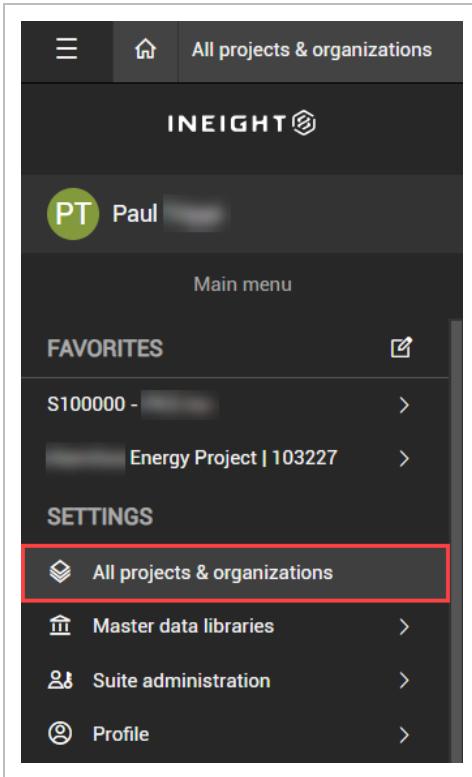
Schedule can be accessed from All projects & organizations in the Main menu, which opens to the Schedule Project List page. If a schedule is linked to a project, from the project home page the Main menu click **Schedule** to open to the project workspace.

Open Schedule from Main Menu

1. Click the Main menu icon.



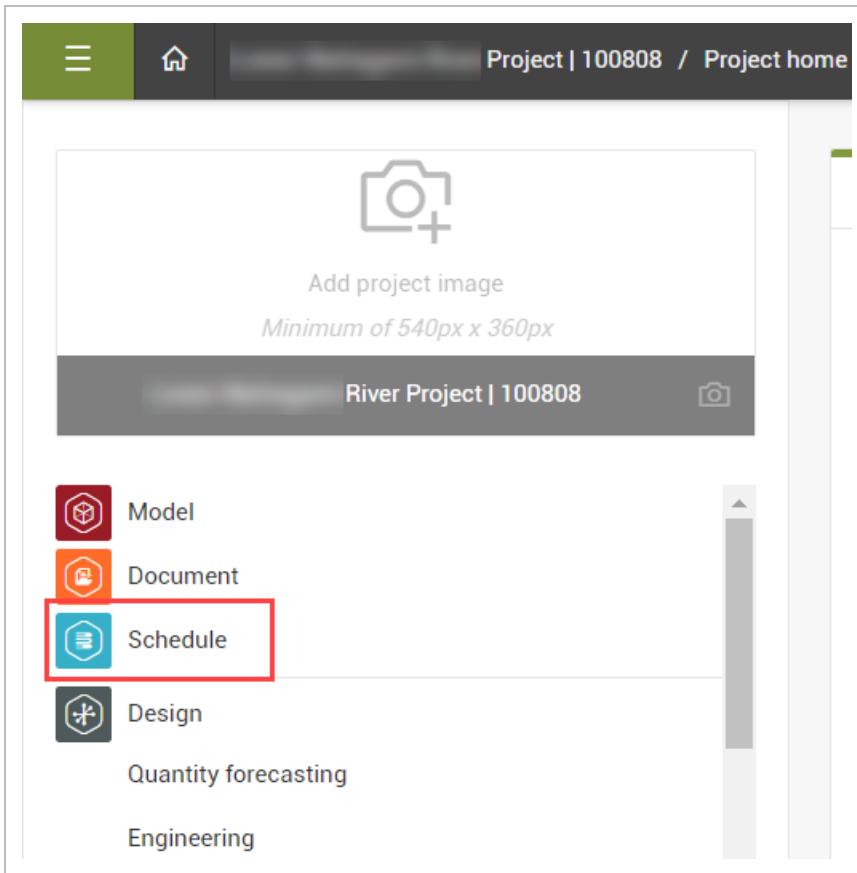
2. Select All projects & organizations from the Main menu.



3. Click on either a project or an organization.

The screenshot shows two tables side-by-side. The top table is titled 'ORGANIZATIONS' and lists four entries: 'S100000 - PKS Inc. SA1000 - Kie' (Central), 'S100000 - PKS Inc. SA1000 - Kie' (Western), 'S100000 - PKS Inc. SA1000 - Kie' (Canada), and 'S100000 - PKS Inc. SA1000 - Kie' (Building). The bottom table is titled 'PROJECTS' and lists four entries: '101979 - East Rail Maintenance Facility' (Active, Execution, SE3001 - Eastern Canada, InEight Service Account), '101984 - Pointe St. Charles Maintenance...' (Active, Execution, SE3001 - Eastern Canada, InEight Service Account), '102004 - I225 Light Rail Corridor' (Active, Execution, SD3005 - Ben Bentley, SE3008 - Central, InEight Service Account), and '102007 - ViamNext - H2 VMC' (Closed, Execution, Hank Adams, SE3001 - Eastern Canada, Scott Schemahorn). The 'ORGANIZATIONS' tab and the 'PROJECTS' tab are both highlighted with red boxes.

4. Select Schedule



User Setup and Roles

Schedule Roles

Schedule Creator

The Schedule Creator role is typically a planner or scheduler at an organization. The user can create schedules and has full rights to those schedules.

Schedule creators can:

- Create and delete their own schedules
- Use Knowledge Library and Smart Planning to inherit schedules and subnets
- Use Productivity Rates

- Assign contributors to schedules for markup
- Manage markup process
- Manage Review and consolidation process
- Contribute to other schedules when assigned as a schedule contributor
- Import from the Knowledge Library and the Risk Register
- Import knowledge tags (codes and UDFs) from the Knowledge Library to Schedule Configuration

Project Member

The Project Member role can be wide range of organizational roles. The organization roles can be Supervisors, Foremen, SME's, External Subs, Customers, anyone that a project would like to contribute to the project. The Project Member role serves as a contributor to projects assigned to them by the administrator or project creator.

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 would 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 Schedule Creator and Contributor Role the Administrator can do the following:

- Manage the Knowledge Library (Schedules, Productivity Rates, Knowledge Tags, Risks)
- Create, delete, and modify any schedule
- Access to the system settings to add users to the instance

When a user in the InEight cloud platform has their permissions updated or a new role added with administrator permissions (Level 2 or Level 3), then the Administrator permissions are automatically assigned to the corresponding Schedule user.

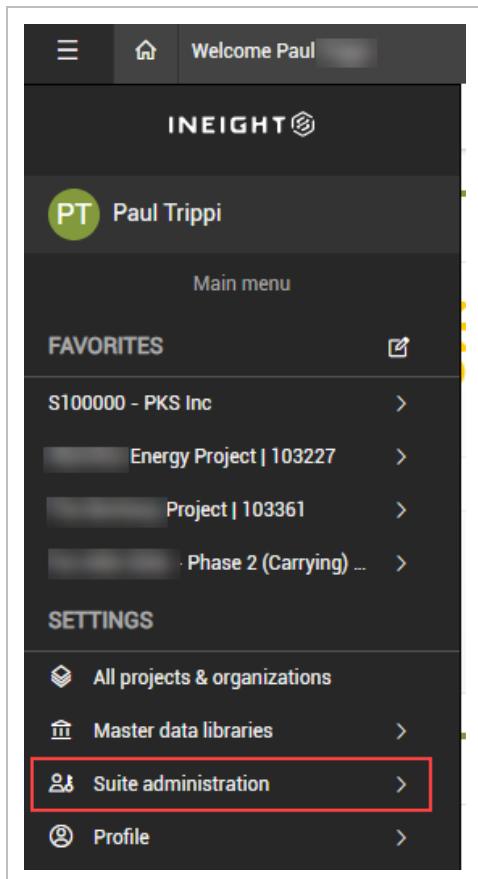
Knowledge Base Administrator

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

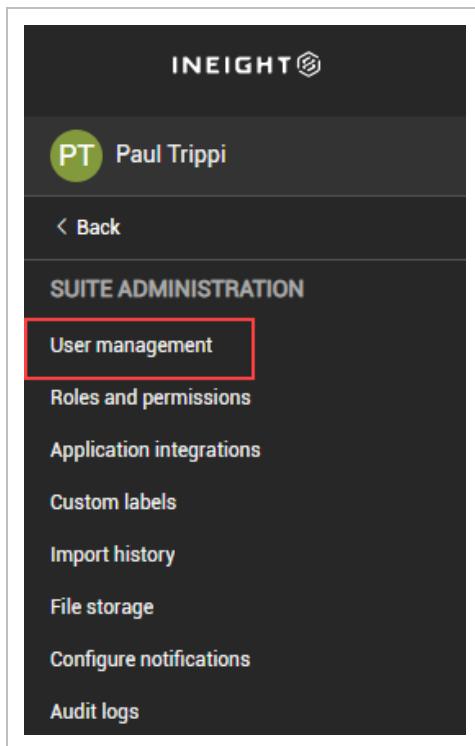
User Creation

Create a New User

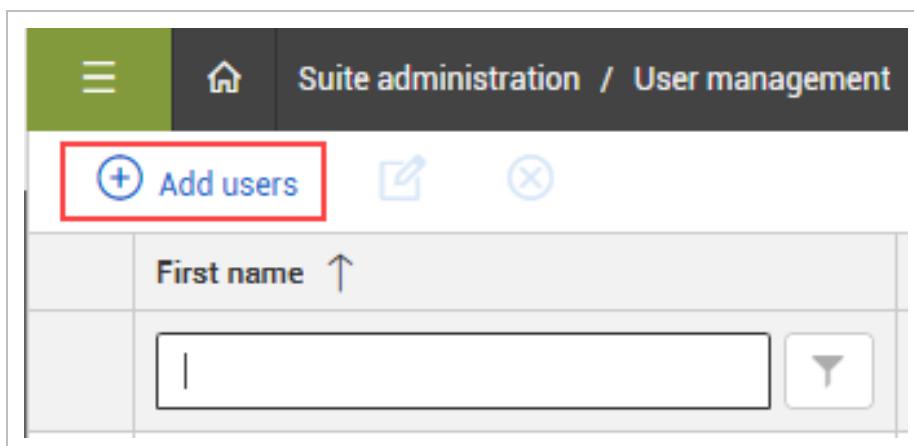
1. Click **Suite Administration**.



2. Select **User Management**.



3. Click the **Add Users**.



4. In the Details tab, enter the user contact information.

Add users

1 DETAILS **2 ROLES**

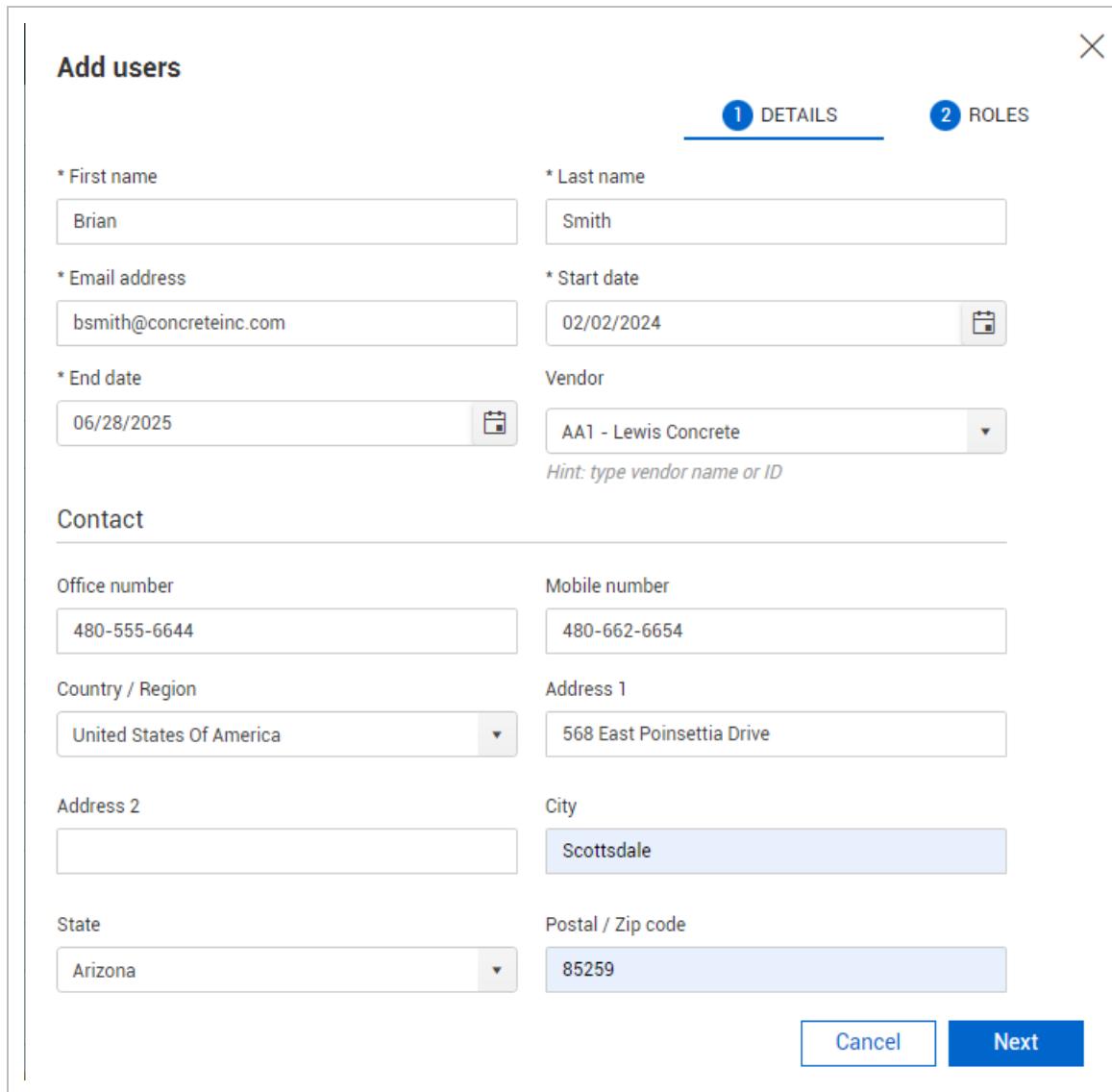
* First name Brian	* Last name Smith
* Email address bsmith@concreteinc.com	* Start date 02/02/2024
* End date 06/28/2025	Vendor AA1 - Lewis Concrete

Hint: type vendor name or ID

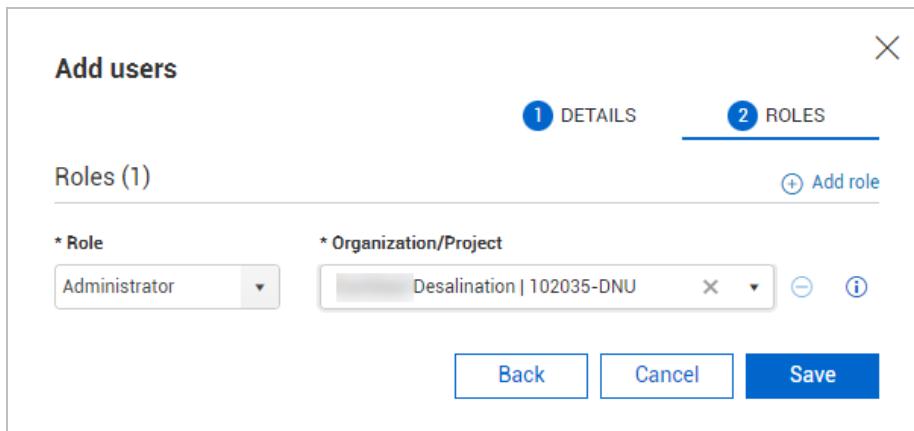
Contact

Office number 480-555-6644	Mobile number 480-662-6654
Country / Region United States Of America	Address 1 568 East Poinsettia Drive
Address 2 	City Scottsdale
State Arizona	Postal / Zip code 85259

Cancel **Next**



5. In the Roles tab, select the **Role** and **Organization**.



1 DETAILS 2 ROLES

Roles (1)

* Role * Organization/Project

Administrator Desalination | 102035-DNU

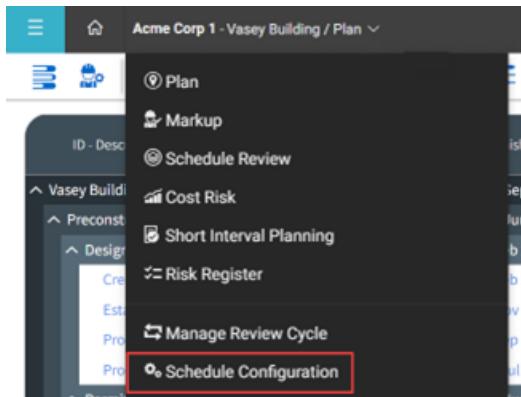
Back Cancel Save

6. Select **Save**.

Schedule Contributor Setup

Schedule Contributors

Schedule Contributors are users assigned to the schedule. The contributors and their roles on a schedule are managed from the Schedule Configuration register.



Contributor Role Types

Project Contributor role types pertain to the user and are specific to each project. Users can be assigned different contributor roles for each project.

Markup

The Markup role grants access to markup and review cycles on a schedule. Selecting this on will allow this user to be assigned to activities for markup.

Short Interval Planner

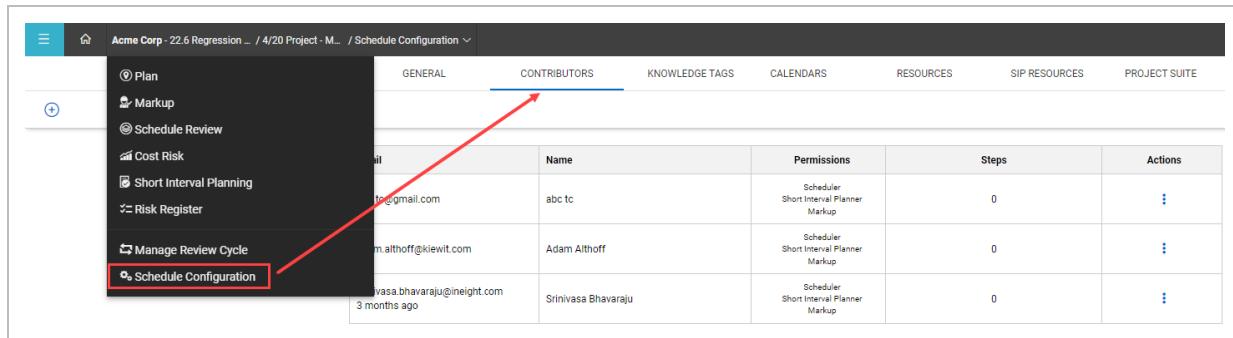
This role grants access to the Short Interval Planning (SIP) section of InEight Schedule. Users in this role can be assigned to activities for field execution planning. For details on how to use the SIP Functionality, see chapter 6.

Scheduler

The Scheduler role has all access and privileges of the Markup and Field Execution Planner roles. Additionally, schedulers can adjust items in the Planning view, such as details in the Iris, logic in the Gantt chart, and resources.

Selecting Project Contributors

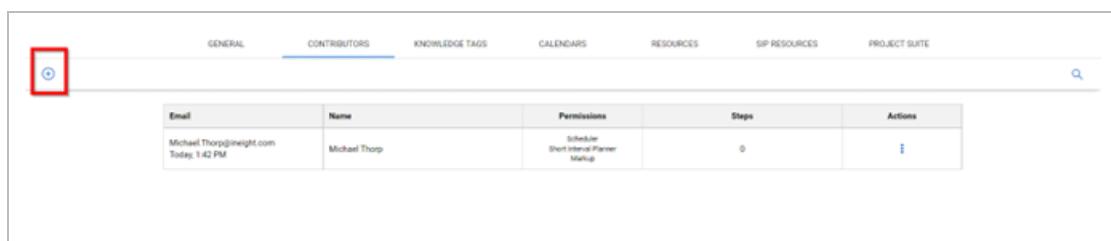
1. In Schedule Configuration, go to the **Contributors** tab.



GENERAL	CONTRIBUTORS	KNOWLEDGE TAGS	CALENDARS	RESOURCES	SIP RESOURCES	PROJECT SUITE
abc@gmail.com	Name	Permissions	Steps	Actions		
m.althoff@ineight.com	abc tc	Scheduler Short Interval Planner Markup	0	⋮		
m.althoff@ineight.com	Adam Althoff	Scheduler Short Interval Planner Markup	0	⋮		
srinivas.bhavaraju@ineight.com	Srinivasa Bhavaraju	Scheduler Short Interval Planner Markup	0	⋮		

- All Project Contributors are listed in the register

2. To add a new user, click **Add User**.

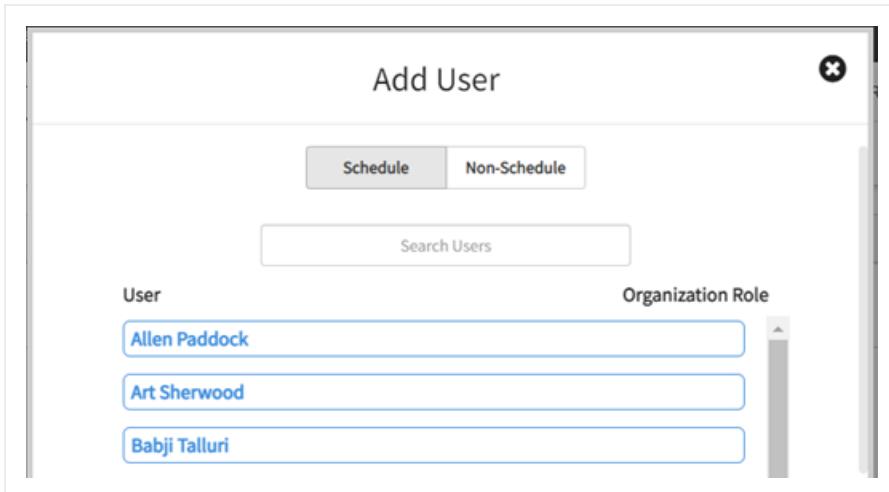


GENERAL	CONTRIBUTORS	KNOWLEDGE TAGS	CALENDARS	RESOURCES	SIP RESOURCES	PROJECT SUITE
Michael.Thorp@ineight.com Today, 1:42 PM	Michael Thorp	Scheduler Short Interval Planner Markup	0	⋮		

- The Add User Window opens

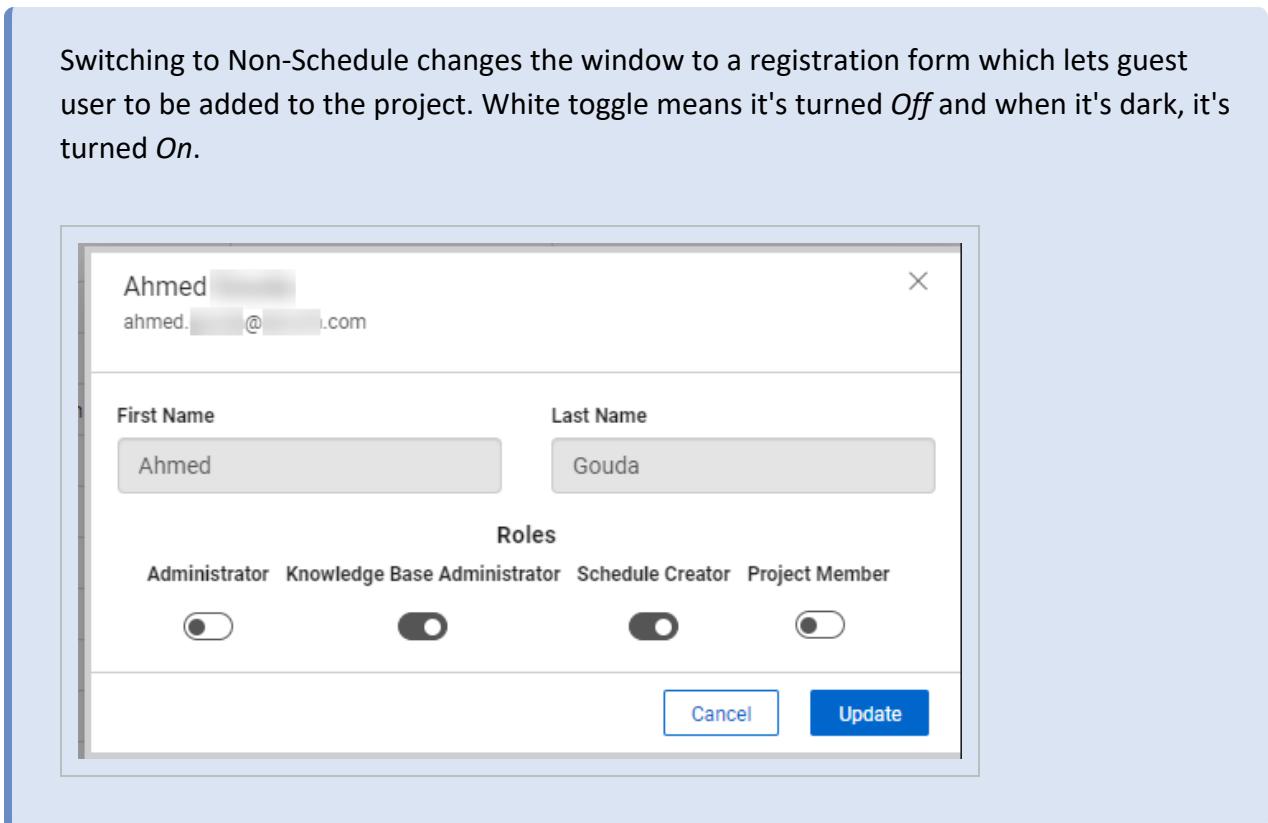
3. Schedule and Non-Schedule options are at the top of the window. Select **Schedule** to list all users currently registered in Schedule.

4. Click on the user(s) to be added as project contributors.



The screenshot shows the 'Add User' window with the 'Schedule' tab selected. At the top, there are two tabs: 'Schedule' (selected) and 'Non-Schedule'. Below them is a search bar labeled 'Search Users'. The main area is divided into 'User' and 'Organization Role' sections. The 'User' section contains three entries: 'Allen Paddock', 'Art Sherwood', and 'Babji Talluri', each in its own blue-bordered box. The 'Organization Role' section is partially visible on the right.

Switching to Non-Schedule changes the window to a registration form which lets guest user to be added to the project. White toggle means it's turned *Off* and when it's dark, it's turned *On*.



The screenshot shows the 'Add User' window in 'Non-Schedule' mode. At the top, it displays the email 'ahmed.████████.com'. Below this, there are fields for 'First Name' (containing 'Ahmed') and 'Last Name' (containing 'Gouda'). Underneath these fields is a 'Roles' section with five options: 'Administrator', 'Knowledge Base Administrator', 'Schedule Creator', and 'Project Member'. Each option has a toggle switch below it. The 'Administrator' and 'Knowledge Base Administrator' switches are white (off), while the others are dark (on). At the bottom of the window are 'Cancel' and 'Update' buttons.

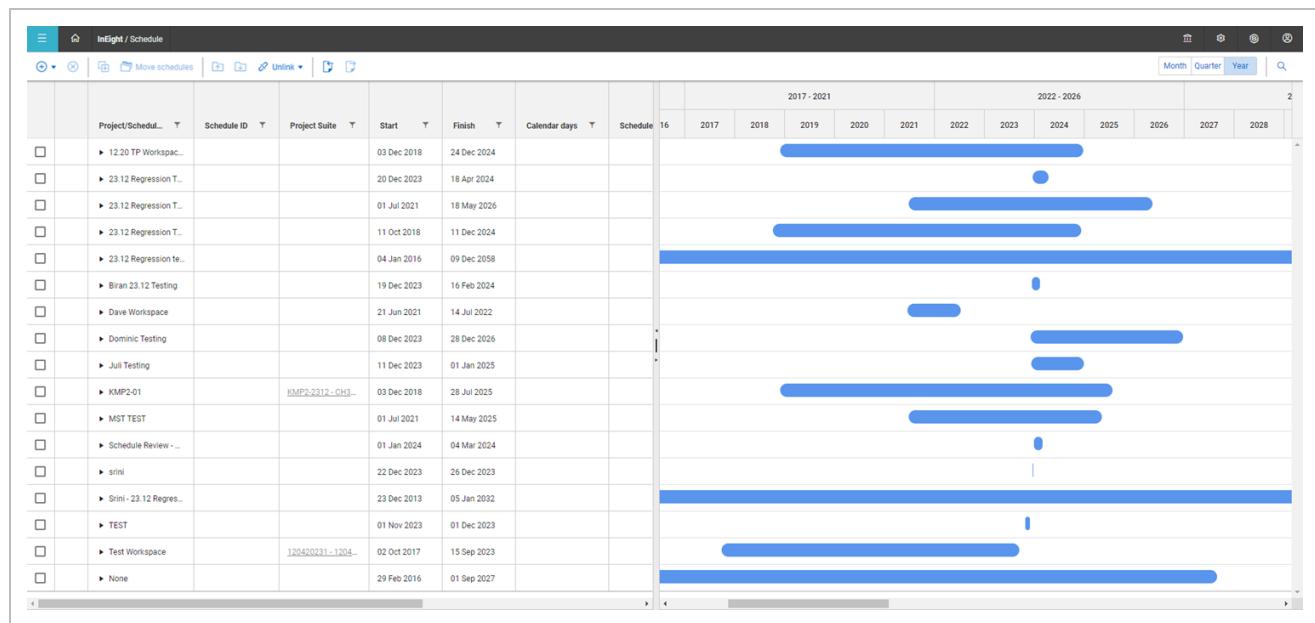
5. Once selected, select ***On*** each role the new user should have.
6. Click **Add**.

This page intentionally left blank.

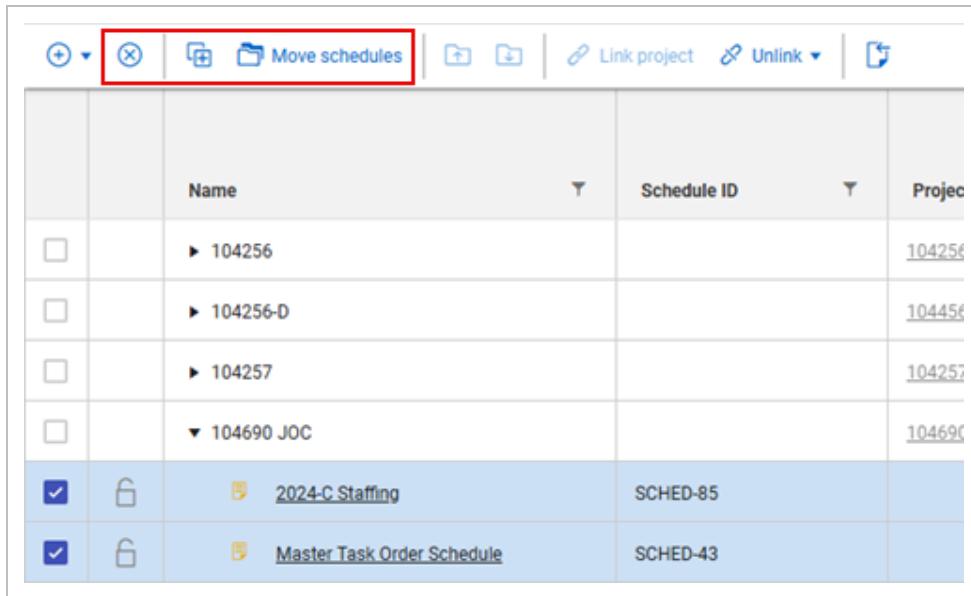
CHAPTER 3 – USER INTERFACE

Project List View

The Schedule home page is where you can see a list of projects and schedules, which includes a Gantt chart that illustrates project work and time periods. When a new project is created in InEight Platform, a workspace in Schedule is automatically added and linked to the project, which shows in the Project List view.

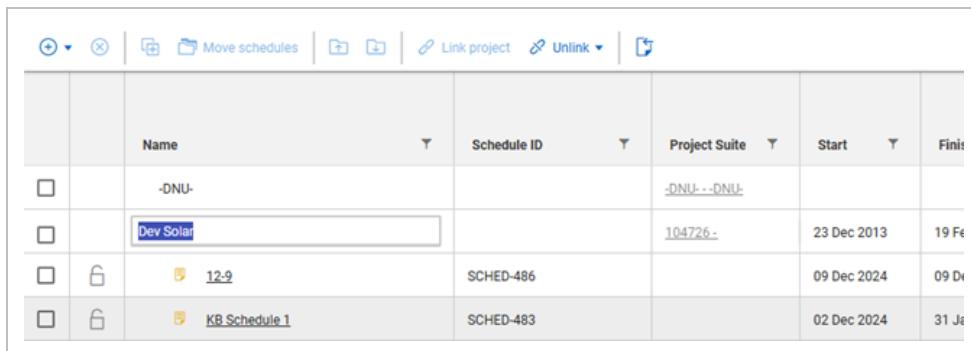


You can select multiple schedules on the Schedule home workspaces page, and then choose from the options to delete, copy or move. A locked schedule cannot be moved or deleted.



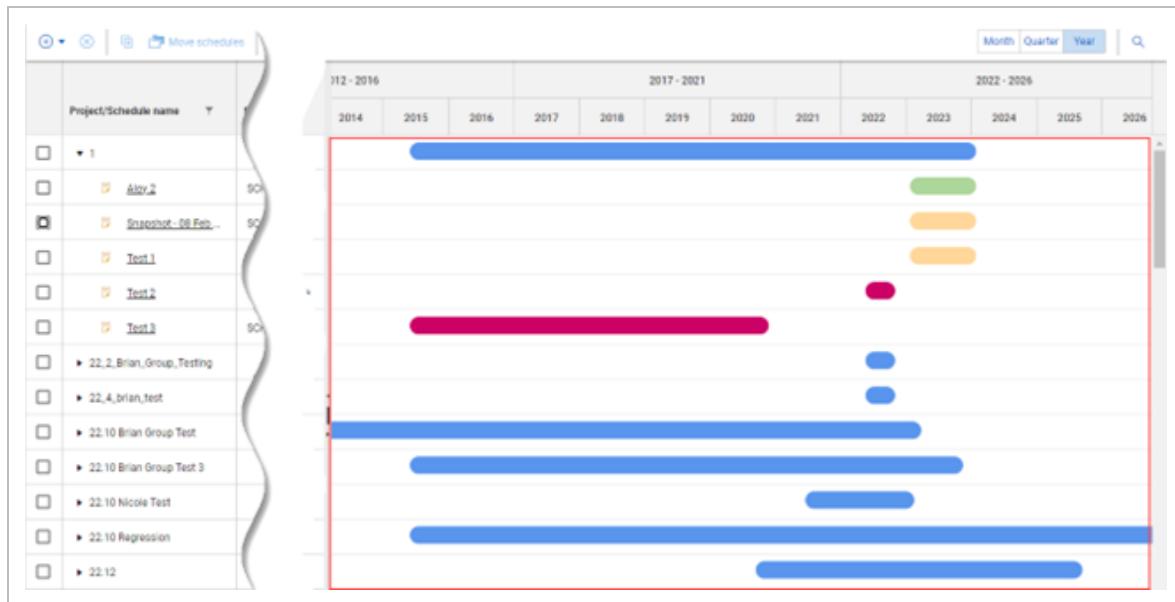
		Name	Schedule ID	Project
<input type="checkbox"/>		▶ 104256		104256
<input type="checkbox"/>		▶ 104256-D		104456
<input type="checkbox"/>		▶ 104257		104257
<input type="checkbox"/>		▼ 104690 JOC		104690
<input checked="" type="checkbox"/>		2024-C Staffing	SCHED-85	
<input checked="" type="checkbox"/>		Master Task Order Schedule	SCHED-43	

You can change the name of workspaces, folders, and IDs on the page by double-clicking the entry in the field.



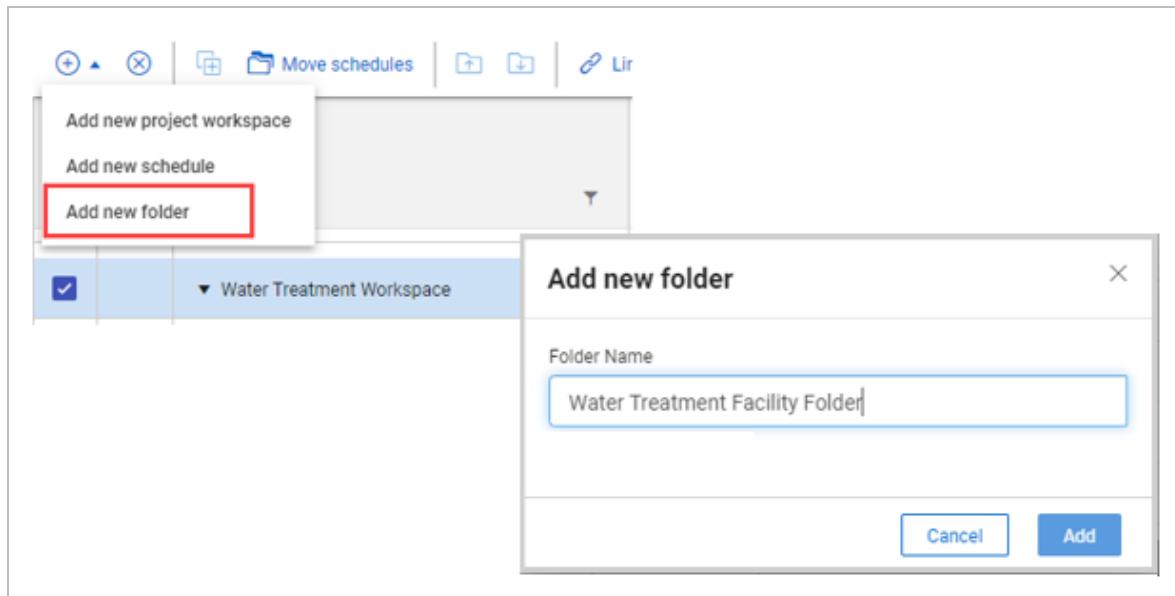
		Name	Schedule ID	Project Suite	Start	Finish
<input type="checkbox"/>		-DNU-		-DNU- -DNU-		
<input type="checkbox"/>		Dev Solar		104726 -	23 Dec 2013	19 Fe
<input type="checkbox"/>		12-9	SCHED-486		09 Dec 2024	09 De
<input type="checkbox"/>		KB Schedule 1	SCHED-483		02 Dec 2024	31 Ja

A Gantt chart is built in to the Schedule home page. The schedule Gantt chart illustrates horizontal lines representing work over a period in relation to the time planned for the work.



3.0.0.1 Schedule folders

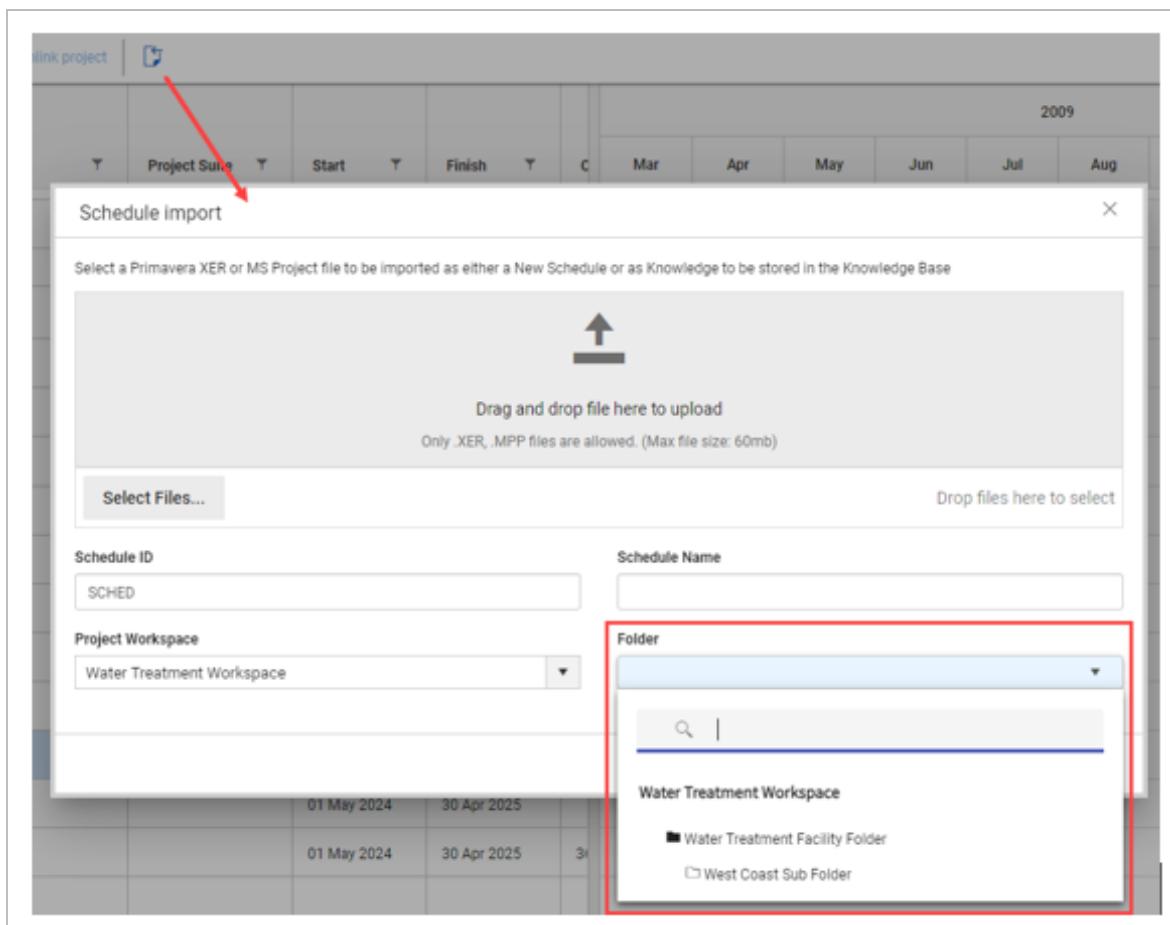
You can create and manage multiple project folders inside of a workspace to better organize your schedules. Schedule project folders act as storage containers that help you group like schedules into manageable repositories.



You can create up to three levels of folders to organize your schedules into, conditional upon how you want to build out the hierarchy of your folder structures.

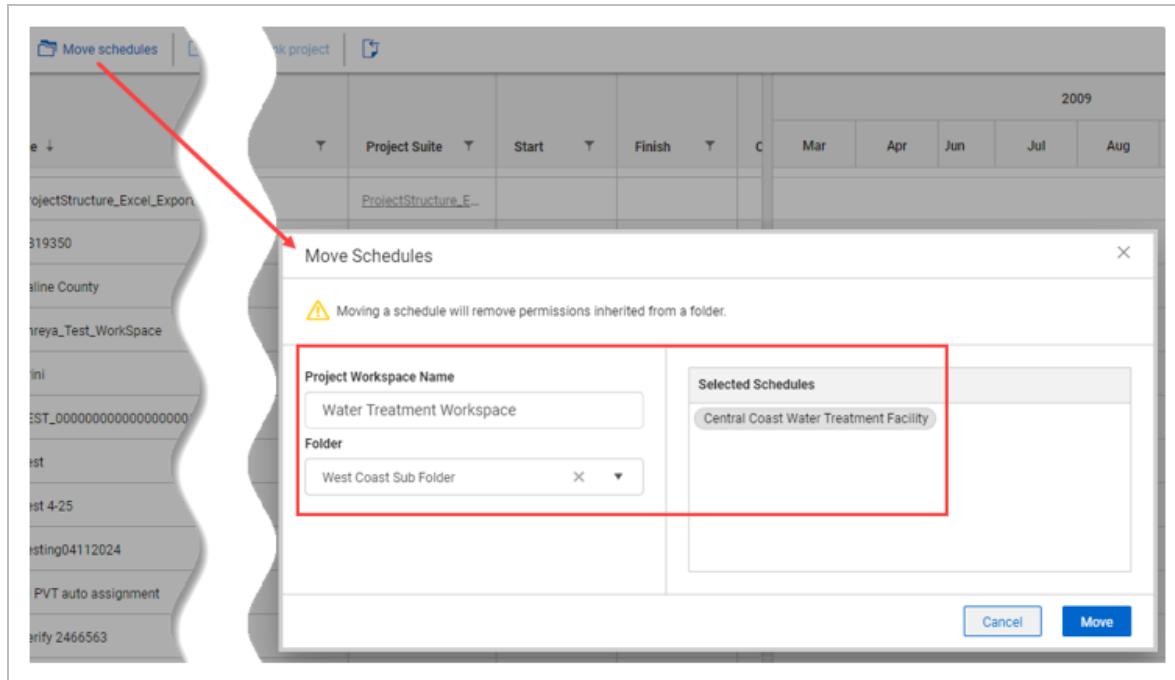
	Name	Schedule ID	Project Suite	Start	Finish
<input type="checkbox"/>	▼ Water Treatment Workspace			01 May 2024	30 Apr 2025
<input type="checkbox"/>	▼ ■ Water Treatment Facility Folder			01 May 2024	30 Apr 2025
<input type="checkbox"/>	▼ □ West Coast Sub Folder			01 May 2024	30 Apr 2025
<input type="checkbox"/> 	 Central Coast Water Treatment...	SCHED-96		01 May 2024	30 Apr 2025

When you import schedules, there is a new Folder drop-down to select which folder to place the schedule into.



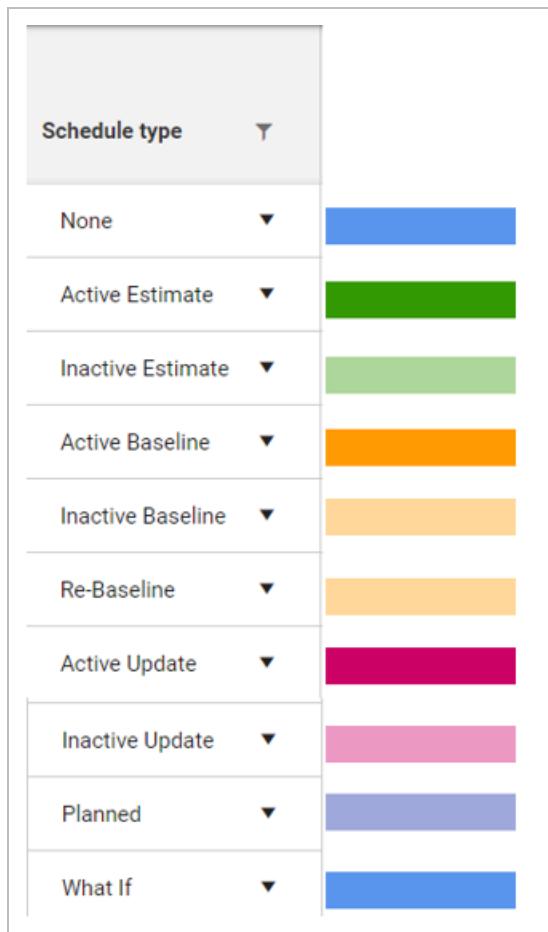
The screenshot shows the 'Schedule Import' dialog box. At the top, there is a message: 'Select a Primavera XER or MS Project file to be imported as either a New Schedule or as Knowledge to be stored in the Knowledge Base'. Below this is a file upload area with a placeholder 'Drag and drop file here to upload' and a note: 'Only .XER, .MPP files are allowed. (Max file size: 60mb)'. There are two buttons: 'Select Files...' and 'Drop files here to select'. Further down, there are fields for 'Schedule ID' (containing 'SCHED') and 'Schedule Name'. The 'Project Workspace' dropdown is set to 'Water Treatment Workspace'. To the right of these fields is a 'Folder' dropdown menu, which is highlighted with a red box. The dropdown menu lists the 'Water Treatment Workspace' folder and its sub-folders: 'Water Treatment Facility Folder' and 'West Coast Sub Folder'.

You can move schedules into specified folders.



3.0.0.2 Schedule type

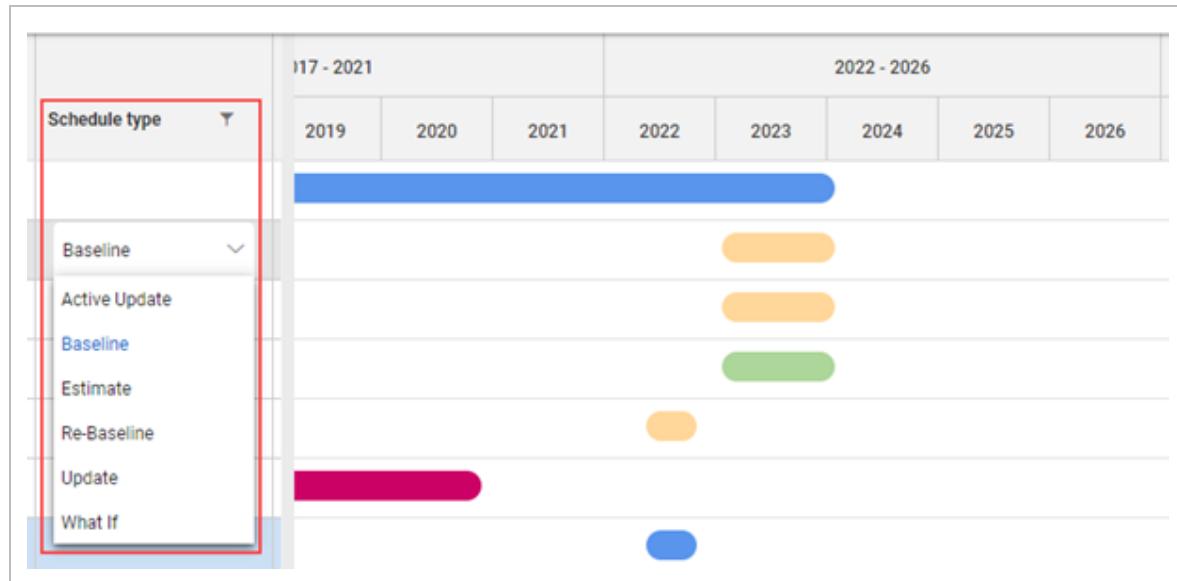
The schedule type shows a corresponding color scheme in the Gantt chart.



Schedule Type	Definition
None	No schedule type selected.
Active Estimate	Represents the latest project agreed schedule based on the construction estimate.
Inactive Estimate	Represents the previous iterations of schedules based on the construction estimate.
Active Baseline	Represents the latest submitted/client approved construction baseline.
Inactive Baseline	Represents previous iterations of submitted/client approved construction baselines
Re-Baseline	Represents a copy of a schedule that has been re-baselined prior to submittal/client approval.
Active Update	Represents the current iteration of a schedule that is actively being

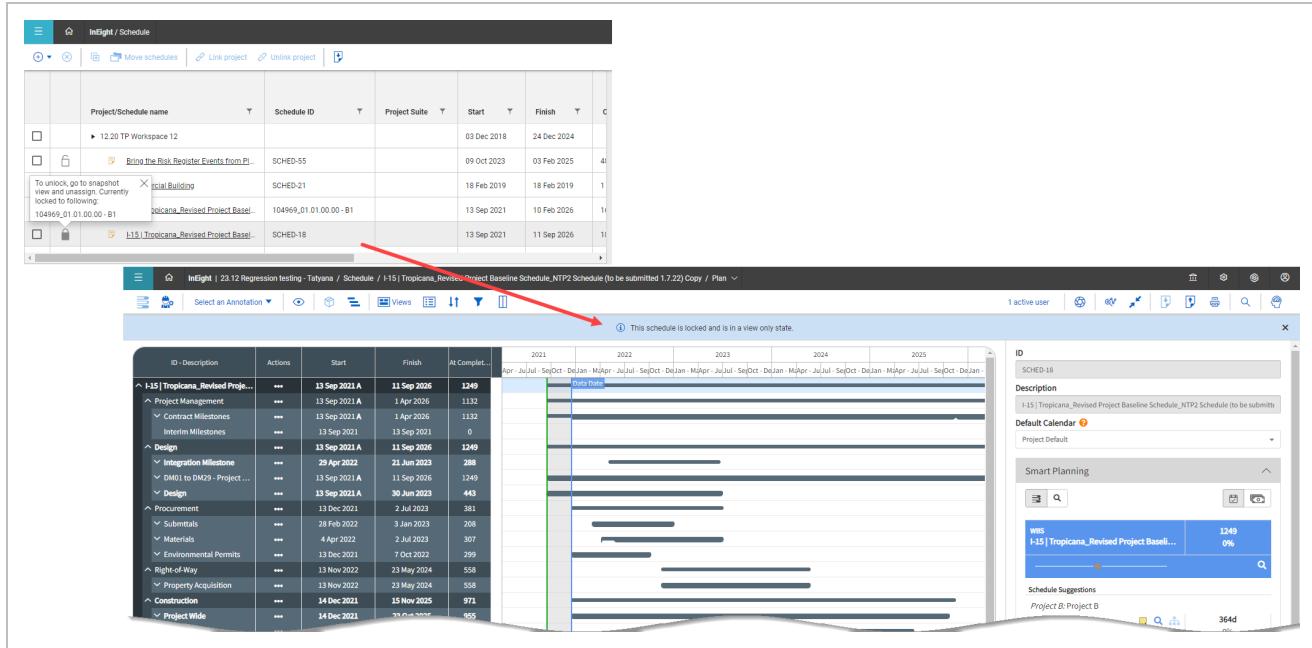
Schedule Type	Definition
	executed.
Inactive Update	Represents previous iterations of a schedule being executed.
Planned	Represents variations of schedules at conceptual phases of a project.
What If	Represents variations of schedules designed to test how different scenarios impact the overall time line. Used for schedule comparison.

You can change the Schedule type values to change the colors of the horizontal lines in the Gantt chart.



Locked Columns

The active baseline schedule type now automatically locks the schedule and converts it into a read-only state, which includes the Gantt grid, all Iris fields, and the Import icon. The locked read only state is applied to all views and impacts any functionality that involves the changing of data.

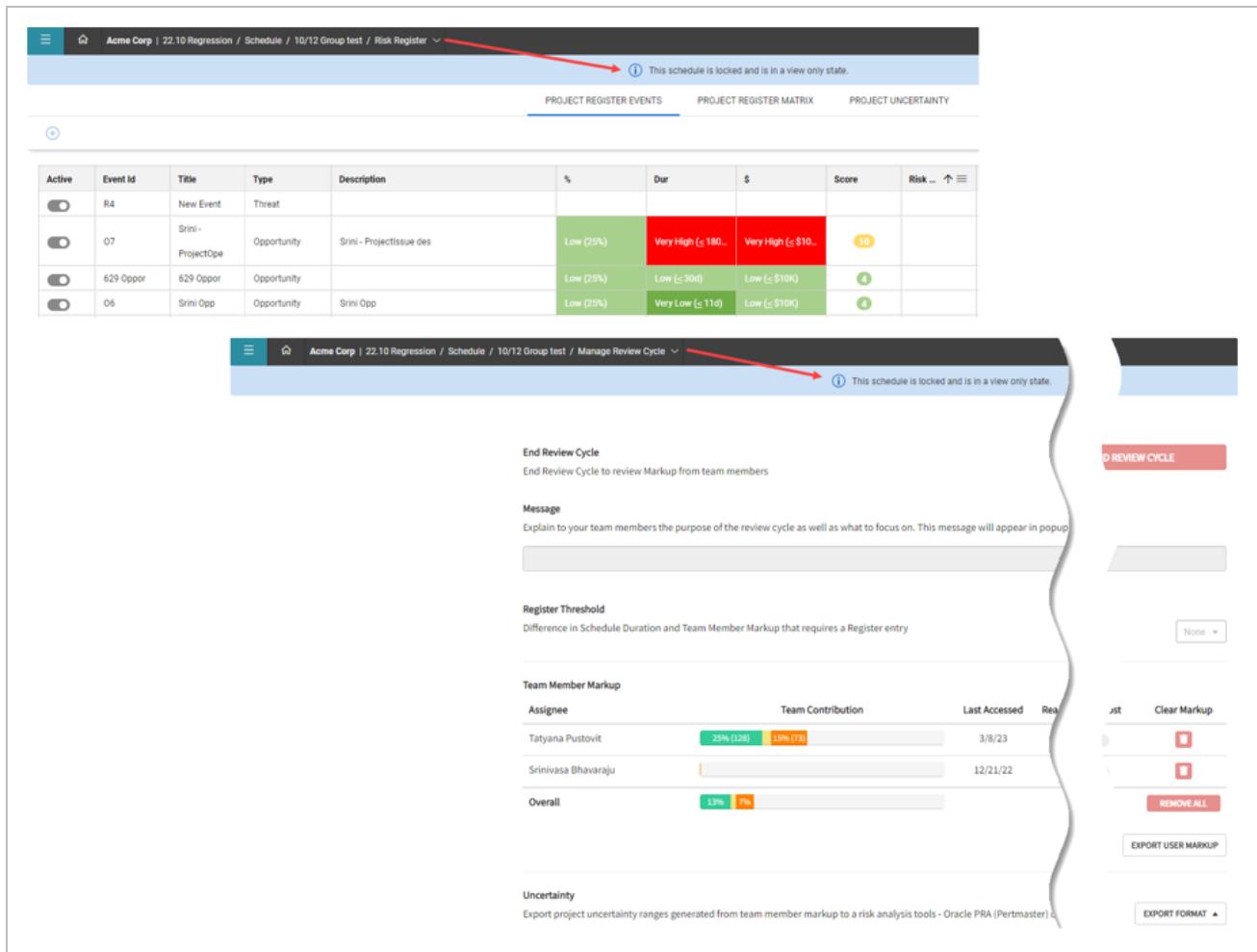


The screenshot shows the InEight Schedule interface. At the top, there is a navigation bar with icons for Home, Move schedules, Link project, Unlink project, and a help icon. Below the navigation bar is a table with columns: Project/Schedule name, Schedule ID, Project Suite, Start, Finish, and C. There are four rows in the table, each representing a different schedule. A red arrow points from the top table down to a detailed view of the 'I-15 | Tropicana_Revised Project Baseline_NTP2 Schedule' in the main content area. This view includes a Gantt chart showing tasks from 2021 to 2025, a timeline at the bottom, and a sidebar with schedule details like ID, Description, Default Calendar, and Smart Planning.

Active baselines are contractual schedule agreements between contractors and owners with infrequent changes. Some scenarios require active baselines to never change, which requires the active baseline to become locked.

The Risk register and Manage Review Cycle views are also in a locked and view only state, but data can still be exported from the Risk register.

Schedule User Guide



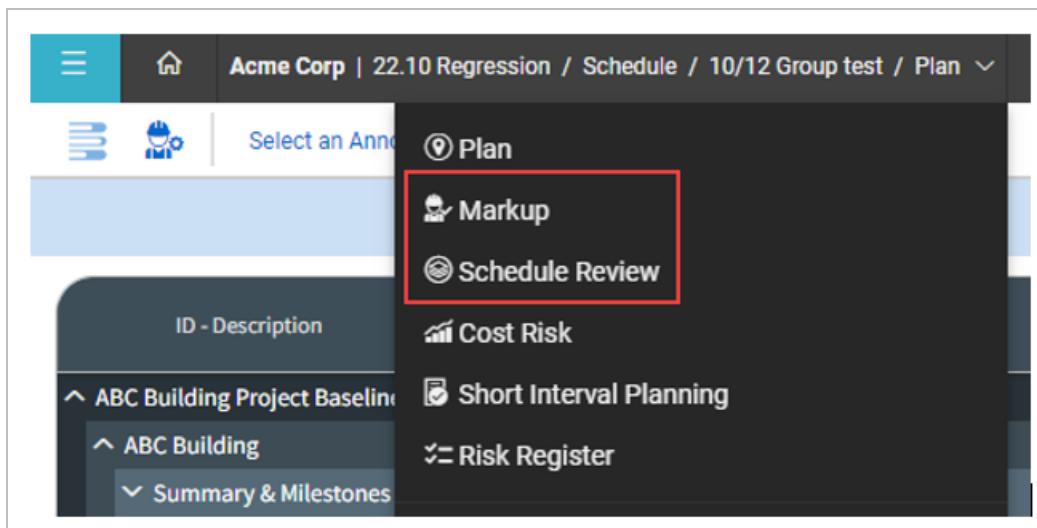
The screenshot shows two related screens for a project named '22.10 Regression / Schedule / 10/12 Group test / Risk Register'.

Risk Register Screen: A table showing risk events. A red arrow points to a status bar at the top right of the table, which reads: "This schedule is locked and is in a view only state." The table has columns: Active, Event Id, Title, Type, Description, %, Dur, \$, Score, and Risk ...

Active	Event Id	Title	Type	Description	%	Dur	\$	Score	Risk ...
On	R4	New Event	Threat						
On	07	Srini - ProjectOpe	Opportunity	Srini - ProjectIssue des	Low (25%)	Very High (≤ 180d)	Very High (≤ \$10K)	10	
On	629 Oppor	629 Oppor	Opportunity		Low (25%)	Low (≤ 30d)	Low (≤ \$10K)	1	
On	06	Srini Opp	Opportunity	Srini Opp	Low (25%)	Very Low (≤ 11d)	Low (≤ \$10K)	1	

Manage Review Cycle Screen: A screen for managing review cycles. A red arrow points to a status bar at the top right of the cycle list, which reads: "This schedule is locked and is in a view only state." The screen includes sections for 'End Review Cycle', 'Message' (with a placeholder for explaining the purpose), 'Register Threshold' (with a dropdown set to 'None'), 'Team Member Markup' (listing contributions for Tatyana Pustovit and Srinivasa Bhavaraju), and 'Uncertainty' (with export options for PRA and format).

The Markup and Schedule Review views are disabled when the project is in a read-only state.

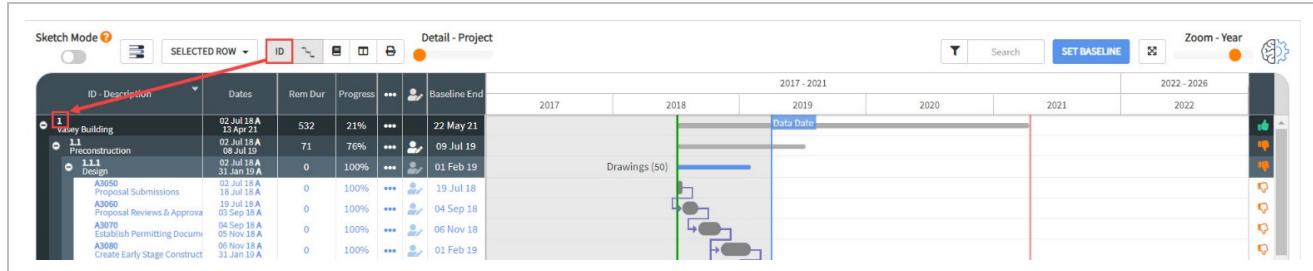


The screenshot shows the 'Plan' screen for the same project. A red box highlights the 'Markup' and 'Schedule Review' options in the sidebar, which are typically used for creating and reviewing project schedules. These options are disabled when the project is in a read-only state.

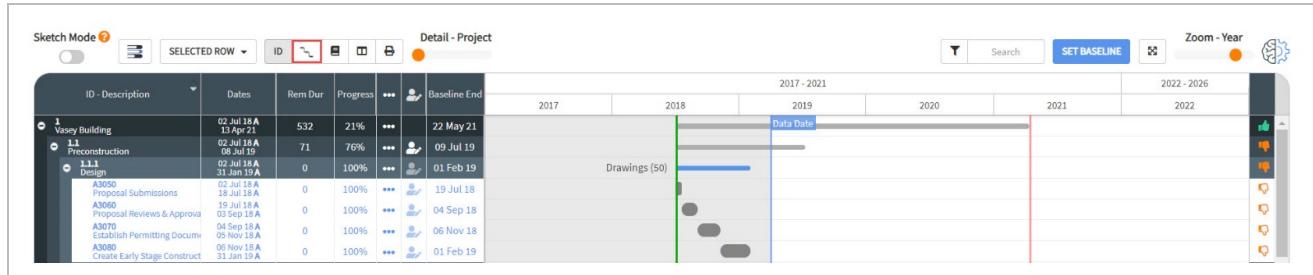
The sidebar also lists other features: 'ID - Description', 'ABC Building Project Baseline', 'ABC Building', 'Summary & Milestones', 'Cost Risk', 'Short Interval Planning', and 'Risk Register'.

3.0.1 Show/Hide Logic, WBS

In the Plan view from the first level drop-down menu within a project, click the **ID** icon to show or hide WBS Codes.

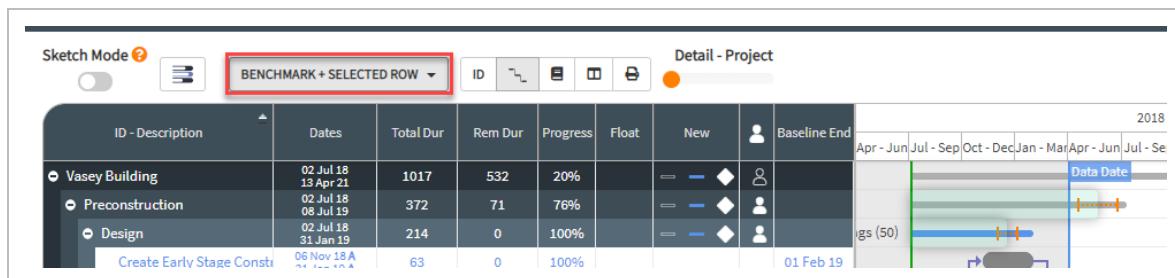


Click on the **Logic** icon to show or hide logic relationships.



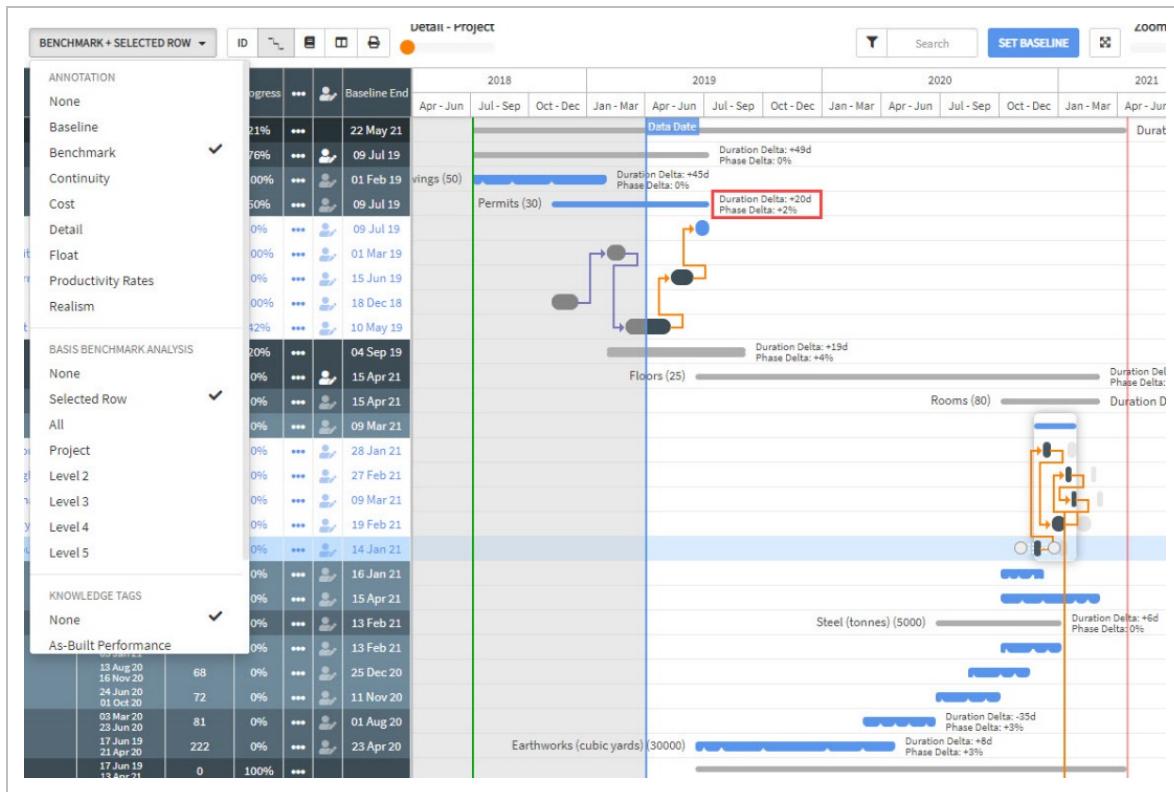
Annotations

In the Plan view from the first level drop-down menu in a project, click the **Annotations** drop-down menu.

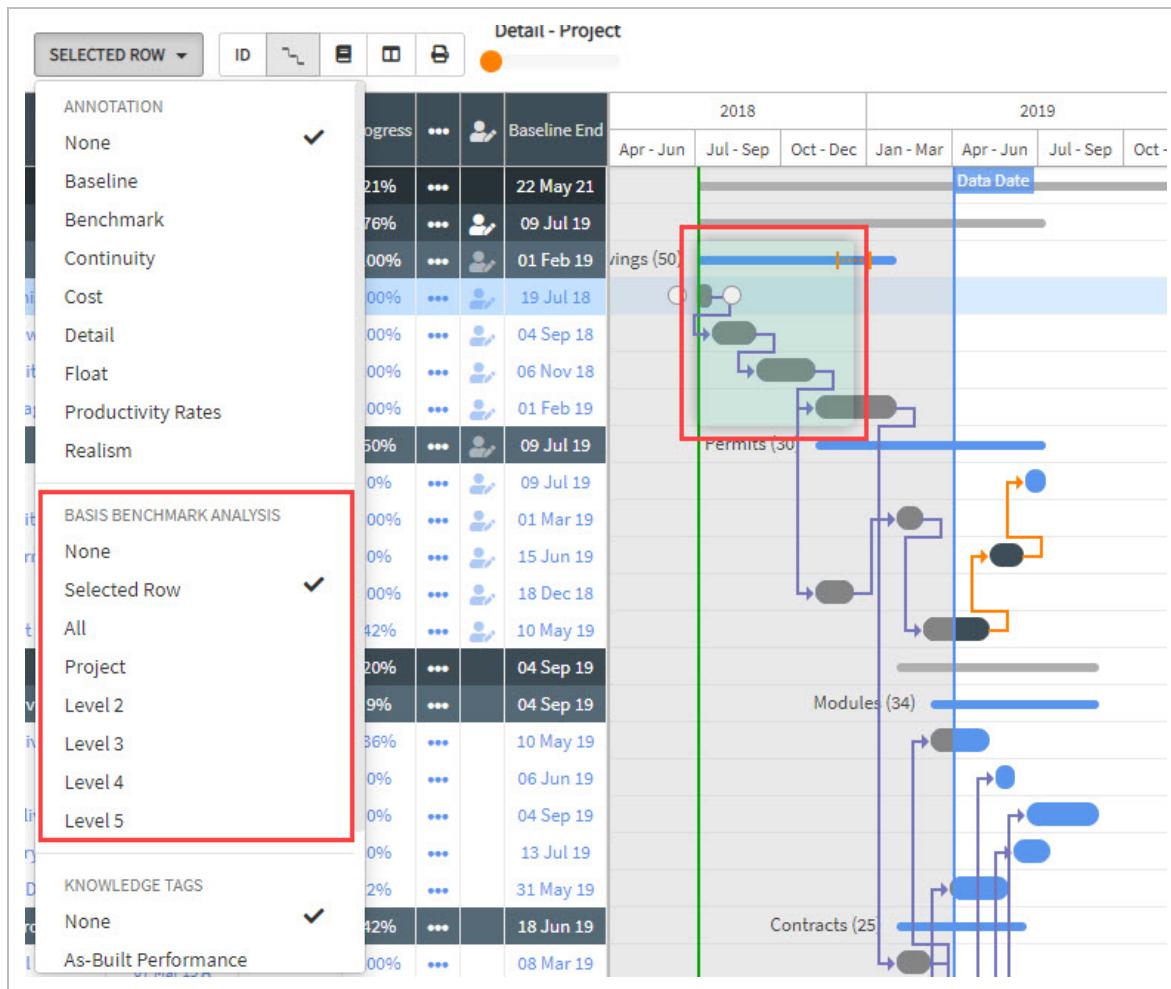


From here, Annotations can be changed by clicking the various options, which will update the information displayed on the Gantt Chart.

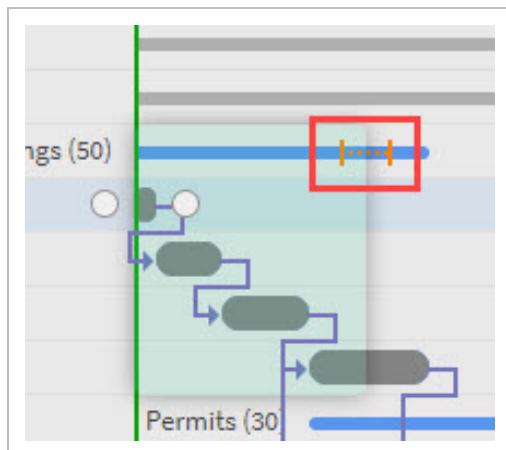
Schedule User Guide



The Benchmark Analysis options can also be used to change what level or WBS elements the phase windows appear.



The phase window indicates the time period that the benchmark falls within in the Knowledge Library project, conformed to the current project using the current project's start date and knowledge tags normalizers. For items that have the phase window showing, there is also a set of brackets indicating a range that the complete date of a summary WBS element is expected to fall within.



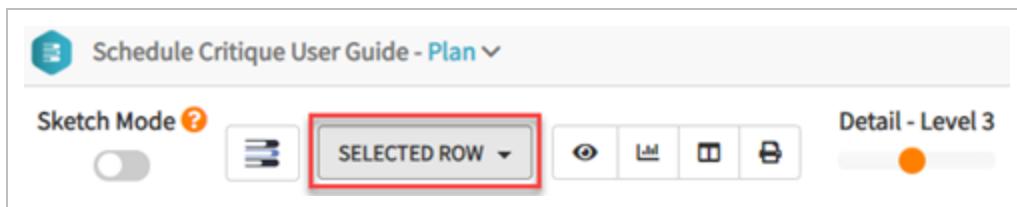
This is based on the % of tolerance defined in the project settings, the start date of the summary WBS in the current project, and the duration of the benchmark from the Knowledge Library.

3.0.2 Schedule Critique Overview

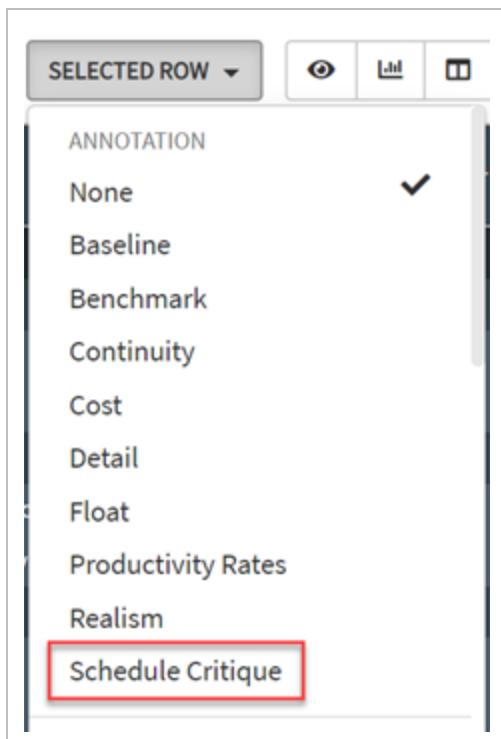
The **Schedule Critique** annotations and filters are available in the Plan view in Schedule. These functions aid schedulers in quickly identifying and isolating potential concerns with the current schedule logic.

Toggle Schedule Critique Annotations On / Off:

1. Start from the Plan view of a project and select the 1st level drop-down menu.



2. Under the Annotation section select **Schedule Critique**.



3. Once selected, the following icons will populate in the Gantt chart, representing potential logic and schedule concerns. These icons are detailed in the table below:

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.

The color of each icon represents the criticality of a critique. Blue icons are typically not desired as they often impede the flow of a schedule. Orange icons are considered with more caution, as these have a higher potential for schedule delay. Red icons identify activities of serious concern.

3.0.2.3 Missing Predecessor or Successor

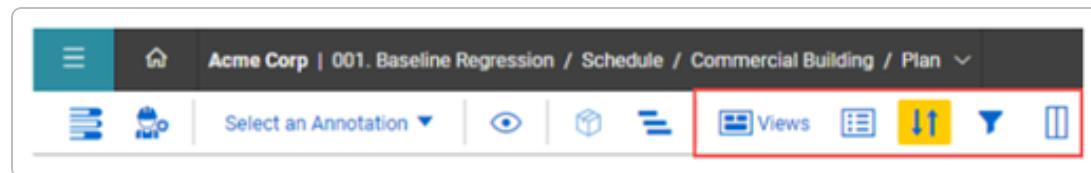
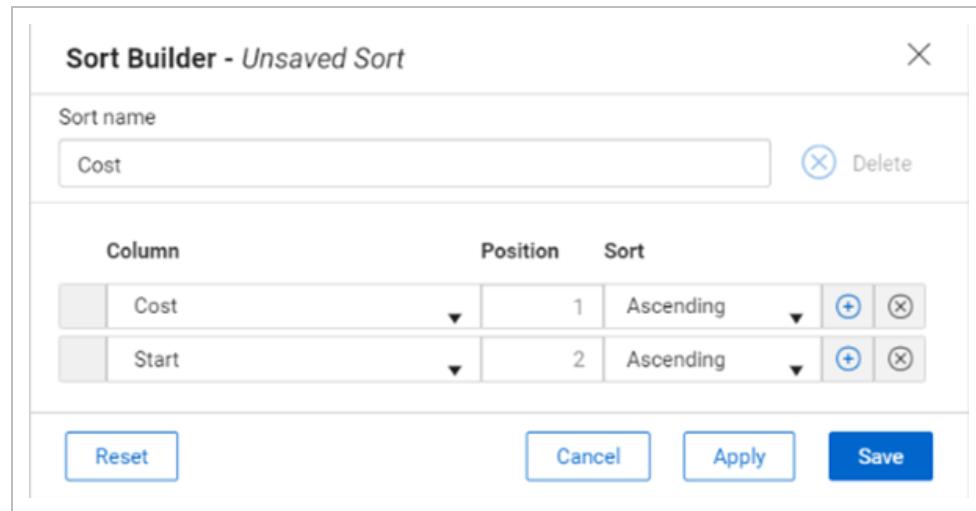
A **Missing Predecessor or Missing Successor** indicator appears when an activity does not have a predecessor or successor activity associated. Adding a predecessor or successor activity resolves this

critique.

Builder menus

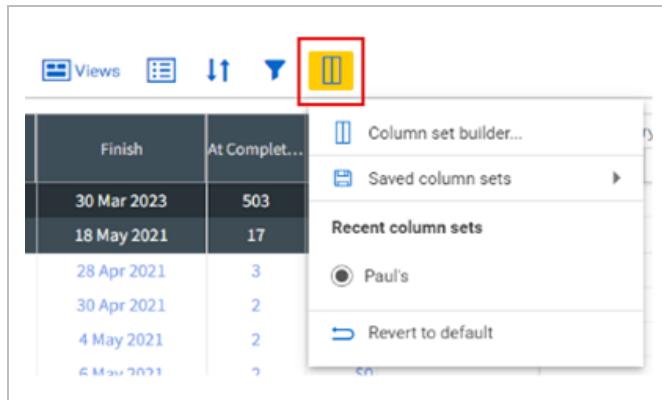
You can run advanced grouping, sorting, and query filters on multiple columns in several Schedule views, save as personal views and reuse in your assigned projects.

All menu builders can be saved and reused. Menu builder icons show highlighted when there are existing saved views. The enhanced search functions are available for all group by and sort builders.

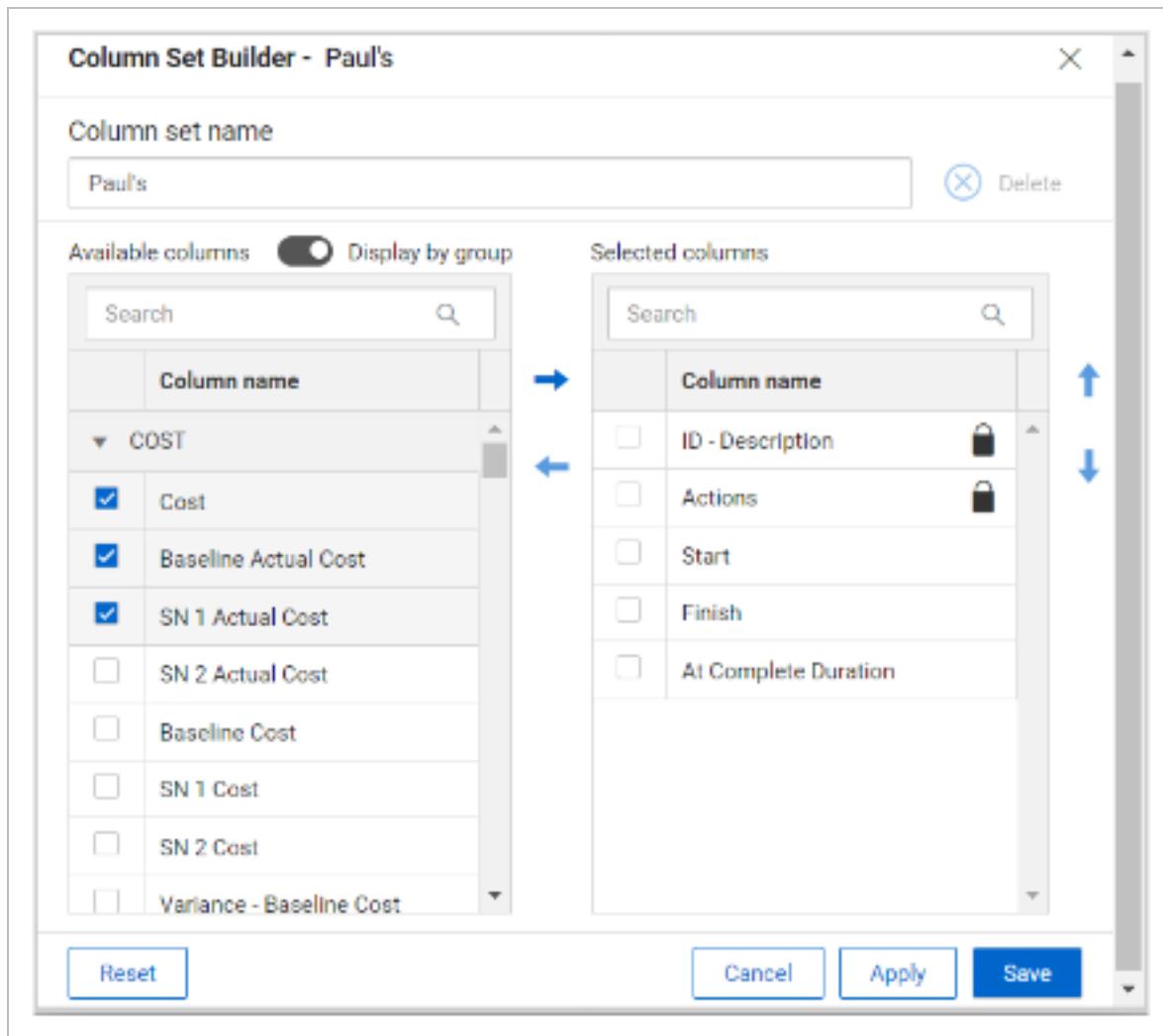


3.0.2.4 Column set builder menu

The Column set builder menu lets you add and remove columns in the Plan, Markup, and Schedule Review views.

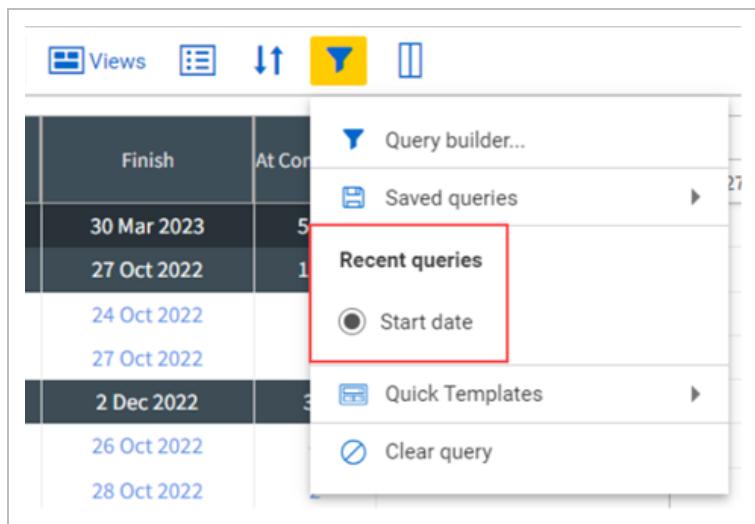


You can choose available columns in the Column set builder to create customized column page layouts.

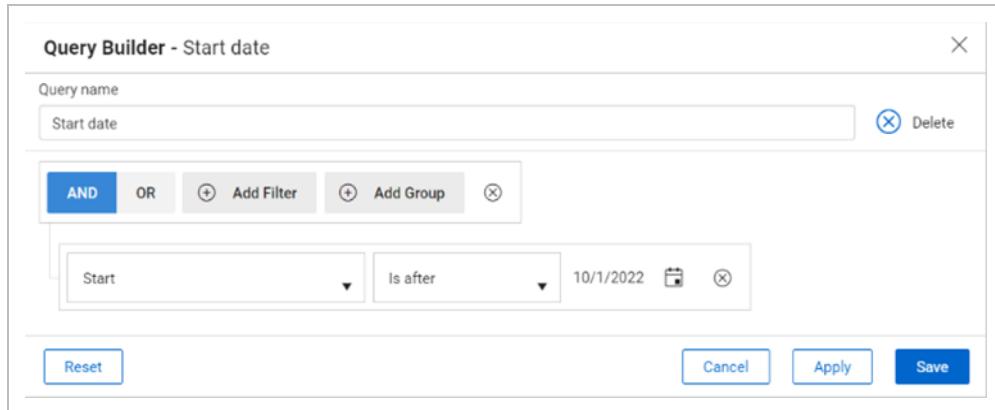


3.0.2.5 Query builder menu

The Query builder menu lets you set column filters in the Plan, Markup, Schedule Review, and Cost Risk views.

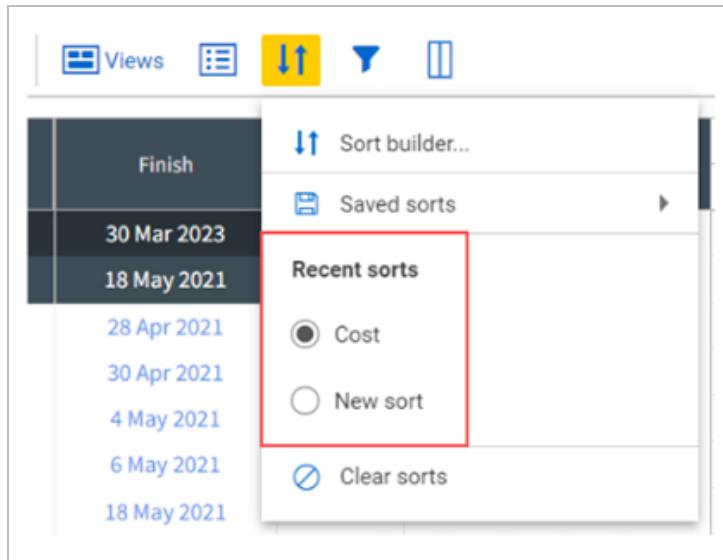


You can choose available columns in the Query builder to create customized page layout query.



3.0.2.6 Sort builder menu

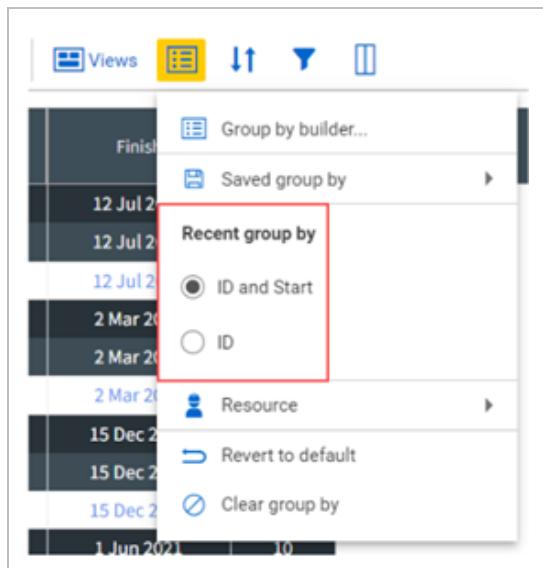
The Sort builder menu lets you sort columns in the Plan, Markup, Schedule Review, and Cost Risk views.



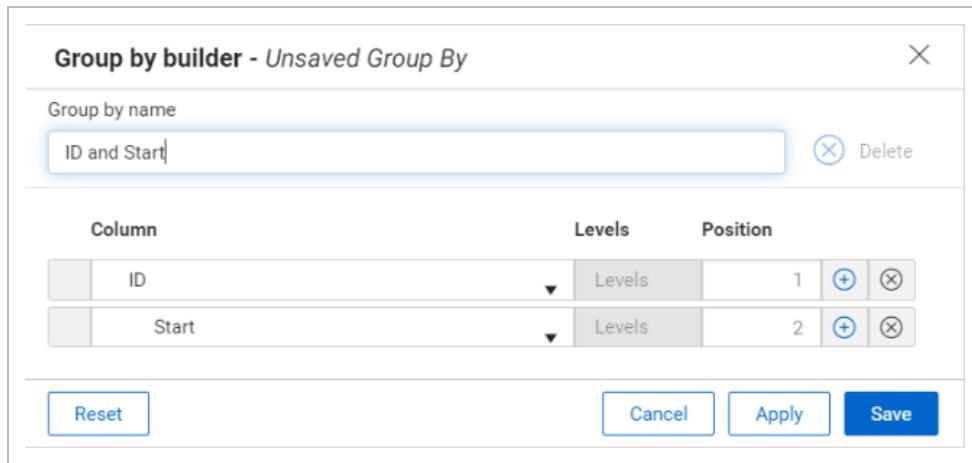
You can choose up to ten columns to sort in ascending and descending order.

3.0.2.7 Group by builder menu

The Group by builder menu lets you group columns in the Plan, Markup, Schedule Review views.

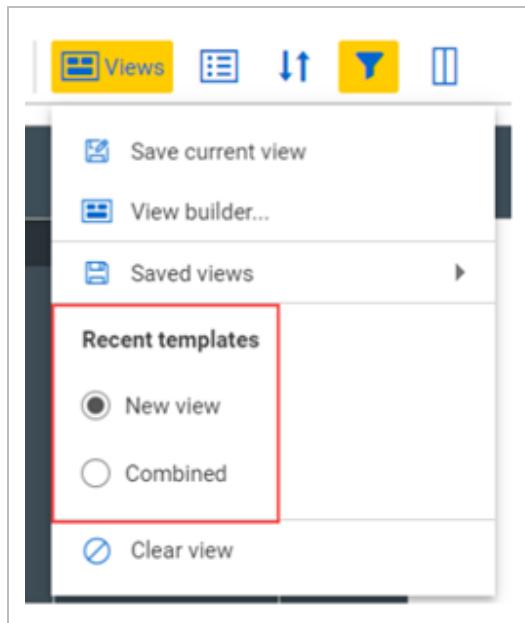


You can choose to group by one column or multiple columns.

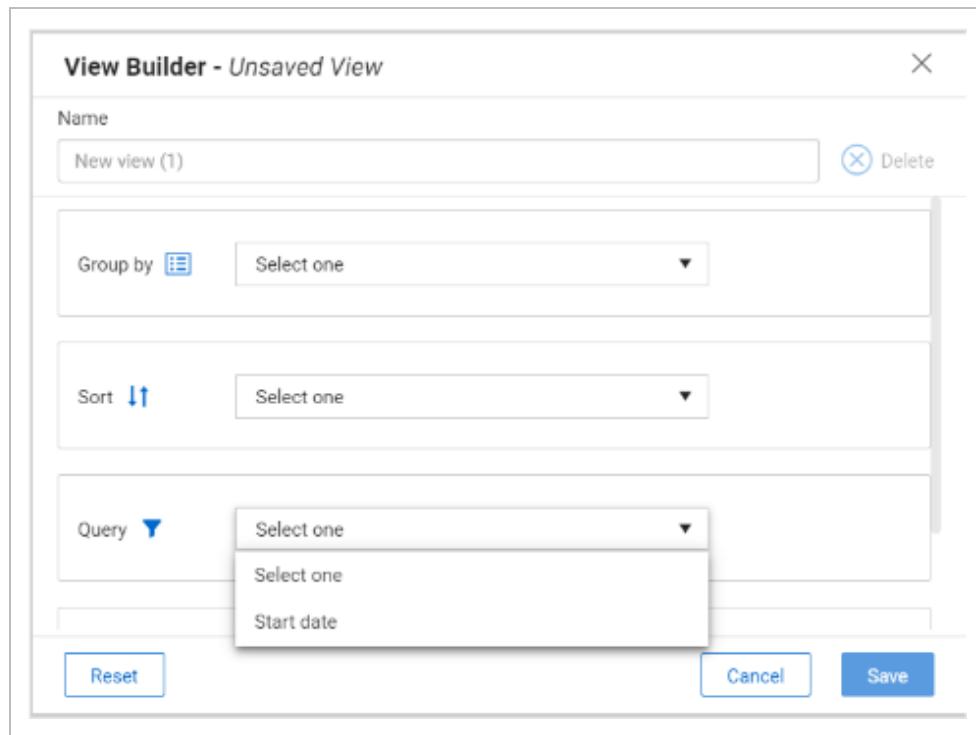


3.0.2.8 View builder menu

The View builder menu lets you combine columns from the other builder menus and show in the Plan, Markup, Schedule Review views.

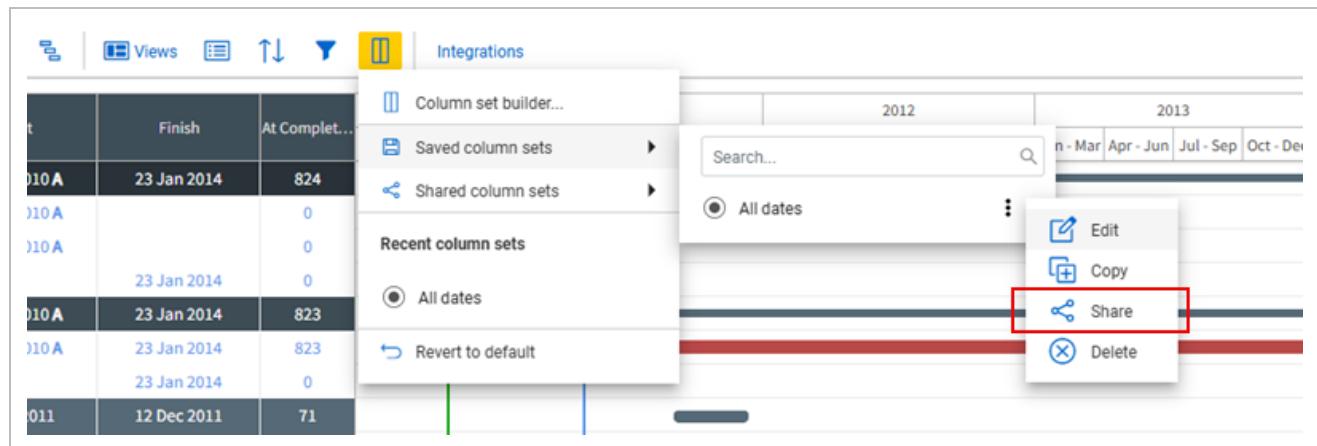


The View Builder lets you choose multiple columns from any of the builder menu columns. The chosen builder menus are highlighted on the toolbar.



3.0.2.9 Share builder items

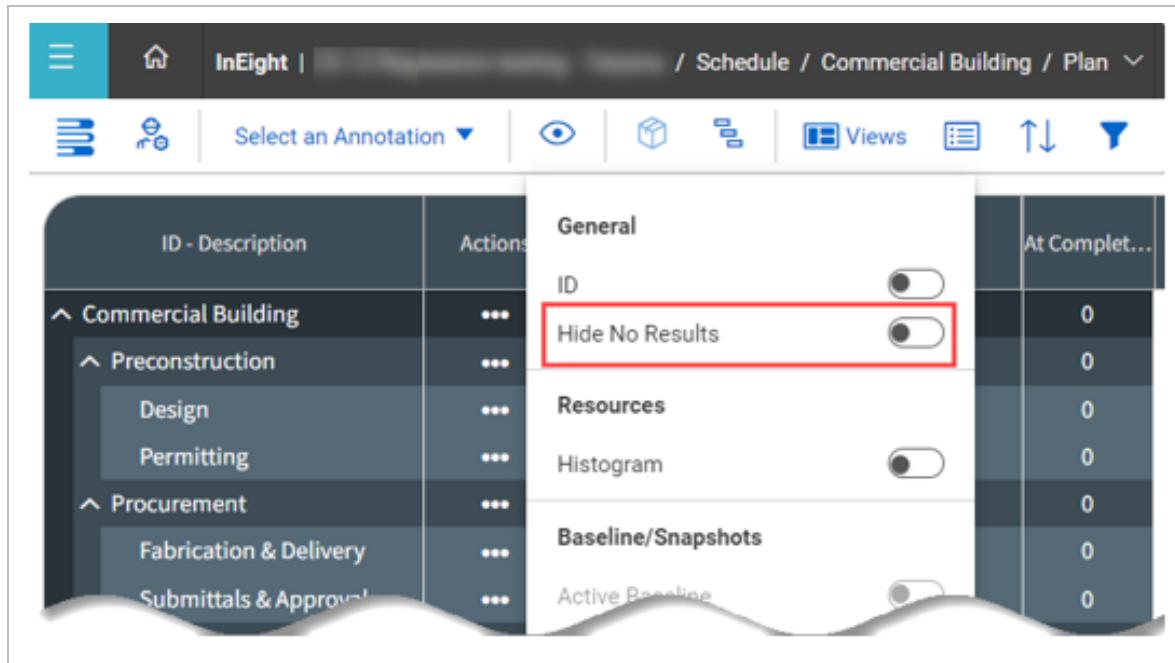
After you have created views, groups, sorts, queries, or column sets in the Builder menus, you can share them with any user that has access to the schedule where the builder items were created. This allows you to create a common view of schedule information for all users of the schedule to see. In the View builder, you can also combine builder items to create a view for the schedule that can then be shared with other users.



The share feature is available in all views. Only the creator of the shared builder item can edit, copy, delete and unshare it.

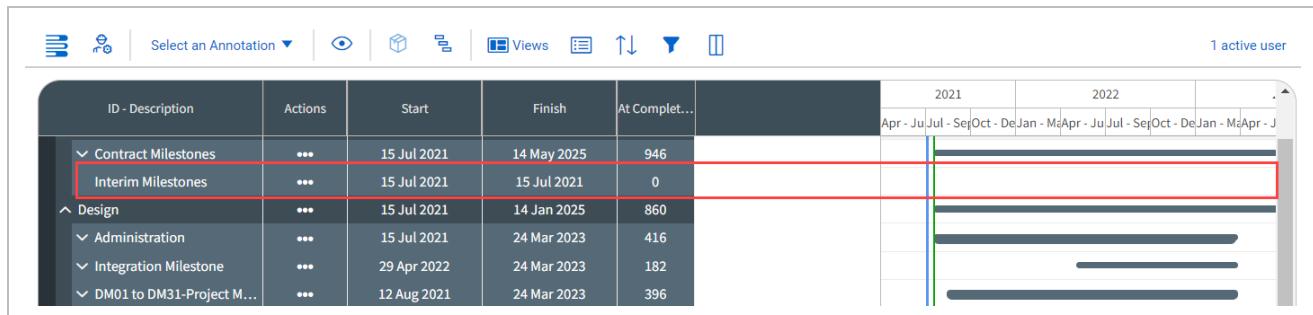
Hide No Results

In View Options, the Hide No Results toggle lets you hide any WBS items or groupings on the Plan page that do not yield any results.



The screenshot shows the InEight software interface with the 'Schedule / Commercial Building / Plan' path in the top navigation bar. The 'View Options' dialog box is open, showing the 'General' section. The 'Hide No Results' toggle switch is highlighted with a red box. The dialog also includes sections for 'Resources', 'Histogram', and 'Baseline/Snapshots'.

For example, Interim Milestones does not show any scheduled activities, work packages, or milestones, in the Gantt chart.



The screenshot shows the InEight Gantt chart view. The 'Contract Milestones' section is expanded, and the 'Interim Milestones' row is highlighted with a red box. The chart displays various tasks with their start and finish dates, and a timeline for the years 2021 and 2022.

When the Hide No Results toggle is set to *On*, Interim Milestones is removed from the Plan view.



CHAPTER 3 – KNOWLEDGE LIBRARY

Knowledge Base

Resources in the Knowledge Base

To access the Knowledge Base, click the **Knowledge Base** icon.

In the Knowledge Base, you can establish the base pool of resources for the organization. Schedule is built on top of augmented intelligence, or machine based learning. The Knowledge Base is used to enhance machine based learning and load with past schedule-related data that an organization would want to include in future schedules. Hence, this data that gets loaded should be as accurate as possible. After set up, schedulers can pull these into projects for use with the resource management functionality and analytics.

CPM SCHEDULES	ACTIVITY PRODUCTIVITY RATES	KNOWLEDGE TAGS	CALENDARS	REGISTER	RESOURCES	MACHINE LEARNING
+						 
Schedules ↓	Schedule ID	Start	Finish	Data Date	Verified	
 MPP Project	SCHED-17		2 Jul 2018	18 Jun 2023	2 Jul 2018	
 ms proj	SCHED-18		1 Jul 2019	26 Feb 2023	1 Jul 2019	
 MS project	SCHED-1		3 Jul 2018	13 Sep 2020	3 Jul 2018	
 New CPM Schedule	SCHED-19		9 Jun 2021	9 Jun 2022	19 Aug 2021	
 new kb	SCHED-70		12 Apr 2022	12 Apr 2023	12 Apr 2022	
 New Sch on 6.27	SCHED-83		27 Jun 2022	27 Jun 2023	27 Jun 2022	
 New schedule from Scratch	SCHED-54		14 Feb 2022	14 Feb 2022	14 Feb 2022	
 no ID	NO ID		3 Jul 2018	13 Sep 2020	3 Jul 2018	
 not	SCHED-37		27 Sep 2021	27 Sep 2021	1 Apr 2019	
 Offshore Platform	SCHED-20		8 May 2019	8 May 2020	8 May 2019	
 Offshore Platform [OUTLINED @ 7/15/20...]	SCHED-21		8 May 2019	8 May 2019	8 May 2019	
 Paradise	SCHED-22		29 Oct 2020	29 Oct 2020	26 Mar 2017	
 Preconstruction	SCHED-23		2 Jul 2018	16 May 2024	27 Oct 2020	
 Procurement	SCHED-24		1 Oct 2017	1 Oct 2018	1 Oct 2017	
 ProjectCode Match	SCHED-80		16 Jun 2022	16 Jun 2023	16 Jun 2022	
 PT	SCHED-112		26 Oct 2022	26 Oct 2023	26 Oct 2022	
 Publish to KB	SCHED-49		21 Feb 2022	20 Feb 2023	19 Feb 2022	

CPM Schedule

CPM schedules in the Knowledge Base contain the same information as project schedules. CPM schedules are past or current schedules where relevant schedule data can be used in future schedules. For example: if you are working on a new schedule for bridgework, you can store past bridgework schedules in the knowledge library to use later for machine learning for new projects.

The Verified column on the far right is controlled by an administrator, and represents schedules that have been certified as schedules that contain accurate data. Schedules that show a green dot are verified, and red dots are unverified schedules.

CPM SCHEDULES	ACTIVITY PRODUCTIVITY RATES	KNOWLEDGE TAGS	CALENDARS	REGISTER	RESOURCES	MACHINE LEARNING
+						
Schedules ↓	Schedule ID	Start	Finish	Data Date	Verified	
MPP Project	SCHED-17	2 Jul 2018	18 Jun 2023	2 Jul 2018	●	
ms proj	SCHED-18	1 Jul 2019	26 Feb 2023	1 Jul 2019	●	
MS project	SCHED-1	3 Jul 2018	13 Sep 2020	3 Jul 2018	●	
New CPM Schedule	SCHED-19	9 Jun 2021	9 Jun 2022	19 Aug 2021	●	
new kb	SCHED-70	12 Apr 2022	12 Apr 2023	12 Apr 2022	●	
New Sch on 6.27	SCHED-83	27 Jun 2022	27 Jun 2023	27 Jun 2022	●	
New schedule from Scratch	SCHED-54	14 Feb 2022	14 Feb 2022	14 Feb 2022	●	
no ID	NO ID	3 Jul 2018	13 Sep 2020	3 Jul 2018	●	
not	SCHED-37	27 Sep 2021	27 Sep 2021	1 Apr 2019	●	
Offshore Platform	SCHED-20	8 May 2019	8 May 2020	8 May 2019	●	
Offshore Platform [OUTLINED @ 7/15/20]	SCHED-21	8 May 2019	8 May 2019	8 May 2019	●	
Paradise	SCHED-22	29 Oct 2020	29 Oct 2020	26 Mar 2017	●	
Preconstruction	SCHED-23	2 Jul 2018	16 May 2024	27 Oct 2020	●	
Procurement	SCHED-24	1 Oct 2017	1 Oct 2018	1 Oct 2017	●	
ProjectCode Match	SCHED-80	16 Jun 2022	16 Jun 2023	16 Jun 2022	●	
PT	SCHED-112	26 Oct 2022	26 Oct 2023	26 Oct 2022	●	
Publish to KB	SCHED-49	21 Feb 2022	20 Feb 2023	19 Feb 2022	●	

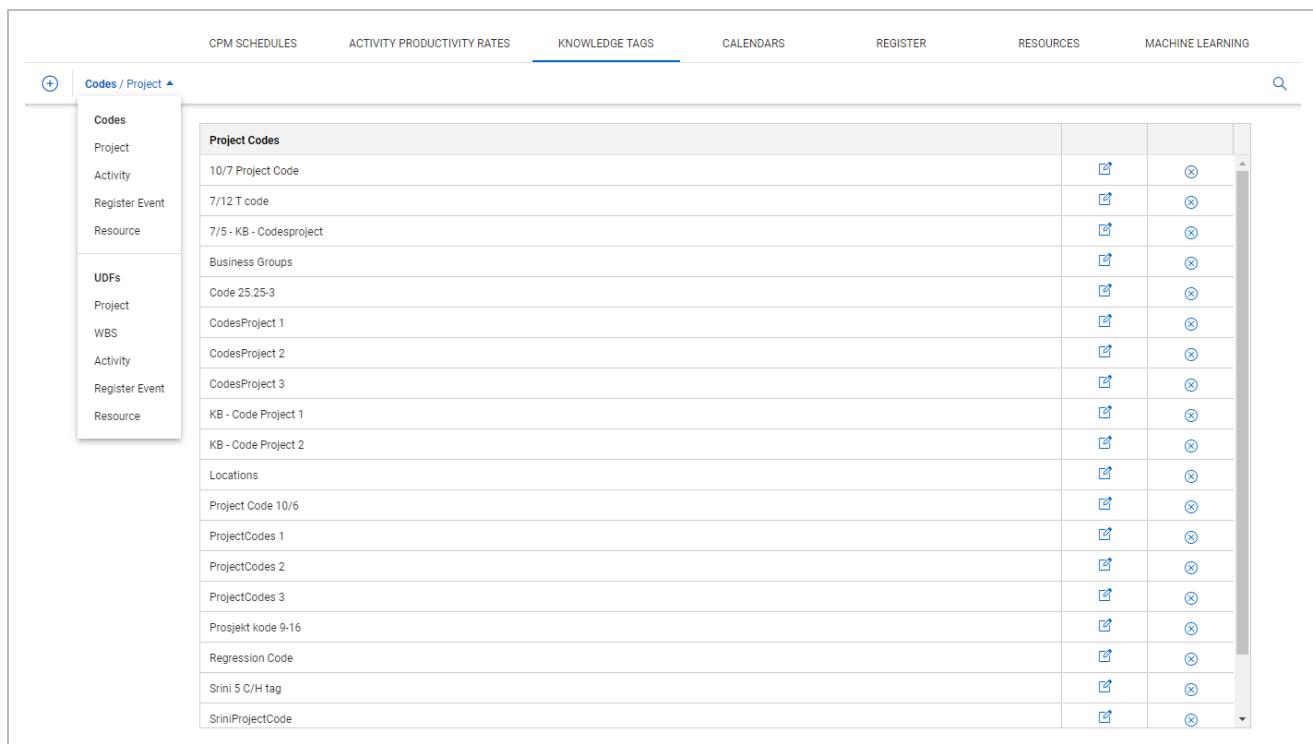
Activity Productivity Rates

Organizations can use Activity Productivity Rates deemed as being the most productive, which can be used to give you durations.

CPM SCHEDULES	ACTIVITY PRODUCTIVITY RATES	KNOWLEDGE TAGS	CALENDARS	REGISTER	RESOURCES	MACHINE LEARNING
+						
Description	Output	UOM	Duration/Output	Duration Unit	\$/Output	
Act 1	1250	Sec		Days ▶	\$5,000,500.00	
Act1	8500	Hours	150	Days ▶	\$787,878,778.00	
APR 1	2	10	200	Hours ▶	\$6,000,000.00	
Brian Test Rate	1	23	23	Days ▶	\$230.00	
Concrete	80	Cubic Yards	144	Days ▶	\$40,000.00	
Concrete Pour (generic)	400	Sq Feet	1	Days ▶	\$36,000.00	
Concrete Pour (generic)	8	Cubic Yards	1	Days ▶	\$0.00	
Concrete Pour (refinery)	6	Cubic Yards	1	Days ▶	\$0.00	
Concrete Pour (refinery)	60	Cubic Yards	1	Days ▶	\$52,000.00	
Controls	1	Unit	4	Days ▶	\$20,000.00	
Controls	1	Unit	4	Days ▶	\$0.00	
Drywall	1	1	5	Days ▶	\$0.00	
Early Works	1	Acre	1	Days ▶	\$0.00	
Early Works	1	Acre	1	Days ▶	\$2,000.00	
Early Works	1	Acre	1	Days ▶	\$2,000.00	
EIA	1	Unit	24	Days ▶	\$30,000.00	
EIA	1	Unit	24	Days ▶	\$0.00	
Excavation	200	Linear Feet	1	Days ▶	\$0.00	
Excavation	0.25	Cubic Yards	0.5	Hours ▶	\$0.00	

Knowledge Tags

On the Knowledge Tags tab, you can review tags defined at the organization level and exclude them as necessary from consideration by the Schedule inference engine. When a new project is created, you have the option to import these knowledge tags into the new project.



The screenshot shows the Schedule User Guide interface with the 'Knowledge Tags' tab selected. The left sidebar is collapsed, showing a list of categories: Codes, Project, Activity, Register Event, Resource, UDFs, Project, WBS, Activity, Register Event, and Resource. The main area displays a table titled 'Project Codes' with the following data:

Code	Edit	Delete
10/7 Project Code		
7/12 T code		
7/5 - KB - Codesproject		
Business Groups		
Code 25.25-3		
CodesProject 1		
CodesProject 2		
CodesProject 3		
KB - Code Project 1		
KB - Code Project 2		
Locations		
Project Code 10/6		
ProjectCodes 1		
ProjectCodes 2		
ProjectCodes 3		
Prosjekt kode 9-16		
Regression Code		
Srini 5 C/H tag		
SriniProjectCode		

Calendars

On the Calendars tab, additional calendars can be created, working days can be edited, and a default calendar can be defined. This is also where holidays are defined.

CPM SCHEDULES	ACTIVITY PRODUCTIVITY RATES	KNOWLEDGE TAGS	CALENDARS	REGISTER	RESOURCES	MACHINE LEARNING				
+										
Calendar	Hours/d...	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Exceptions	Actions
2 Days	10	○	●	●	●	○	○	○	4	 
22 Day	10	○	●	●	○	○	○	○	0	 
3 Day	8	○	●	●	●	○	○	○	0	 
4 Day	8	○	●	●	●	●	○	○	0	 
5 Day	8	○	●	●	●	●	●	○	0	 
6 Day	8	○	●	●	●	●	●	●	0	 
7 Day	8	●	●	●	●	●	●	●	0	 
Brian Default Work Schedule	1	○	○	○	○	●	○	○	0	 
Global Calendar	8	○	●	●	●	●	●	○	0	 
My calendar	5	○	○	●	●	●	○	○	2	 
Tatyana's calendar	6	○	●	●	●	●	●	○	2	 

Register

Events register

The Events register is where you store persistent risks that occur on projects. The Events register is useful for pulling stored risks into new schedules and use them for risk workshops. The following fields can be quickly edited from the register.

Tab	Function/Description
Title	Title of the event.
Type	This describes the type of register item, for example, Risk, Opportunity, or Action Item.
Description	Items descriptions can be edited at any time.
%	The Probability an event will occur in a risk simulation.
Dur	Impact range event would have on a simulation when it occurs.
\$	Impact range event would have on a simulation when it occurs

Tab	Function/Description
Score	A score is automatically generated based on the probability and impact of items.
Mitigation	Mitigation strategies can be captured here.
Status	Indicates the status of an event in the register
Activities	The number of times the register item appears schedules. Specific Project and WBS element appearances can be reviewed by clicking on the number. You can select the All drop down to filter the list by project.
Created By	Indicates the user that created the Event.
Verified	Items can be either created directly in the Knolwedge Library, or pushed from individual projects. Items pushed from projects will appear here as unverified, and will not show up as Smart Suggestion options in other projects until verified.
Delete	Deletes the Event from the register and from any assigned instances in schedules.

Register Types

Additional Register Types can be defined by selecting the register type tab.

CPM SCHEDULES	ACTIVITY PRODUCTIVITY RATES	KNOWLEDGE TAGS	CALENDARS	REGISTER	RESOURCES	MACHINE LEARNING
Events Register	Register Types	Matrix Definition				

Name	Prefix	Probability	Schedule Impact	Cost Impact	Positive Impact	Edit	
Opportunity	O	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Idea	I	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Srini Test	SR	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Tatyana Test	TP	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Schedule Change Request	S	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Test 9-16	TP	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Type 1	TP	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
General	GEN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Threat	R	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Issue	U	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

Matrix Definition

The tenant level definition of the likelihood and range of impact for both duration and cost a register event has in the cost risk, and schedule review views on risk simulations. These can be adjusted to be project or schedule specific

CPM SCHEDULES	ACTIVITY PRODUCTIVITY RATES	KNOWLEDGE TAGS	CALENDARS	REGISTER	RESOURCES	MACHINE LEARNING
Events Register	Register Types	Matrix Definition				

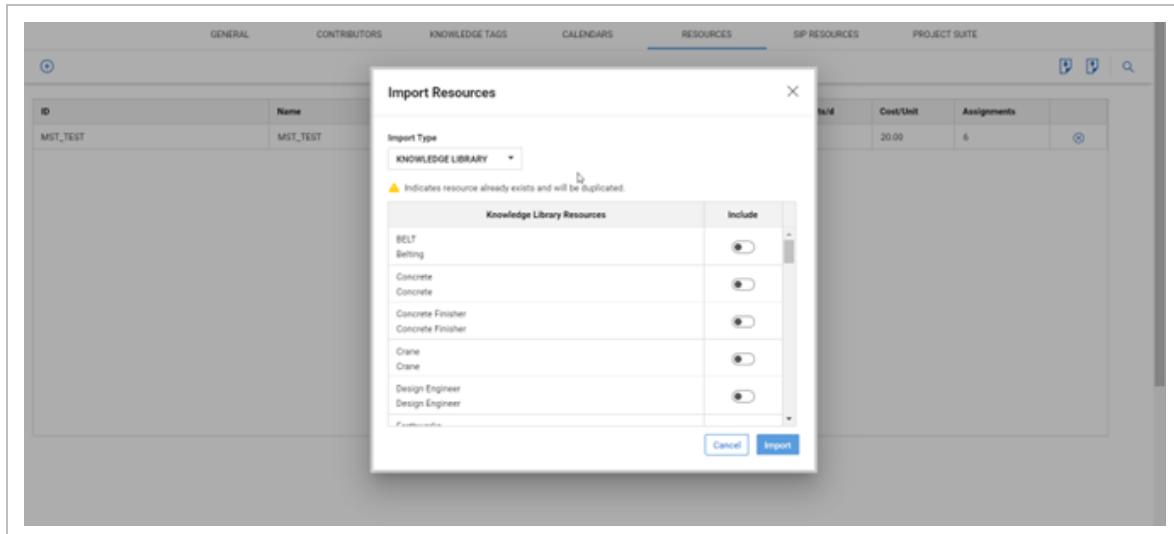
Description	Probability	Schedule Impact	Cost Impact	Color
Very Low	10%	≤ 11 days	≤ \$13	
Low	25%	≤ 30 days	≤ \$10,000	
Medium	50%	≤ 60 days	≤ \$100,000	
High	75%	≤ 90 days	≤ \$1,000,000	
Very High	95%	≤ 180 days	≤ \$10,000,000	

Resources

Resource details such as ID, Name, Category, Default Units, and Costs can be edited in the register. The indent arrows located on the far right of the screen are used to create child resources or to move the resource to a different part of the grid.

ID		Name	Category	Color	UoM	Default Units/d	Cost/Unit	
Kim Test for Keith		Kim Test	Labor	grey	Hours	8.00	1.00	
Robin Tester		Tester	Material	red	Each	1.00	200.00	
Project resource		project resource	Nonlabor	purple	Each	1.00	75.00	
009		Resource 9	Nonlabor	green	Each	1.00	0	
Global		Global	New Category	blue	Each	1.00	0	
Srini Import ID		Srini Import Desc	Unique	cyan	Each	1.00	0	
Indent		Indent	Labor	magenta	Hours	8.00	0	
Tatyana Reg Test		Ressurs 009	Supply	red	Hour	25.00	5080.00	
SB2			Labor	green	Hours	8.00	0	
SP		Ski Patroller	Labor	dark green	Hours	8.00	25.00	
No UOM		UOM No	Labor	grey		1.00	0	
Jonny B		Bonny J	Labor	teal	Hours	8.00	0	
Baby Jon		Jonny babe	Labor	olive	Hours	2.00	3.00	
629 Res 1		Res 1	Labor	magenta	Hours	8.00	0	
629 Res 2		Res 2	Labor	grey	Hours	8.00	0	
7/12		Resource 3	Labor	purple	Hours	8.00	0	

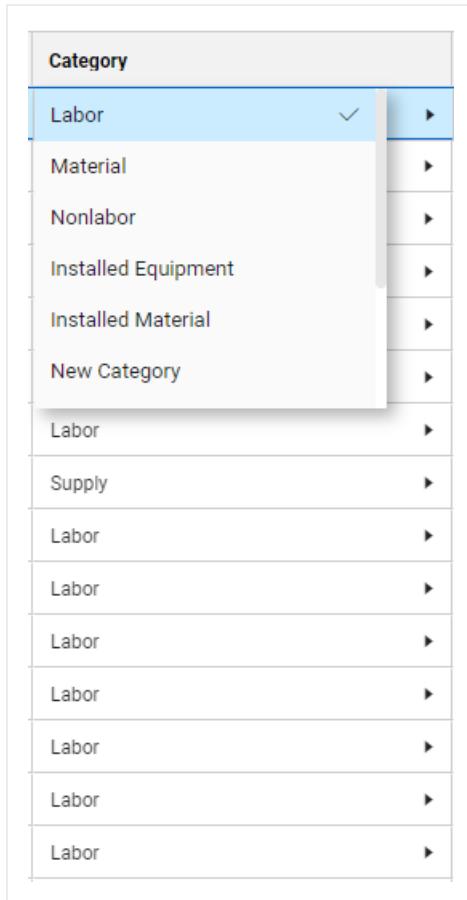
Resources can be imported from a Microsoft Excel file and also exported, which can then be edited and imported back into the Resources tab.



Categories

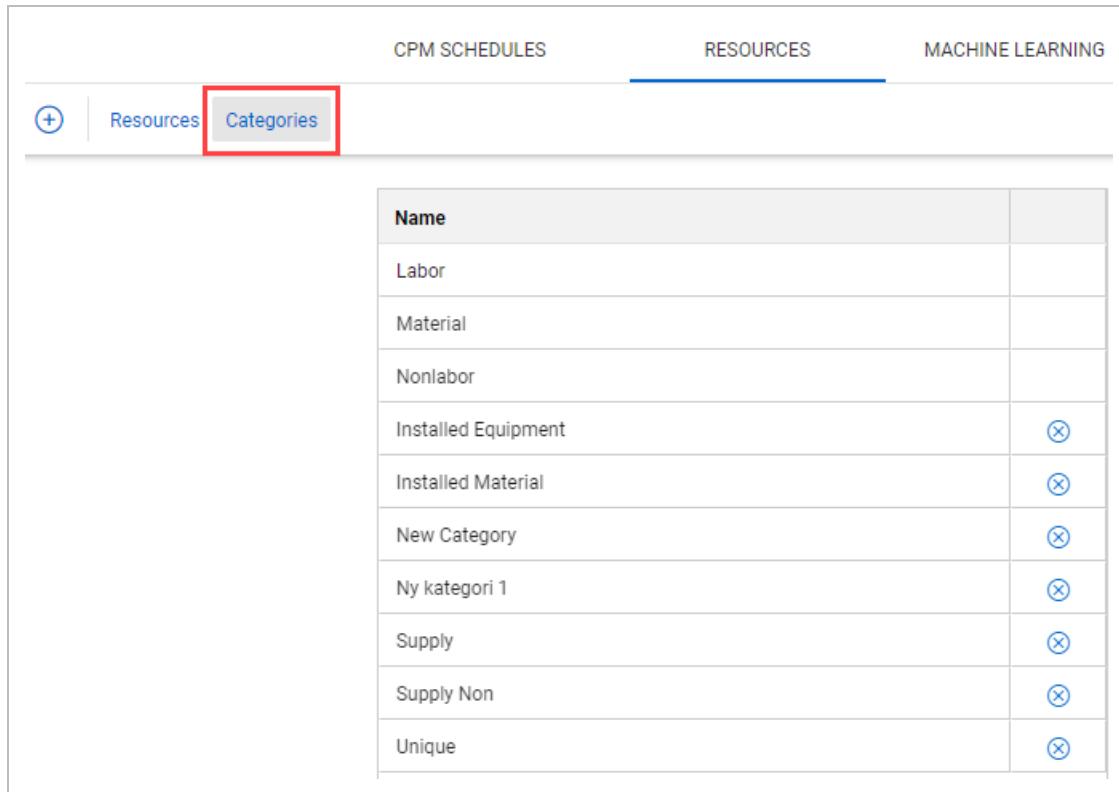
Schedule validates the Categories column in the Resources register after it is updated.

Only System Administrators can add, edit, or delete Category types.



To modify the categories available, click on the Categories section of the Knowledge Library Resource register.

The screenshot shows the "Resources" section of the Knowledge Library. The "Categories" tab is highlighted with a red box. The page includes tabs for "CPM Schedules", "Activity Productivity Rates", "Knowledge Tags", "Register", "Resources", and "Machine Learning". Below the tabs are buttons for "Search", "EXPORT", "IMPORT", and "ADD RESOURCE". A table lists resources with columns for "Name", "Description", "Category", "Unit", "Default Units/d", "Cost/Unit", "Assignments", and "Delete". One row is shown for "ECR110" with a description of "Crane 110 Ton", category "Equipment", unit "Hour", default units "8", cost "224", assignments "0", and a delete icon.

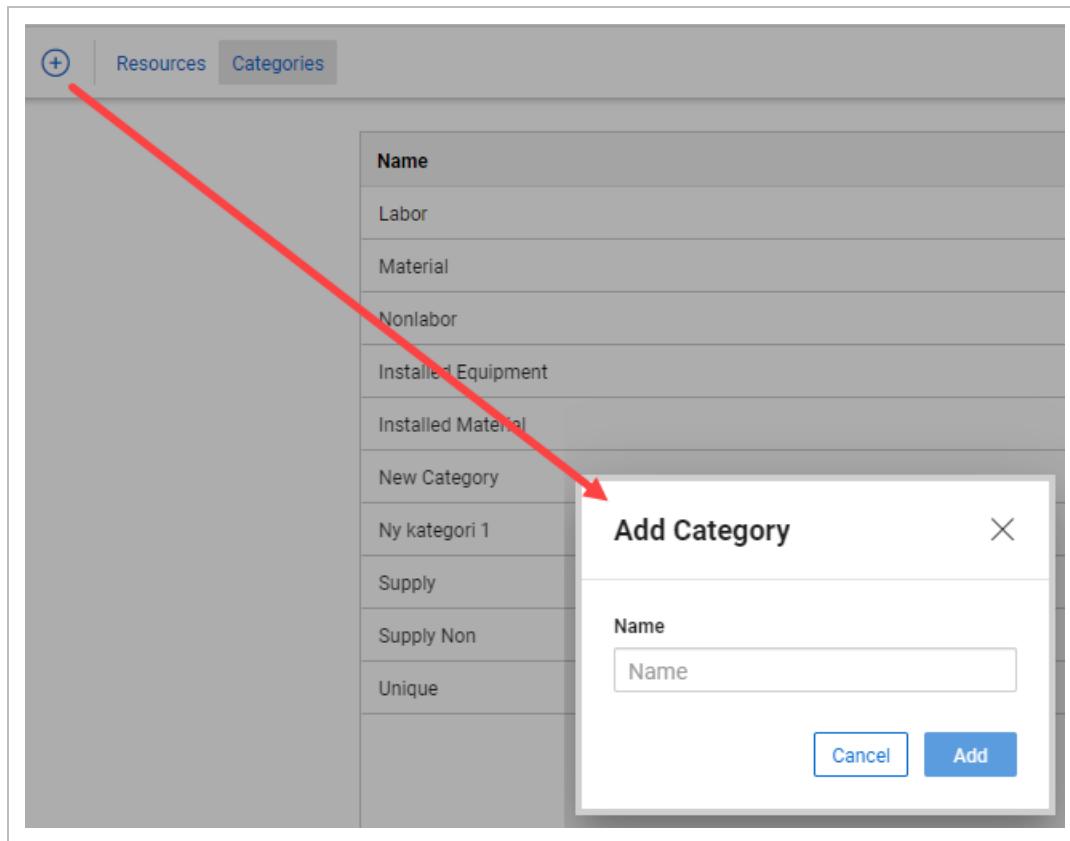


The screenshot shows a user interface for managing resources. At the top, there are three tabs: 'CPM SCHEDULES', 'RESOURCES' (which is the active tab, indicated by a blue underline), and 'MACHINE LEARNING'. Below the tabs, there is a navigation bar with a plus sign icon, the text 'Resources', and a button labeled 'Categories' which is highlighted with a red box. The main content area is a table with the following data:

Name	
Labor	
Material	
Nonlabor	
Installed Equipment	<input type="button" value="X"/>
Installed Material	<input type="button" value="X"/>
New Category	<input type="button" value="X"/>
Ny kategori 1	<input type="button" value="X"/>
Supply	<input type="button" value="X"/>
Supply Non	<input type="button" value="X"/>
Unique	<input type="button" value="X"/>

To add a category, click the **Add Category** button.

Type in a new category name. Click **Add** to complete the action.



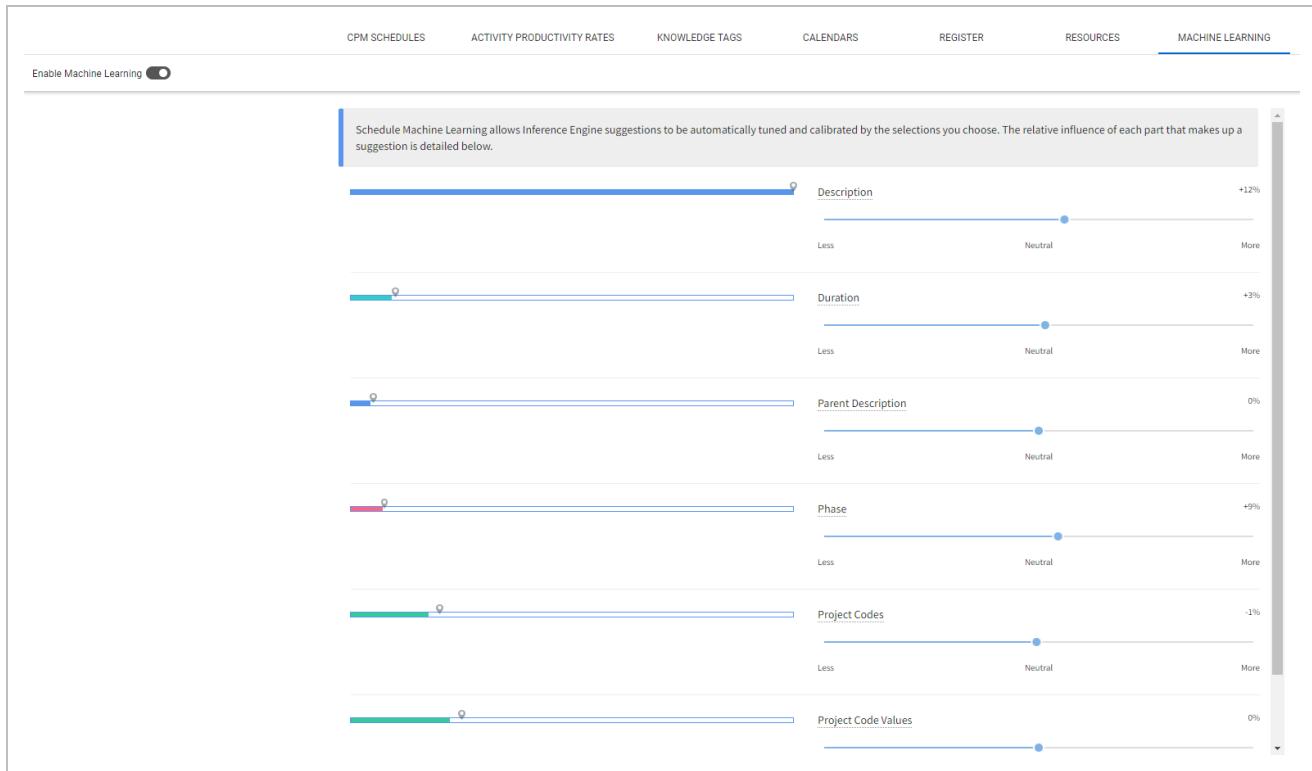
To edit a category name, click directly into the name field of the category to be modified.

If a category needs to be deleted, select the icon in the delete column.

If you are using Estimate or Control, these categories also match the default categories.

Machine learning

Machine learning lets inference engine suggestions be automatically tuned and calibrated by the chosen selection.

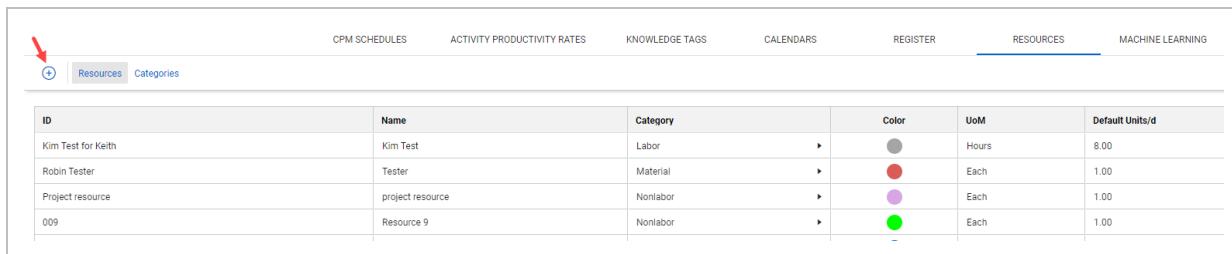


Set Up Resources

1. Open the **Knowledge Base** and then go to the **Resources** tab.

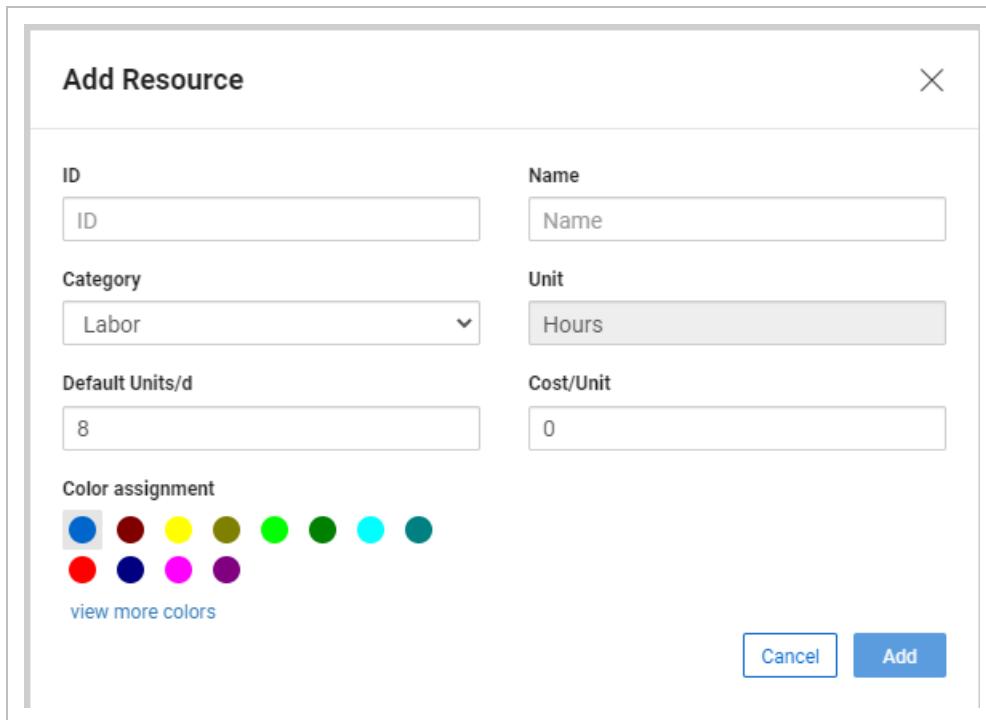
ID	Name	Category	Color	UoM	Default Units/d	Cost/Unit
Kim Test for Keith	Kim Test	Labor	Grey	Hours	8.00	1.00
Robin Tester	Tester	Material	Red	Each	1.00	200.00
Project resource	project resource	Nonlabor	Purple	Each	1.00	75.00
009	Resource 9	Nonlabor	Green	Each	1.00	0
Global	Global	New Category	Blue	Each	1.00	0

2. In the Resources Register, select the **Add Resource** button to establish a new resource.



		CPM SCHEDULES	ACTIVITY PRODUCTIVITY RATES	KNOWLEDGE TAGS	CALENDARS	REGISTER	RESOURCES	MACHINE LEARNING
ID	Name	Category	Color	UoM	Default Units/d			
Kim Test for Keith	Kim Test	Labor	Grey	Hours	8.00			
Robin Tester	Tester	Material	Red	Each	1.00			
Project resource	project resource	Nonlabor	Purple	Each	1.00			
009	Resource 9	Nonlabor	Green	Each	1.00			

- A dialog box opens.



Add Resource

ID:

Name:

Category:

Unit:

Default Units/d:

Cost/Unit:

Color assignment:
● ● ● ● ● ● ●
● ● ● ●

[view more colors](#)

Field	Definition
Name	Recognizable resource name or abbreviation schedulers reference when selecting resources from the register
Description	Extended description or full title of the resource
Category	Resource type classification such as Labor, equipment, and material.

Field	Definition
Unit	The resource's unit of measure
Default Units/d	Daily unit production/completion rate
Cost/Unit	Cost per unit

3. Enter in the resource details and then click **Add** when complete.

Add Resource

ID	Name
754	Electric
Category	Unit
Material	Each
Default Units/d	Cost/Unit
1	0
Color assignment  view more colors	
<input type="button" value="Cancel"/> <input type="button" value="Add"/>	

- The new resource is added to the Resource register

Resources								
ID	Name	Category	Color	UoM	Default Units/d	Cost/Unit		
754	Electric	Material	●	Each	1.00	0		
L61	Concrete (Labor)	Labor	●	Hours	8.00	100.00		
120838	Ubct Partnership	Labor	●	Hours	8.00	100.00		
NL-07-B Earthworks	NL-07-B (Mat) Constr - Earthworks	Installed Material	●	Square Meter	22.00	100.00		

To edit a resource, click directly into the specific field of that resource in the register.

To delete a resource, click the icon in the Delete column.

4. Click the header of the column to sort by to sort resources by field.

- Clicking the header initially sorts ascending/A-Z
- Clicking the header a second time sorts descending/Z-A
- Clicking the header a third time clears the sort function

Import/Export

In addition to using the Resources register to set up individual resources, you can also import and export resources in bulk.

1. In the Knowledge Library Resource register, click the **Export** button.

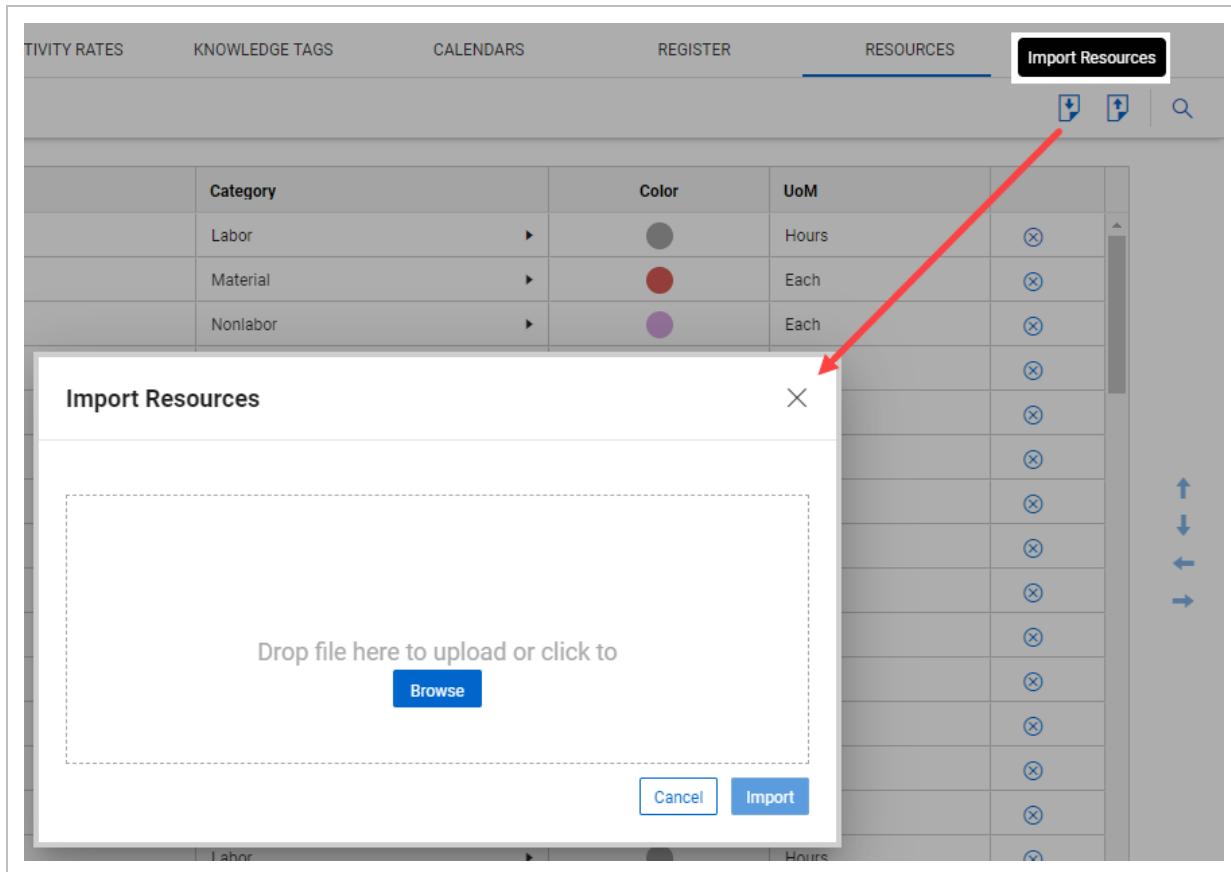
- Once selected, an Excel file downloads to your local drive. The file contains the list of resources currently in the organization's Resource register.

A	B	C	D	E	F	G
1 REQUIRED	Field is required for import					
2 OPTIONAL	Field is optional for import					
3 VALIDATED	Field must match master data available in application					
4 IGNORED	Field not to be populated					
Notes:						
1. Create New Resources - To create a new Resource enter valid input for the required fields. Rows that are left blank with required fields will not be entered into Schedule as a new Resource.						
2. The default Category is Labor						
3. Colors are defined using predefined set of hexadecimal characters, the default Color is 0066CC						
6 ID	7 Name	8 Category	9 Color	10 Unit	11 Default Units Per Day	12 Cost Per Unit
Text	Text	Text: "Labor", "Construction Equ	Text: "0066CC", "800000	Text	Numeric: > 0	Numeric: > 0
256	256		7			
Kim Test for Keith	Kim Test	Labor	a5a5a5	Hours	8	1
Robin Tester	Tester	Material	D85C57	Each	1	200
Project resource	project resource	Nonlabor	D8A6E2	Each	1	75

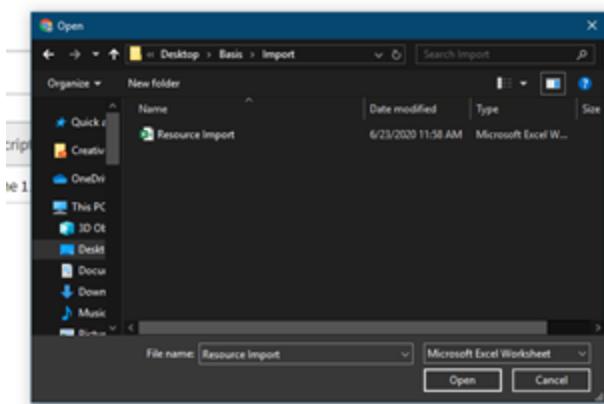
2. In Excel, populate the columns with additional resources and details.

- Once complete, save the .xlsx file

3. In the Knowledge Library Resource Register, click the **import** icon.



4. A dialog box opens where you select the updated .xlsx file. Select the file, and, click **Open**.

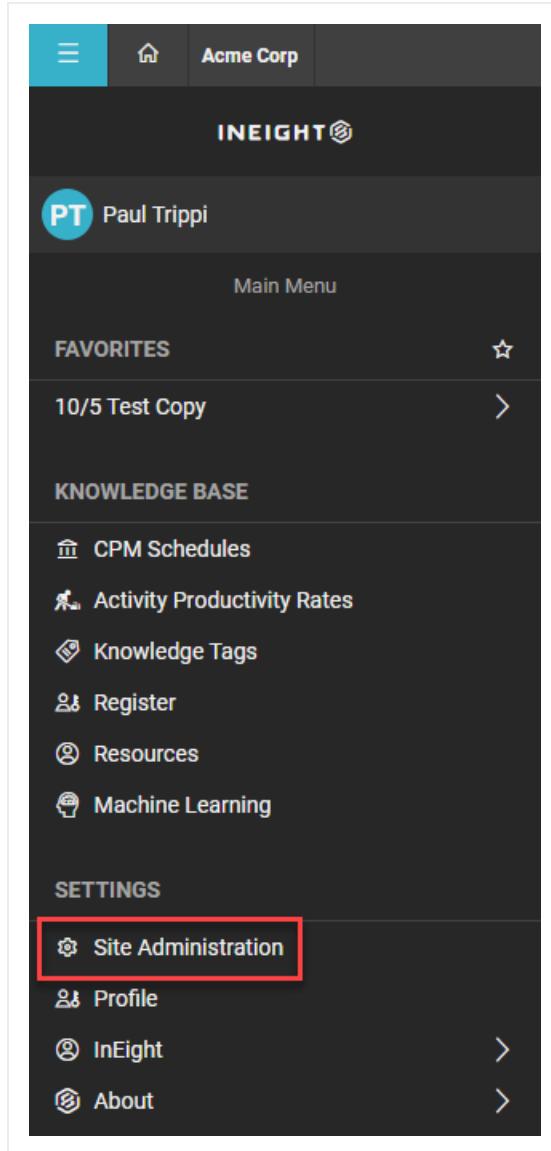


- Schedule processes the data and updates the register with new items and changes.

ID	Name	Category	Color	UoM	Default Units/d	Cost/Unit	
Kim Test for Keith	Kim Test	Labor	Grey	Hours	8.00	1.00	<input checked="" type="checkbox"/>
Robin Tester	Tester	Material	Red	Each	1.00	200.00	<input checked="" type="checkbox"/>
Project resource	project resource	Nonlabor	Purple	Each	1.00	75.00	<input checked="" type="checkbox"/>
009	Resource 9	Nonlabor	Green	Each	1.00	0	<input checked="" type="checkbox"/>
Global	Global	New Category	Blue	Each	1.00	0	<input checked="" type="checkbox"/>
Srini Import ID	Srini Import Desc	Unique	Cyan	Each	1.00	0	<input checked="" type="checkbox"/>

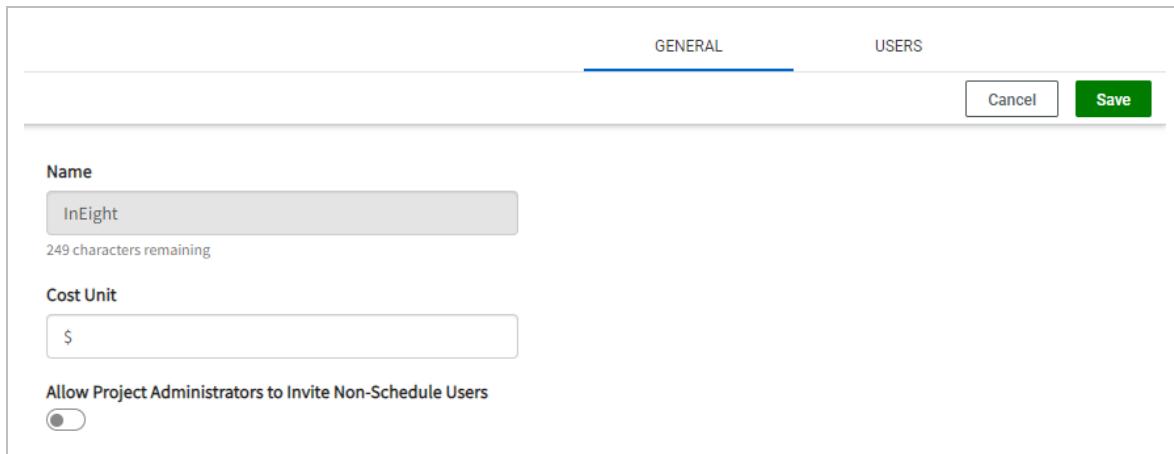
Site Administration

You can access the Application settings by clicking the **Site Administration** button, and can also be accessed in the upper right corner in a project.



General Settings

From the General tab, project name, Cost Unit and Allow Project Administrators to invite Non-Schedule Users can be updated.



GENERAL

USERS

Name

InEight

249 characters remaining

Cost Unit

\$

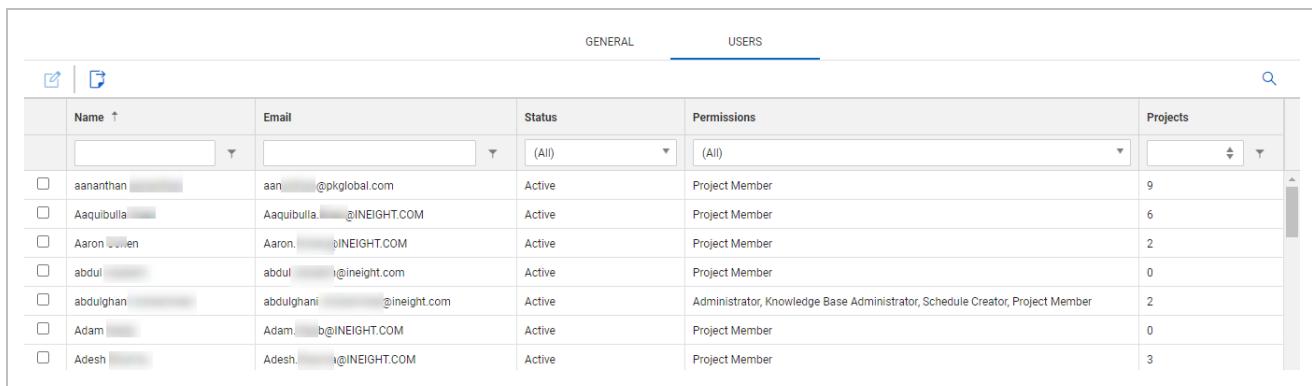
Allow Project Administrators to Invite Non-Schedule Users

Cancel

Save

Users

You can add both external and internal users to the project. You can also remove users or update their access levels.



GENERAL

USERS

Name	Email	Status	Permissions	Projects
aananthan	aan...@pkglobal.com	Active	Project Member	9
Aaquibulla	Aaquibulla...@INEIGHT.COM	Active	Project Member	6
Aaron	Aaron...@INEIGHT.COM	Active	Project Member	2
abdul	abdul...@ineight.com	Active	Project Member	0
abdulghan	abdulghan...@ineight.com	Active	Administrator, Knowledge Base Administrator, Schedule Creator, Project Member	2
Adam	Adam...b@INEIGHT.COM	Active	Project Member	0
Adesh	Adesh...@INEIGHT.COM	Active	Project Member	3

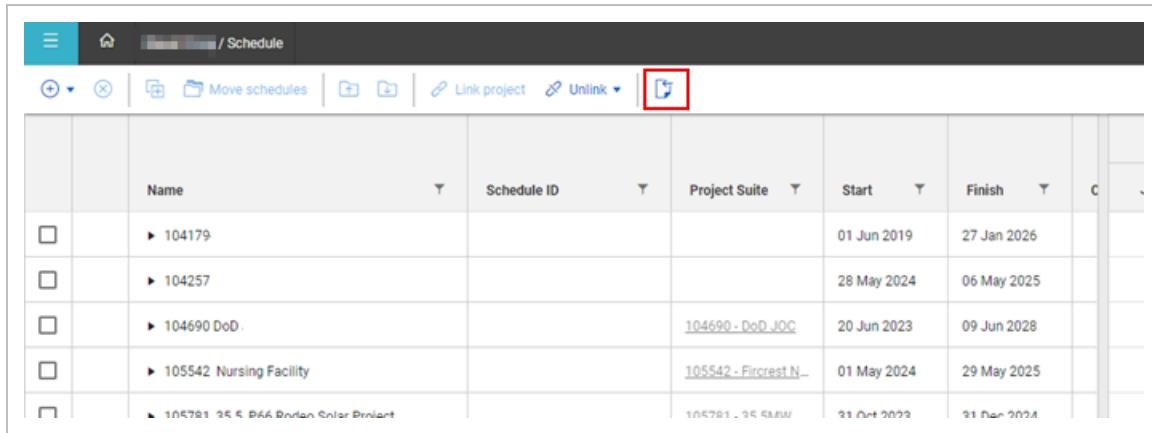
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CHAPTER 4 – PROJECT CREATION

Import a Schedule

Importing a schedule

1. From the Schedule home page, click the **Import** icon.



2. Select a folder on your computer or external source, and then drag and drop the schedule to upload into the Schedule import dialog box.
3. Enter a schedule ID and schedule name. Select a project workspace and folder from the drop-down lists.

Schedule import X

Select a Primavera XER or MS Project file to be imported as either a New Schedule or as Knowledge to be stored in the Knowledge Base



Drag and drop file here to upload

Only .XER, .MPP files are allowed. (Max file size: 60mb)

Select Files...

Drop files here to select

Schedule ID

Schedule Name

Project Workspace

Folder

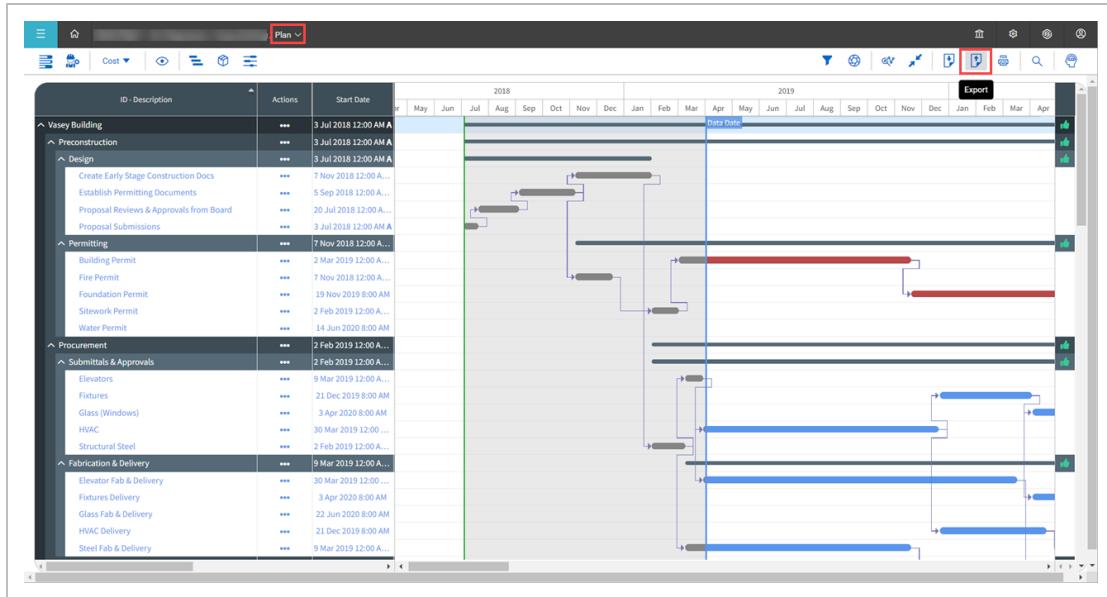
Cancel Import

4. Click **Import**.

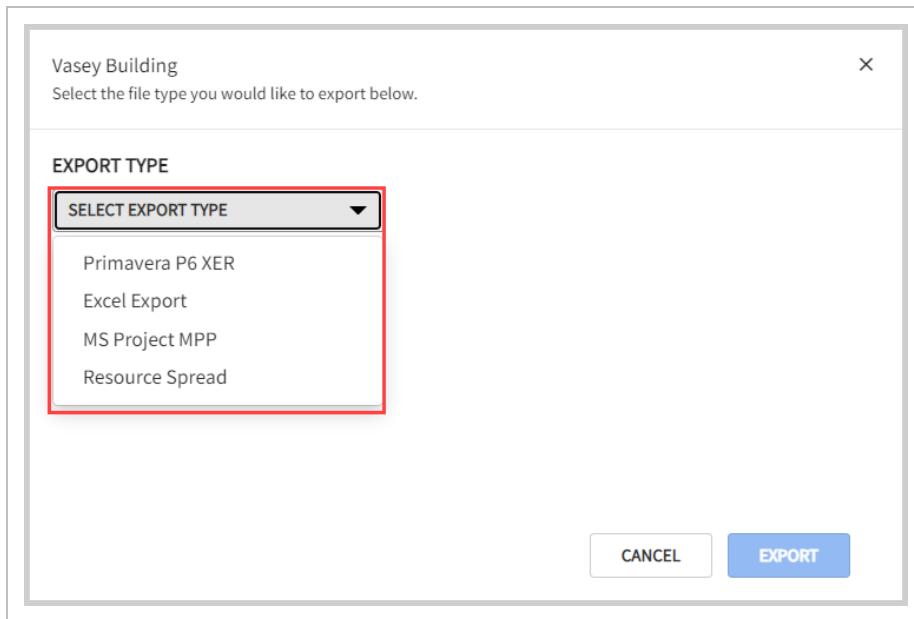
Export a Schedule

Exporting a schedule

1. In Plan view, click the **Export** icon at the top right of the page.



2. Select the export type from the Export Type drop-down options. Click **Export**.

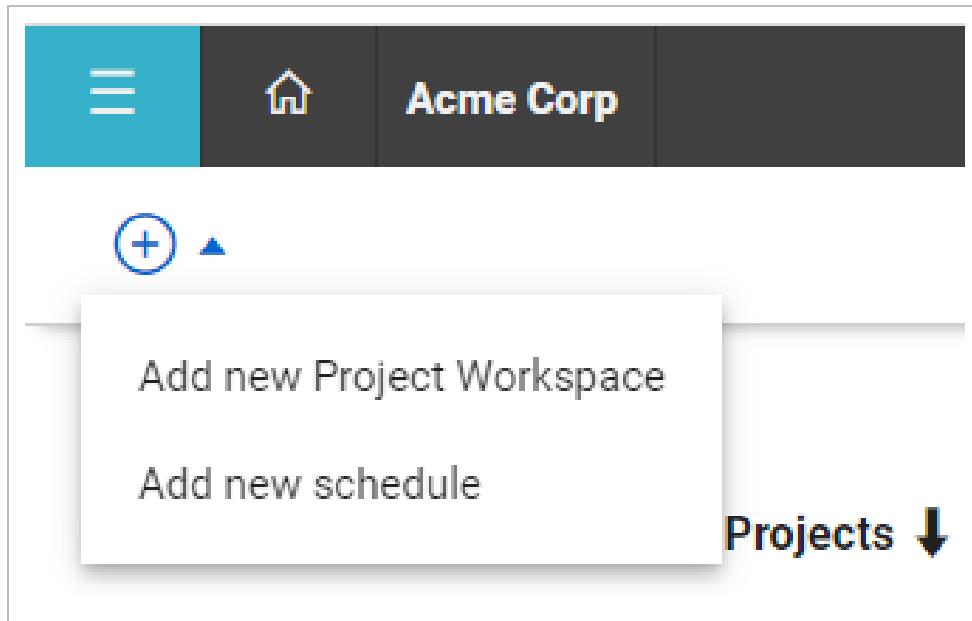


The export file is downloaded to your browser's download folder.

Create a Schedule from Scratch

When you create a new schedule, there are two key sections to fill out: Details and Outline.

To start, click **Add New Schedule** in the Schedule register. This opens a window so that you can begin to fill out the schedule details.



Details

The Details section is the first stage for creating a new schedule.

Add a new schedule

Details ————— Context ————— Outline

Schedule ID

Schedule Name

Project Workspace

Start Date

NEXT

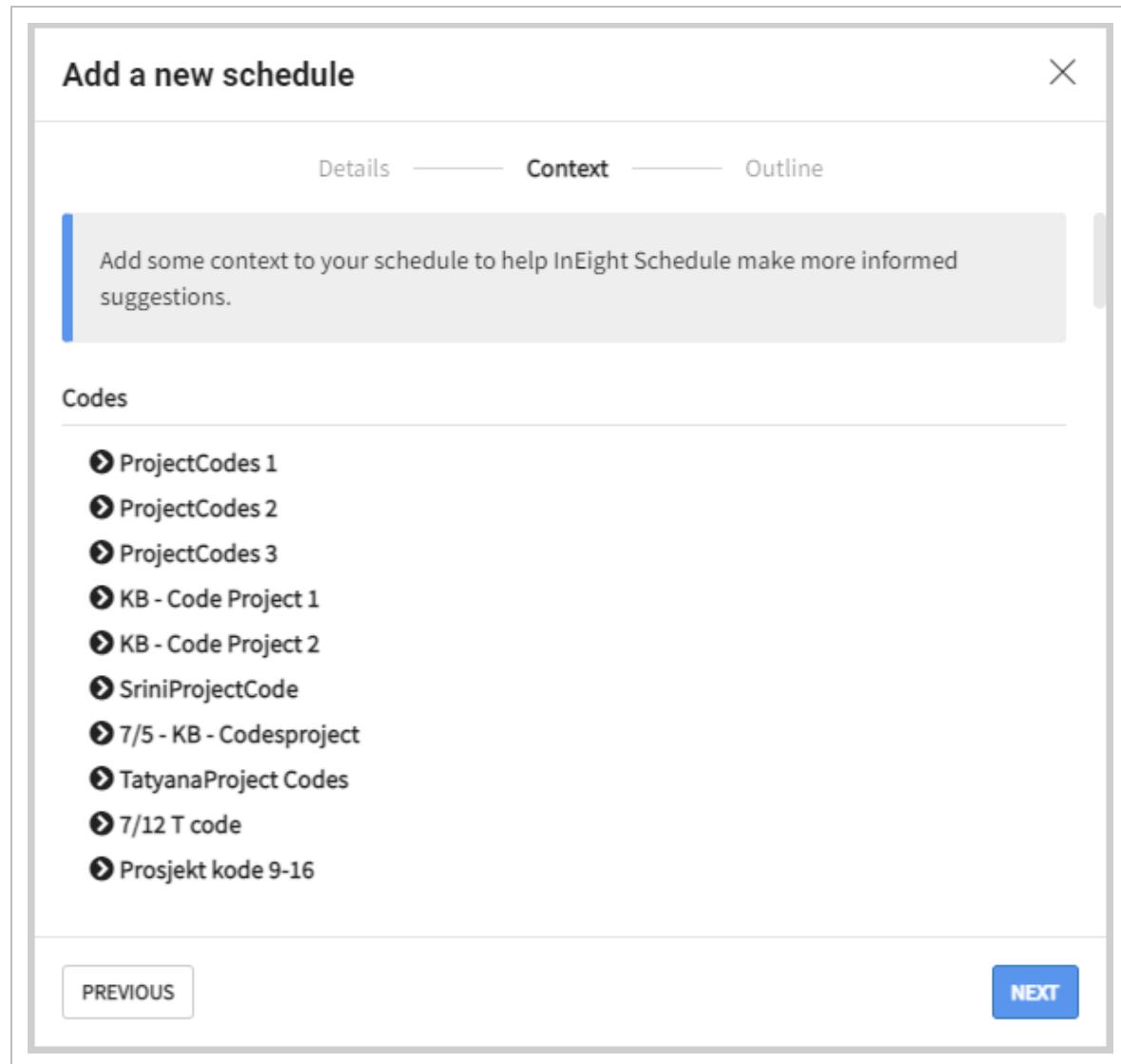
In the details section, complete the following information:

Field	Description
Schedule ID	Unique ID used for schedule identification.
Schedule Name	Official name of the schedule.
Project Workspace	Grouping of multiple schedules.
Start Date	Date the project starts.

Select **Next**.

Context

The second stage in creating a schedule is Context. Context lets you select existing project codes and UDFs to apply on a newly created schedule. These selections help with Knowledge Base suggestions throughout the Schedule application.



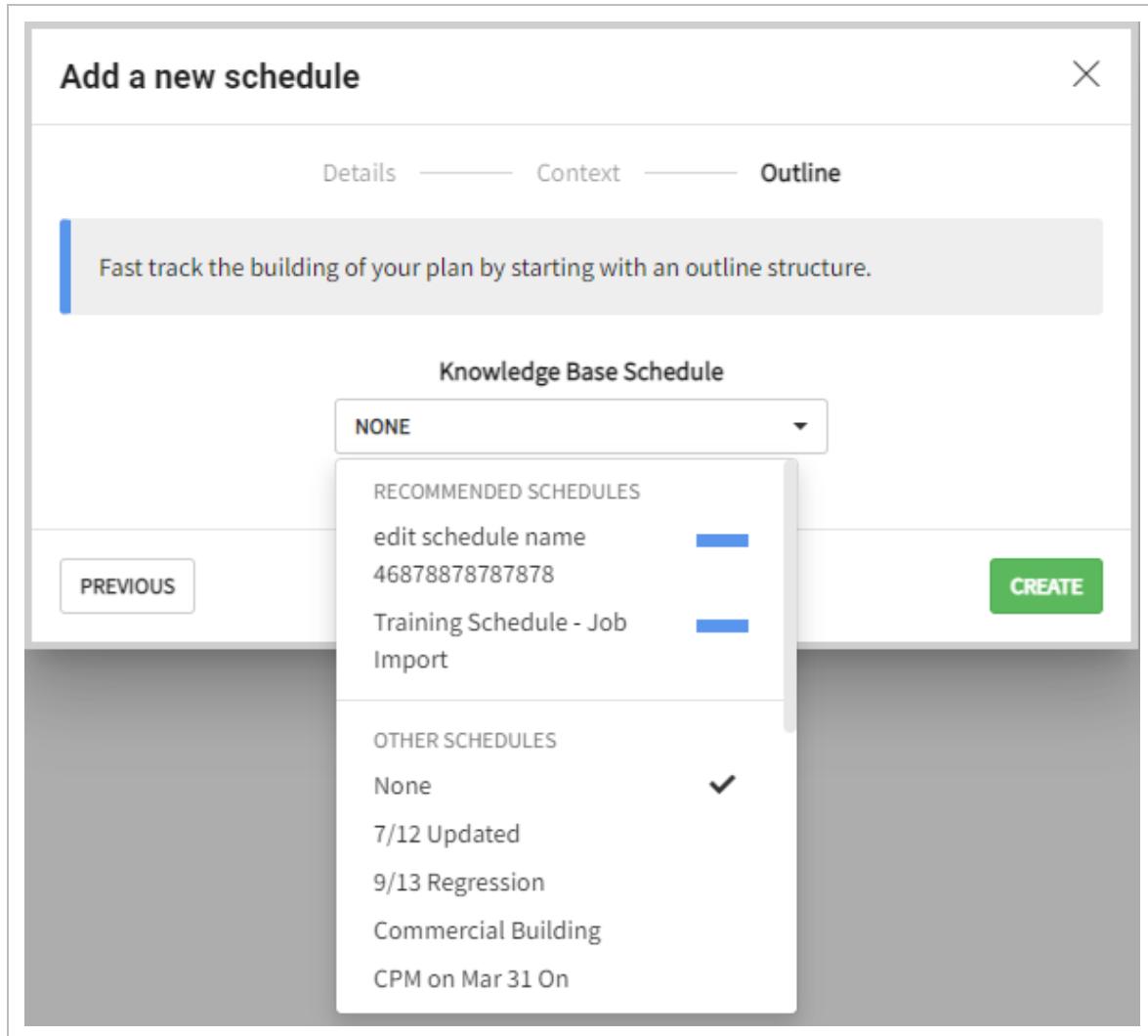
The screenshot shows a modal window titled 'Add a new schedule' with a close button 'X' in the top right. Below the title are three tabs: 'Details', 'Context' (which is selected and highlighted in blue), and 'Outline'. A text box below the tabs contains the instruction: 'Add some context to your schedule to help InEight Schedule make more informed suggestions.' A list titled 'Codes' follows, containing the following items:

- ProjectCodes 1
- ProjectCodes 2
- ProjectCodes 3
- KB - Code Project 1
- KB - Code Project 2
- SriniProjectCode
- 7/5 - KB - Codesproject
- TatyanaProject Codes
- 7/12 T code
- Prosjekt kode 9-16

At the bottom left is a 'PREVIOUS' button, and at the bottom right is a blue 'NEXT' button.

Outline

The third stage in creating a schedule is Outline. In this section, you select an existing Knowledge Library Schedule as reference for the new schedule being built.



Select a schedule to bring in the work package structure from the Knowledge Base project.

Add a new schedule

Details —— Context —— **Outline**

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

Knowledge Base Schedule

COMMERCIAL BUILDING

Include Risk Register

Include Levels

ALL

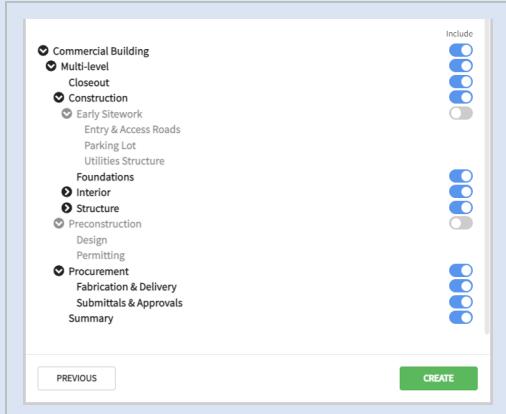
Include

- Commercial Building
- Preconstruction
- Procurement
- Construction
- Closeout
- Summary

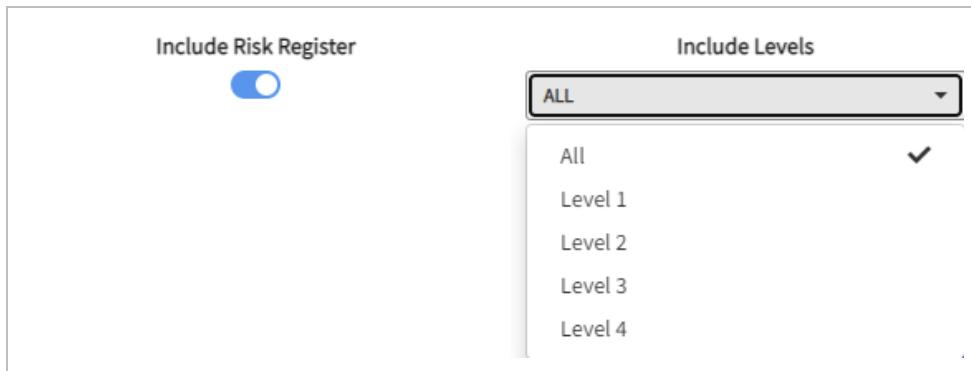
PREVIOUS **CREATE**

You can select all or parts of the structure levels to use in the schedule being created. This is done by selecting a level from the Include Levels drop-down or by manually toggling work packages in the Include column.

Turning off a Superior work package will turn off its subordinates.



Also, the include Risk Register toggle lets you specify whether to include risks, and if so, the level of risk to include.

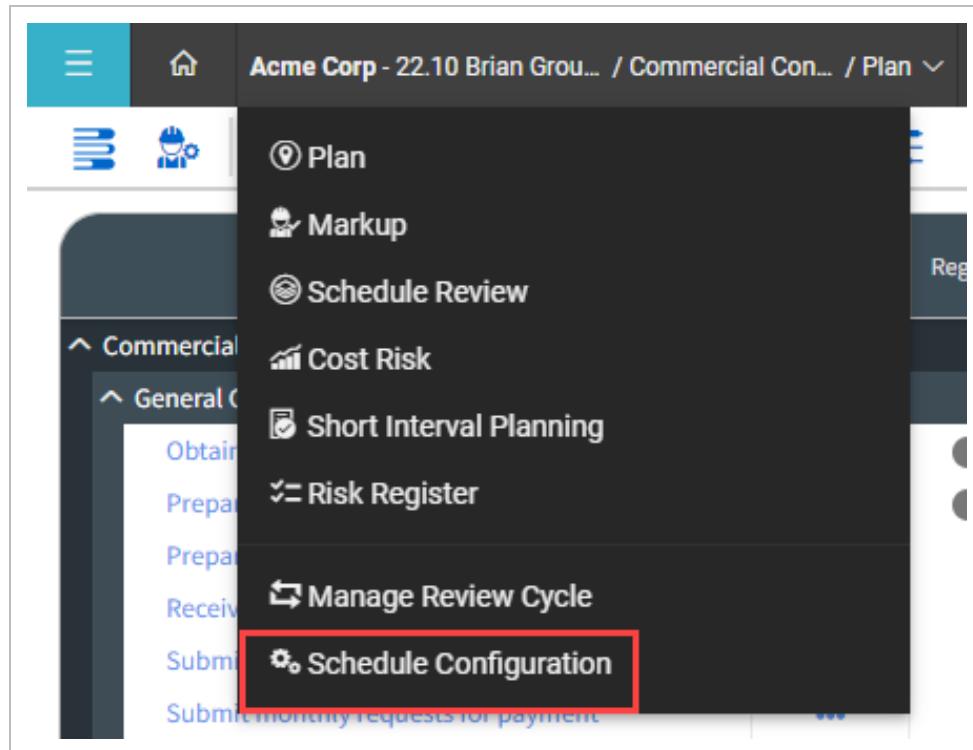


Any risks assigned to the Knowledge Library schedule are brought into the new schedule. Include Risk Register brings in the risk register items from the Knowledge Library Schedule into the new schedule.

The available risk levels are configured at the organization level.

Schedule Configuration Settings

Schedule settings lets you adjust the data date, switch schedule modes, switch how out of sequence progress is handled. These functions can be accessed via the secondary toolbar at the top of Plan view.



Schedule Configuration

Schedule Configuration contains the general information and settings for the current project.

Depending on the tab selected, information and settings pertaining to the tab heading are shown.

Tab	Function/Description
General	Schedule details, such as Project Name, Location, Estimate, Benchmark and work hours.
Contributors	Add, remove, and edit project contributors.
Crews	Set up standard crews for the project.
Knowledge Tags	Manage knowledge tags on the project.
Calendars	Define project calendars and non-workdays.
Resources	Manage project resources.
SIP Resources	Activities from the CPM Schedule show in the Short Interval Planning (SIP) view that are grouped, based on how the Plan view WBS is organized.
Project Suite	Connectivity to other InEight Project Suite Solutions (as needed).

General

On the General tab, you can configure the project details.

GENERAL	CONTRIBUTORS	KNOWLEDGE TAGS	CALENDARS	RESOURCES	SIP RESOURCES	PROJECT SUITE
<p>Schedule ID SCHED-512</p> <p>Schedule Name Test Schedule</p> <p>Location Location not set</p> <p>Include Cost Estimation <input checked="" type="checkbox"/></p> <p>Default Activity Percent Complete Type Duration</p>						

Contributors

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

GENERAL	CONTRIBUTORS	KNOWLEDGE TAGS	CALENDARS	RESOURCES	SIP RESOURCES	PROJECT SUITE

Knowledge Tags

On the Knowledge Tags tab, organizational defined tags can be reviewed, and excluded from consideration by the Schedule inference engine.

GENERAL	CONTRIBUTORS	KNOWLEDGE TAGS	CALENDARS	RESOURCES	SIP RESOURCES	PROJECT SUITE
Codes / Project ▾ <ul style="list-style-type: none">CodesProjectActivityRegister EventResource <hr/> <ul style="list-style-type: none">UDFsProjectWBSActivityRegister EventResource						

Calendars

On the Calendars tab, additional calendars can be created, working days can be edited, and a default calendar can be defined. This is also where holidays are defined.

Schedule User Guide

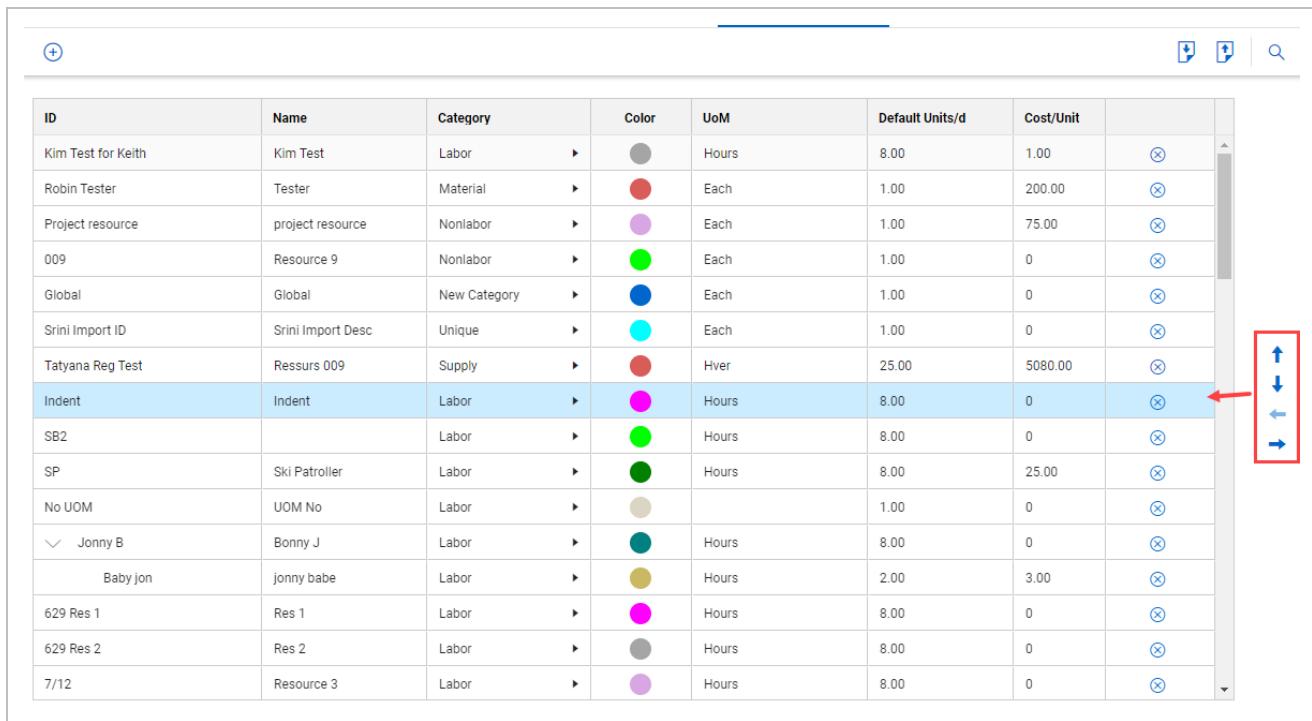
GENERAL		CONTRIBUTORS		KNOWLEDGE TAGS		CALENDARS		RESOURCES		SIP RESOURCES		PROJECT SUITE	
+													+
	★ Calendar			Hours/d...	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Exceptions	Actions
(●)	724 Su-Sa 12:00A-12:00A No Hol			24	●	●	●	●	●	●	●	0	Edit Delete
(○)	*508 M-F 8:00A-5:00P US Hol			8	○	●	●	●	●	●	○	1431	Edit Delete
(○)	0. Standard 5 Day w/ Hol			8	○	●	●	●	●	●	○	1377	Edit Delete
(○)	24 hours / 7 days			24	●	●	●	●	●	●	●	9	Edit Delete
(○)	24x7 w/ Turtle Season			24	●	●	●	●	●	●	●	6642	Edit Delete
(○)	24x7 w/ Turtle Season			24	●	●	●	●	●	●	●	6642	Edit Delete
(○)	510 M-F No Holidays			10	○	●	●	●	●	●	○	477	Edit Delete
(○)	510 Su-Th 7:00A-5:00P No Hol			10	●	●	●	●	●	●	○	477	Edit Delete
(○)	7d-24h (no holidays continuous)			24	●	●	●	●	●	●	●	0	Edit Delete
(○)	KOS G 5d x 10hr w Holidays			10	○	●	●	●	●	●	○	657	Edit Delete

Resources

On the Resources tab, additional resources can be added and searched. Resource details such as ID, Name, Category, Unit, Default Units, and Costs can be edited in the grid by double-clicking the cell. Use the indent arrows on the right to create a child resource from the selected resource or to move the resource to a different part of the grid.

GENERAL		CONTRIBUTORS		KNOWLEDGE TAGS		CALENDARS		RESOURCES		SIP RESOURCES		PROJECT SUITE	
+													+
ID	Name	Category		Color	UoM		Default Units/d		Cost/Unit		Assignments		
*EXPT	Export Vessel	Labor	▶	●	Hours		80.00		500000.00		1	Edit	
*SURV	Survey Vessel	Labor	▶	●	Hours		80.00		500.00		2	Edit	
*FLAY	Flowline Vessel	Labor	▶	●	Hours		80.00		100000.00		1	Edit	
SPL-1	Subsea Package Lead - Dolron	Labor	▶	●	Hours		80.00		1.00		47	Edit	
SPL-2	Subsea Package Lead - Pyron	Labor	▶	●	Hours		80.00		1.00		167	Edit	
SPL-3	Subsea Package Lead - Timte	Labor	▶	●	Hours		80.00		1.00		81	Edit	
SPL-4	Subsea Package Lead - Gaston	Labor	▶	●	Hours		80.00		1.00		40	Edit	
SPL-5	Subsea Package Lead - Blockhus	Labor	▶	●	Hours		80.00		1.00		36	Edit	
SPL-6	Subsea Package Lead - Anderson	Labor	▶	●	Hours		80.00		1.00		17	Edit	
SPL-8	Subsea Package Lead - Tavassoli	Labor	▶	●	Hours		80.00		1.00		4	Edit	
SPL-9	Subsea Package Lead - Ferguson	Labor	▶	●	Hours		80.00		1.00		10	Edit	
Nbl Ops & Eng Serv	Noble Operations and Engineering Services	Labor	▶	●	Hours		8.00		0		0	Edit	

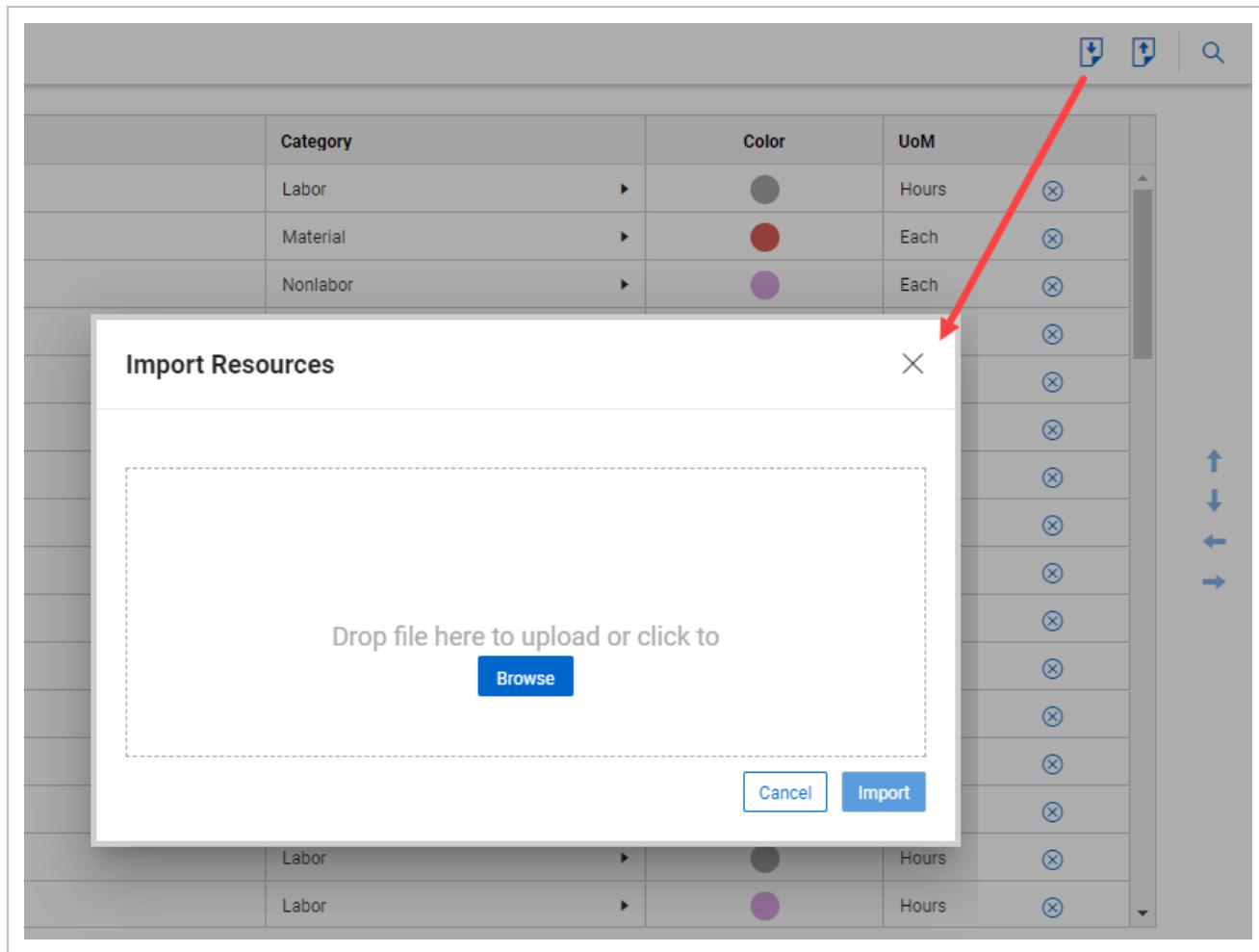
Use the indent arrows on the right to create a child resource from the selected resource or to move the resource to a different part of the grid.



The screenshot shows a table of resources with various columns: ID, Name, Category, Color, UoM, Default Units/d, Cost/Unit, and a final column with a delete icon. A vertical toolbar on the right side of the table has four buttons: up, down, left, and right, with a red box and arrow highlighting the right arrow button.

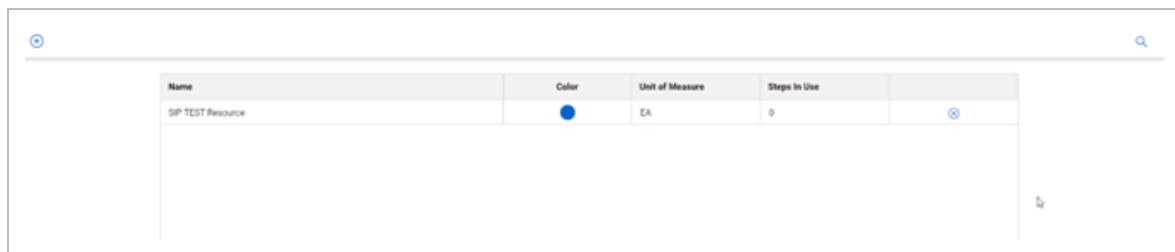
ID	Name	Category	Color	UoM	Default Units/d	Cost/Unit	
Kim Test for Keith	Kim Test	Labor	Grey	Hours	8.00	1.00	✖
Robin Tester	Tester	Material	Red	Each	1.00	200.00	✖
Project resource	project resource	Nonlabor	Purple	Each	1.00	75.00	✖
009	Resource 9	Nonlabor	Green	Each	1.00	0	✖
Global	Global	New Category	Blue	Each	1.00	0	✖
Srini Import ID	Srini Import Desc	Unique	Cyan	Each	1.00	0	✖
Tatyana Reg Test	Ressurs 009	Supply	Red	Hver	25.00	5080.00	✖
Indent	Indent	Labor	Magenta	Hours	8.00	0	✖
SB2		Labor	Green	Hours	8.00	0	✖
SP	Ski Patroller	Labor	Dark Green	Hours	8.00	25.00	✖
No UOM	UOM No	Labor	Light Grey		1.00	0	✖
Jonny B	Bonny J	Labor	Teal	Hours	8.00	0	✖
Baby jon	jonny babe	Labor	Yellow-Gold	Hours	2.00	3.00	✖
629 Res 1	Res 1	Labor	Magenta	Hours	8.00	0	✖
629 Res 2	Res 2	Labor	Grey	Hours	8.00	0	✖
7/12	Resource 3	Labor	Purple	Hours	8.00	0	✖

Resources can be imported using the Excel or Knowledge Library import type. Use the toggles from the Knowledge Library import to select resources to import.

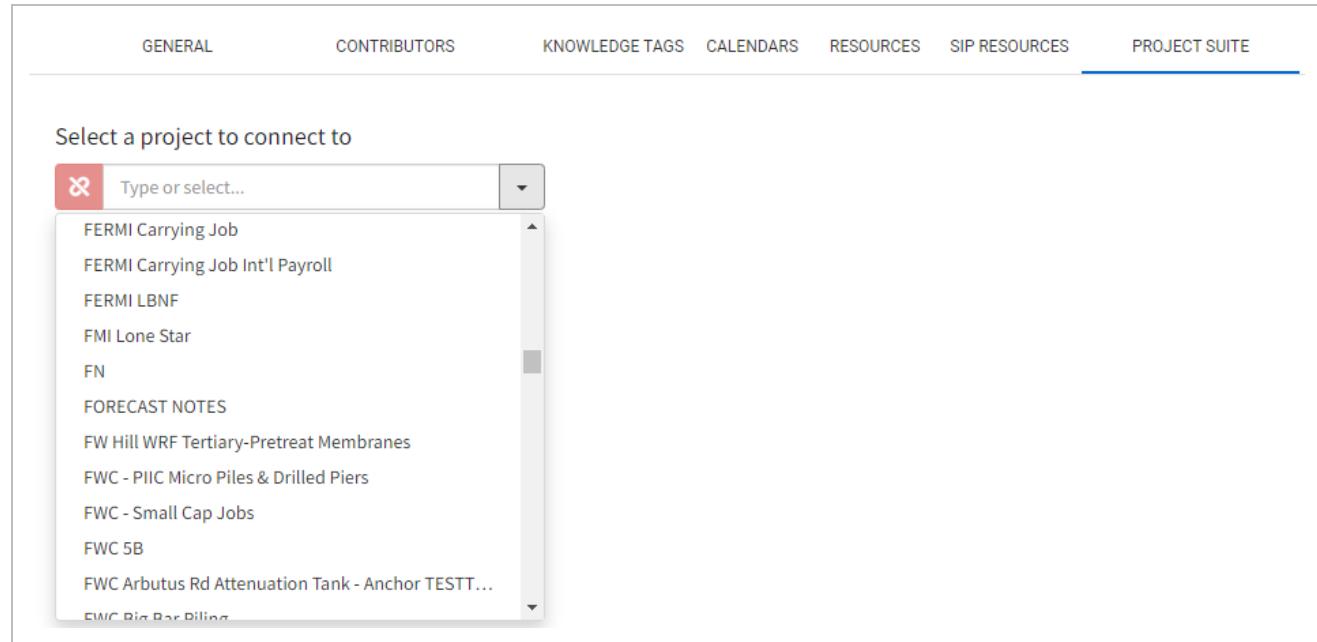


SIP Resources

On the SIP Resources tab, SIP Resources can be created, edited, deleted, and searched. SIP Resources also shows which step each resource is being used.



Project Suite



GENERAL CONTRIBUTORS KNOWLEDGE TAGS CALENDARS RESOURCES SIP RESOURCES PROJECT SUITE

Select a project to connect to

Type or select...

- FERMI Carrying Job
- FERMI Carrying Job Int'l Payroll
- FERMI LBNF
- FMI Lone Star
- FN
- FORECAST NOTES
- FW Hill WRF Tertiary-Pretreat Membranes
- FWC - PIIC Micro Piles & Drilled Piers
- FWC - Small Cap Jobs
- FWC 5B
- FWC Arbutus Rd Attenuation Tank - Anchor TESTT...
- FWC Big Bay Billing

Print View

In Plan view, the Go To Print View icon lets you customize printable output to show and save to a PDF file by modifying the settings in the Page Setup and Gantt Setup tabs. After you configure the setup, you can then save the settings as a template to use again. Click the **Print templates** icon to access saved templates and create a new template.

Page Setup

On the Page Setup tab, you can choose from the options for the print page size, orientation, and scaling.

Schedule User Guide

You can choose to include a header and footer to show on the print output page. Click in the location of the header or footer that you want to use, and then select the type of content to show from the list.

Click the **Add** icon to select the location in the header. Select the content type from the drop-down list to add, select the font size, and then click **Submit**. You can hover over the section to show the **Edit** icon. Click the **Edit** icon to make any necessary changes.

Gantt Setup

On the Gantt Setup tab, you can choose to show or hide the Gantt chart in the print output. When showing the Gantt chart, you can set the date range and timescale of the duration and include the active baseline and saved snapshots.

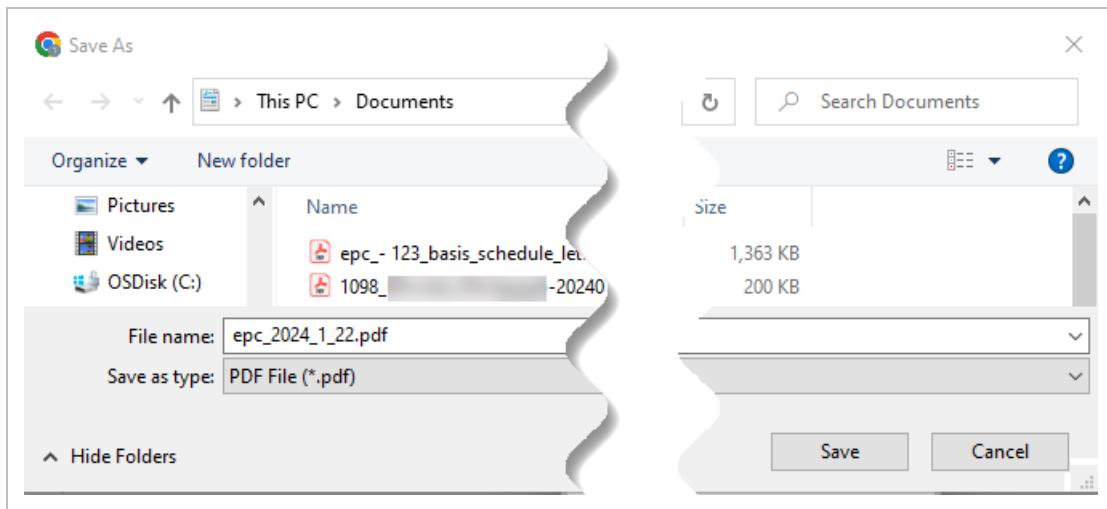
The Histogram toggle lets you hide or show the histogram. When showing the histogram, you have multiple configurations to choose from depending on the settings you choose.

4.0.0.1 Print Templates

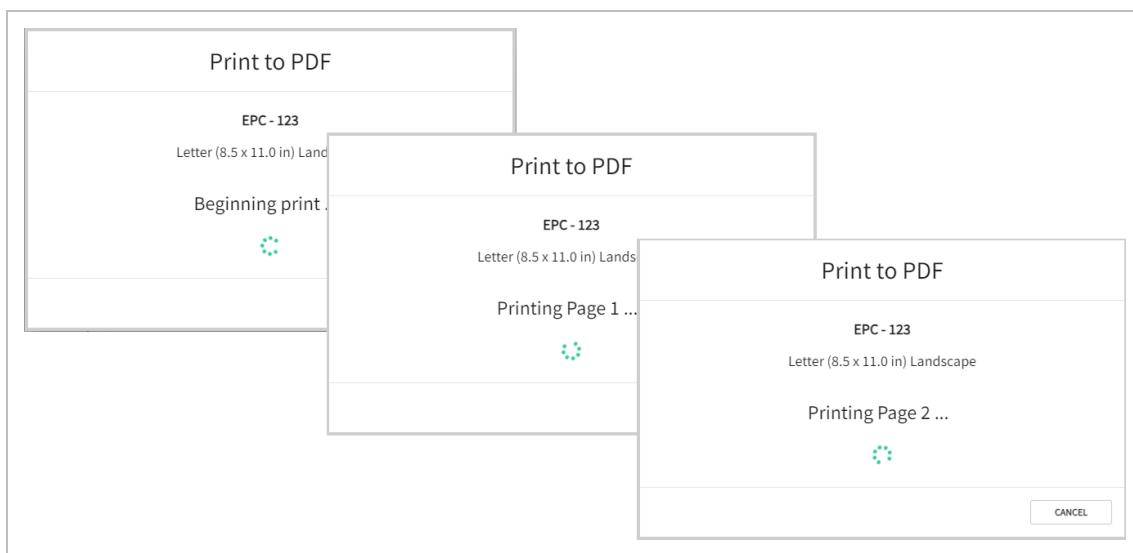
After you configure the print settings on the Page setup and Gantt setup tabs, you can then save them to a template that you can easily access and reuse. After you configure the print settings, click Print templates > **Save current print settings**, and then enter a name for the template. The settings are saved, and the template is created which shows in the Saved print templates list.

Save to PDF

1. In Plan view, click the **Go to print view** icon at the top right of the page.
2. Do either of the following:
 - Go to Print templates > **Saved print templates**, and then select a template.
 - Configure settings on the Page Setup and Gantt Setup tabs.
3. Click **Save to PDF**.
4. In the Save As window, select a file name and choose a file location, and then click **Save**.



5. The Print to PDF windows will show printing status and a success message will show when the PDF printing is complete.



CHAPTER 5 – PACKAGES AND ACTIVITIES

Activity Productivity Rates

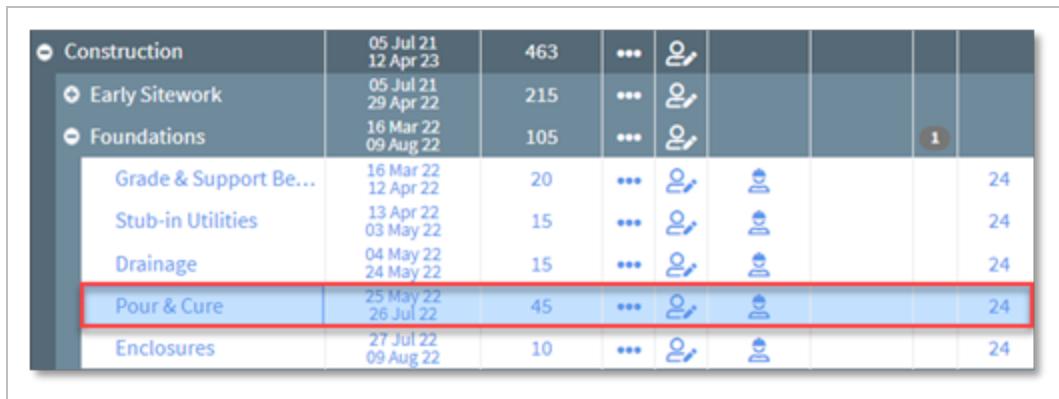
Productivity rates allow schedulers to establish a productivity factors for activities and thus scale durations accordingly.

These rates also aid in generating a bottom-up cost for the project.

To set the productivity factor, use the built-in application in the Iris' Smart Planning Section.

Set the productivity factor

1. Select an activity.



Construction	05 Jul 21 12 Apr 23	463	...	👤				
Early Sitework	05 Jul 21 29 Apr 22	215	...	👤				
Foundations	16 Mar 22 09 Aug 22	105	...	👤				1
Grade & Support Be...	16 Mar 22 12 Apr 22	20	...	👤	👤			24
Stub-in Utilities	13 Apr 22 03 May 22	15	...	👤	👤			24
Drainage	04 May 22 24 May 22	15	...	👤	👤			24
Pour & Cure	25 May 22 26 Jul 22	45	...	👤	👤			24
Enclosures	27 Jul 22 09 Aug 22	10	...	👤	👤			24

2. In Iris > Smart Planning section, select the **set productivity rate** option for the activity duration field.

ID	A1000		
Description	Activity A1000		
Calendar	Project Default		
Smart Planning			
Planned (d)	Cost (\$)		
0	0		
Remaining (d)	Start	<input type="button" value=""/>	
0	0	<input type="button" value=""/>	
Actual (d)	Finish	<input type="button" value=""/>	
0	0	<input type="button" value=""/>	
At Complete (d)	Percent Complete	<input type="button" value=""/>	
0	Dur ▾	0	
<hr/>			
Early Start	Early Finish		
6 Oct 2022	6 Oct 2022		
Late Start	Late Finish		
31 Dec 1969	31 Dec 1969		
Planned Start	Planned Finish		
6 Oct 2022	6 Oct 2022		
Total Float	Free Float		

- A new window opens with the Productivity Rate Calculator and Knowledge Library Suggestions

R Estimate the duration and cost of this activity using a Productivity Rate.

Unit Rate
Manhour Rate

Rate

Description

Engineering

Output ? *	UOM ?	Hours/unit *	\$/unit
1		Hours ▾ 328	0

Work

How many units?*	Crew/Equip Count *
1	1

Remaining duration is currently **41 days**
1 unit of Engineering with **1** crew will take **41 days**

Productivity Rate Suggestions

Act 1

days @ \$5MM per 1,250.00 Sec

1 Sec will take **0 days** and cost **\$4K**

Srin new act

555.0000 hours @ \$2 per Sec

1 Sec will take **555 days** (555 hours) and cost **\$2**

CANCEL
APPLY RATE

Using the Productivity Rate Calculator

In the top section, schedulers establish the package of work to be conducted. Here, you enter the values for the calculator to use to determine the base productivity rate:

When you select the Unit Rate method, the following fields are shown.

R Estimate the duration and cost of this activity using a Productivity Rate.

Unit Rate
Manhour Rate

Rate

Description

Engineering

Output ? *	UOM ?	Hours/unit *	\$/unit
1		Hours ▾ 328	0

Work

How many units?* 1

Crew/Equip Count * 1

Remaining duration is currently **41 days**
1 unit of Engineering with **1** crew will take **41 days**

Productivity Rate Suggestions

Act 1
 days @ **\$5MM** per **1,250.00 Sec**
1 Sec will take **0 days** and cost **\$4K**

Srin new act
555.0000 hours @ **\$2 per Sec**
1 Sec will take **555 days (555 hours)** and cost **\$2**

CANCEL
APPLY RATE

Field	Description
Activity Description	Activity this Productivity Rate is for
Output	Output quantity for a single package (in the respective Unit of

Field	Description
	Measure)
UOM	Unit of Measure description
Time/ "Output & UoM"	Time (Hours/Days/Weeks) to complete the output established
\$/"Output & UoM"	Cost to complete the output established

When you select the Manhour Rate method, the following fields are shown.

R Estimate the duration and cost of this activity using a Productivity Rate.

Unit Rate **Manhour Rate**

Rate

Description
WBS SCHED-99.2

Output ? 1	UOM ?	Manhours 2920	\$/unit 0
-----------------------------	---------------------	-------------------------	---------------------

Work

How many manhours? 2920	Crew/Equip Count * 1
-----------------------------------	---------------------------------------

Remaining duration is currently **365 days**
1 unit of **WBS SCHED-99.2** with **1** crew will take **365 days**

Productivity Rate Suggestions
No suggestions found.

CANCEL **APPLY RATE**

All of the Manhour Rate fields are the same as the Unit Rate Fields, with the exception that the Manhour Rate uses Manhours and the work calculates with manhours instead of units.



The screenshot shows a form with the following fields:

- Output ?***: Value 1
- UOM ?**: Blank
- Manhours**: Value 2920 (highlighted with a red box)
- \$/unit**: Value 0

Work

- How many manhours?***: Value 2920 (highlighted with a red box)
- Crew/Equip Count ***: Value 1

Under the Work subheader, schedulers can define the variables on the current project that the productivity rate will be factored against:

Field	Description
How many “manhours”?	Total quantity of manhours of effort to be expended
Crew/Equipment Count	Total Crews or Equipment assigned to complete the work

After all the variables have been entered, Schedule provides a summary of the calculation.

Using the Knowledge Base Suggested Rates

The Knowledge Base pulls in suggested productivity rates based on past packages that are similar in their descriptions, associated knowledge tags , and benchmark selection.

R

Estimate the duration and cost of this activity using a Productivity Rate.

Unit Rate
Manhour Rate

Rate

Description

Engineering

Output ?^{*}

UOM ?

Hours/unit *

\$/unit

Hours

Work

How many units?*

1

Crew/Equip Count *

1

Remaining duration is currently **41 days**

1 unit of Engineering with **1** crew will take **41 days**

Productivity Rate Suggestions

Act 1

days @ \$5MM per 1,250.00 Sec

1 Sec will take 0 days and cost \$4K

Srin new act

555.0000 hours @ \$2 per Sec

1 Sec will take 555 days (555 hours) and cost \$2

CANCEL
APPLY RATE

To select a suggestion, click **Adopt**. This will automatically fills in the Productivity Rate Calculator with the values from the Knowledge Library.

You can still make adjustments to the rate for the current project after adopting the suggestion.

Calculate Productivity Rates

1. Go to the Knowledge Base productivity rate suggestions and **Adopt** a productivity rate.
2. Set or change the amount of work and crew size.

R Estimate the duration and cost of this activity using a Productivity Rate.

Unit Rate **Manhour Rate**

Rate

Description
Engineering

Output <small>?</small> *	UOM <small>?</small>	Hours/unit *	\$/unit
1		Hours ▾ 328	0

Work

How many units? *	Crew/Equip Count *
1	1

Remaining duration is currently **41 days**
1 unit of Engineering with **1** crew will take **41 days**

Productivity Rate Suggestions

Act 1
 days @ \$5MM per 1,250.00 Sec
 1 Sec will take 0 days and cost \$4K
 Srin new act
 555.0000 hours @ \$2 per Sec
 1 Sec will take 555 days (555 hours) and cost \$2

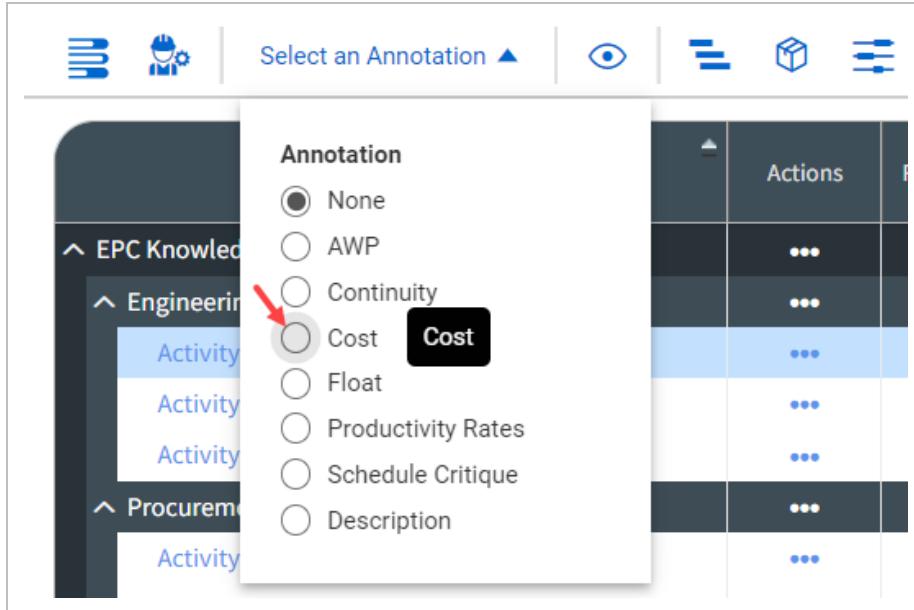
ADOPT 

ADOPT

CANCEL **APPLY RATE**

Pay attention to how this impacts the activity duration and cost

3. Click **Apply Rate** when complete.
4. Open the Annotation drop-down menu and select **Cost**.



- Now, you can view your project's bottom-up and top-down costs



Create Activities

There are two ways to conceptualize activity creation within InEight Schedule and depending on your intended outcome, there are benefits to each process:

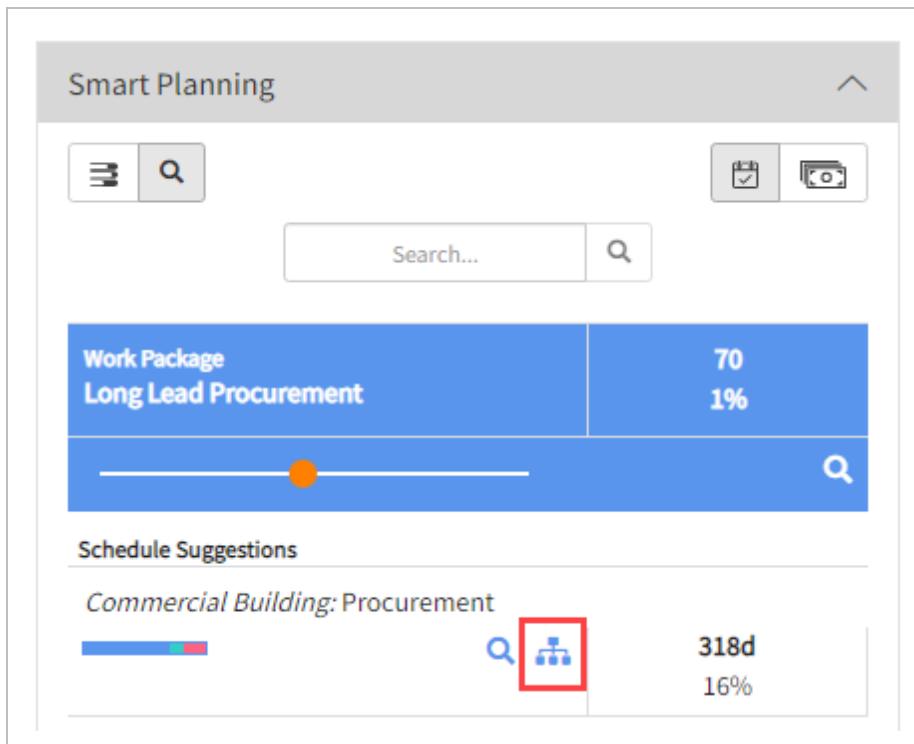
- Knowledge subnet
- Create from scratch

Knowledge subnets

Schedule leverages the Knowledge Base to rapidly build a schedule based on historical projects or existing templates. This feature enables you to pull in similar activities from Knowledge Base projects and adjust them based on the parameters of the project being created.

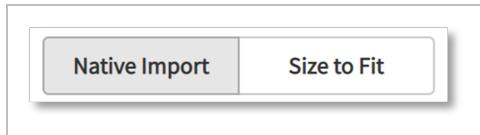
Building a schedule

1. Select a planning package.
2. From the Iris > **Smart Planning**, under the first Schedule Suggestion, click **Import Knowledge Subnet**.



- The merge window opens, letting you customize your selection of planning packages and activities. For this example include all packages and activities in the subnet switched on

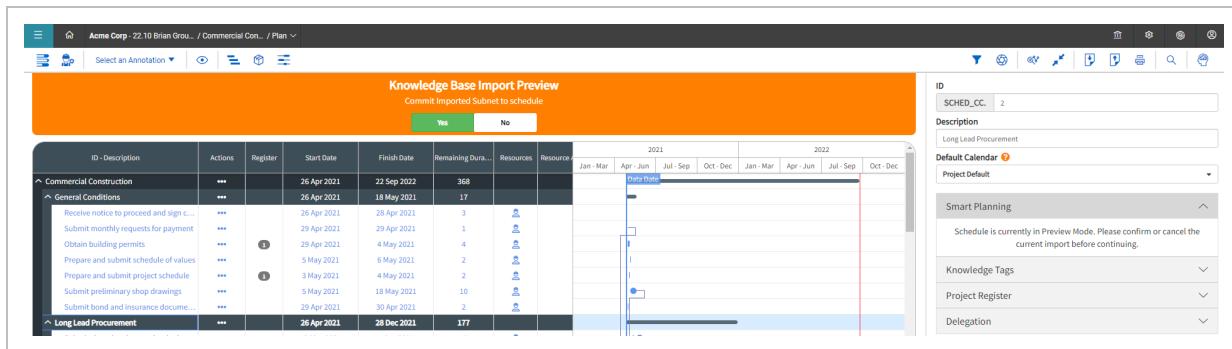
3. After the subnet selection is made, the option to bring in Knowledge Base subnet as *Native Import* or *Size to Fit* is available.



- Native Import: it will bring in the selected subnet with the original durations from the Knowledge Base
- Size to Fit: it will proportionally adjusts the subnet to fit within the duration of the Superior planning package in the current schedule

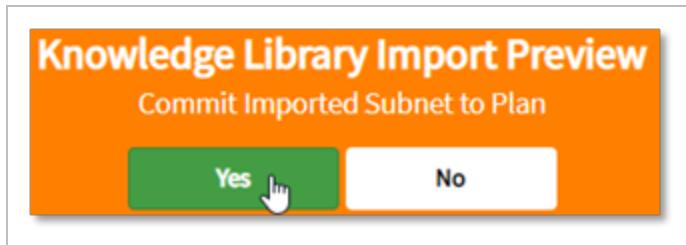
4. Select either **Native Import** or **Size to Fit**.

5. When complete, click **Preview**.



- Schedule merges in the Knowledge Subnet into the project and presents it as a preview.

6. If the preview looks good for merge, select **Yes** to commit the import in Schedule.

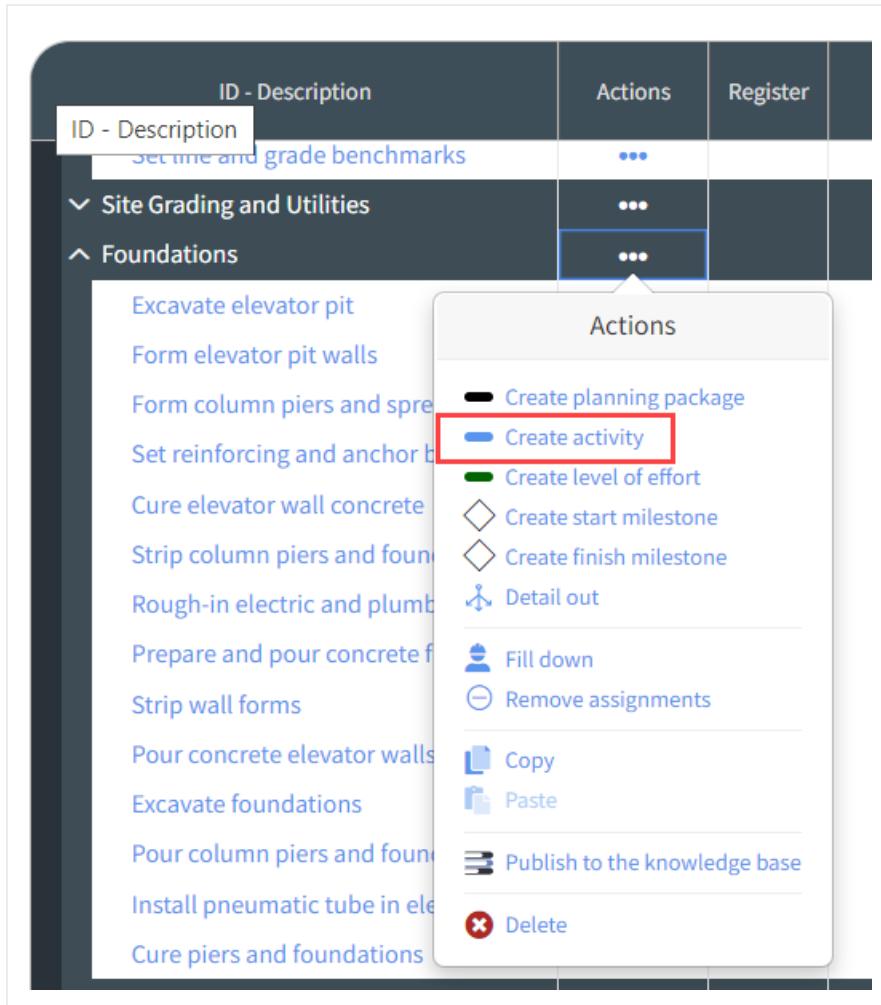


Activities from Scratch

The second way to create activities is from scratch. This allows activities not yet in the Knowledge Library to be created on the project. Additionally, it provides schedulers total manual control when creating an activity.

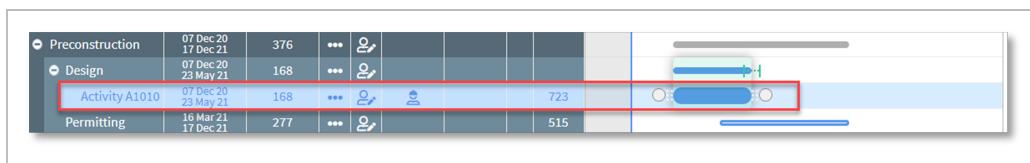
Build Activities from Scratch

1. Click the **Actions** icon for the planning package which the subordinate activity falls under.

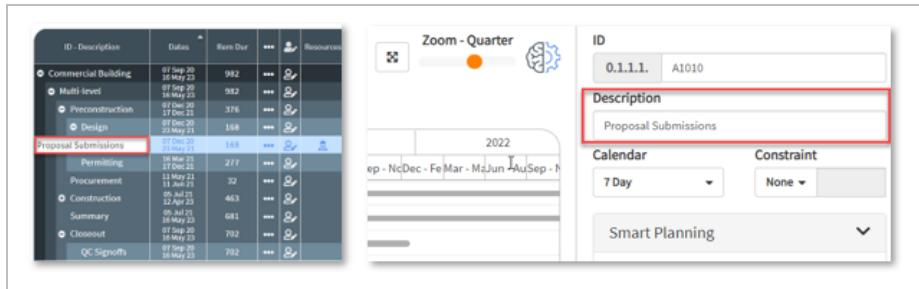


2. Select **Create Activity**.

- A new activity will appear as a subordinate



3. Rename your activity by either selecting the description field in the Gantt View or by going to the Iris and adjusting the description there.



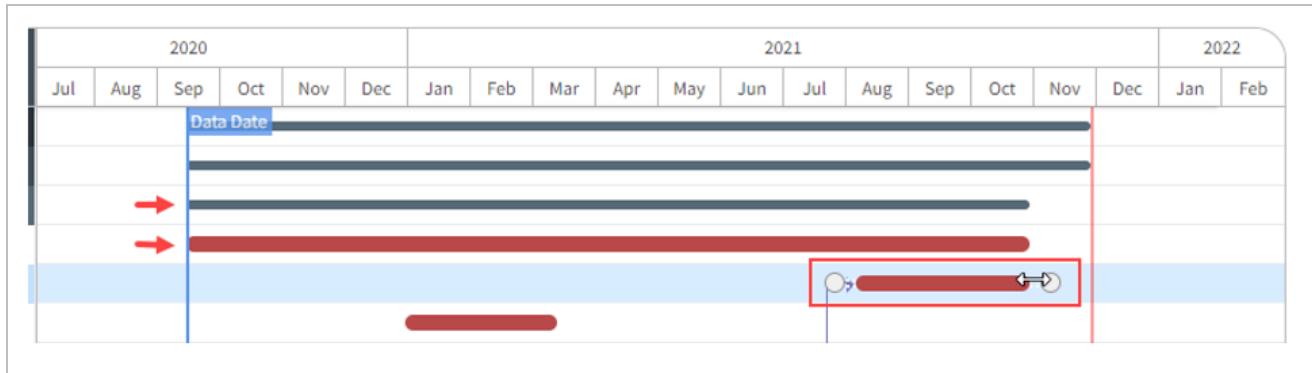
5.0.0.1 WBS summary activity type

In Schedule > Plan, you can create a WBS summary activity. Primavera XER imports support the WBS summary activity type and does not convert these summaries to Planning packages.

The screenshot shows the Schedule application interface with a context menu open over a WBS summary activity. The menu is titled 'Actions' and includes options like 'Create WBS', 'Create planning package', 'Create activity', 'Create level of effort', 'Create start milestone', 'Create finish milestone', 'Create WBS summary activity' (which is highlighted with a red border), 'Detail out', 'Fill down', 'Remove assignments', 'Copy', 'Paste', 'Publish to the knowledge base', and 'Delete'.

ID - Description	Actions	Cost (\$)	Start Date	Finish Date
1BR Beach Villa	...	\$0	14 Sep 2020	14 Nov 2021
1BR Beach Villa	...	\$0	14 Sep 2020	14 Nov 2021
Concrete Works	...	\$0	14 Sep 2020	18 Oct 2021
Activity A1000			14 Sep 2020	18 Oct 2021
Lean Concrete and			7 Dec 2020	23 Mar 2021
Roof Beam			21 Jun 2021	30 Jun 2021
Ground Slab			4 May 2021	7 May 2021
Site Set Out			12 Oct 2020	13 Oct 2020
Ground Beam			14 Apr 2021	21 Apr 2021
Column			24 May 2021	28 May 2021
Clean site available			14 Sep 2020	14 Sep 2020
Excavation			11 Nov 2020	17 Nov 2020
Roof Cover			26 Jul 2021	18 Oct 2021
Masonry Works			5 Jun 2021	27 Aug 2021
Activity A1010			5 Jun 2021	27 Aug 2021
External Wall clad			5 Jul 2021	17 Jul 2021
External wall and			5 Jun 2021	5 Jul 2021
Door and window			23 Aug 2021	27 Aug 2021
1st Fix of MEP	...	\$0	21 Jun 2021	14 Nov 2021

When you increase or decrease the duration of a portion of your WBS in your schedule, the WBS summary activity dynamically reacts to the modified duration changes.



You can load resources into WBS summary activities to help linearly spread units over a specific time frame. Different calendars can be assigned to the WBS summary activity for tracking.

5.0.0.2 Change Activity Type

You can select an Activity Type in the plan schedule and change it from one type to another via a drop-down menu, which lets change an activity type without having to leave the page.

Change Activity Type

1. From the Schedule Plan view select an (terminal level) **Activity**.
2. Click on **Show/Hide Iris**.

The screenshot displays the InEight software interface with two main panels: the Schedule module on the left and the Plan module on the right. A large, semi-transparent red arrow points from the Schedule module towards the Plan module, highlighting the transition or relationship between the two.

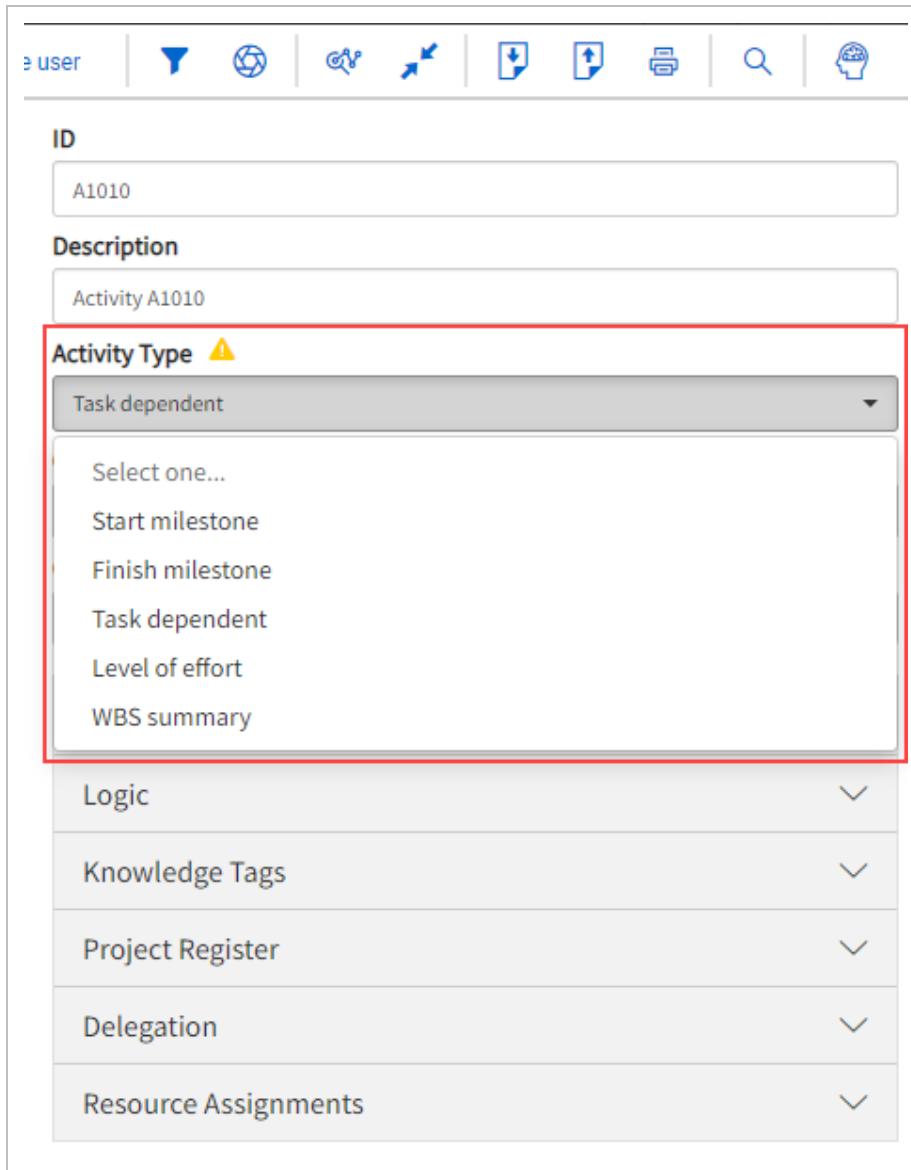
Schedule Module (Left):

- Header: InEight | 23.8 Regression testing - Tatyana / Schedule / 8-24 / Plan
- Toolbar: Includes icons for Home, Select an Annotation, and various schedule-related functions.
- Table: Shows a hierarchical WBS structure under 'WBS SCHED.3'. The first row is collapsed, and the second row, 'Activity A1000', is expanded, showing its sub-activities: 'Activity A1010' and 'Activity A1020'. Each activity row includes columns for ID - Description, Actions, Start Date, and Finish Date.

Plan Module (Right):

- Header: ve user
- Toolbar: Includes icons for Filter, Refresh, and various planning-related functions.
- Form: Displays detailed planning parameters for an activity. The 'ID' field is set to 'A1010'. The 'Description' field is 'Activity A1010'. The 'Activity Type' is 'Task dependent'. The 'Calendar' is 'Project Default'. The 'Constraint' is 'None'. The 'Smart Planning' and 'Logic' sections are collapsed.

3. Click on **Activity type drop-down**, and select an activity type.



The screenshot shows a software interface for managing activities. At the top, there is a navigation bar with icons for user management, search, and other project functions. Below the navigation bar, there are fields for 'ID' (containing 'A1010') and 'Description' (containing 'Activity A1010'). The 'Activity Type' field is highlighted with a red box. It contains a dropdown menu with the following options: 'Task dependent' (selected), 'Select one...', 'Start milestone', 'Finish milestone', 'Task dependent', 'Level of effort', and 'WBS summary'. Below this, there are sections for 'Logic', 'Knowledge Tags', 'Project Register', 'Delegation', and 'Resource Assignments', each with a collapse/expand arrow.

Bulk Activities from Scratch

If multiple activities are to be created from scratch, the detail out function can be used as well.

Create Activities in Bulk

1. Click the **Actions** icon for the planning package that the subordinate activities fall under.
2. From the Actions menu, click **Detail Out**.
3. Create your activities as needed.
4. Set the Work or Scope option to **Activity**.
5. Set the Sequence option to **In Succession**.
6. Set the Duration to **Automatic**.
7. Set your **Quantity**.
8. Click **Build**.


X

Quickly build more detailed schedules by creating multiple activities or planning packages. Establish as a logical sequence or in parallel (concurrent).

Work or Scope	Activity		Planning Package	
Sequence	In Succession	Parallel	Automatic	Manual
Duration				
Quantity	4		0	
Lag Duration				
Schedule will create 4 Activities In Succession each with a duration of 31 days under WBS SCHED-379.2 .				
			Cancel	Build

9. Change the activity names and their respective duration.

ID - Description	Actions	Register	Start Date	Finish Date	Remaining Dura...	Resources	Resource A...	2022			2023			2024		
								Apr - Jun	Jul - Sep	Oct - Dec	Jan - Mar	Apr - Jun	Jul - Sep	Oct - Dec	Jan - Mar	Apr - Jun
SCHED-379000 Cost Risk WBS Import	...		11 Jul 2022	15 May 2024	675											
SCHED-379001 WBS SCHED-379.1	...	2	11 Jul 2022	15 May 2024	675											
A1020 Activity A1020	...	2	27 Apr 2023	15 May 2024	385											
A1000 Activity A1000	...	2	11 Jul 2022	29 Nov 2022	142											
A1010 Activity A1010	...	2	30 Nov 2022	26 Apr 2023	148											
SCHED-379002 WBS SCHED-379.2	...		10 Nov 2022	13 Mar 2023	124											
A1100 Activity A1100	...		10 Nov 2022	10 Dec 2022	31											
A1120 Activity A1120	...		11 Dec 2022	10 Jan 2023	31											
A1130 Activity A1130	...		11 Jan 2023	10 Feb 2023	31											

Assign Knowledge Tags

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

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

Assigning Knowledge Tags in the Iris

1. Select an activity. Open the Iris and go to the Knowledge Tags Section.
 - Knowledge Tags will appear in the Iris based on what is set up in the Knowledge Base & the Configuration Knowledge Tags Register.



2. Click on the arrow to expand the Knowledge Tags available within each group.

Knowledge Tags

Codes UDFs

- As-Built Performance (Expand All) SHOW
- AWP Structure (Expand All) SHOW
 - POCA (POCA)
 - POCB (POCB)
- Brian Activity Code Test (Expand All) SHOW
- CALENDAR (Expand All) SHOW

New Tag Value 1
CHECK ((New Code Value))
- Kansas Animals (Expand All) SHOW
 - EKT (Eastern Kansas Tiger)
 - WKT (Western Kansas Tiger)

Some tags have “Inherited” values. These are rolled down from a superior level (i.e. assigned at the project level, assigned at the planning package level)

3. Select a tag from the drop-down menu to assign it to the activity.

Knowledge Tags

Codes UDFs

- As-Built Performance (Expand All) SHOW
- AWP Structure (Expand All) SHOW
 - POCA (POCA)
 - POC B (POC B)
- CALENDAR (Expand All) SHOW

New Tag Value 1
CHECK ((New Code Value))

Assigning Logic

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

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

Within Schedule, there are two ways to setup schedule logic: via the Gantt Chart or the Iris.

Using the Gantt Chart to Assign Logic

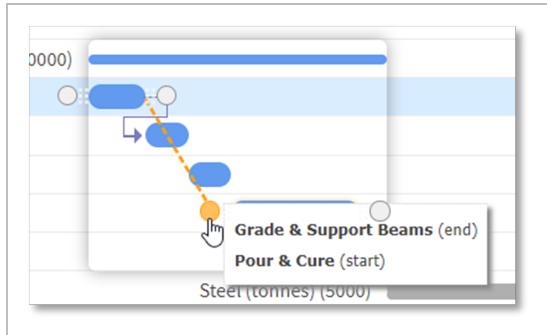
The Gantt Chart has built-in functionality allowing activity logic to be tied together directly in the visual. This is great for quickly adding or adjusting logic in the schedule.

When hovering over any activity bar in the Gantt chart, two dots will appear at the beginning and end of the activity:

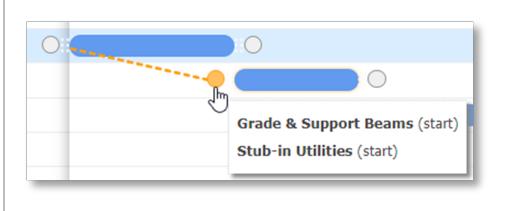
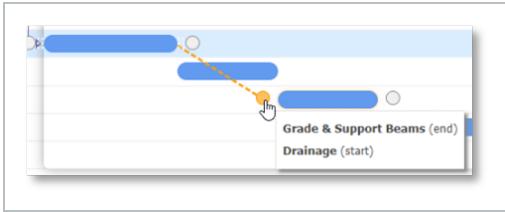
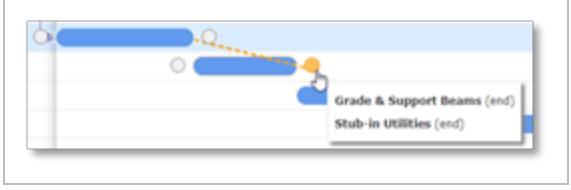
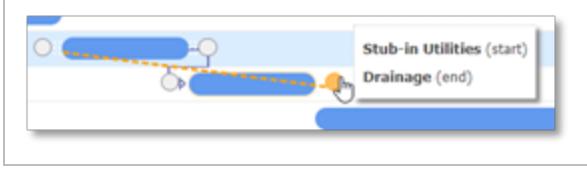
Activity	Start Date	End Date	Duration	Team	Planned	Actual (Yards) (10000)
Foundations	16 Mar 22 09 Aug 22		105	***	Planned	
Grade & Support Beams	16 Mar 22 12 Apr 22		20	***	Planned	
Stub-in Utilities	13 Apr 22 03 May 22		15	***	Planned	

Clicking and dragging either dot from what activity to another will create a logic tie.

- Dot at the beginning of an activity: the start logic of the activity
- Dot at the end of an activity: the end logic of the activity



Connecting dots between activities, define the type of logic being applied.

Function (Connect the Dots)	Logic (How to Connect)
	Start-to-Start (SS) Connect the start of one activity to the start of another activity
	Finish-to-Start (FS) Connect the end of one activity to the start of another activity
	Finish-to-Finish (FF) Connect the end of one activity to the end of another activity
	Start-to-Finish (SF) Connect the start of one activity to the end of another activity

The first activity dot selected is treated as the predecessor to the second activity dot. Thus, the second activity will be a successor to the first activity.

Planning Mode

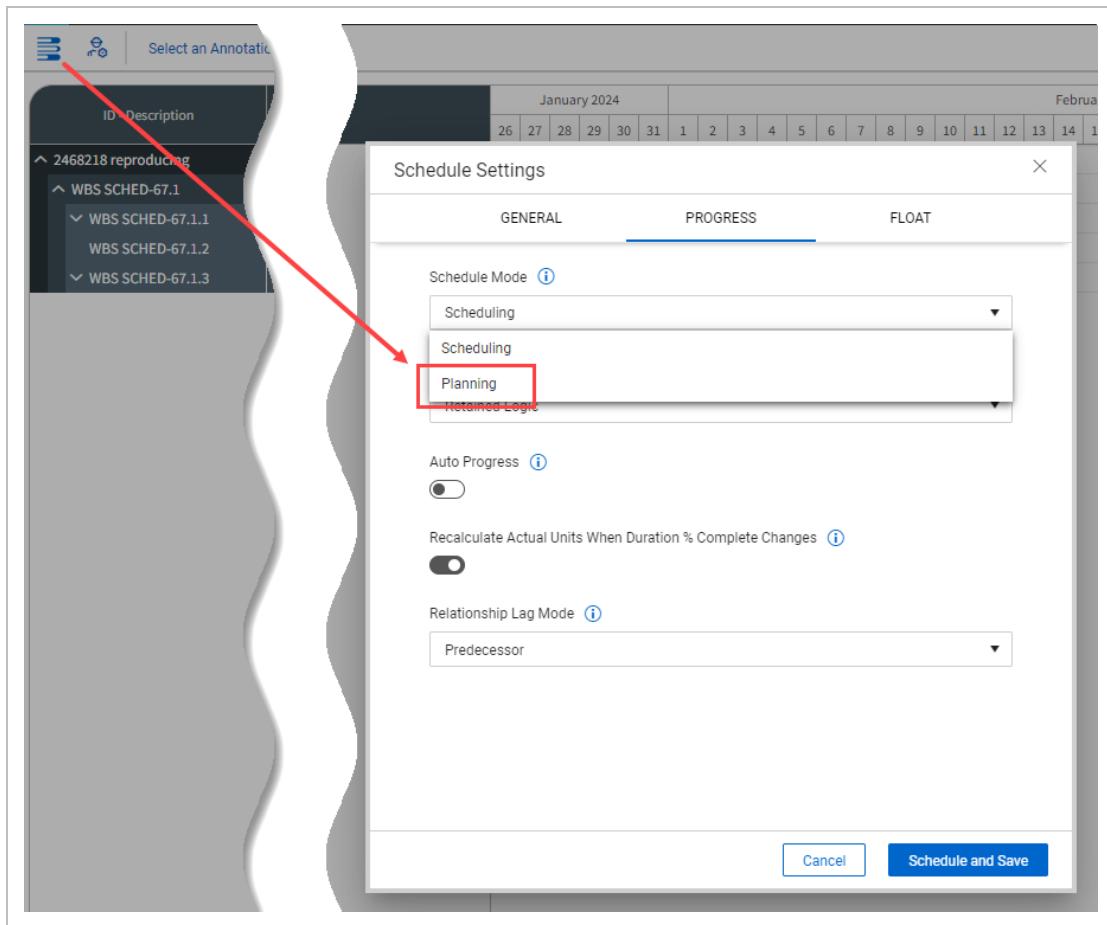
At the start of the project or phase, non-schedulers identify the key items to be planned for and create a rough timeline of the plan. InEight Schedule gives you the ability to do this in a way that easily carries forward into a full schedule.

Planning mode lets users freely move around planning items. In this mode, planning packages and milestones can be added, but not activities.

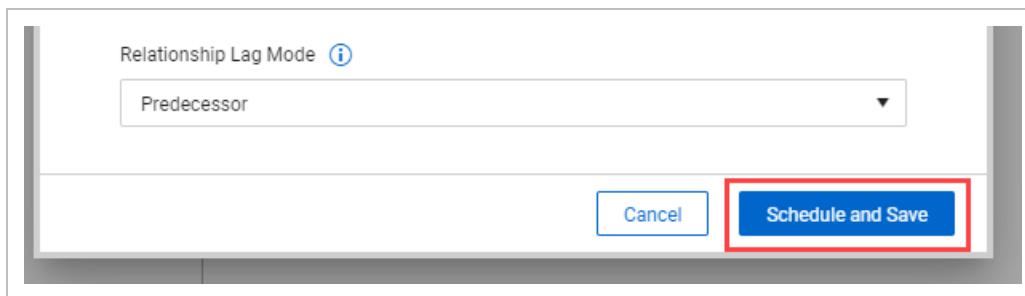
Create a new planning package

Planning packages brought in from the outline during project creation are automatically populated.

1. To create a new planning package from scratch, click the **Schedule** icon in the far left corner and select **Planning** Schedule mode.



2. Scroll down to select **Schedule and Save** at the bottom far right on the Schedule Settings window.



New planning packages are created as subordinates under the open or selected parent package.

ID - Description	Dates	Rem Dur	...	👤	Resources	Resource As	📅	Float
● Commercial Building	07 Sep 20 16 May 23	982	...	👤				
● Multi-level	07 Sep 20 16 May 23	982	...	👤				
Preconstruction	07 Sep 20 25 Jul 21	322	...	👤				660
Procurement	22 Feb 21 14 Sep 21	205	...	👤		1	609	
Construction	05 Jul 21 12 Apr 23	647	...	👤				34
Summary	05 Jul 21 16 May 23	681	...	👤				0
Closeout	08 Mar 23 16 May 23	70	...	👤				0
WBS 0.1.6	07 Sep 20 16 May 23	702	...	👤				0

If the Actions icon is not available, you can bring it into view using the **Customize Gantt View** icon at top.

1. Click in the **Description** column to rename your new planning package.
2. Organize planning packages by clicking and dragging the rows.

● Commercial Building	07 Sep 20 16 May 23	982	...	👤				
● Multi-level	07 Sep 20 16 May 23	982	...	👤				
Preconstruction	07 Sep 20 25 Jul 21	322	...	👤				660
Procurement	22 Feb 21 14 Sep 21	205	...	👤		1	609	
Construction	05 Jul 21 12 Apr 23	647	...	👤				34
Summary	05 Jul 21 16 May 23	681	...	👤				0
Closeout	07 Sep 20 16 May 23	702	...	👤				0
QC Signoffs	07 Sep 20 16 May 23	702	...	👤				0
QC Signoffs	07 Sep 20 16 May 23	702	...	👤				0

When dragging rows in the Gantt chart, either a white dot or a blue line shows where in the hierarchy the row is being moved. Or, a row is boxed in blue, signifying the planning package being dragged will become a subordinate to the boxed work package.

3. You can continue adjusting planning packages using the bars in the Gantt chart.

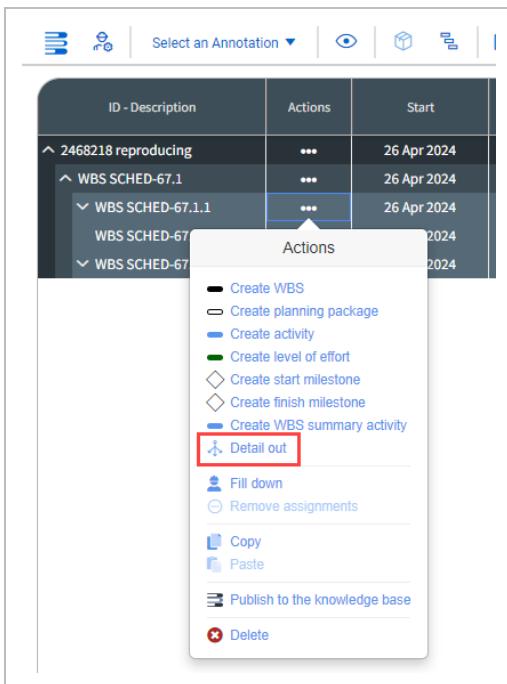
You can adjust a planning package's duration in the Rem Dur column. This will adjust its duration while holding the current start date.



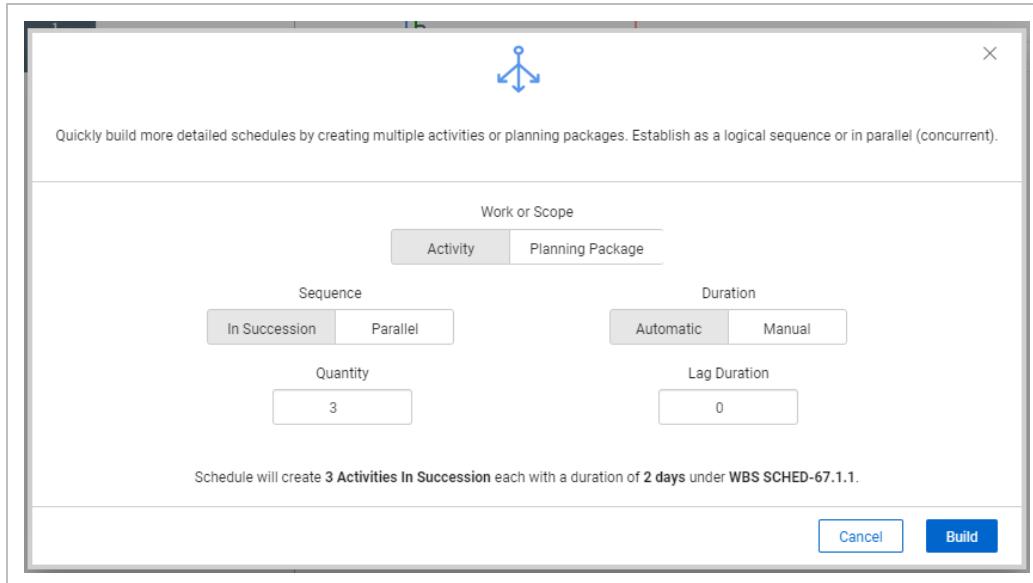
Bulk creation of planning packages

Add planning packages individually or in bulk with the Detail Out function.

1. Select the **Actions** icon on an existing planning package.
2. From the drop-down menu, select **Detail Out**.



- From here you can select how you want to add your new planning packages



Field	Description
Sequence	Sets the new planning packages to occur in succession or parallel.
Duration (Automatic)	Schedule will distribute the superior duration evenly across the subordinate planning packages.
Duration (Manual)	Manually set a custom base duration.
Quantity	Number of subordinate planning packages are being created.
Use Logic (On)	Logic is tied from one package to the next.
Use Logic (Off)	Logic is not assigned. Additionally, the option to set a scope gap is provided.

The values set here are for the default/initial creation of packages and can be changed as needed later .

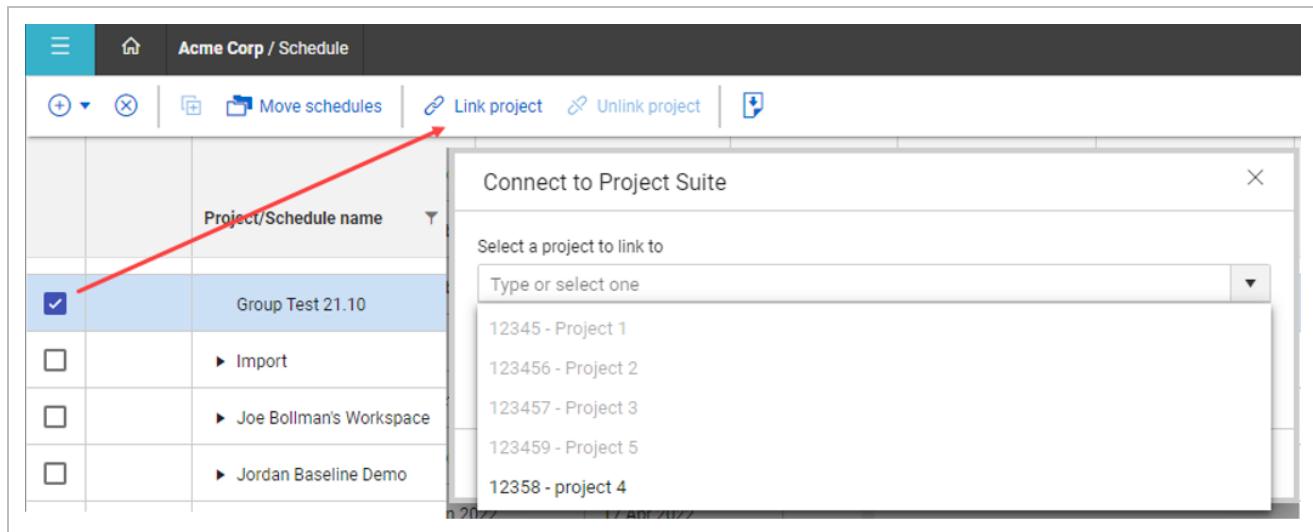
- Set the **quantity**.
- Click **Build**.

At the bottom of the Detail Out window is a summary of what will be added to the schedule.

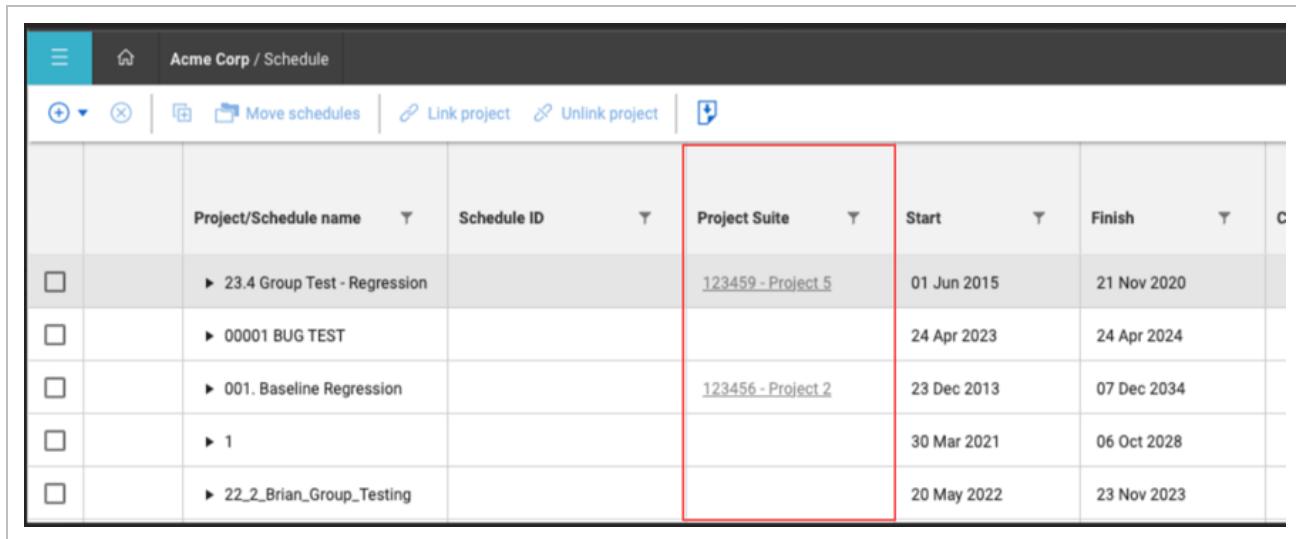
5. Your new WBS planning package is created, and you can rename your planning packages accordingly.

Advanced Work Packaging

The integration with Project Suite is built primarily for the Project Suite migration. For new users or non-connected workspaces, you can navigate to the Project List page, select a workspace and link a project. You can then select a project in Project Suite to connect and link a project schedule in Schedule.



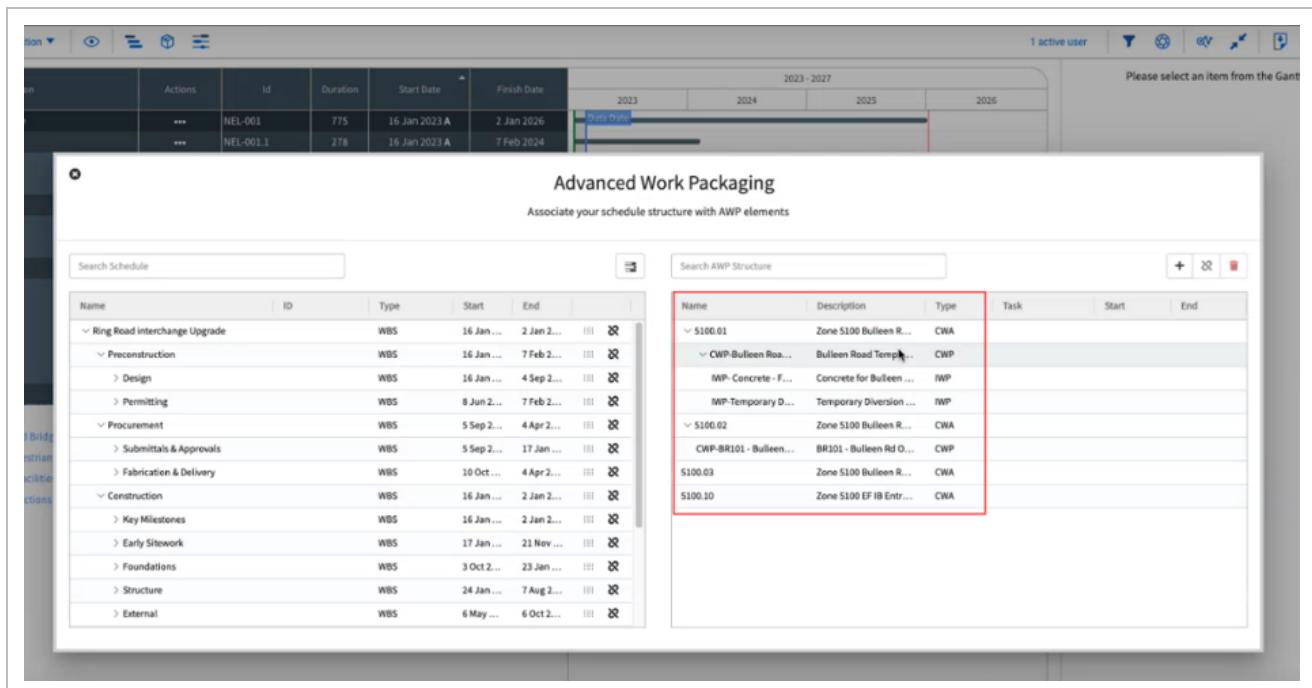
When linked, the Project Suite field becomes populated with a selected project.



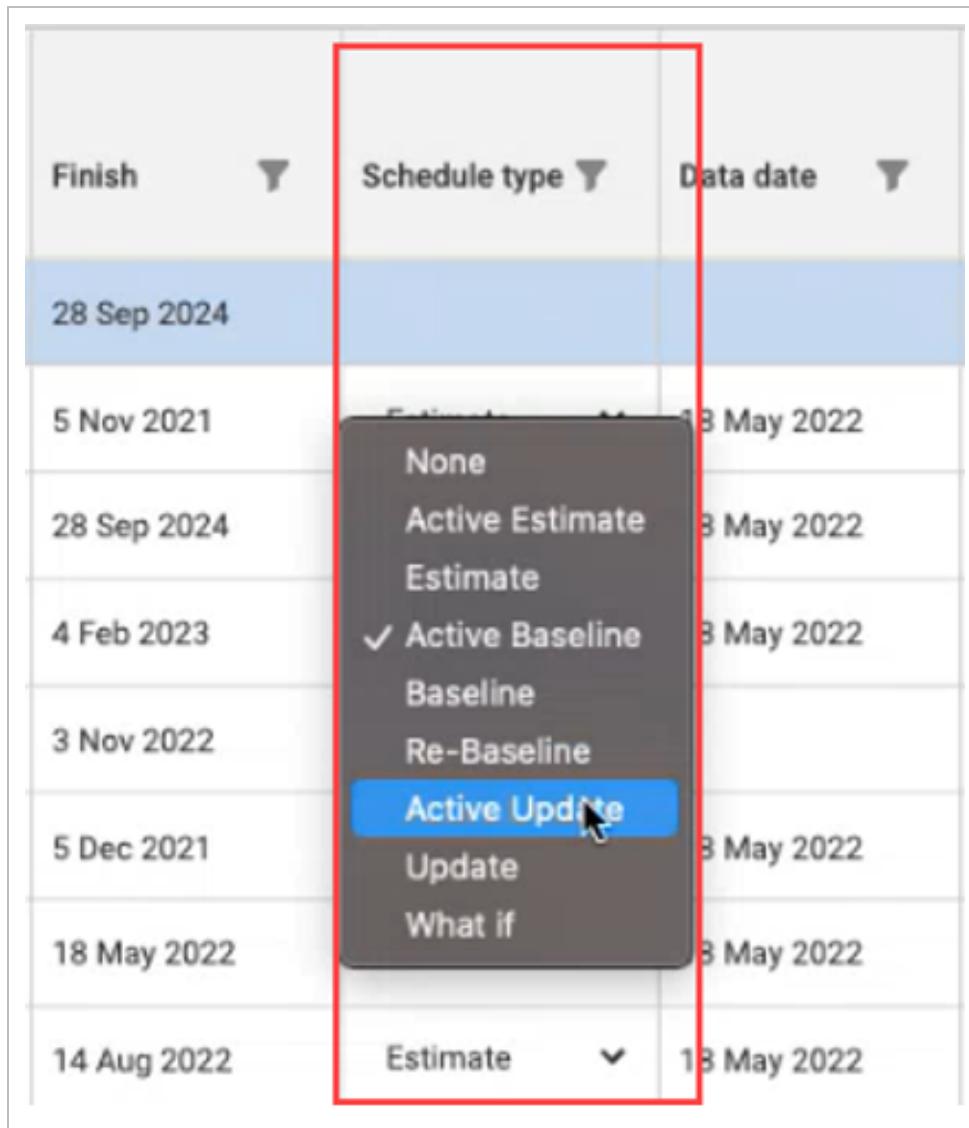
	Project/Schedule name	Schedule ID	Project Suite	Start	Finish	Cost
<input type="checkbox"/>	► 23.4 Group Test - Regression		123459 - Project 5	01 Jun 2015	21 Nov 2020	
<input type="checkbox"/>	► 00001 BUG TEST			24 Apr 2023	24 Apr 2024	
<input type="checkbox"/>	► 001. Baseline Regression		123456 - Project 2	23 Dec 2013	07 Dec 2034	
<input type="checkbox"/>	► 1			30 Mar 2021	06 Oct 2028	
<input type="checkbox"/>	► 22.2_Brian_Group_Testing			20 May 2022	23 Nov 2023	

When you go to AWP, you see Plan and Progress data in that schedule.

The availability of AWP data from Plan is determined by the Advanced work and scheduling features toggle in InEight cloud platform > project > Settings > General > **Global Options**. The toggle must be set to **ON** for projects that want to use the AWP feature in Schedule.



When a project schedule is identified as an Active Update Schedule Type, it becomes the Project Suite connected schedule.



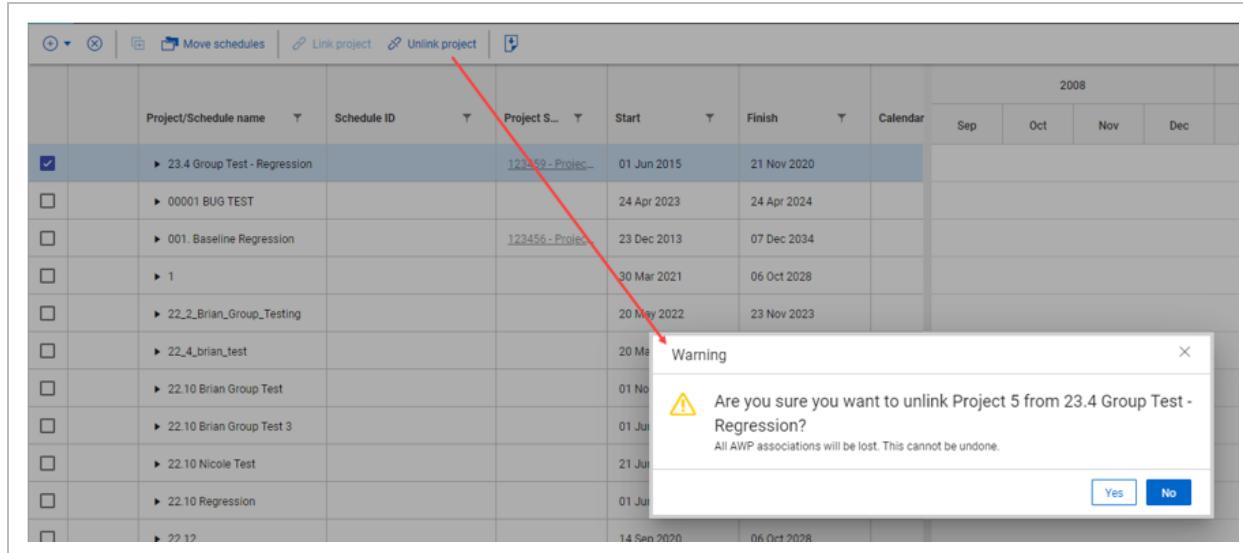
An InEight icon shows next to the project schedule name to signify that the schedule is now linked with a project in Project Suite.

A screenshot of a Project Suite interface showing a list of schedules. The second row, 'Metropolitan ring r...', has an InEight icon (a small blue icon with a white 'i') next to it. A red box highlights this row. A tooltip 'Linked to Ridgegate Campus' is shown over the InEight icon. The table has columns for checkboxes, locks, names, schedule numbers, and dates.

<input type="checkbox"/>	<input type="checkbox"/>	 Melbourne Airport ...	SCHED-45	06 Dec 2021
<input type="checkbox"/>	<input type="checkbox"/>	 Metropolitan ring r...	NEL-002	06 Dec 2021
<input type="checkbox"/>	<input type="checkbox"/>	 Linked to Ridgegate Campus	NEL-001	16 Jan 2023
<input type="checkbox"/>	<input type="checkbox"/>	 Ring Road intercha...	NEL-005	16 Jan 2023

5.0.0.3 Unlink a Project Suite project

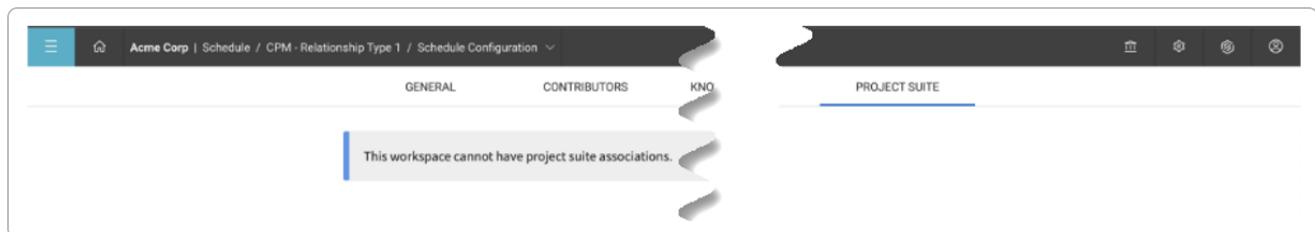
You can select **Unlink project** to disconnect a Project suite project from Schedule. All the AWP associations will be deleted, and any changes cannot be undone.



The screenshot shows a table of projects with columns for Project/Schedule name, Schedule ID, Project S..., Start, Finish, and Calendar. A warning dialog box is overlaid on the table, asking if the user is sure they want to unlink a project. The dialog includes a warning icon, the project name, a message about lost AWP associations, and Yes/No buttons.

5.0.0.4 Schedule Configuration

Schedules that are housed under the *None* project workspace do not support a Project Suite project connection via the Project Suite tab in Schedule Configuration.



The screenshot shows the Schedule Configuration interface for a workspace named 'None'. The 'PROJECT SUITE' tab is selected, but a message box indicates that this workspace cannot have project suite associations. The 'GENERAL' tab is also visible.

If a connection is required, you can move the schedule file to a new or existing workspace to enable this feature.

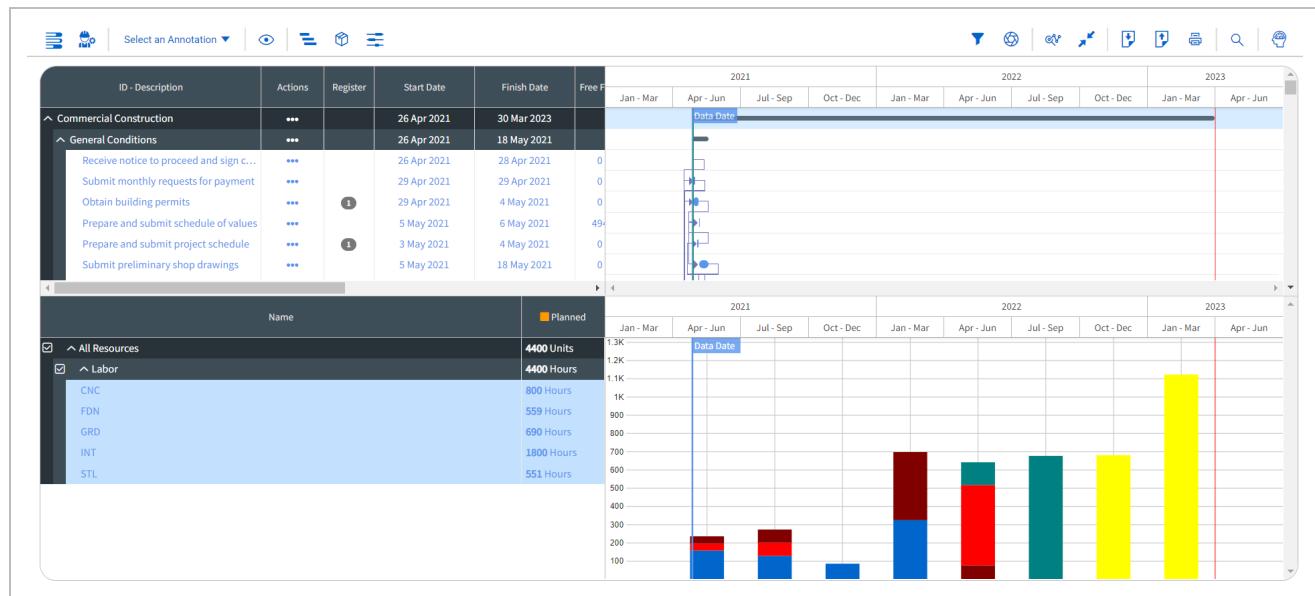


The screenshot shows the 'Move schedules' dialog box. It displays a table with one row for a project named 'None'. The 'None' workspace is selected. The 'Move to workspace' dropdown is set to 'None'. The 'Move' button is visible at the bottom.

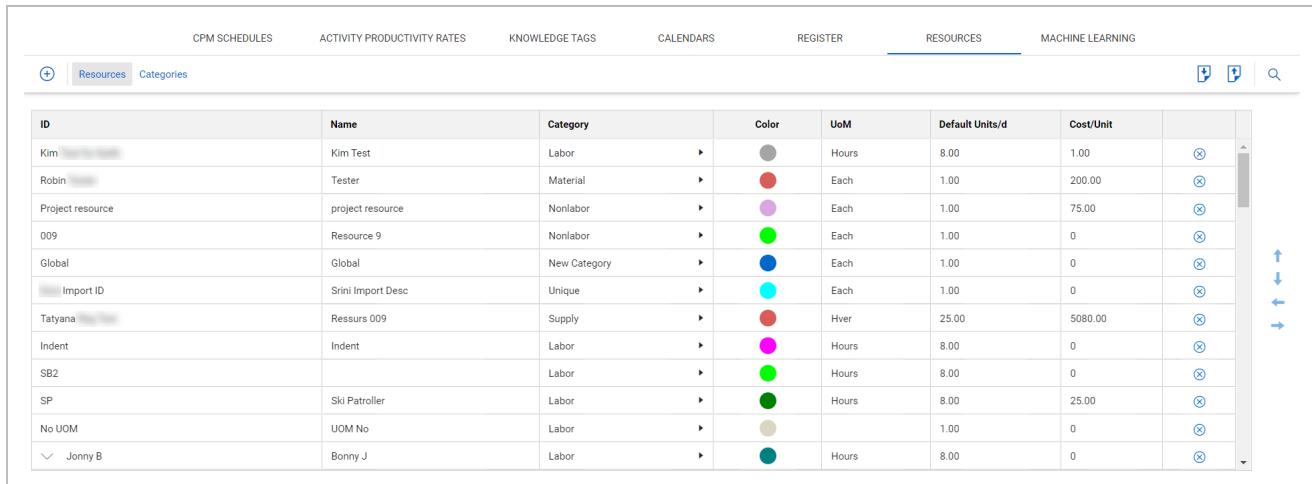
CHAPTER 6 – RESOURCE MANAGEMENT

Project Resources

The Resource Management function provides schedulers with the ability to account for and report on the project resources (for example, labor, materials, or equipment) that are needed to plan the scheduled work.



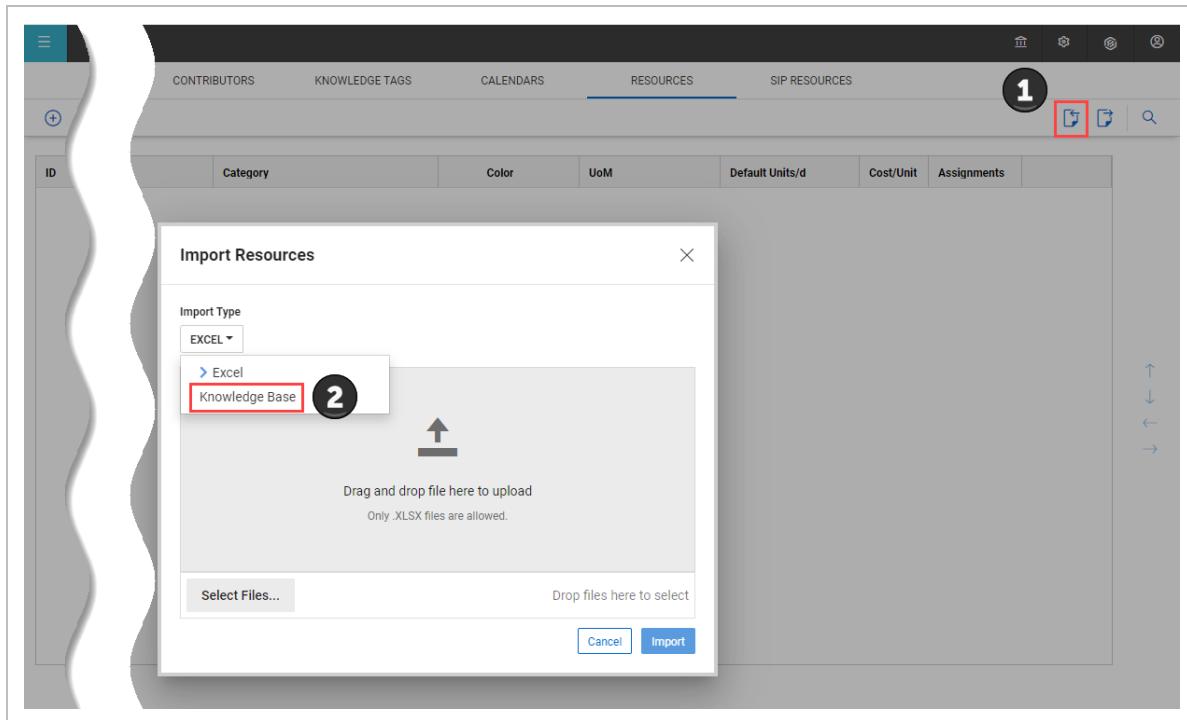
From a shared organization resource pool, schedulers can assign the required resources to activities. With the resource utilization data, InEight Schedule can assess cost and time impacts in a time-phased manner.



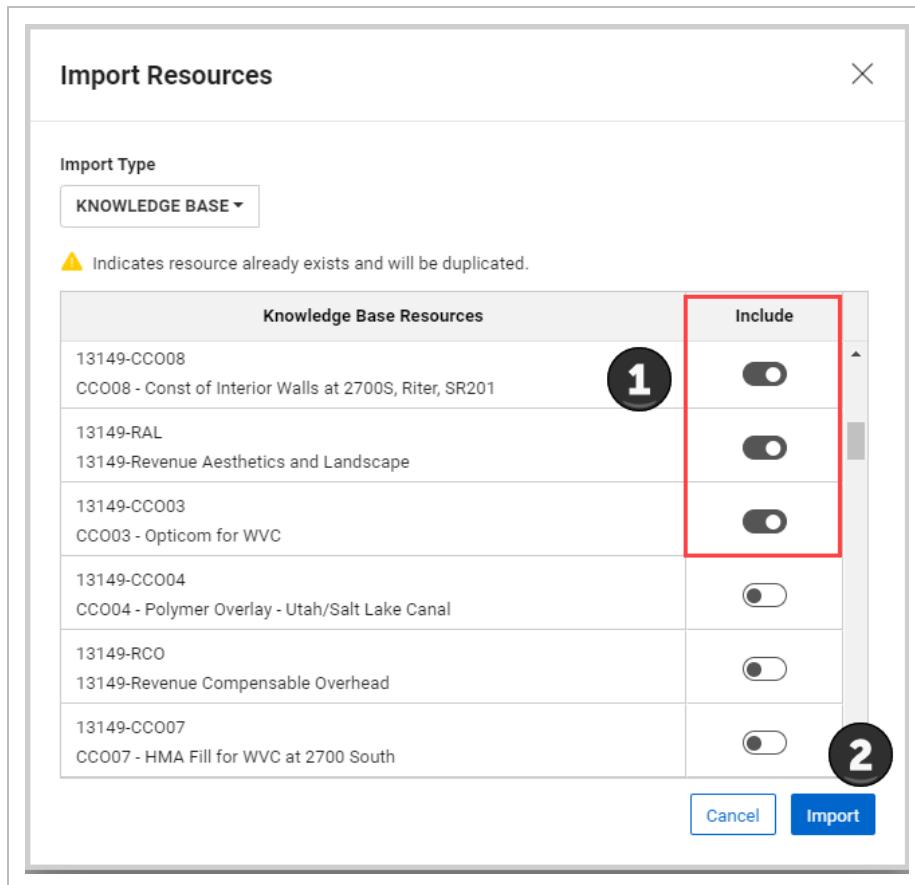
ID	Name	Category	Color	UoM	Default Units/d	Cost/Unit	Actions
Kim [REDACTED]	Kim Test	Labor	Grey	Hours	8.00	1.00	  
Robin [REDACTED]	Tester	Material	Red	Each	1.00	200.00	  
Project resource	project resource	Nonlabor	Purple	Each	1.00	75.00	  
009	Resource 9	Nonlabor	Green	Each	1.00	0	  
Global	Global	New Category	Blue	Each	1.00	0	  
 Import ID	Srini Import Desc	Unique	Cyan	Each	1.00	0	  
Tatyana [REDACTED]	Ressurs 009	Supply	Red	Hver	25.00	5080.00	  
Indent	Indent	Labor	Pink	Hours	8.00	0	  
SB2		Labor	Green	Hours	8.00	0	  
SP	Ski Patroller	Labor	Green	Hours	8.00	25.00	  
No UOM	UOM No	Labor	Grey		1.00	0	  
Jonny B	Bonny J	Labor	Teal	Hours	8.00	0	  

Import resources from Knowledge Base Resource register into Project Resources Register

1. Click on the **Import Resources** icon, and then select **Knowledge Base** from the Import Type drop-down menu.

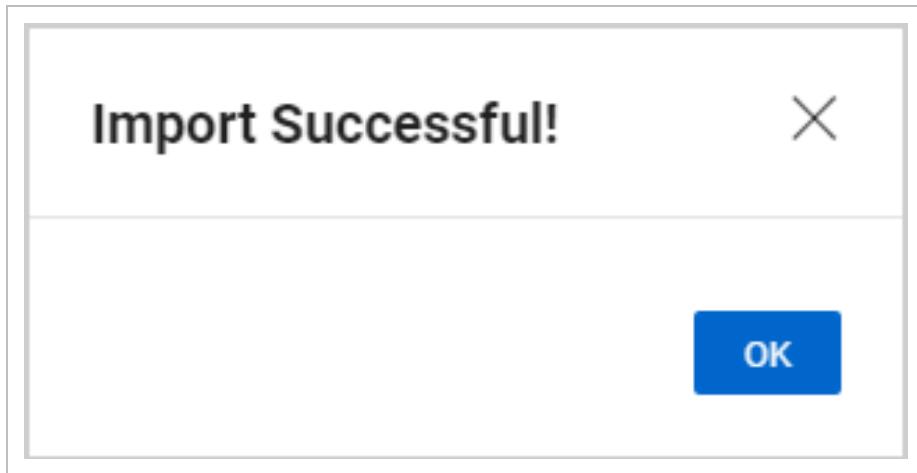


2. Select the **Knowledge Base resources** that you want to include in your project, and then click **Import**.



The  symbol indicates that the resource already exists and will be duplicated.

3. You will see an Import Successful message. Select **OK**.



The selected resources are now imported into the project from the Knowledge Base Resource register.

GENERAL		CONTRIBUTORS		KNOWLEDGE TAGS		CALENDARS		RESOURCES		SIP RESOURCES	
⊕										F	F
ID	Name	Category		Color	UoM	Default Units/d	Cost/Unit	Assignments			
13149-CC008	CC008 - Const of Interior Walls at 2700S, Riter, SF	Material	▶	●	Dollars	1.00	1.00	0	X		
13149-RAL	13149-Revenue Aesthetics and Landscape	Material	▶	●	Dollars	1.00	1.00	0	X		
13149-CC003	CC003 - Opticom for WVC	Nonlabor	▶	●	Each	1.00	1.00	0	X		

Resource Assignments

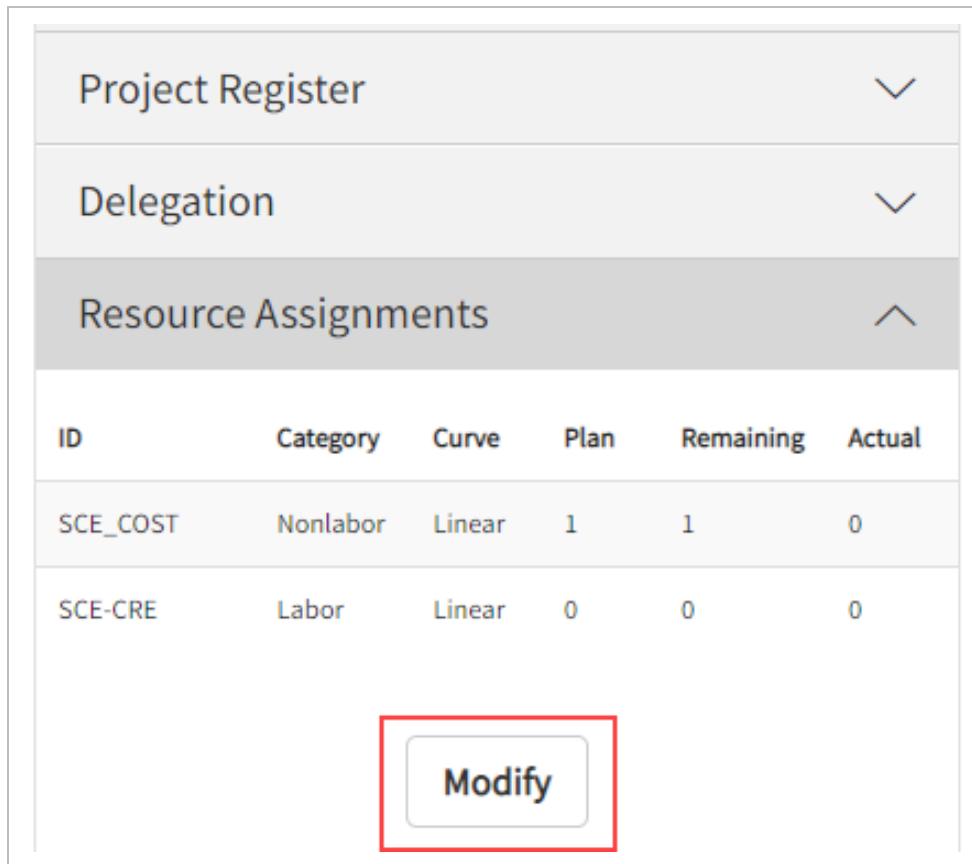
Resources are assigned to activities (activity level) but can also be set via work packages (summary level) in the schedule. You can assign the same resource multiple times to a single activity.

The setting that allows the same resource to be assigned more than once is on by default. If needed, with the applicable permissions the toggle can be set to *Off* in Schedule Configuration > General > **Enable Duplicate Resource Assignments**.

Assign Resources at the Activity Level

From Plan view, you can access the resource assignments of the assigned by using the options below:

- Open an Activity's details in the Iris, expand the Resource Assignments section, and then select **Modify**.



The screenshot shows a software interface for managing project resources. At the top, there are three expandable sections: 'Project Register' (down arrow), 'Delegation' (down arrow), and 'Resource Assignments' (up arrow). Below these is a table with the following data:

ID	Category	Curve	Plan	Remaining	Actual
SCE_COST	Nonlabor	Linear	1	1	0
SCE-CRE	Labor	Linear	0	0	0

At the bottom of the table area, there is a button labeled 'Modify' enclosed in a red rectangular box.

- Customize the Gantt Chart view to include the Resources Column, and then select the **Resources** icon directly in the Gantt Chart.

ID - Description	Actions	Register	Start Date	Finish Date	Remaining Dura...	Resources	Resource Assignments
^ ABC Building Project Baseline	...	4	21 Jun 2021	14 Jul 2022	268		
^ ABC Building	...	4	21 Jun 2021	14 Jul 2022	268		
▼ Summary & Milestones	...	4	21 Jun 2021	14 Jul 2022	268		
▼ Pre-Construction	...	4	21 Jun 2021	24 Nov 2021	110		
^ Construction	...	4	4 Aug 2021	11 Jul 2022	234		
^ Mobilization	...	1 4	4 Aug 2021	16 Aug 2021	9		
Temp Trailer Install	...	5	11 Aug 2021	11 Aug 2021	1		SCE_COST, SCE-CRE
Temporary Electric Install	...	5	5 Aug 2021	11 Aug 2021	5		SCE_COST, SCE-CRE
Existing Conditions Document...	...	5	4 Aug 2021	6 Aug 2021	3		SCE_COST, SCE-CRE
Install Temporary Barracades	...	5	9 Aug 2021	10 Aug 2021	2		SCE_COST, SCE-CRE
Temp Sanitary Facilities Install	...	5	11 Aug 2021	11 Aug 2021	1		SCE_COST, SCE-CRE
Dig Alert	...	5	4 Aug 2021	6 Aug 2021	3		SCE_COST, SCE-CRE

2. The resource assignment window opens.

2420: Existing Conditions Documentation
(4 Aug 2021 - 6 Aug 2021) - 3d

[+ Add new resource](#)

[Q](#)

ID ↑	Name	Category	Col...	Curve	Unit...	Unit	Cost...	FTE/...	Plan	Rem	Act	
SCE-CRE	SCE CRE Res	Labor		Lin...	►	0	Hours	0	-	0	0	
SCE_COST	SCE Cost	Nonlabor		Lin...	►	1	Hours	0	1	3	3	

3. In the resource window, under Available Resources, select the resource.

ID ↑	Name	Category	Col...	Curve	Unit...	Unit	Cost...	FTE/...	Plan	Rem	Act	
332	Crane	Labor	●	Lin... ▶	8	Hours	0	1	328	328	0	✖
754	Exavator 2	Labor	●	Lin... ▶	8	Hours	0	1	328	328	0	✖
Baby jon	jonny babe	Labor	●	Lin... ▶	2	Each	3	1	82	82	0	✖
Jonny B	Bonny J	Labor	●	Lin... ▶	8	Hours	0	1	328	328	0	✖
SP	Ski Patroller	Labor	●	Lin... ▶	8	Hours	25	1	328	328	0	✖
Steel		Labor	●	Lin... ▶	8	Hours	0	1	328	328	0	✖
754	Exavator 2	Labor	●	Lin... ▶	8	Hours	0	1	328	328	0	✖
5343	Iron Worker	Labor	●	Lin... ▶	8	Hours	0	1	328	328	0	✖

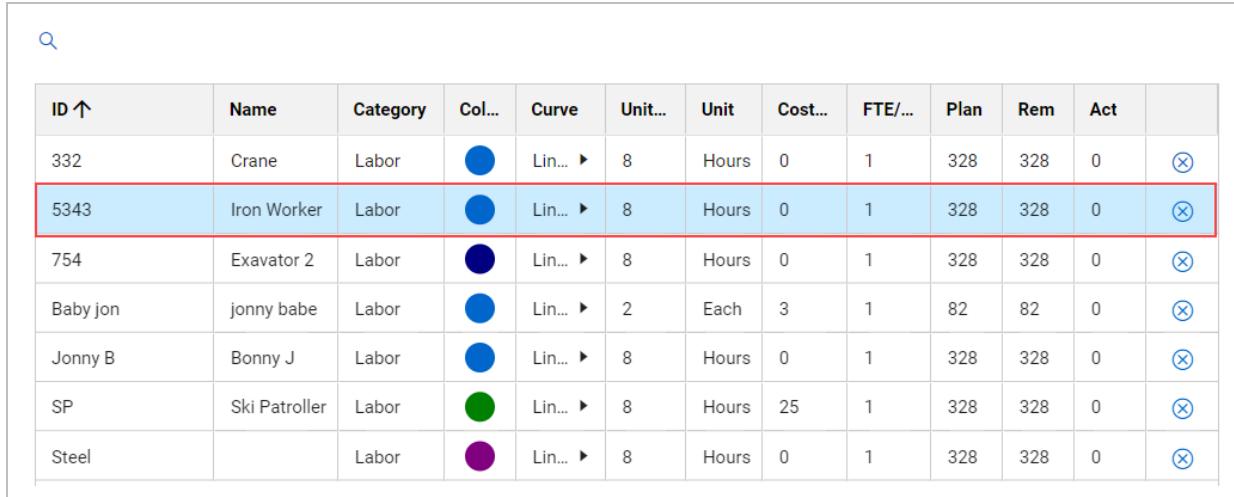
All available resources can be found quickly using the Search function in the resource assignment window.

4. After the resource is selected, click the **right arrow** icon to add the resource to the activity's Resource register.

ID ↑	Name	Category	Col...	Curve	Unit...	Unit	Cost...	FTE/...	Plan	Rem	Act	
332	Crane	Labor	●	Lin... ▶	8	Hours	0	1	328	328	0	✖
754	Exavator 2	Labor	●	Lin... ▶	8	Hours	0	1	328	328	0	✖
Baby jon	jonny babe	Labor	●	Lin... ▶	2	Each	3	1	82	82	0	✖
Jonny B	Bonny J	Labor	●	Lin... ▶	8	Hours	0	1	328	328	0	✖
SP	Ski Patroller	Labor	●	Lin... ▶	8	Hours	25	1	328	328	0	✖
Steel		Labor	●	Lin... ▶	8	Hours	0	1	328	328	0	✖
754	Exavator 2	Labor	●	Lin... ▶	8	Hours	0	1	328	328	0	✖
5343	Iron Worker	Labor	●	Lin... ▶	8	Hours	0	1	328	328	0	✖

Double clicking a resource will also add it to the activity's Resource register.

- When the resource is added, details for each resource can be modified for the activity. Fields that can be adjusted at this level include Curve, Units/d, Cost/Unit, FTE/Qty, and Plan.

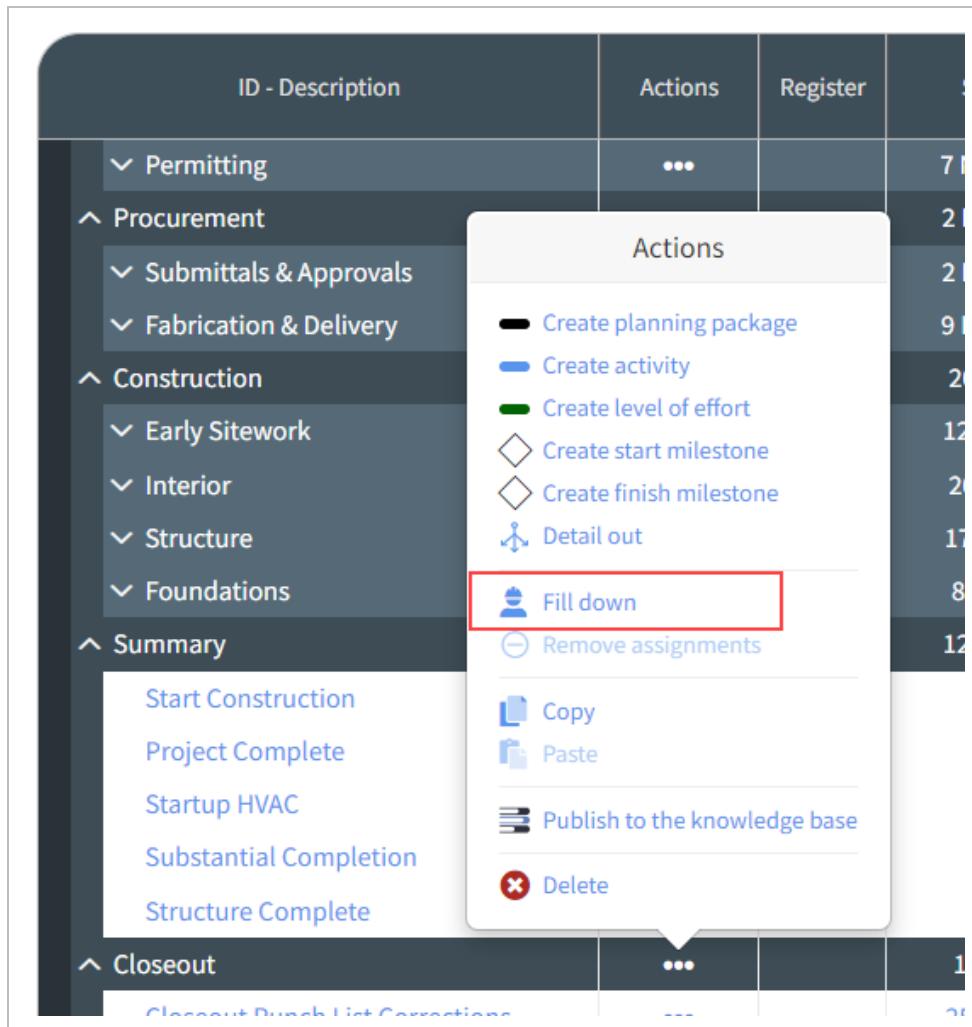


ID ↑	Name	Category	Col...	Curve	Unit...	Unit	Cost...	FTE/...	Plan	Rem	Act	
332	Crane	Labor	●	Lin... ▶	8	Hours	0	1	328	328	0	✖
5343	Iron Worker	Labor	●	Lin... ▶	8	Hours	0	1	328	328	0	✖
754	Excavator 2	Labor	●	Lin... ▶	8	Hours	0	1	328	328	0	✖
Baby jon	jonny babe	Labor	●	Lin... ▶	2	Each	3	1	82	82	0	✖
Jonny B	Bonny J	Labor	●	Lin... ▶	8	Hours	0	1	328	328	0	✖
SP	Ski Patroller	Labor	●	Lin... ▶	8	Hours	25	1	328	328	0	✖
Steel		Labor	●	Lin... ▶	8	Hours	0	1	328	328	0	✖

If a resource is not available in the Project's resource register, a new resource can be created directly from the Resource Assignment window. See "Creating Project Resources via Resource Assignment" topic.

Fill Down

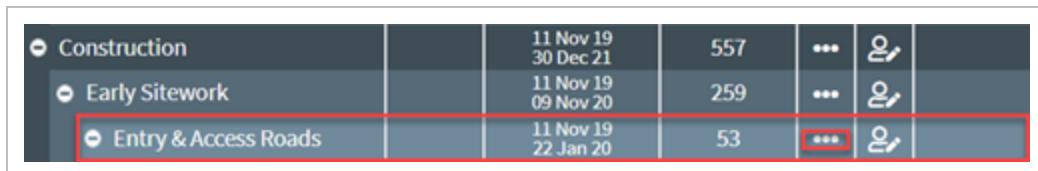
The Fill Down function lets you fill down a calendar, code or resource from the summary level. You select the items to fill down, the system fills down the selections and processes the items to all child level elements.



The screenshot shows the InEight Schedule software interface. On the left, there is a hierarchical tree view with categories like Permitting, Procurement, Construction, and Closeout. Under Construction, there are sub-categories: Early Sitework, Interior, Structure, and Foundations. Under Closeout, there are items: Start Construction, Project Complete, Startup HVAC, Substantial Completion, and Structure Complete. On the right, there is a table with columns: ID - Description, Actions, Register, and Status. A context menu is open over a row in the table, listing actions: Create planning package, Create activity, Create level of effort, Create start milestone, Create finish milestone, Detail out, Fill down (which is highlighted with a red box), Remove assignments, Copy, Paste, Publish to the knowledge base, and Delete.

Fill Down from the summary level

1. Identify the summary level planning package to assign resources to, and select the Actions icon.

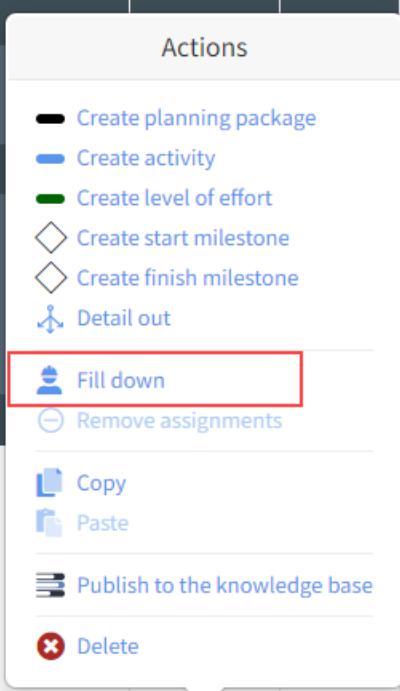


The screenshot shows a table with three rows. The first row is 'Construction' (selected), the second is 'Early Sitework', and the third is 'Entry & Access Roads' (highlighted with a red box). Each row has columns for Name, Start Date, End Date, Duration, Actions, and Resource assignments.

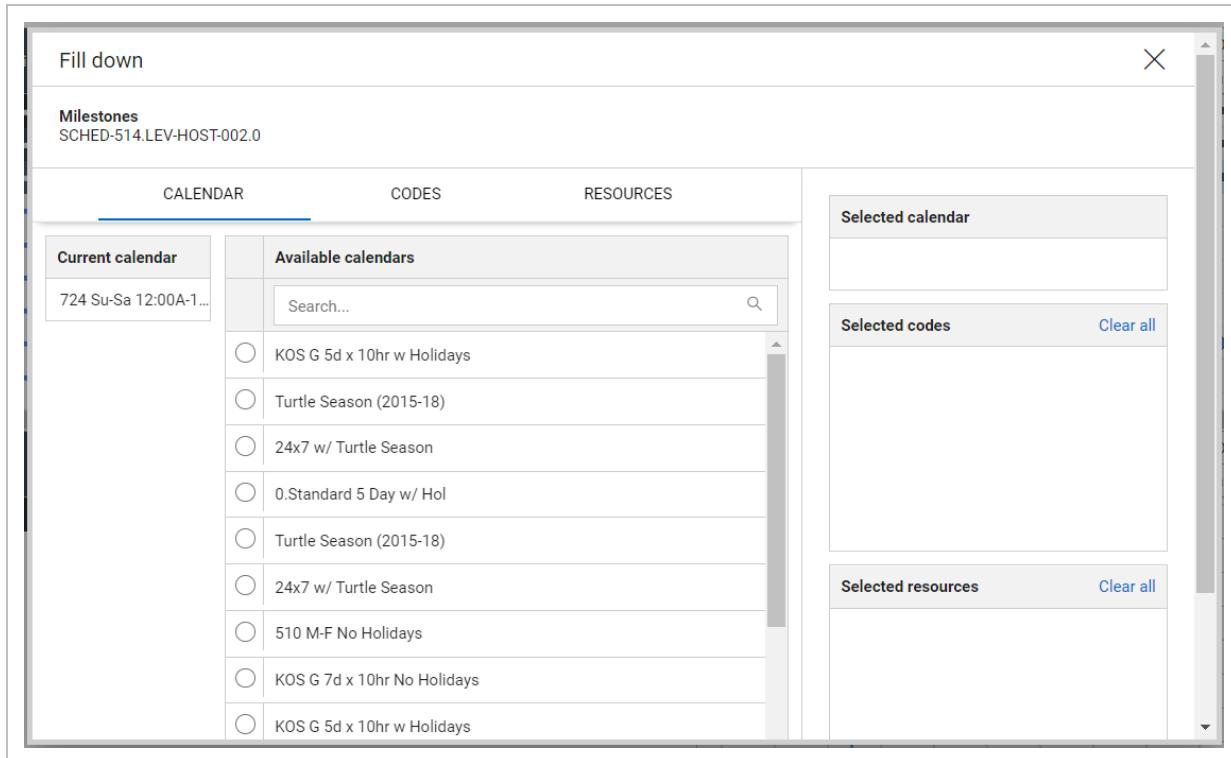
Construction		11 Nov 19 30 Dec 21	557	...	👤
Early Sitework		11 Nov 19 09 Nov 20	259	...	👤
Entry & Access Roads		11 Nov 19 22 Jan 20	53	...	👤

2. In the Actions menu, select **Fill Down**.

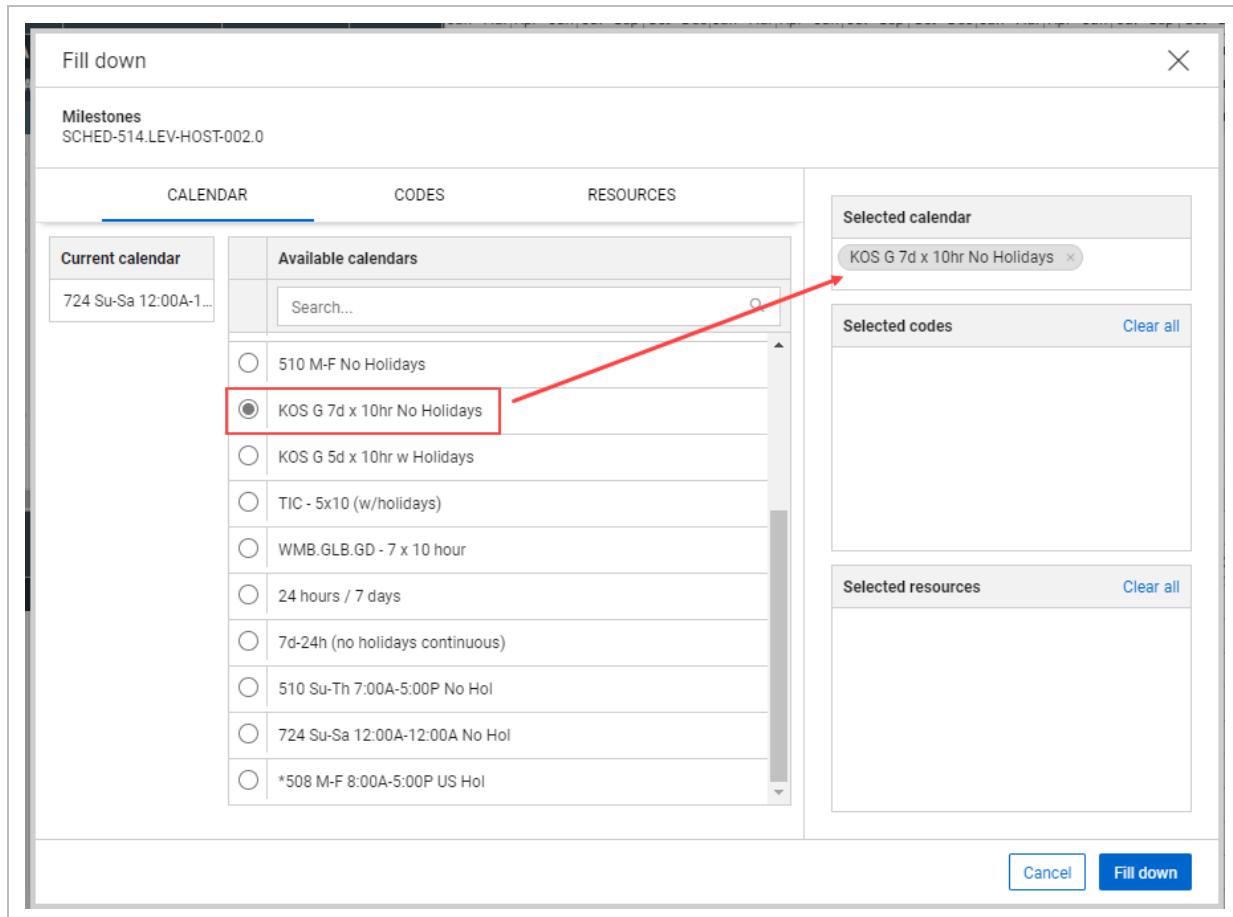
ID - Description	Actions	Register	
▼ Permitting	...	71	
▲ Procurement		21	
▼ Submittals & Approvals		21	
▼ Fabrication & Delivery		21	
▲ Construction		12	
▼ Early Sitenwork		12	
▼ Interior		2	
▼ Structure		12	
▼ Foundations		17	
▲ Summary		8	
Start Construction		12	
Project Complete		12	
Startup HVAC		12	
Substantial Completion		12	
Structure Complete		12	
▲ Closeout	...	1	
Closeout Branch List Corrections			



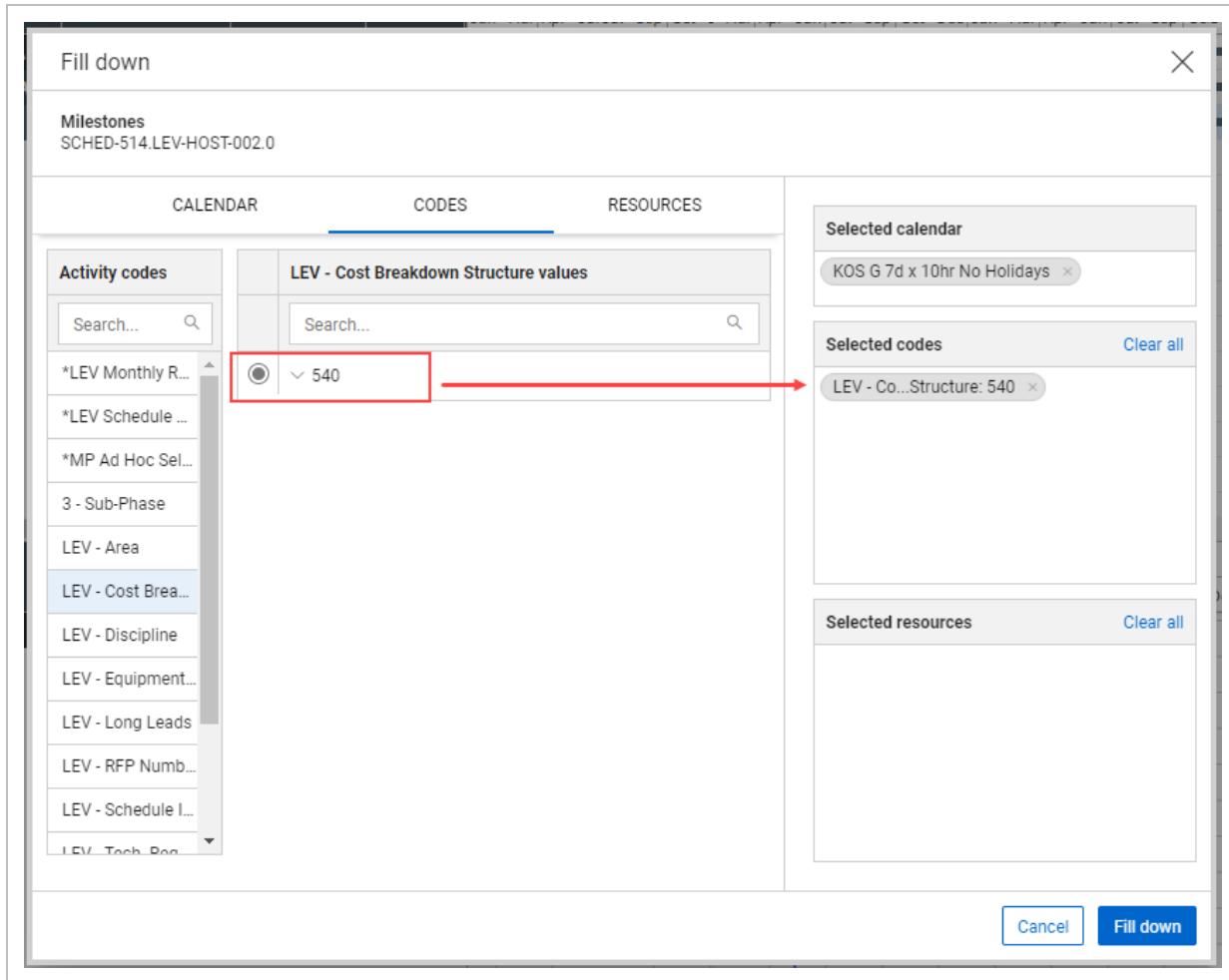
The Fill down window shows.



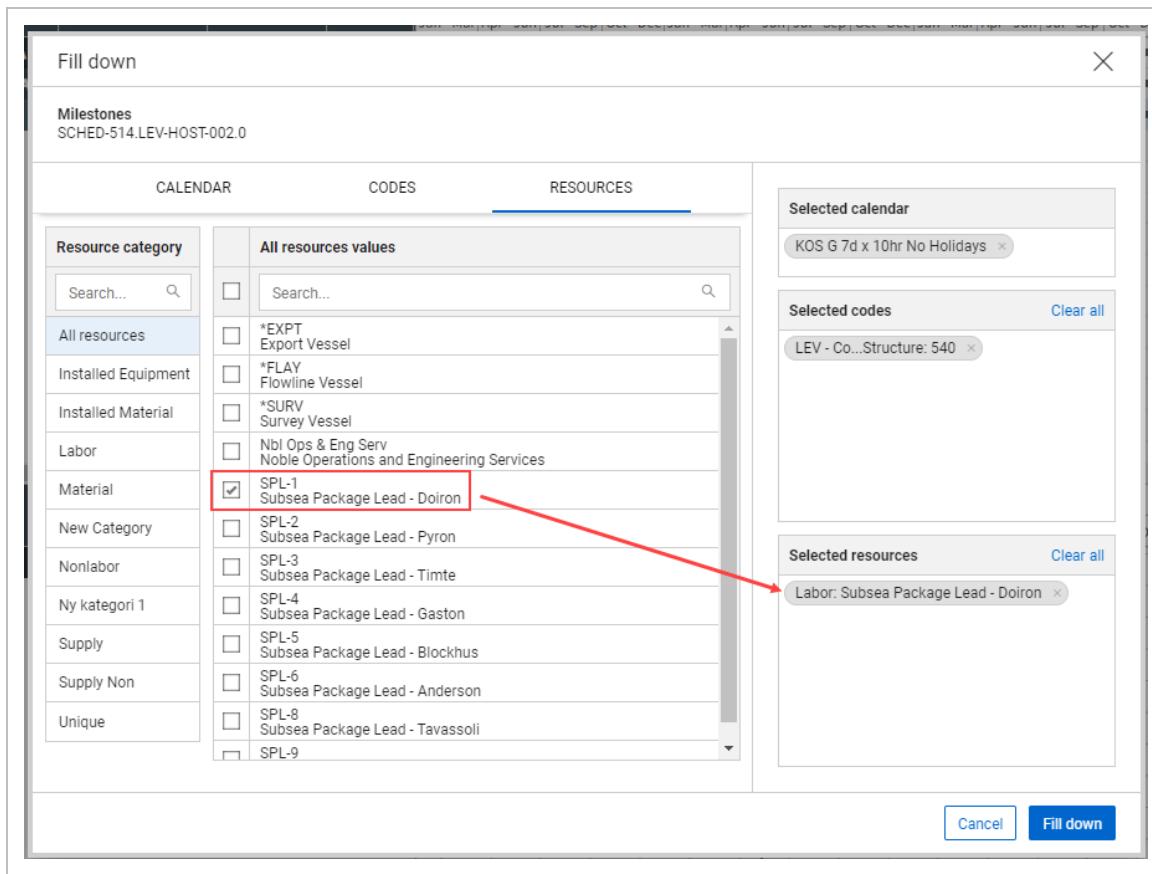
3. On the Calendar tab, select from available calendars.



4. On the Codes tab, select any Activity Code.



5. On the Resources tab, select any Resource value.



- All assignments made from this window flow down to all subordinate activities.

All available resources can be quickly found using the search function in the resource assignment window. If a resource cannot be found or a project specific resource is to be made, see the “Creating Project Resources via Resource Assignment” section for more information.

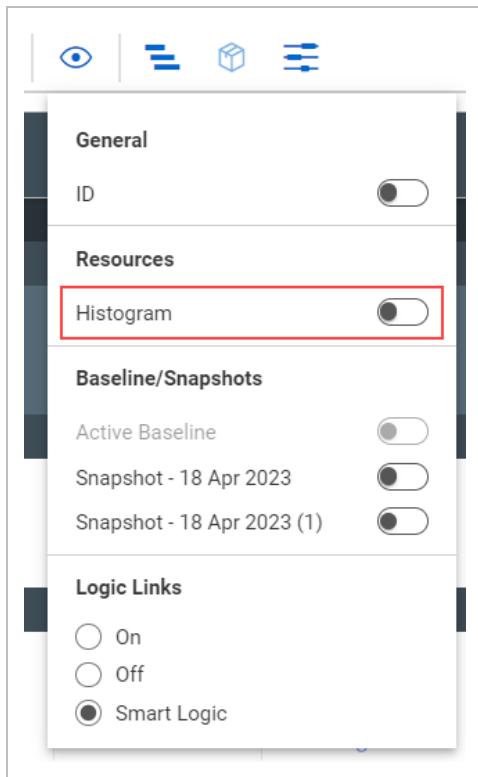
Resources can still be further edited at the activity level even when set up from the summary level. Plan values are not editable when applying a resource at the summary level but can be adjusted at the activity level.

Resource Histogram

After a schedule has been loaded with resources, Schedule can generate a resource histogram.

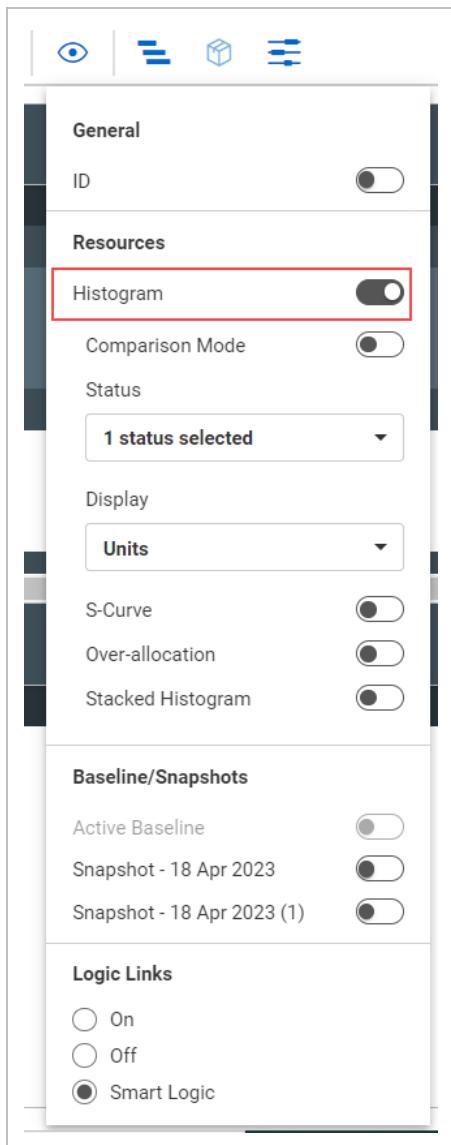
Generate a Resource Histogram

1. In the Schedule's Planning View, select **View Options**. A drop-down menu opens where you can set the Resource Histogram to *On* or *Off*.
2. Change the Histogram toggle from *Off* to *ON*.



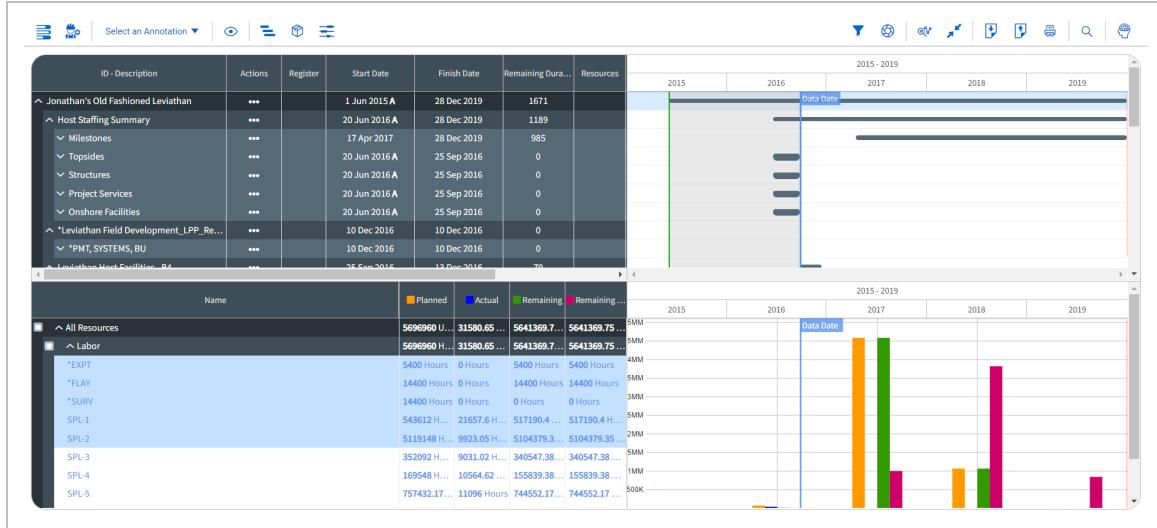
A histogram shows below the Gantt Chart. The resource histogram plots resource utilization over time depending on the following:

- **Resource Settings Configuration Options:** When the resource histogram is switched on, more settings become available for configuration.

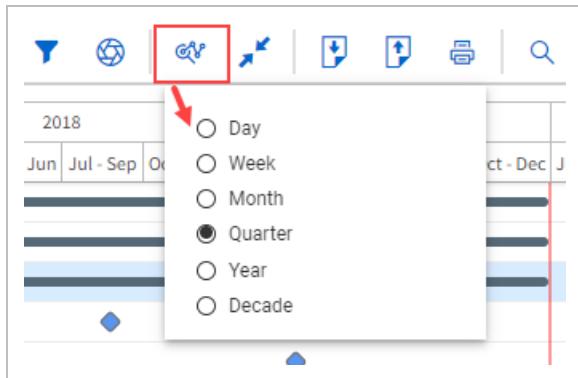


Setting	Function
Resource Histogram	You can switch the Resource Histogram view on or off.
Comparison Mode	Compares Current, Active Baseline, and Snapshots in the Resource Histogram.
Status	Filters histogram to show Planned, Actual

Setting	Function
	resource quantities, Remaining or Remaining Late.
Display	Adjusts the Y-axis of the histogram to show Units, FTE, or Cost.
Unit	The resource's unit of measure.
S-Curve	Switches on or off the S-Curve on the resource histogram.

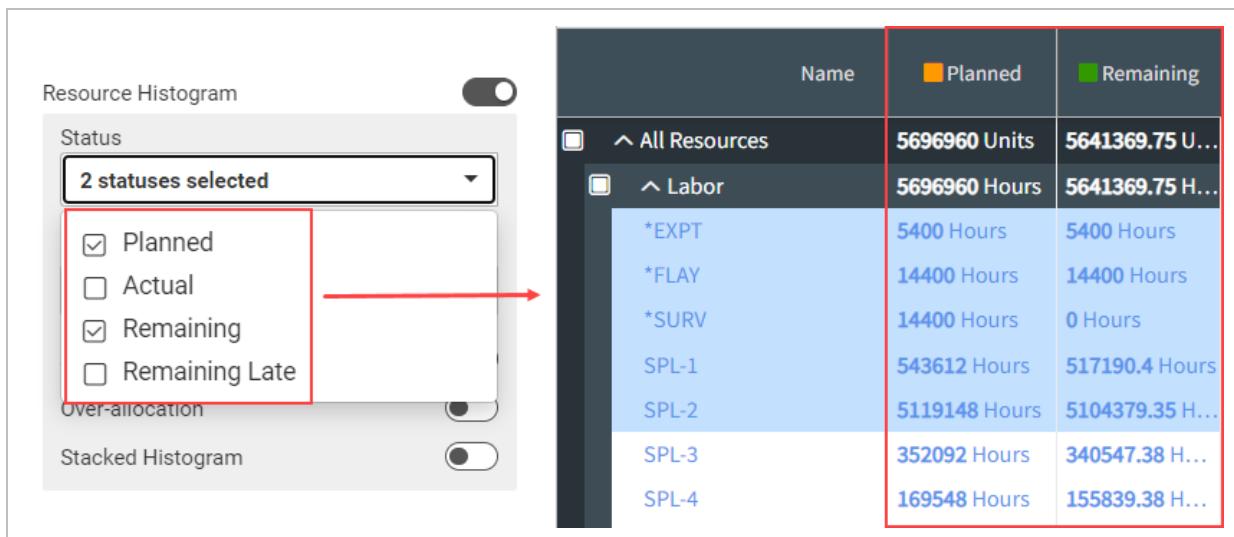


- **The activity or summary level selected in the Gantt Chart:** The resource histogram plots out data based on the activity or planning package selected in the schedule
 - *The zoom level selection:* The zoom level for the Gantt chart controls both the schedule and resource histogram X-axis units of time that is days, weeks, months, quarters, years or decades.



3. Set the Resource Setting Configuration Status to **Planned & Remaining**.

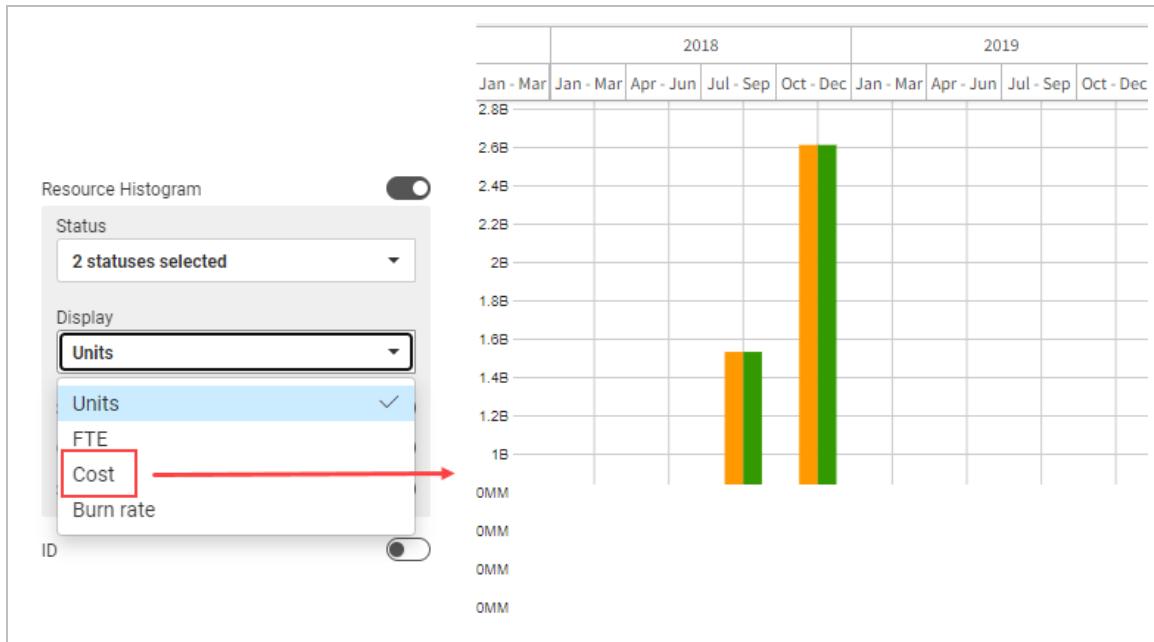
This populates the Resource Histogram with all planned and remaining resources for the activity or planning package selected.



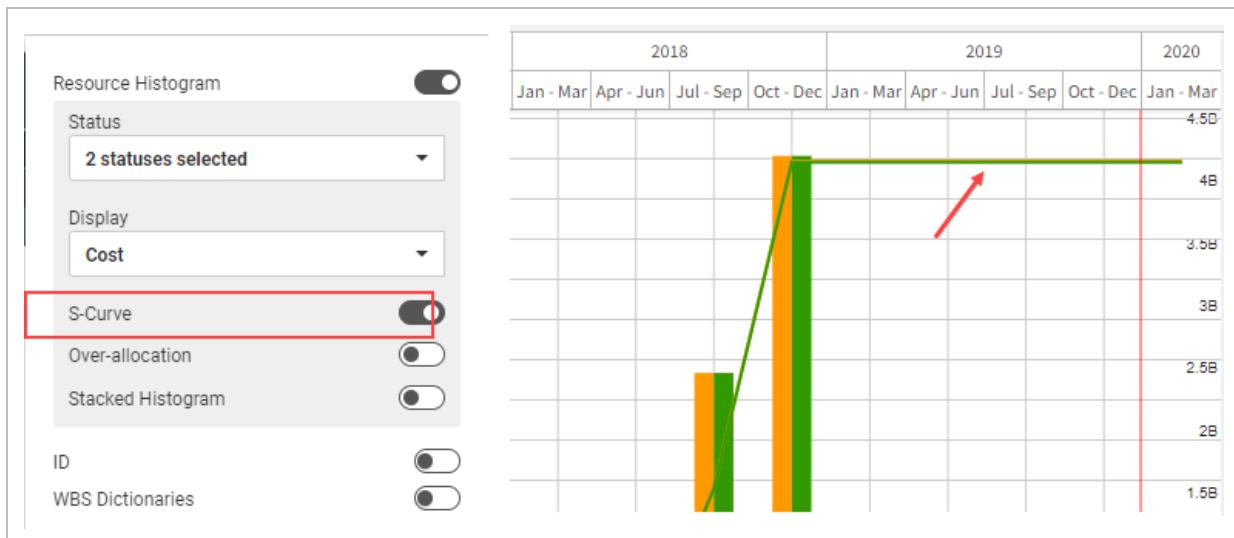
4. Change the Resource Setting Configuration Display from Units to **Cost**.

- FTE stands for Full Time Equivalent, and is the count of people per time period.
- Burn rate is the percent planned per period of time.

- This adjusts the Y-axis values from resource quantities to dollars



5. Switch on the **S-Curve**. This overlays the S-Curve on the Resource Histogram.

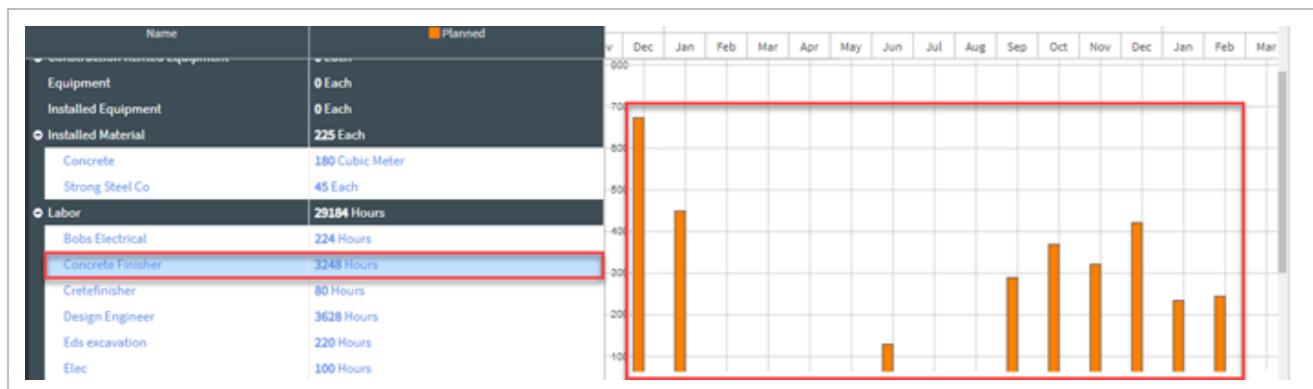


S-Curves reflect cumulative data. As the values increase over time, this reflects the accumulation of resource units/FTE/cost, depending on settings, over time.

Filtering by Resource

Filtering by resource only applies if the stacked resource histogram is turned to *On*. In the filter functionality, the Gantt chart & resource histogram can be filtered to see planning packages and activities assigned specific resources. When the resource histogram is switched on, it can be used as an interactive filter as well. Selecting a Resource Name listed in the histogram or any of the resource bars will filter down the Gantt Chart and Resource Histogram to show only data pertaining to the information selected.

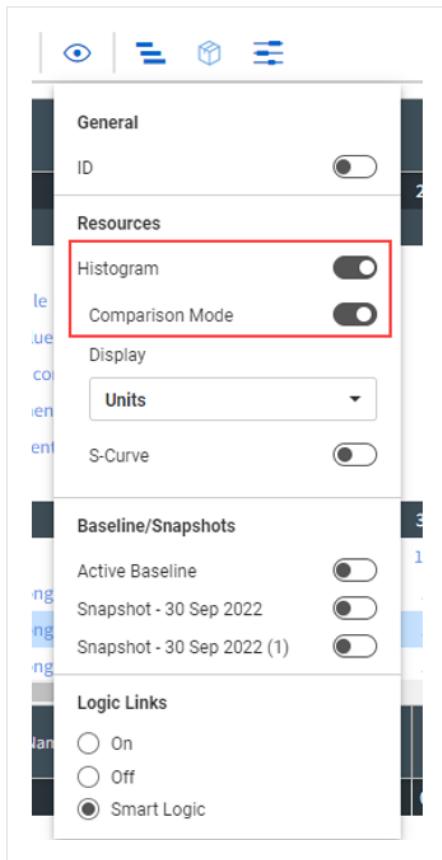
In the image below, the Resource Histogram is filtering based on the selected resource: *Concrete Finisher*.



Additionally, to modify or disable the resource filtering, users may click the filter icon to make adjustments to the filter parameters.

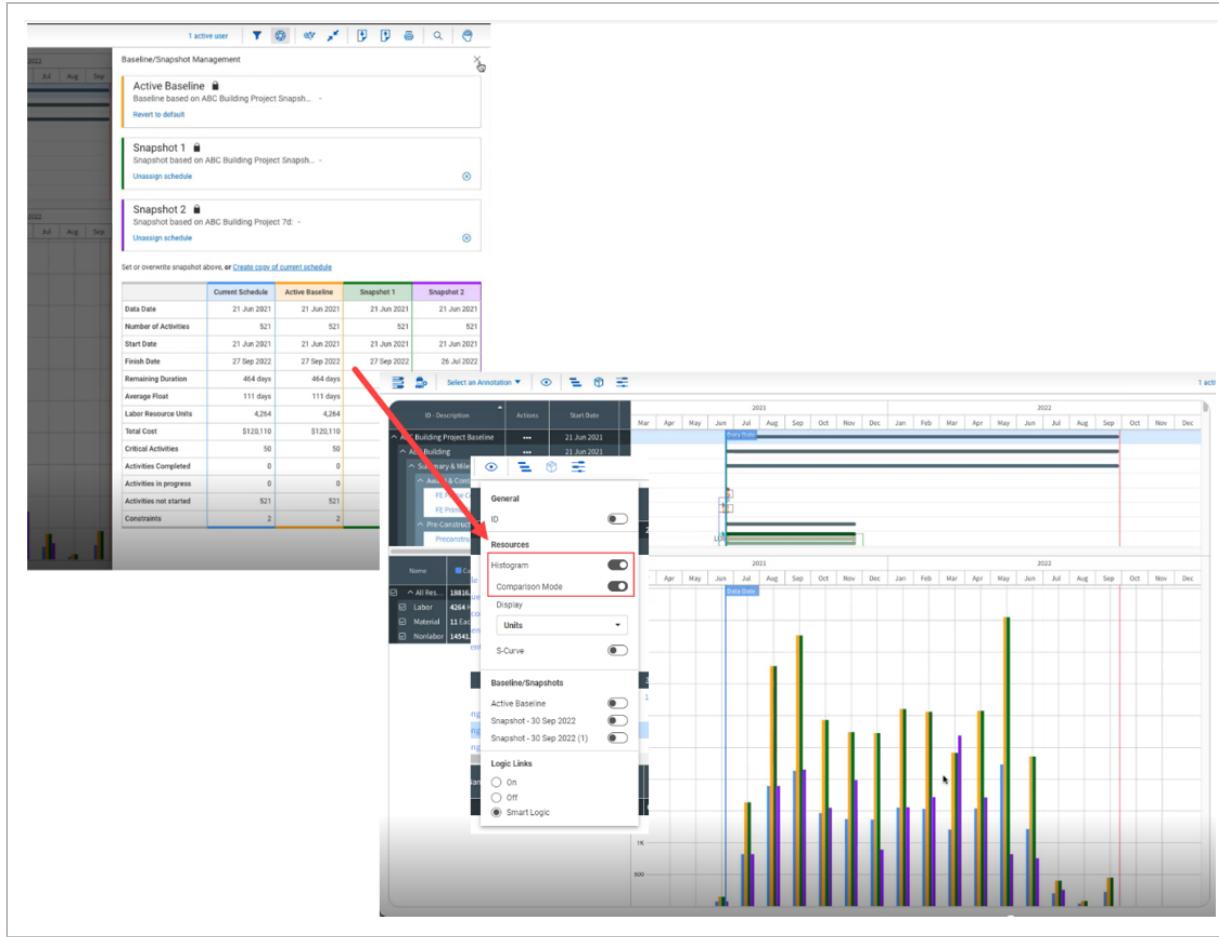
Histogram Comparison Mode

In View Options, you can view the histogram in comparison mode, when enabled.

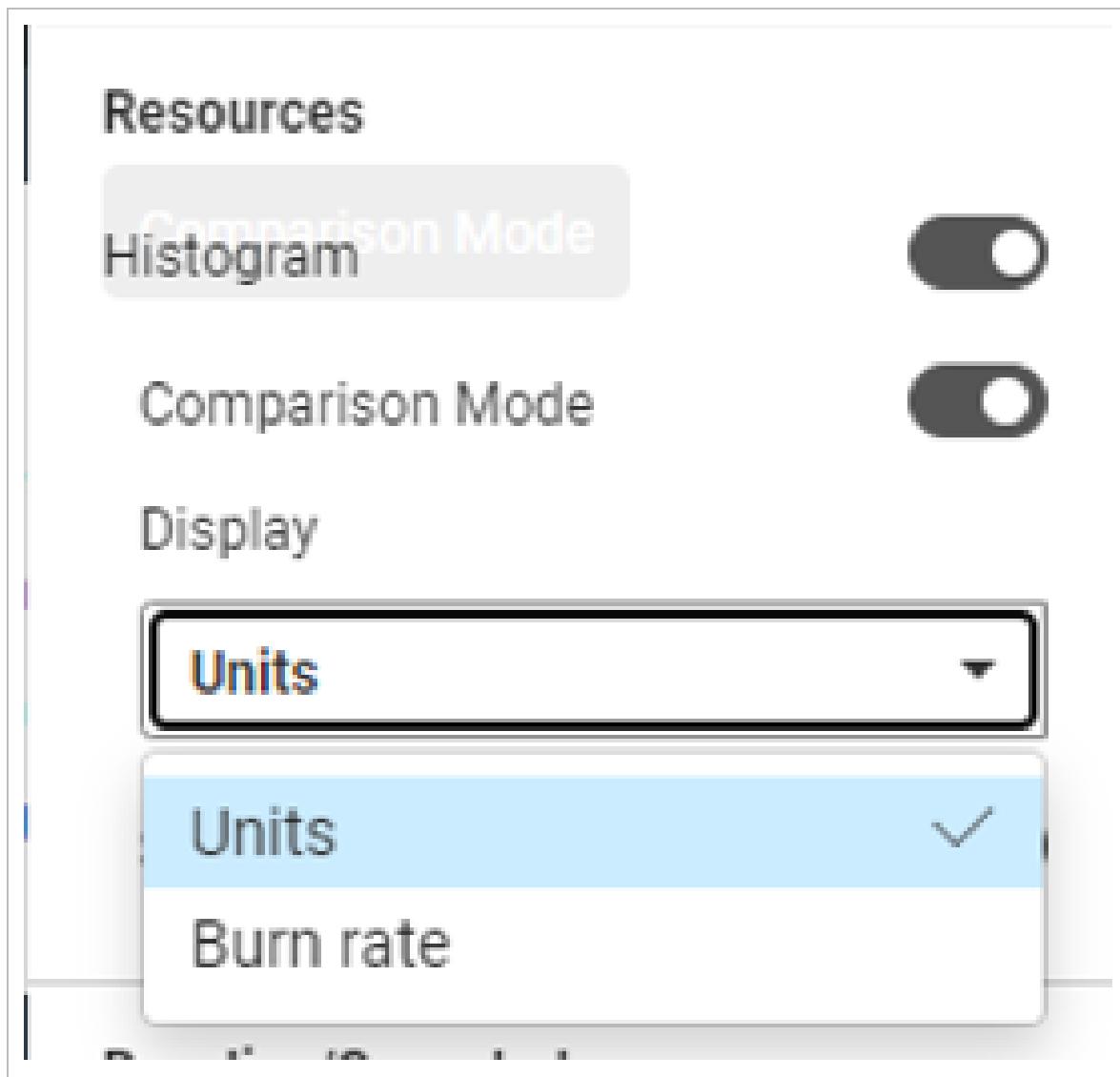


When the Comparison mode toggle is set to On, the baselines and snapshots that exist in the Baseline/Snapshot Management show as a graph with the current baseline. The histogram compares resources rolled up to the category type and shows you resources as they trend.

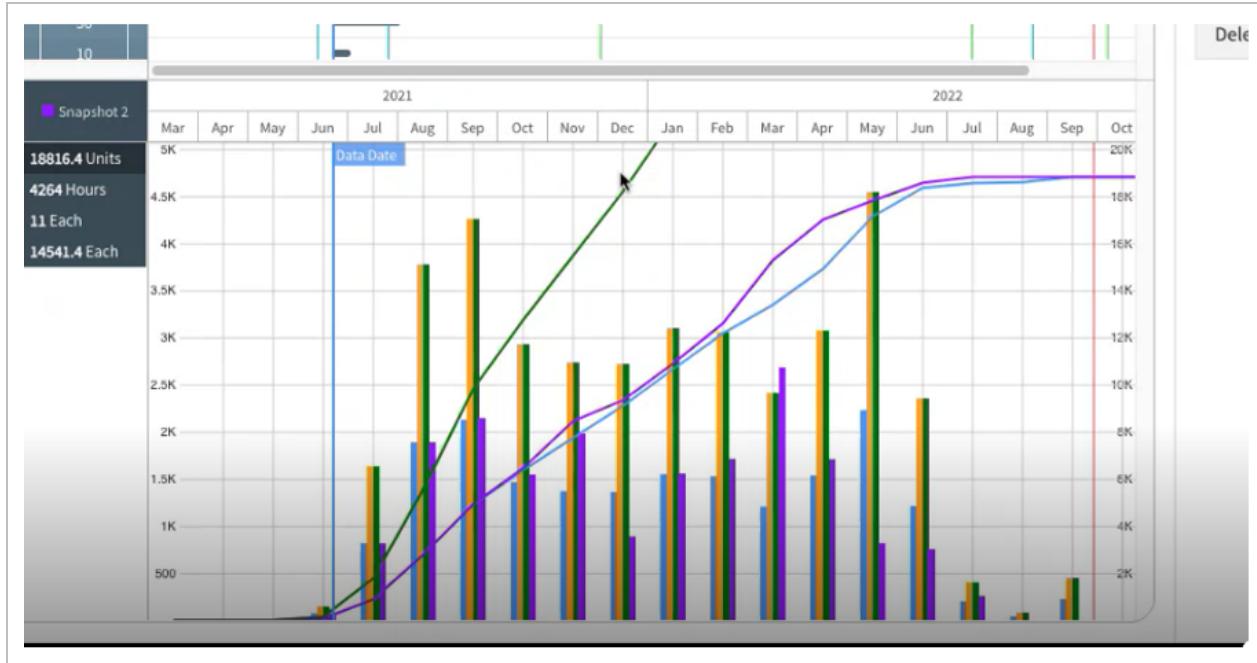
Each line in the graph represents a baseline, snapshot, and the current estimate.



The histogram graph can now also be shown in units and burn rate.



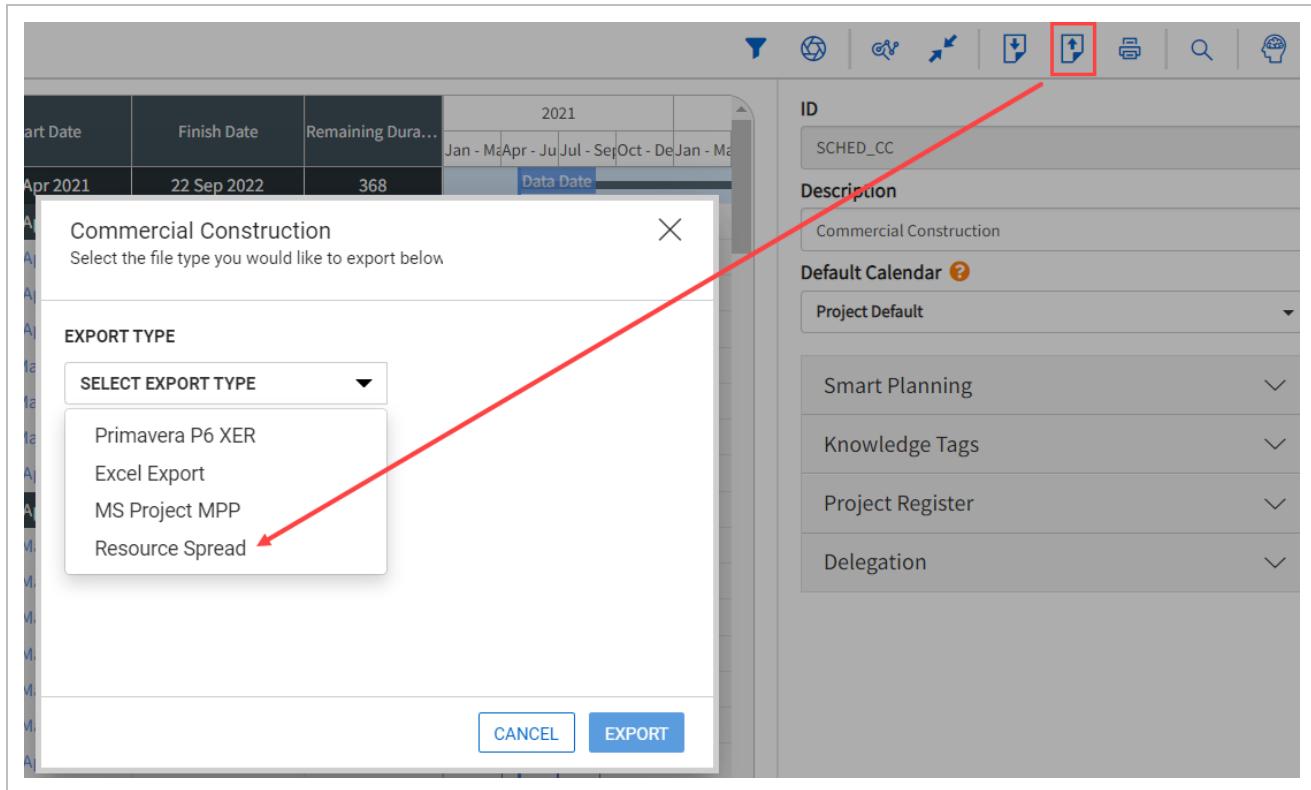
You can also view the histogram with an S-Curve that shows you a cumulative trend line for each baseline, snapshot and current.



Export Assignments

Schedule export functionality includes the ability to export resource assignments. You can export resource spread data that shows every resource and hours worked for every day of the entire schedule selected.

- In Plan view, select the **Export** icon, then select the **Resource Spread** export type from the drop-down menu to send the data to a reporting API.
- To export the data from the Project List page, select a schedule and then click the **Generate resource spread** export icon.



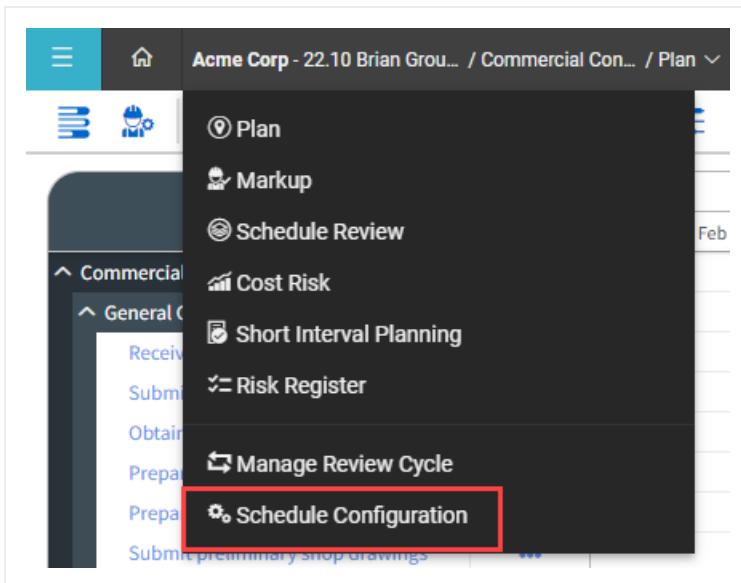
Project Specific Resources: Project Configuration Setup

Resources in a Project are either global resources or project specific resources. Global resources automatically populate a project's resource register from the Knowledge Base. If a resource is not available from the established global resources, project specific resources can be set up.

Project specific resources are useful when the resource utilized is unique to that project and not applicable across the organization.

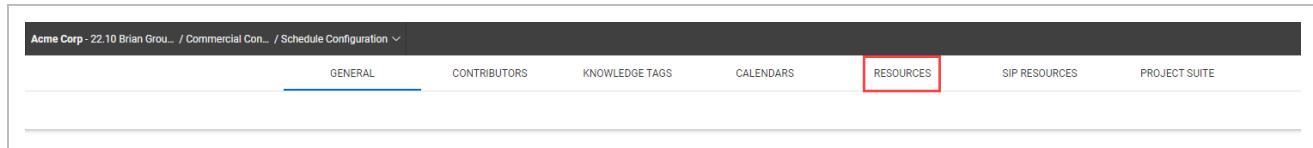
To establish project specific resources:

1. Select Schedule Configuration from the project drop-down menu.



2. Select the **Resources** tab in the Knowledge Base.

This brings you to the project-level resource register



The Project level resource register functions the same as the Knowledge Base. See [Setting up Resources](#) for information about how to add resources and use the Import/Export functionality in the Resources register

The screenshot shows a table of resources. The columns are ID, Name, Category, Color, UoM, Default Units/d, Cost/Unit, and Assignments. The table includes rows for FDN, CNC, GRD, STL, and INT. The 'Add' button is highlighted with a red box.

ID	Name	Category	Color	UoM	Default Units/d	Cost/Unit	Assignments
FDN	Foundations	Labor	●	Hours	8.00	100.00	15
CNC	Concrete	Labor	●	Hours	8.00	200.00	22
GRD	Grading	Labor	●	Hours	8.00	150.00	7
STL	Steel	Labor	●	Hours	8.00	350.00	7
INT	Interiors	Labor	●	Hours	8.00	225.00	15

Schedule possesses the concept of global and project specific resources. When you create a schedule, it does not populate the resources in the Schedule Configuration window, but you can import resources from the Knowledge Base to use in your schedule.

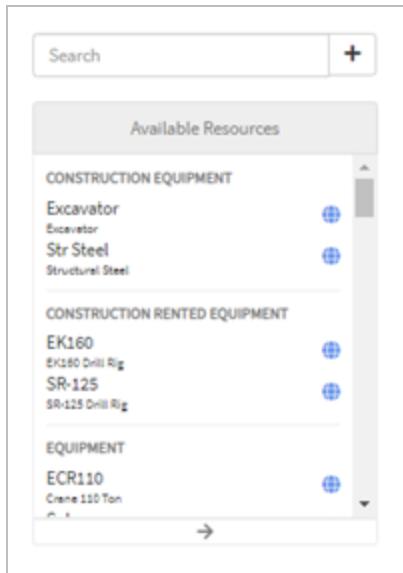
Project specific resources can also be added from the resource assignment window in the planning view. See the Resource Assignment for more information.

6.0.0.1 Create a project-specific resource via the Resource Assignment window

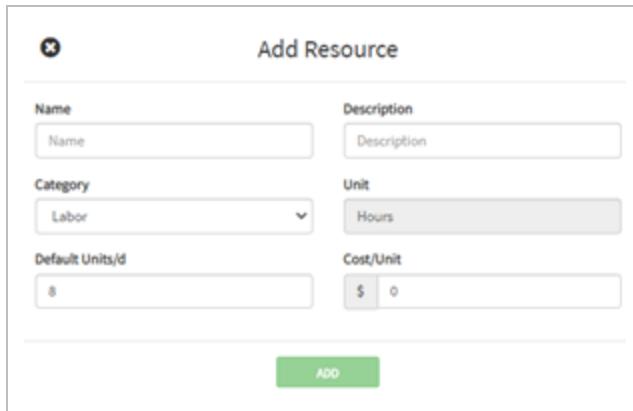
Project Specific Resources can also be created from the Resource Assignment window in the Planning view.

Create a Project Specific Resource via the Resource Assignment Window

1. Without having any resources selected, click the Add icon.



- The Add Resource opens to add a project specific resource.



Name	Description
<input type="text"/>	<input type="text"/>

Category	Unit
Labor	Hours

Default Units/d	Cost/Unit
8	\$ 0

ADD

2. Enter the project resource information, and then click **Add**.

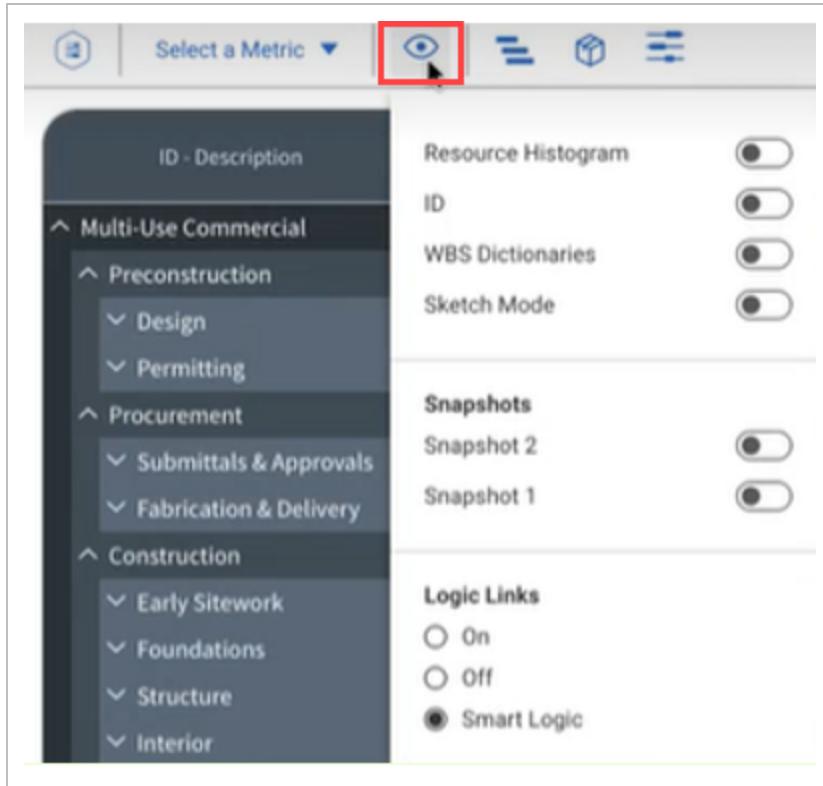
Resource histogram view

The Resource histogram shows the assigned resources for the project in the histogram window. Assigned resources can be viewed based on Planned, Remaining, Actual, and Remaining Late statuses.

Use the following instructions to enable the Resource histogram view.

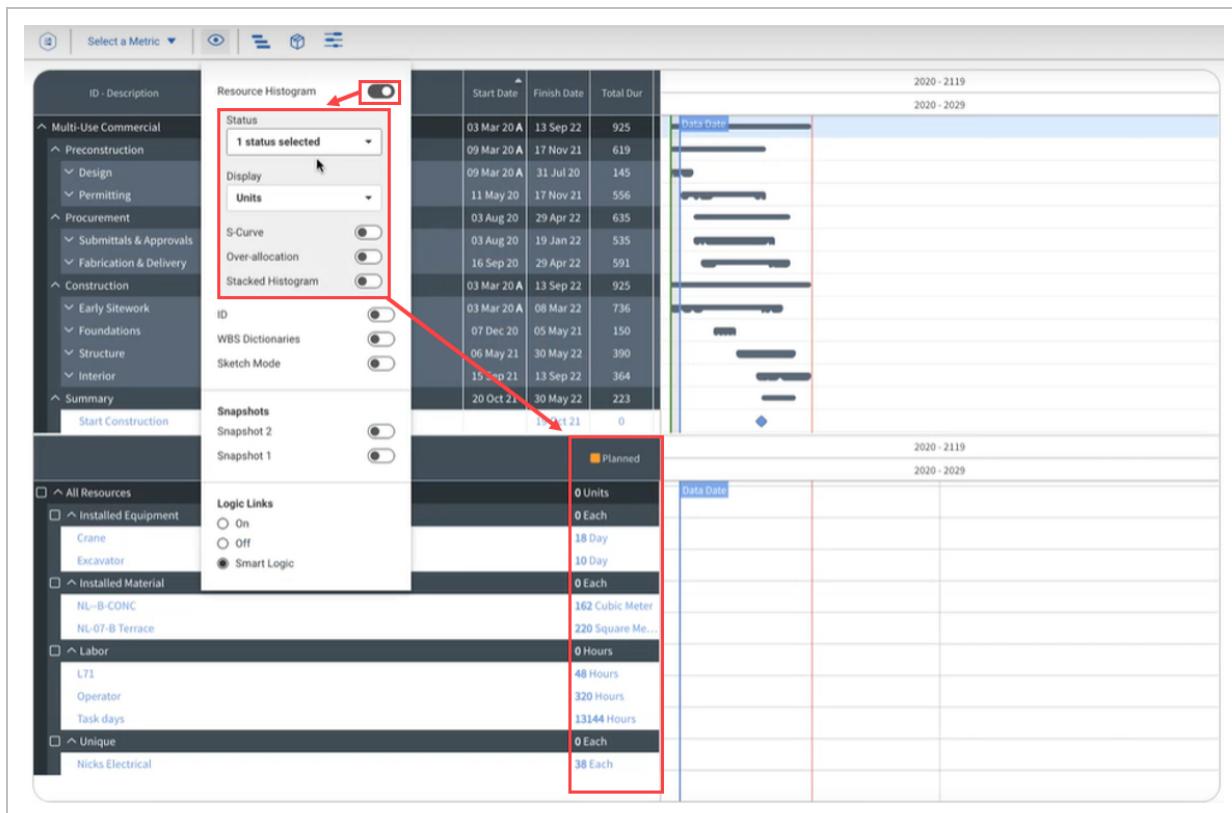
Enable the Resource Histogram View

1. In the toolbar, click the **View options** icon.

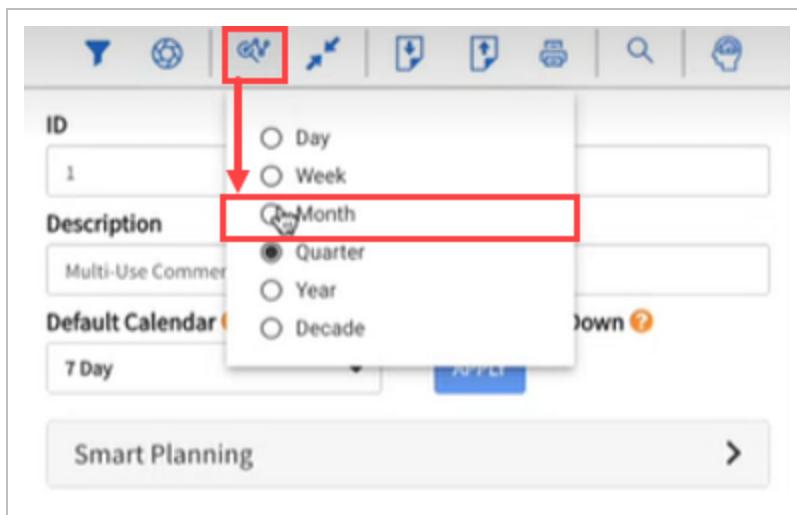


2. Switch the Resource Histogram toggle to enable the Resource histogram.

The view options menu now shows more features in the gray box area. Resources show in the bottom left of the screen. To the right, the histogram window shows.

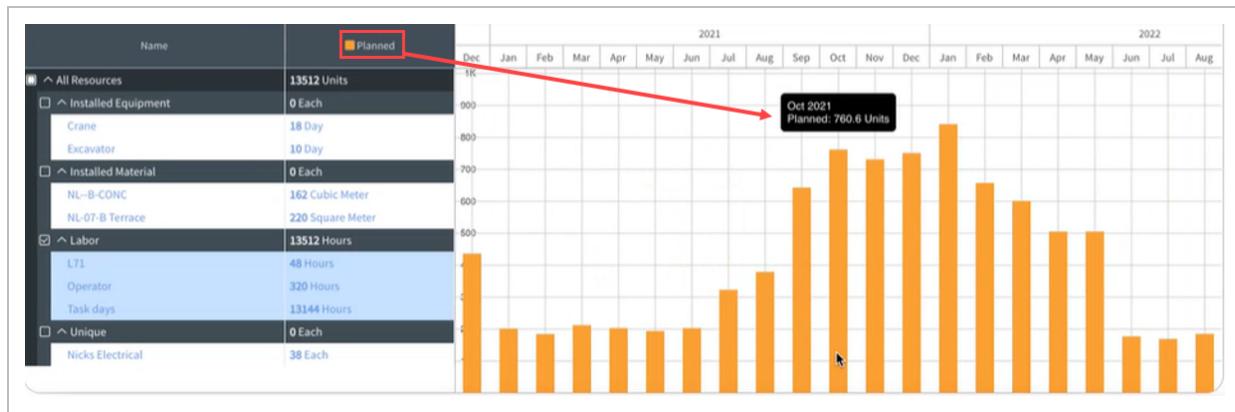


3. To view a specific date range for resources, on the right side of the screen, select the **Zoom level** icon.



The Zoom level is set to Month in the following images.

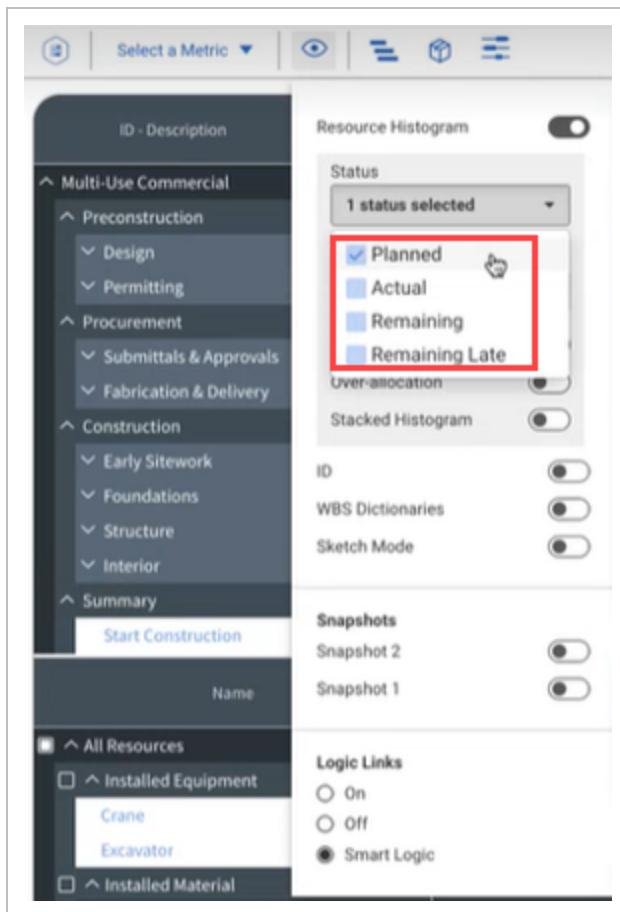
The histogram now shows resources allocated based on the month. By default, only the Planned status is selected.



Use the following instructions to add statuses to the histogram.

Add statuses to the Resource histogram

1. Select the **View options** icon, and then select the **Status** drop-down menu.
The Planned status is selected by default.
2. Select another status to show on the histogram that has not been selected previously.



The additional statuses show the resource bar in different colors. You can hover over the bar to view the data or you can review the resource data in the left column. The image below shows that the Planned and Remaining Late statuses currently occupy the histogram.



In the columns on the left of the screen, the status selected brings in the units associated to it. In this case, the remaining late units are brought in because the Remaining late status is selected. You can see those units spread incrementally across the project.

The data date is also shown on the histogram. You can add the data date and the finish date of the project for reference so that you know the boundaries of your project.

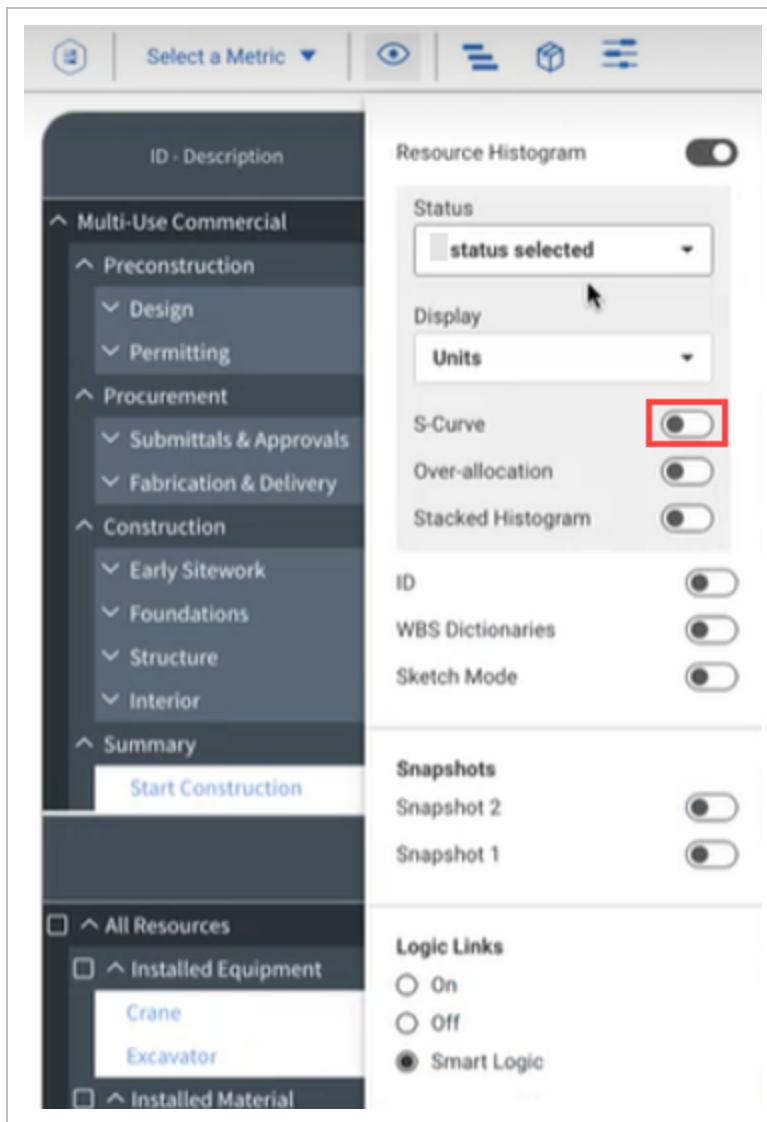
S-curve

In addition to the incremental curve, you also have a cumulative curve. This is also known as the S-curve. If you toggle the S-curve *On*, you can see two S-curves are planned on the histogram.

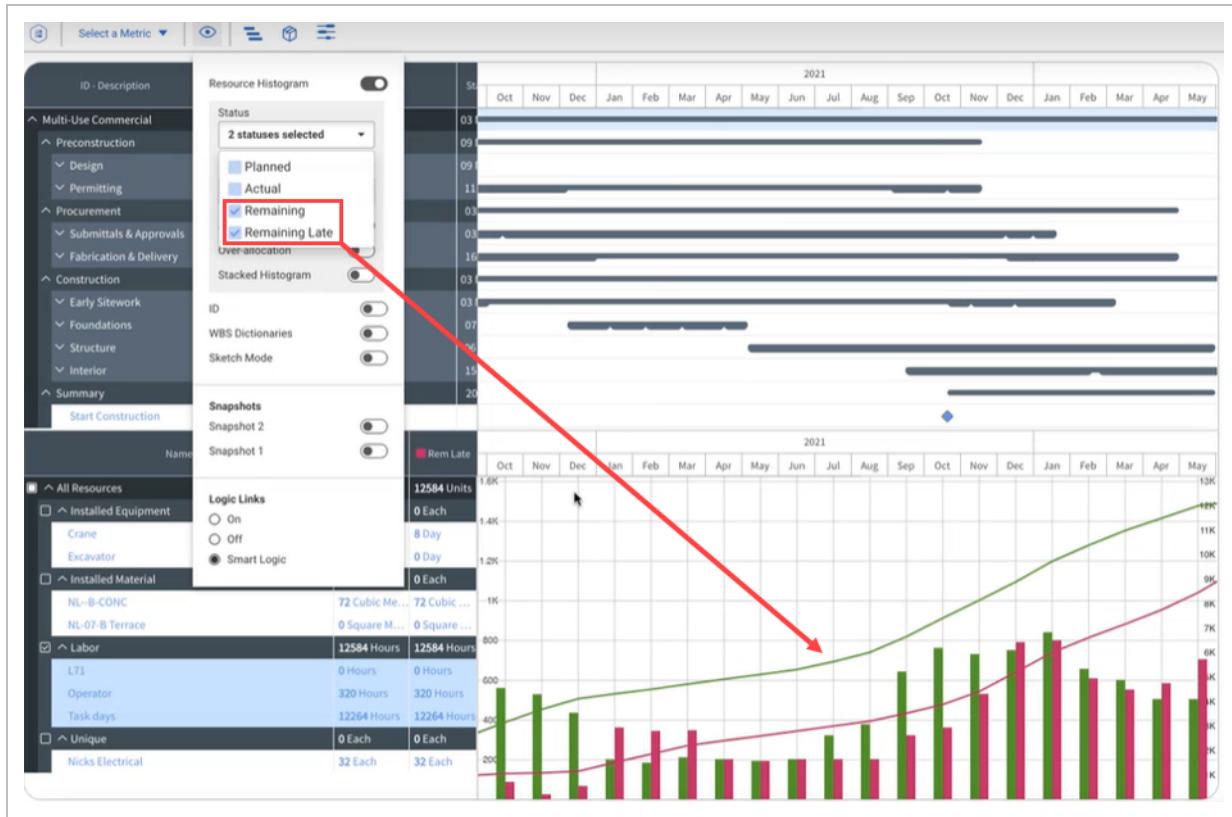
Use the following step by step to enable the S-curve in the Resource histogram.

Enable the S-curve

1. In the toolbar, click the **View options** icon.
2. Select the **Status** drop-down menu, and then select **Remaining** and **Remaining Late**.
3. Switch the S-curve toggle to enable the S-curve.

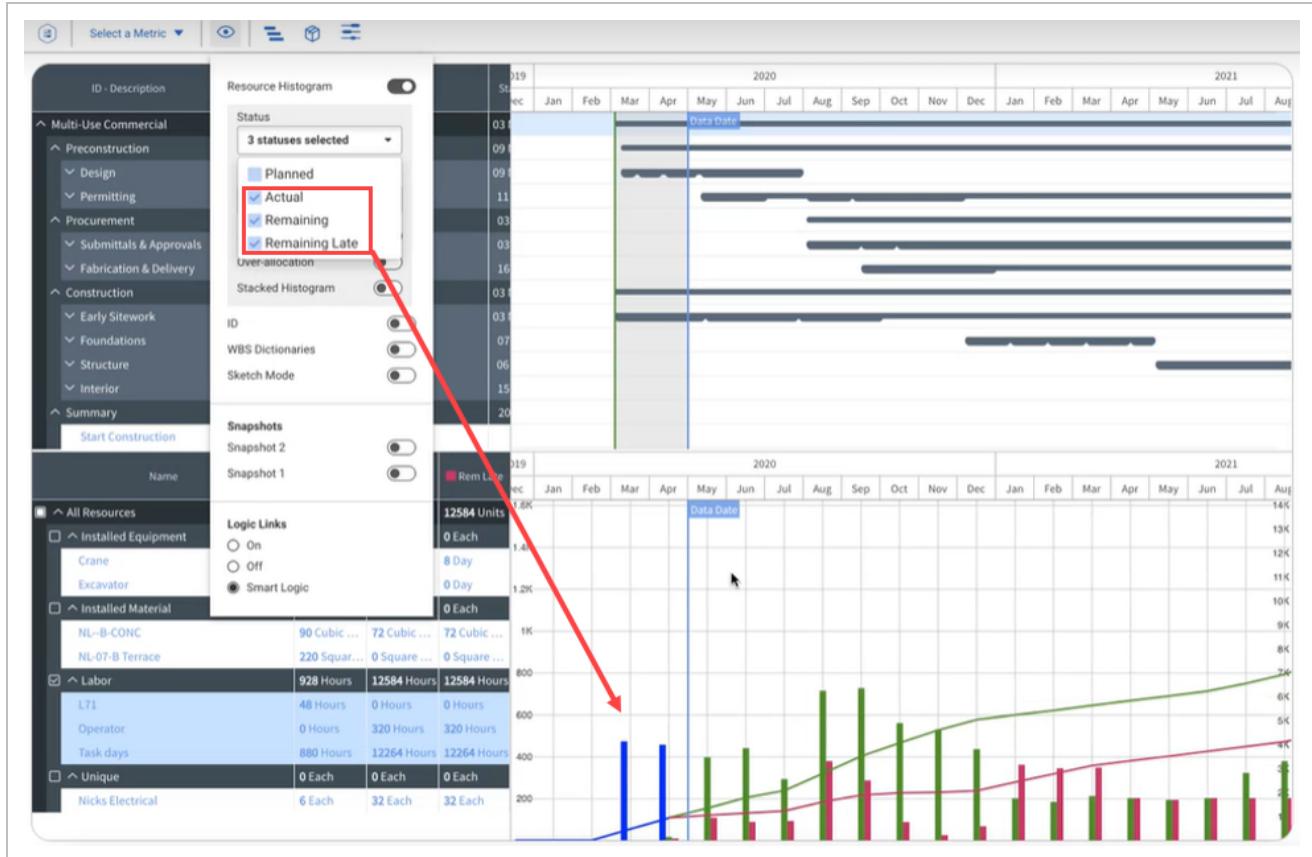


Two S-curves show on the histogram. At the conceptual phase of a project, you are shown these early and late dates. The space between those curves is the float on the project.



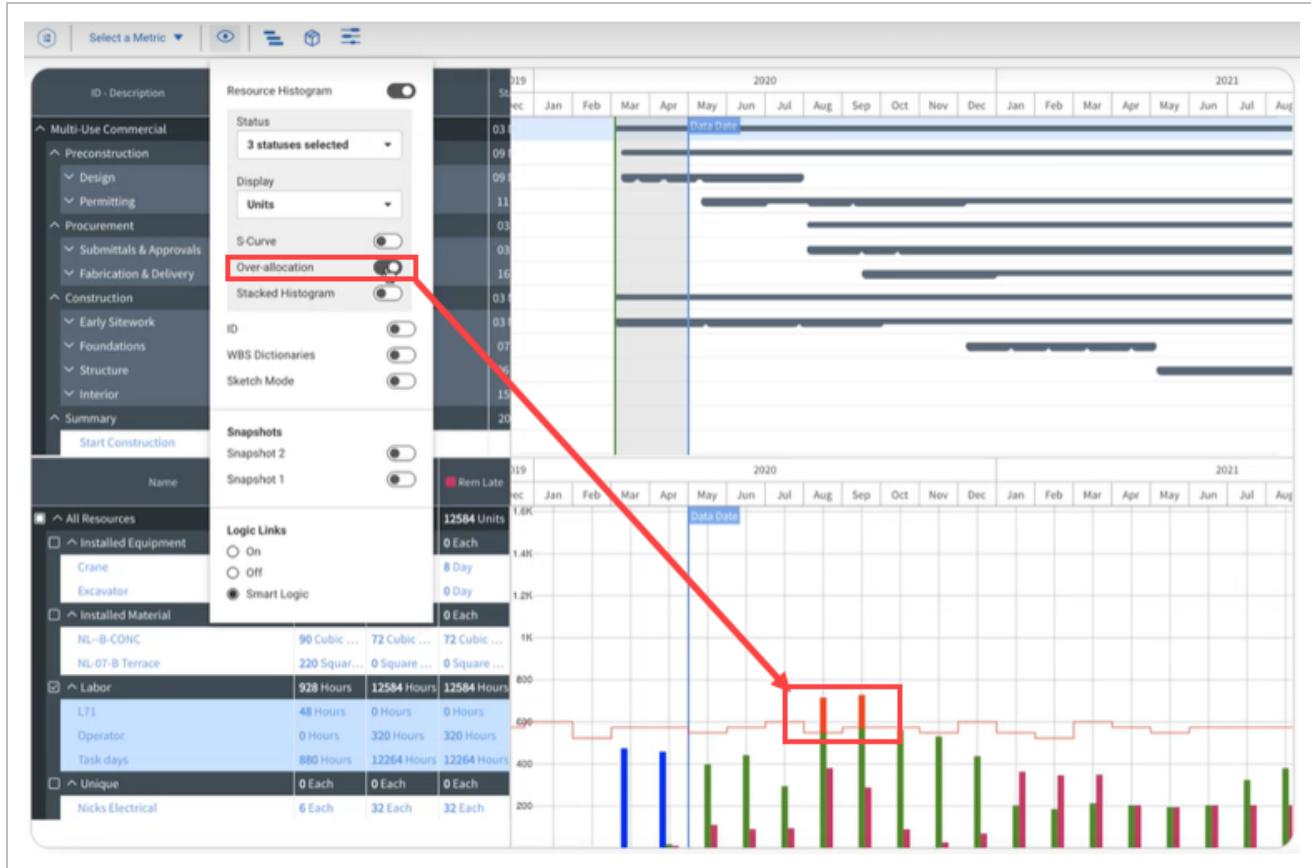
Actual status enabled with S-curve

With the Actual status enabled with the S-curve lines, you can see that the Actual line ends where the Remaining Late and Remaining lines start. This is your job to date running total for the project. For example, you had certain man-hours earned to date and the remaining hours to earn start from what you have earned to date. You started from the Actuals line in blue and then you go forward from there. The Actual line end where remaining units begin. The Remaining and Remaining late lines starts where actuals for the project end.



Over-allocation

Over-allocation shows you where you are over allocated based on your resource limits. For example, where you planned for more resources needed to complete the work than you currently plan to have on site. This means in the month of August and September, the bars above the line represent a need for more resources. To fix this over-allocation, you can move activities around to flatten that peak, add more resources, or extend the duration of your activities.



The line across the histogram represents the activity calendars on which these resources are assigned. Weekends, holidays, and exceptions make the line drop because you are working fewer days in that given period. During those periods, you have fewer days to complete the work.

Use the following step by step to enable Over-allocation in the Resource Histogram.

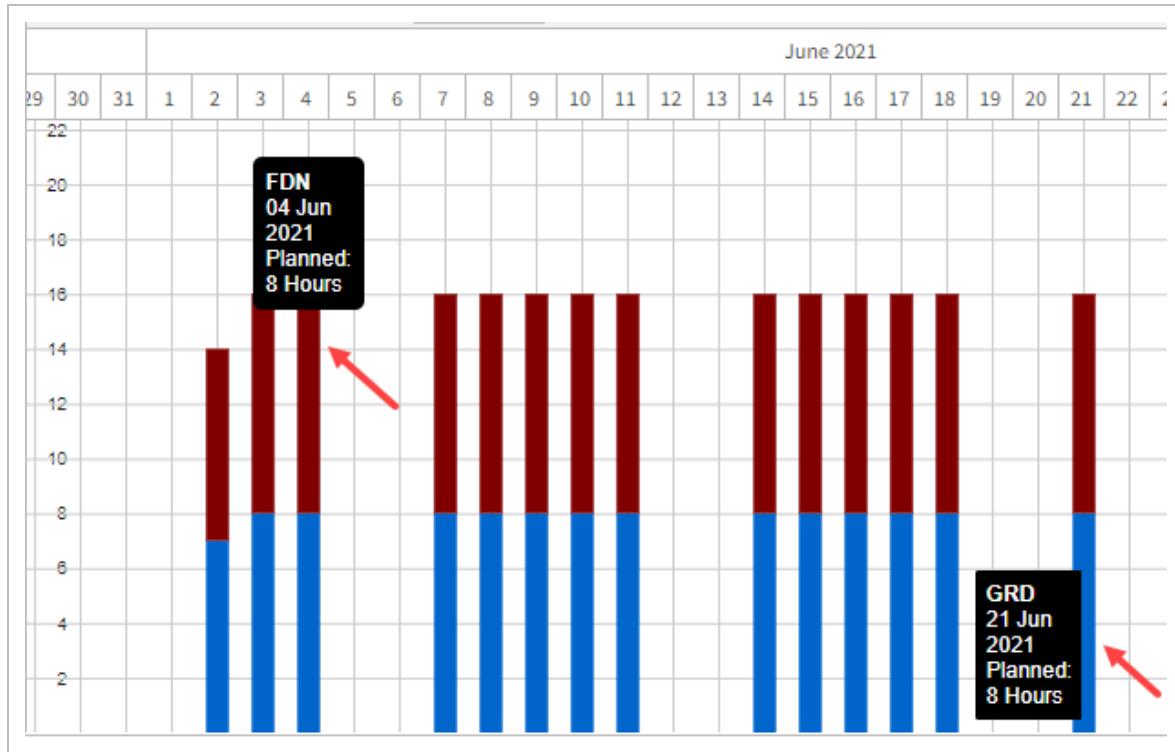
Enable the Over-allocation

1. In the toolbar, click the **View options** icon.
2. With Resource Histogram enabled, switch the Over-allocation toggle to enable Over-allocation.

Stacked histogram

The Stacked Histogram shows the different resources in the histogram using different colors. Hover over the different colored tool tips to show which resource that color represents. The tool tip also gives you data for the specific resource and period.

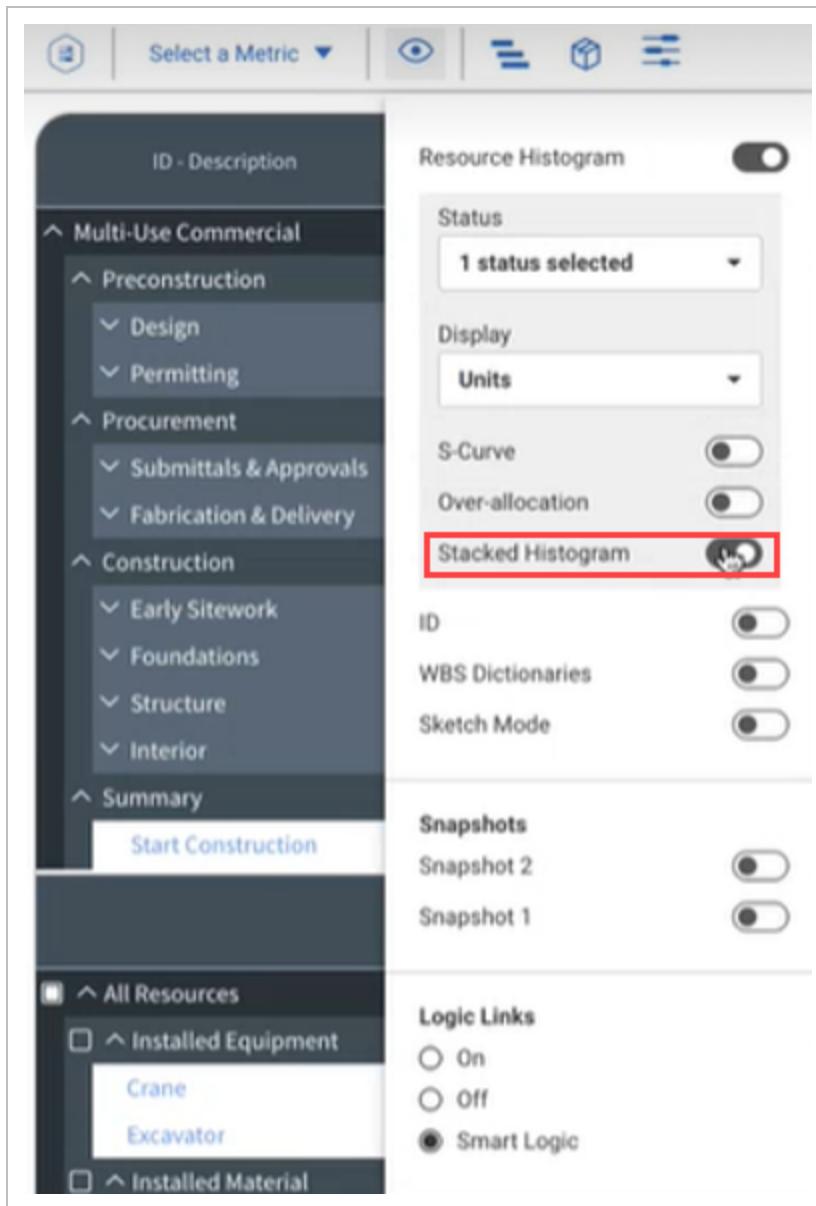
The Stacked Histogram contains advanced filtering capabilities, letting you click on a specific colored bars in a specific time period. Schedule then builds a filter to show that resource for that time period in the Gantt chart.



Use the following step by step to enable the Stacked Histogram.

Enable the Stacked Histogram

1. In the toolbar, click the **View options** icon.
2. With Resource Histogram enabled, switch the **Stacked Histogram** toggle on.



Stacked Histograms are shown on the histogram.

3. Hover over the different colored bars to show the tool tip information.



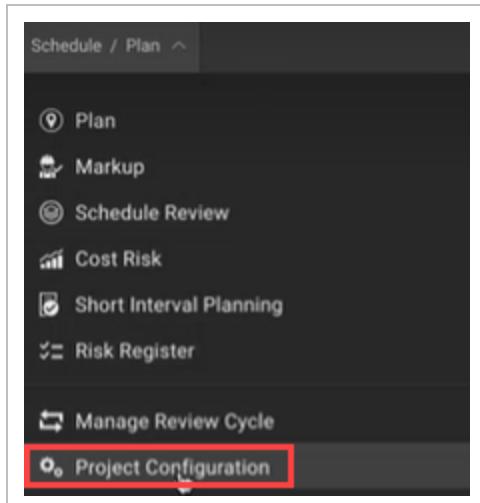
Changing the stacked histogram colors

Similar to the color column in the SIP resources, the Stacked Histogram colors are controlled at a project level in the Project Configuration.

Use the following step by step to edit the column colors for the stacked histogram.

Edit Stacked Histogram Colors

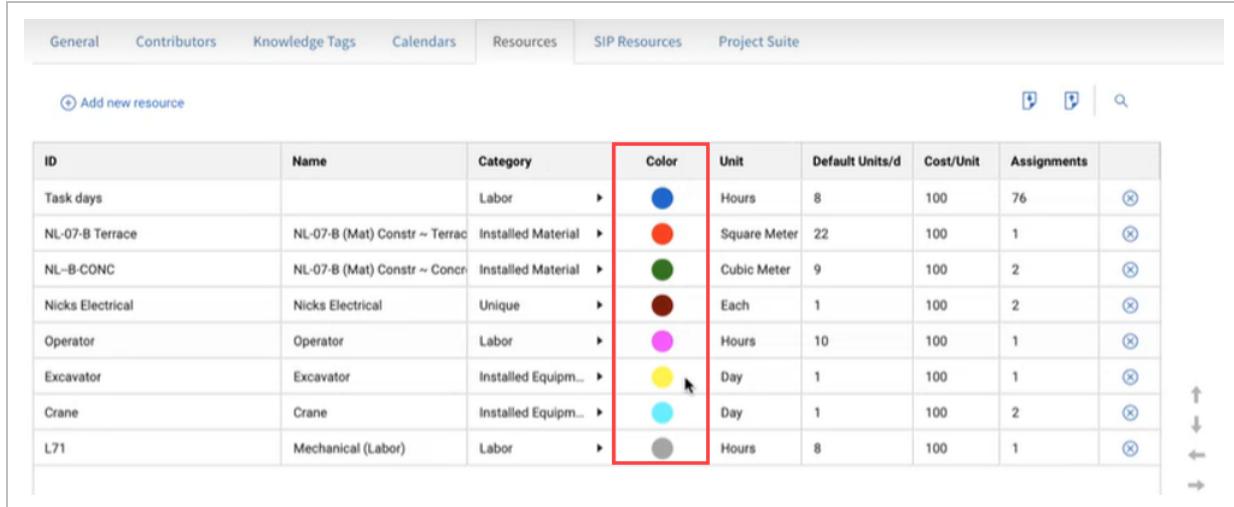
1. Select the navigation drop-down menu.
2. Select **Schedule Configuration**.



3. Select the **Resources** tab.

Resources that have been added to the Resources tab have a column labeled Color.

4. Select the color cell in the row of the resource you want to edit. Then choose a different color for that resource.



General	Contributors	Knowledge Tags	Calendars	Resources	SIP Resources	Project Suite			
				Add new resource					
Task days			Labor	●	Hours	8	100	76	
NL-07-B Terrace	NL-07-B (Mat) Constr ~ Terrac	Installed Material		●	Square Meter	22	100	1	
NL-B-CONC	NL-07-B (Mat) Constr ~ Concra	Installed Material		●	Cubic Meter	9	100	2	
Nicks Electrical	Nicks Electrical	Unique		●	Each	1	100	2	
Operator	Operator	Labor		●	Hours	10	100	1	
Excavator	Excavator	Installed Equipment		●	Day	1	100	1	
Crane	Crane	Installed Equipment		●	Day	1	100	2	
L71	Mechanical (Labor)	Labor		●	Hours	8	100	1	

Burn Rate

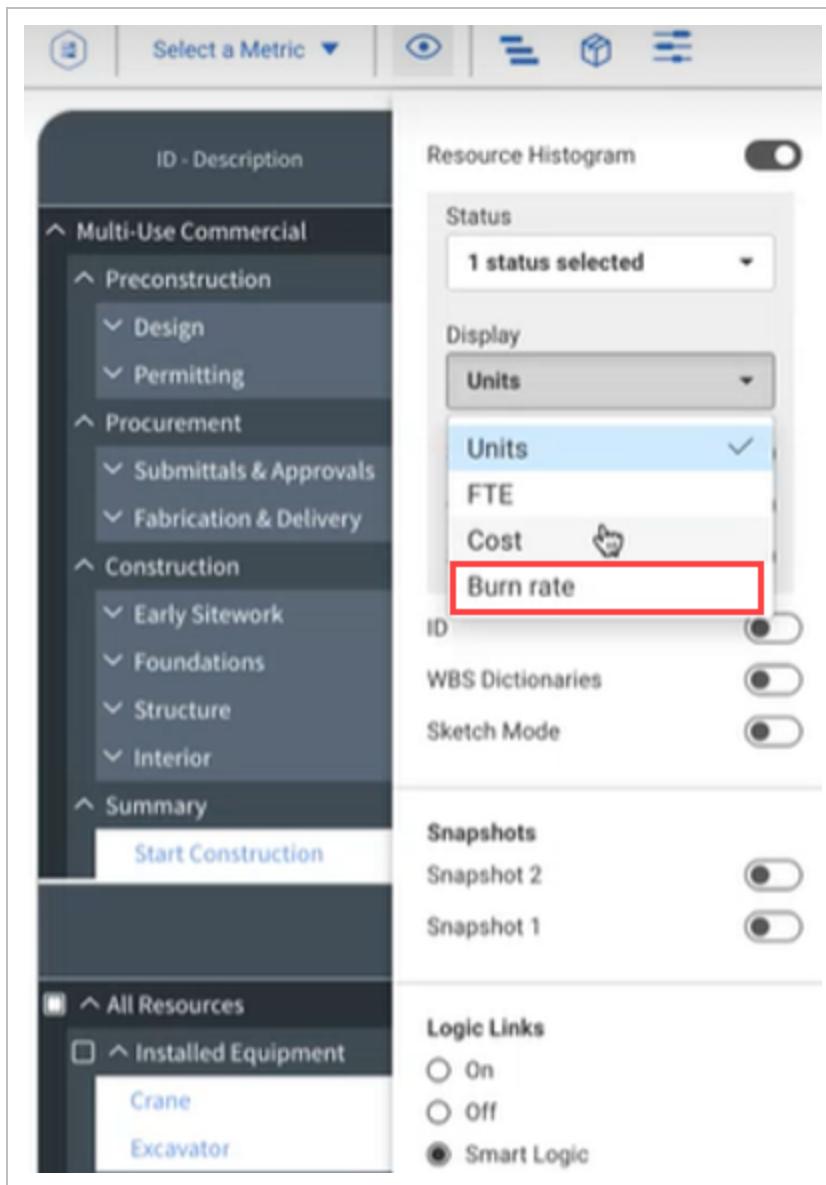
When Burn Rate is enabled, it shows as a percentage on the x-axis. The Burn rate is the percent of total man-hours in a period. The equation is the following:

Month total for a resource \div project total for resource(s) = Burn rate percentage

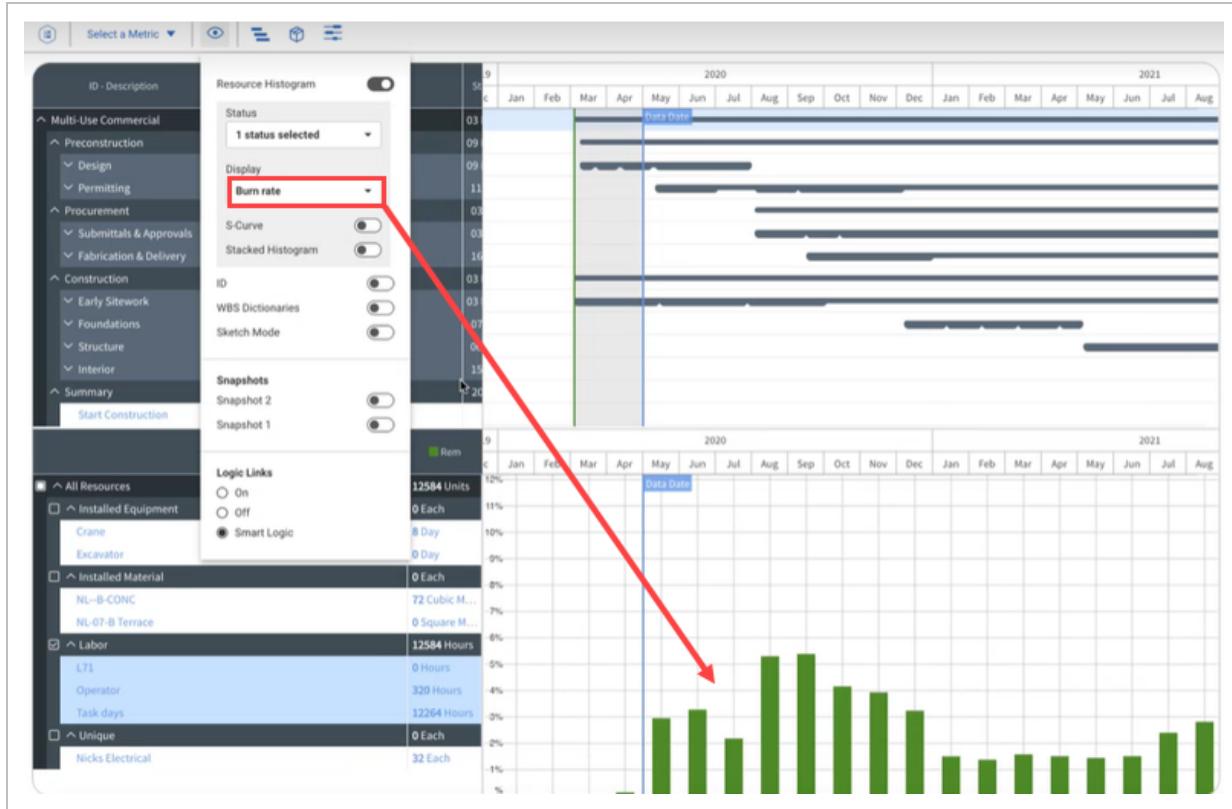
Use the following step by step to enable the Burn rate on the Resource Histogram.

Enable the Burn rate

1. In the toolbar, click the **View options** icon.
2. Select the **Display** drop-down menu.
3. Select **Burn rate**.



The histogram shows Burn rate data.



Excel Export

The Excel export feature lets you use the exported project file for reporting since it is a flat data source.

When you export from Schedule, the data from the entire project is exported including the following tabs:

- WBS
- Activity
- Logic
- Codes
- Udfs
- Resource Assignments

Each tab provides information that can be built upon each other. This lets you pivot on different data to create slicers for your reports. The Excel export also lets you make bulk edits to a schedule. You can

build an entire schedule in Excel and then import it back into Schedule. This includes logic, resource assignments, and the WBS. Each tab contains the following fields:

- Required
- Optional
- Validated
- Ignored

When considering what to import back into a Schedule project, you have the option to delete some tabs and import in only the specific tabs that were changed.

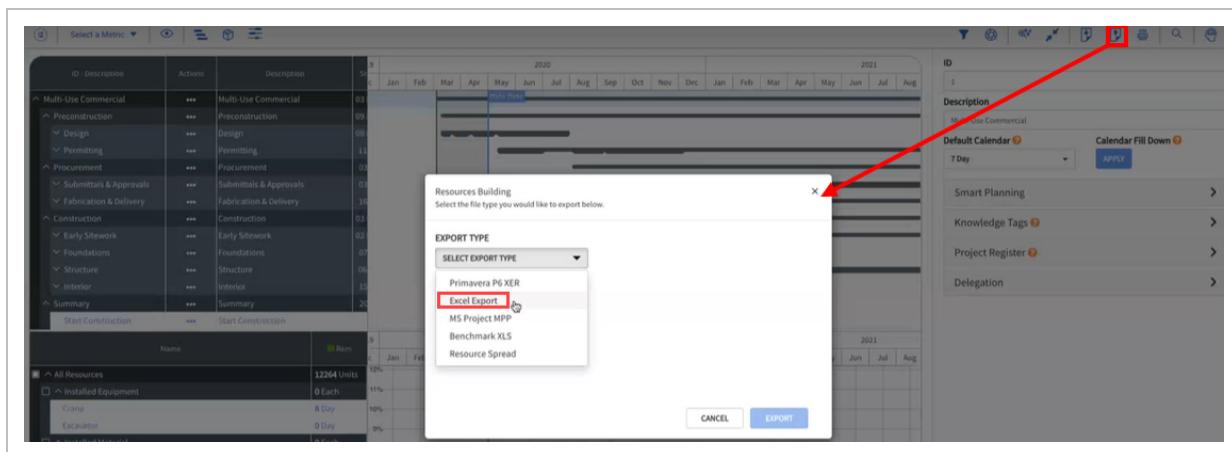
If there are no changes to the file imported back into a Schedule project, the import shows no changes have been made.

Use the following step by step to export a Schedule project.

Export from Histogram

1. Select the **Export** button on the right of the screen.

- The Resources Building dialog box is shown



2. Select the **Export Type** drop-down menu.

3. Select **Excel Export**, and then select **Export**

- An Excel project file opens

A	B	C	D	E	F	G	H	I
1	REQUIRED	Field is required for import						
2	OPTIONAL	Field is optional for import						
3	VALIDATED	Field must match master data available in application						
4	IGNORED	Field not to be populated						
Notes:								
1. WBS ID must be unique								
2. When a WBS is deleted, all child WBS's will be deleted and activities will be placed in the root of the project								
5	6	7	8	9	10	11	12	13
	WBS ID	WBS Description	Cost	Deliverable	Deliverable Quantity	Delete Record		
	Text	Text	Numeric	Text	Numeric: > 0	Text: "Yes"		
	8256	256		128				
	10	1.1	1.1.1	1.1.1.1	1.1.1.2	1.1.2	1.2.1	1.2.2
	11	1.1.1	1.1.1.1	1.1.1.2	1.1.2	1.2	1.2.1	1.2.2
	12	1.1.2	1.1.2.1	1.1.2.2	1.2.1	1.2.2	1.2.3	1.3
	13	1.1.2.1	1.1.2.2	1.2.1	1.2.2	1.2.3	1.3.1	1.3.1.1
	14	1.1.2.2	1.2.1	1.2.2	1.2.3	1.3.1	1.3.1.1	1.3.1.2
	15	1.2.1	1.2.2	1.2.3	1.3.1	1.3.1.1	1.3.1.2	1.3.2
	16	1.2.2	1.2.3	1.3.1	1.3.1.1	1.3.1.2	1.3.2	1.3.2.1
	17	1.2.3	1.3.1	1.3.1.1	1.3.1.2	1.3.2	1.3.2.1	1.3.2.2
	18	1.3.1	1.3.1.1	1.3.1.2	1.3.2	1.3.2.1	1.3.2.2	1.3.3
	19	1.3.1.1	1.3.1.2	1.3.2	1.3.2.1	1.3.2.2	1.3.3	1.3.3.1
	20	1.3.1.2	1.3.2	1.3.2.1	1.3.2.2	1.3.3	1.3.3.1	1.3.3.2
	21	1.3.2	1.3.2.1	1.3.2.2	1.3.3	1.3.3.1	1.3.3.2	1.3.4
	22	1.3.2.1	1.3.2.2	1.3.3	1.3.3.1	1.3.3.2	1.3.4	1.3.5
	23	1.3.2.2	1.3.3	1.3.3.1	1.3.3.2	1.3.4	1.3.5	1.3.5.1
	24	1.3.3	1.3.3.1	1.3.3.2	1.3.4	1.3.5	1.3.5.1	1.3.5.2
	25	1.3.3.1	1.3.3.2	1.3.4	1.3.5	1.3.5.1	1.3.5.2	1.3.5.3
	26	1.3.3.2	1.3.4	1.3.5	1.3.5.1	1.3.5.2	1.3.5.3	1.3.5.4
	27	1.3.4	1.3.5	1.3.5.1	1.3.5.2	1.3.5.3	1.3.5.4	1.3.5.5
	28	1.3.5	1.3.5.1	1.3.5.2	1.3.5.3	1.3.5.4	1.3.5.5	1.3.5.6
	29	1.3.5.1	1.3.5.2	1.3.5.3	1.3.5.4	1.3.5.5	1.3.5.6	1.3.5.7
	30	1.3.5.2	1.3.5.3	1.3.5.4	1.3.5.5	1.3.5.6	1.3.5.7	1.3.5.8
	31	1.3.5.3	1.3.5.4	1.3.5.5	1.3.5.6	1.3.5.7	1.3.5.8	1.3.5.9
	32	1.3.5.4	1.3.5.5	1.3.5.6	1.3.5.7	1.3.5.8	1.3.5.9	1.3.5.10
	33	1.3.5.5	1.3.5.6	1.3.5.7	1.3.5.8	1.3.5.9	1.3.5.10	1.3.5.11
	34	1.3.5.6	1.3.5.7	1.3.5.8	1.3.5.9	1.3.5.10	1.3.5.11	1.3.5.12
	35	1.3.5.7	1.3.5.8	1.3.5.9	1.3.5.10	1.3.5.11	1.3.5.12	1.3.5.13
	36	1.3.5.8	1.3.5.9	1.3.5.10	1.3.5.11	1.3.5.12	1.3.5.13	1.3.5.14
	37	1.3.5.9	1.3.5.10	1.3.5.11	1.3.5.12	1.3.5.13	1.3.5.14	1.3.5.15
	38	1.3.5.10	1.3.5.11	1.3.5.12	1.3.5.13	1.3.5.14	1.3.5.15	1.3.5.16
	39	1.3.5.11	1.3.5.12	1.3.5.13	1.3.5.14	1.3.5.15	1.3.5.16	1.3.5.17
	40	1.3.5.12	1.3.5.13	1.3.5.14	1.3.5.15	1.3.5.16	1.3.5.17	1.3.5.18
	41	1.3.5.13	1.3.5.14	1.3.5.15	1.3.5.16	1.3.5.17	1.3.5.18	1.3.5.19
	42	1.3.5.14	1.3.5.15	1.3.5.16	1.3.5.17	1.3.5.18	1.3.5.19	1.3.5.20
	43	1.3.5.15	1.3.5.16	1.3.5.17	1.3.5.18	1.3.5.19	1.3.5.20	1.3.5.21
	44	1.3.5.16	1.3.5.17	1.3.5.18	1.3.5.19	1.3.5.20	1.3.5.21	1.3.5.22
	45	1.3.5.17	1.3.5.18	1.3.5.19	1.3.5.20	1.3.5.21	1.3.5.22	1.3.5.23
	46	1.3.5.18	1.3.5.19	1.3.5.20	1.3.5.21	1.3.5.22	1.3.5.23	1.3.5.24
	47	1.3.5.19	1.3.5.20	1.3.5.21	1.3.5.22	1.3.5.23	1.3.5.24	1.3.5.25
	48	1.3.5.20	1.3.5.21	1.3.5.22	1.3.5.23	1.3.5.24	1.3.5.25	1.3.5.26
	49	1.3.5.21	1.3.5.22	1.3.5.23	1.3.5.24	1.3.5.25	1.3.5.26	1.3.5.27
	50	1.3.5.22	1.3.5.23	1.3.5.24	1.3.5.25	1.3.5.26	1.3.5.27	1.3.5.28
	51	1.3.5.23	1.3.5.24	1.3.5.25	1.3.5.26	1.3.5.27	1.3.5.28	1.3.5.29
	52	1.3.5.24	1.3.5.25	1.3.5.26	1.3.5.27	1.3.5.28	1.3.5.29	1.3.5.30
	53	1.3.5.25	1.3.5.26	1.3.5.27	1.3.5.28	1.3.5.29	1.3.5.30	1.3.5.31
	54	1.3.5.26	1.3.5.27	1.3.5.28	1.3.5.29	1.3.5.30	1.3.5.31	1.3.5.32
	55	1.3.5.27	1.3.5.28	1.3.5.29	1.3.5.30	1.3.5.31	1.3.5.32	1.3.5.33
	56	1.3.5.28	1.3.5.29	1.3.5.30	1.3.5.31	1.3.5.32	1.3.5.33	1.3.5.34
	57	1.3.5.29	1.3.5.30	1.3.5.31	1.3.5.32	1.3.5.33	1.3.5.34	1.3.5.35
	58	1.3.5.30	1.3.5.31	1.3.5.32	1.3.5.33	1.3.5.34	1.3.5.35	1.3.5.36
	59	1.3.5.31	1.3.5.32	1.3.5.33	1.3.5.34	1.3.5.35	1.3.5.36	1.3.5.37
	60	1.3.5.32	1.3.5.33	1.3.5.34	1.3.5.35	1.3.5.36	1.3.5.37	1.3.5.38
	61	1.3.5.33	1.3.5.34	1.3.5.35	1.3.5.36	1.3.5.37	1.3.5.38	1.3.5.39
	62	1.3.5.34	1.3.5.35	1.3.5.36	1.3.5.37	1.3.5.38	1.3.5.39	1.3.5.40
	63	1.3.5.35	1.3.5.36	1.3.5.37	1.3.5.38	1.3.5.39	1.3.5.40	1.3.5.41
	64	1.3.5.36	1.3.5.37	1.3.5.38	1.3.5.39	1.3.5.40	1.3.5.41	1.3.5.42
	65	1.3.5.37	1.3.5.38	1.3.5.39	1.3.5.40	1.3.5.41	1.3.5.42	1.3.5.43
	66	1.3.5.38	1.3.5.39	1.3.5.40	1.3.5.41	1.3.5.42	1.3.5.43	1.3.5.44
	67	1.3.5.39	1.3.5.40	1.3.5.41	1.3.5.42	1.3.5.43	1.3.5.44	1.3.5.45
	68	1.3.5.40	1.3.5.41	1.3.5.42	1.3.5.43	1.3.5.44	1.3.5.45	1.3.5.46
	69	1.3.5.41	1.3.5.42	1.3.5.43	1.3.5.44	1.3.5.45	1.3.5.46	1.3.5.47
	70	1.3.5.42	1.3.5.43	1.3.5.44	1.3.5.45	1.3.5.46	1.3.5.47	1.3.5.48
	71	1.3.5.43	1.3.5.44	1.3.5.45	1.3.5.46	1.3.5.47	1.3.5.48	1.3.5.49
	72	1.3.5.44	1.3.5.45	1.3.5.46	1.3.5.47	1.3.5.48	1.3.5.49	1.3.5.50
	73	1.3.5.45	1.3.5.46	1.3.5.47	1.3.5.48	1.3.5.49	1.3.5.50	1.3.5.51
	74	1.3.5.46	1.3.5.47	1.3.5.48	1.3.5.49	1.3.5.50	1.3.5.51	1.3.5.52
	75	1.3.5.47	1.3.5.48	1.3.5.49	1.3.5.50	1.3.5.51	1.3.5.52	1.3.5.53
	76	1.3.5.48	1.3.5.49	1.3.5.50	1.3.5.51	1.3.5.52	1.3.5.53	1.3.5.54
	77	1.3.5.49	1.3.5.50	1.3.5.51	1.3.5.52	1.3.5.53	1.3.5.54	1.3.5.55
	78	1.3.5.50	1.3.5.51	1.3.5.52	1.3.5.53	1.3.5.54	1.3.5.55	1.3.5.56
	79	1.3.5.51	1.3.5.52	1.3.5.53	1.3.5.54	1.3.5.55	1.3.5.56	1.3.5.57
	80	1.3.5.52	1.3.5.53	1.3.5.54	1.3.5.55	1.3.5.56	1.3.5.57	1.3.5.58
	81	1.3.5.53	1.3.5.54	1.3.5.55	1.3.5.56	1.3.5.57	1.3.5.58	1.3.5.59
	82	1.3.5.54	1.3.5.55	1.3.5.56	1.3.5.57	1.3.5.58	1.3.5.59	1.3.5.60
	83	1.3.5.55	1.3.5.56	1.3.5.57	1.3.5.58	1.3.5.59	1.3.5.60	1.3.5.61
	84	1.3.5.56	1.3.5.57	1.3.5.58	1.3.5.59	1.3.5.60	1.3.5.61	1.3.5.62
	85	1.3.5.57	1.3.5.58	1.3.5.59	1.3.5.60	1.3.5.61	1.3.5.62	1.3.5.63
	86	1.3.5.58	1.3.5.59	1.3.5.60	1.3.5.61	1.3.5.62	1.3.5.63	1.3.5.64
	87	1.3.5.59	1.3.5.60	1.3.5.61	1.3.5.62	1.3.5.63	1.3.5.64	1.3.5.65
	88	1.3.5.60	1.3.5.61	1.3.5.62	1.3.5.63	1.3.5.64	1.3.5.65	1.3.5.66
	89	1.3.5.61	1.3.5.62	1.3.5.63	1.3.5.64	1.3.5.65	1.3.5.66	1.3.5.67
	90	1.3.5.62	1.3.5.63	1.3.5.64	1.3.5.65	1.3.5.66	1.3.5.67	1.3.5.68
	91	1.3.5.63	1.3.5.64	1.3.5.65	1.3.5.66	1.3.5.67	1.3.5.68	1.3.5.69
	92	1.3.5.64	1.3.5.65	1.3.5.66	1.3.5.67	1.3.5.68	1.3.5.69	1.3.5.70
	93	1.3.5.65	1.3.5.66	1.3.5.67	1.3.5.68	1.3.5.69	1.3.5.70	1.3.5.71
	94	1.3.5.66	1.3.5.67	1.3.5.68	1.3.5.69	1.3.5.70	1.3.5.71	1.3.5.72
	95	1.3.5.67	1.3.5.68	1.3.5.69	1.3.5.70	1.3.5.71	1.3.5.72	1.3.5.73
	96	1.3.5.68	1.3.5.69	1.3.5.70	1.3.5.71	1.3.5.72	1.3.5.73	1.3.5.74
	97	1.3.5.69	1.3.5.70	1.3.5.71	1.3.5.72	1.3.5.73	1.3.5.74	1.3.5.75
	98	1.3.5.70	1.3.5.71	1.3.5.72	1.3.5.73	1.3.5.74	1.3.5.75	1.3.5.76
	99	1.3.5.71	1.3.5.72	1.3.5.73	1.3.5.74	1.3.5.75	1.3.5.76	1.3.5.77
	100	1.3.5.72	1.3.5.73	1.3.5.74	1.3.5.75	1.3.5.76	1.3.5.77	1.3.5.78
	101	1.3.5.73	1.3.5.74	1.3.5.75	1.3.5.76	1.3.5.77	1.3.5.78	1.3.5.79
	102	1.3.5.74	1.3.5.75	1.3.5.76	1.3.5.77	1.3.5.78	1.3.5.79	1.3.5.80
	103	1.3.5.75	1.3.5.76	1.3.5.77	1.3.5.78	1.3.5.79	1.3.5.80	1.3.5.81
	104	1.3.5.76	1.3.5.77	1.3.5.78	1.3.5.79	1.3.5.80	1.3.5.81	1.3.5.82
	105	1.3.5.77	1.3.5.78	1.3.5.79	1.3.5.80	1.3.5.81	1.3.5.82	1.3.5.83
	106	1.3.5.78	1.3.5.79	1.3.5.80	1.3.5.81	1.3.5.82	1.3.5.83	1.3.5.84
	107	1.3.5.79	1.3.5.80	1.3.5.81	1.3.5.82	1.3.5.83	1.3.5.84	1.3.5.85
	108	1.3.5.80	1.3.5.81	1.3.5.82	1.3.5.83	1.3.5.84	1.3.5.85	1.3.5.86
	109	1.3.5.81	1.3.5.82	1.3.5.83	1.3.5.84	1.3.5.85	1.3.5.86	1.3.5.87
	110	1.3.5.82	1.3.5.83	1.3.5.84	1.3.5.85	1.3.5.86	1.3.5.87	1.3.5.88
	111	1.3.5.83	1.3.5.84	1.3.5.85	1.3.5.86	1.3.5.87	1.3.5.88	1.3.5.89
	112	1.3.5.84	1.3.5.85	1.3.5.86	1.3.5.87	1.3.5.88	1.3.5.89	1.3.5.90
	113	1.3.5.85	1.3.5.86	1.3.5.87	1.3.5.88	1.3.5.89	1.3.5.90	1.3.5.91
	114	1.3.5.86	1.3.5.87	1.3.5.88	1.3.5.89	1.3.5.90	1.3.5.91	1.3.5.92
	115	1.3.5.87	1.3.5.88	1.3.5.89	1.3.5.90	1.3.5.91	1.3.5.92	1.3.5.93
	116	1.3.5.88	1.3.5.89	1.3.5.90	1.3.5.91	1.3.5.92	1.3.5.93	1.3.5.94
	117	1.3.5.89	1.3.5.90	1.3.5.91	1.3.5.92	1.3.5.93	1.3.5.94	1.3.5.95
	118	1.						

Use the following step by step to import an Excel file into a Schedule project.

Import into the Schedule

1. From Schedule, select the **Import** button on the right of the screen.
2. Browse to the file you want to import back into Schedule.
3. Select **Import**.

An error message can be shown during the Import process. This error message can show where an error occurred in the Excel template and where the fix needs to be made. The import still brings in the data that is correct, but it skips over the data that generated the error. The error is then logged in Schedule.

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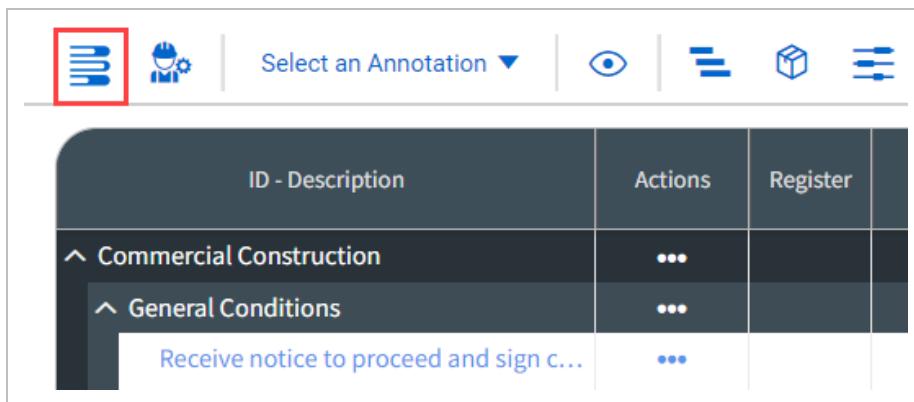
CHAPTER 7 – SCHEDULING

7.0.1 Scheduling Overview

Scheduling

Setting Schedule Progress Attributes

1. Click the **Scheduling** icon in the Smart Planning tab.

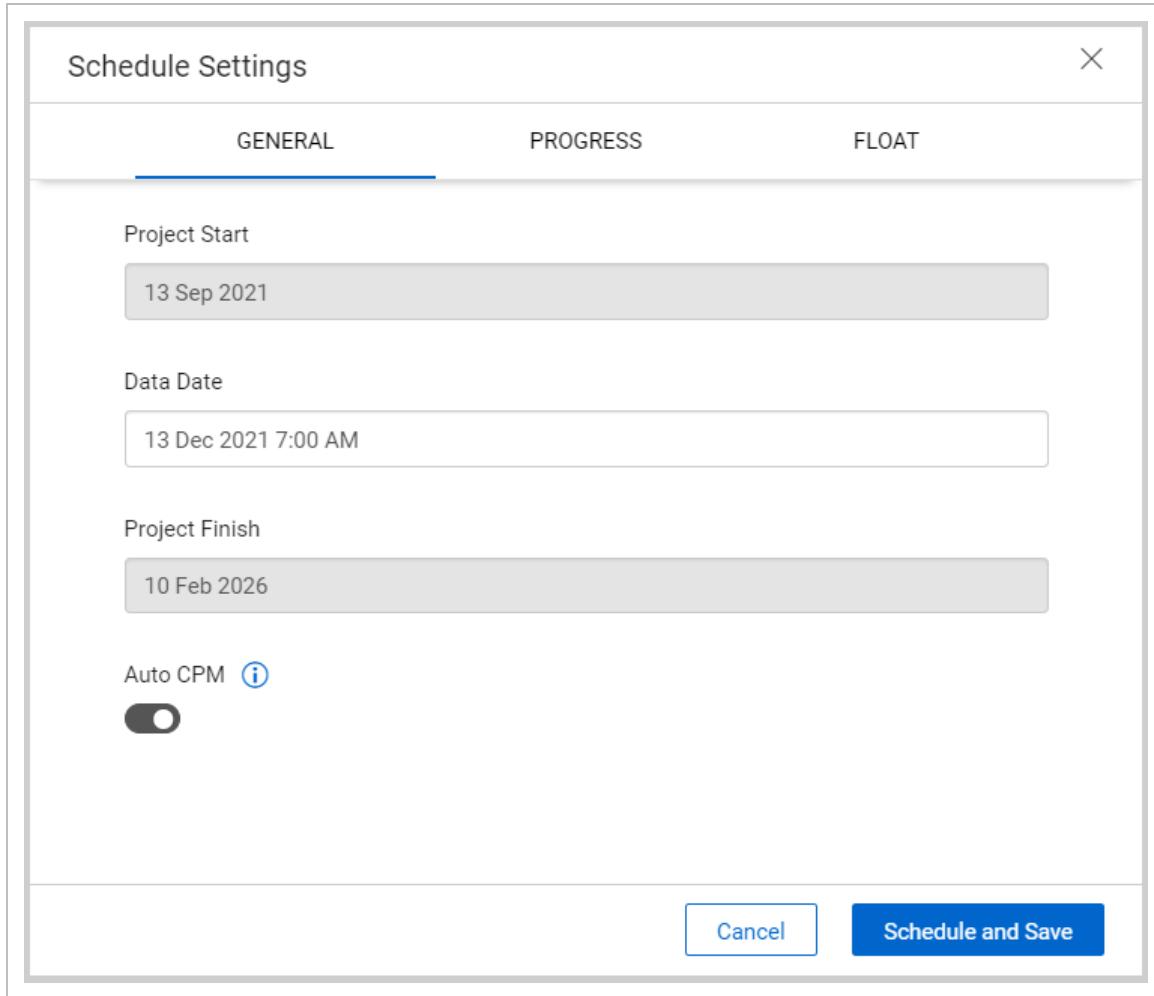


ID - Description	Actions	Register
^ Commercial Construction	...	
^ General Conditions	...	
Receive notice to proceed and sign c...	...	

2. Populate the following information on the General tab:

- **Project Start** - This is the project start date.
- **Data Date** - Sets the “current” or as-of date that you are looking at in the system.
- **Project Finish** - This is the project finish date.
- **Auto CPM** - This should generally be set to *On*, so logic is automatically applied to

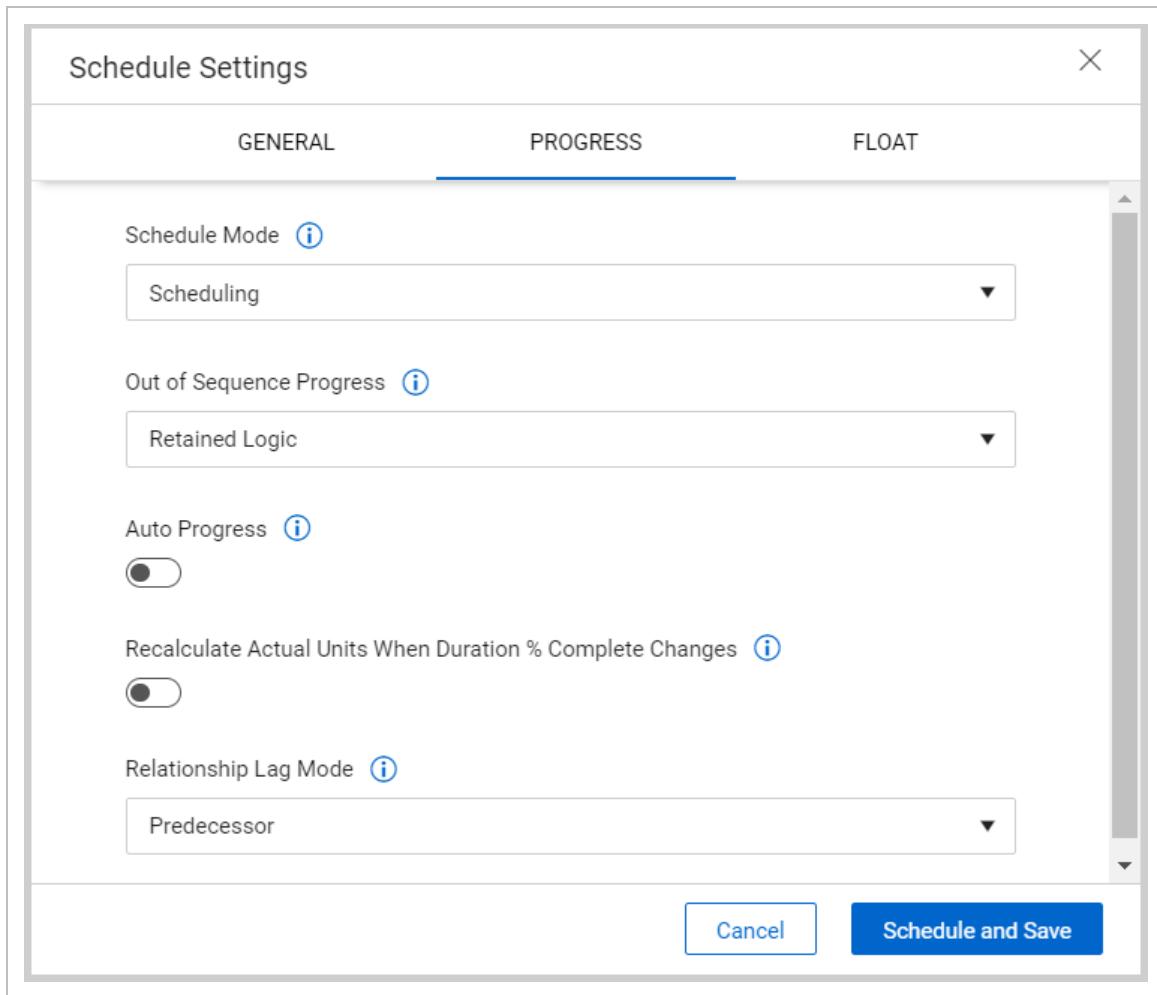
items in your schedule.



3. Populate the following information on the Progress tab:

- **Schedule Mode** - The Schedule Mode can either be **Scheduling** or **Planning**. Activities without predecessor logic or constraints will be scheduled against the Data Date.
- **Out of Sequence Progress** - This should remain on retained logic, retains planned dependencies between unworked portions of activities.
- **Auto Progress** - If set to *On*, Schedule assumes that work is proceeding as planned. Activities will be progressed to where they were planned to be on the data date. If set to *Off*, you manually progress activities. This should be done prior to advancing the data date of the project.

- **Recalculate Actual Units When Duration % Complete Changes** - Actual units on assigned resources update per the duration % complete. For example, if a 10-day activity is progressed to 50% duration % complete then a resource assigned to that activity with 100 units planned would update to 50 actual units. Off - Duration % complete and Actual units are unlinked.
- **Relationship Lag Mode** - Dictates which calendar between a predecessor and its successor the lag of a relationship is used when establishing Finish and Start dates in CPM.

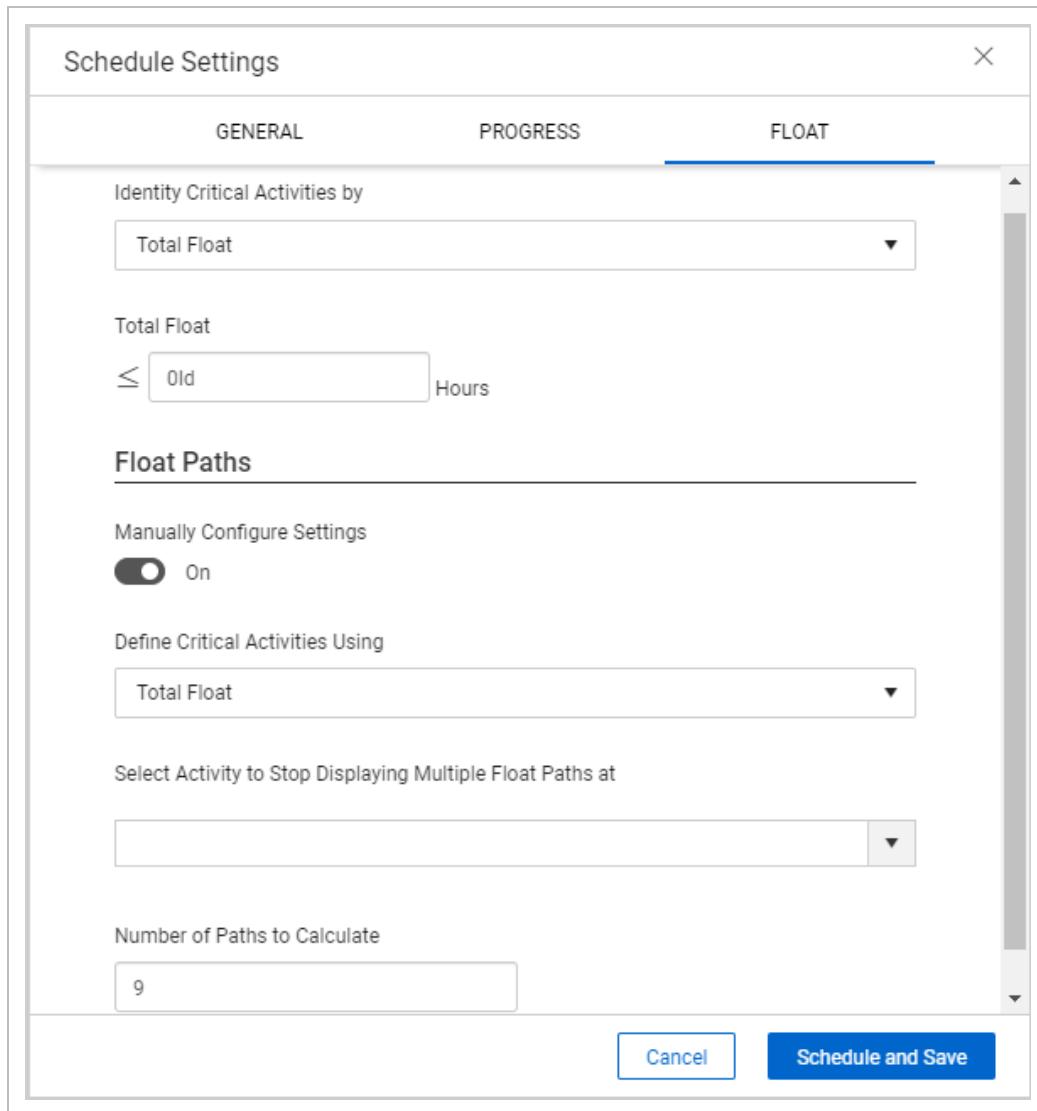


4. Populate the following information on the Float tab:

- **Identify Critical Activities by** - Identify critical activities by either the **Total Float** or the **Longest Path**. If the Total Float value is less than or equal to the defined number of hours (default 0) then it is an indication that an activity is critical. The Longest Path is the path

through a project network from start to finish where the Total Duration is longer than any other path.

- **Total Float** - Set the Total float to less than or equal to **8 hours**. The Total Float represents the amount of time a task can be delayed without affecting the completion date of the project.
- **Manually Configure Settings** - Set the Manually Configure Settings to **On**.
- **Define Critical Activities Using** - You can define critical activities using either **Total Float** or **Free Float**. Free Float represents the amount of time a task can be delayed without affecting the start date of its subsequent tasks.
- **Number of Paths to Calculate** - You can calculate up to 10 sub-critical paths. This helps you to better envision the activities that have a potential of being delayed, which gives you additional time and consideration to push out the schedule. You can choose to execute certain actions such as defining the critical activities by using either free float or total float, select an activity to stop showing multiple float paths, and determine the number of float paths to calculate.



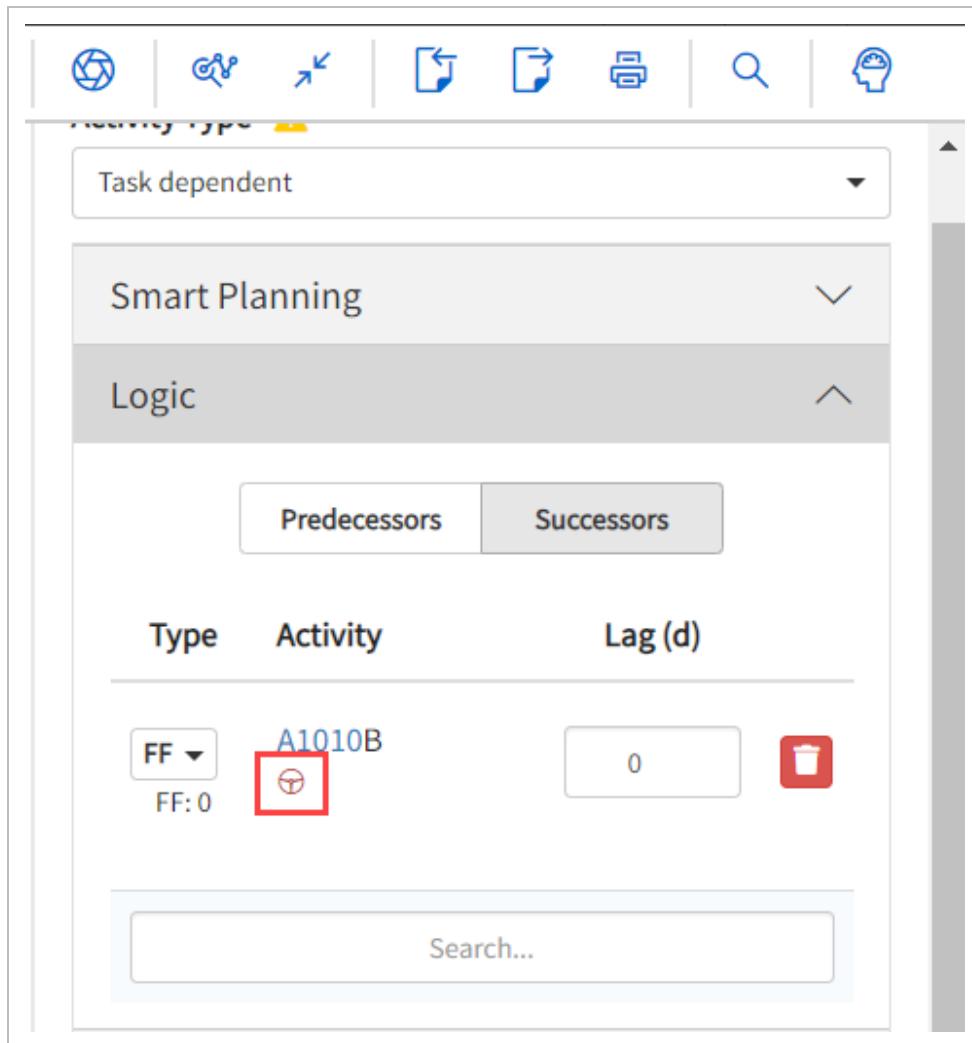
To see the float paths in Plan view, you can group by float path in the Group By Builder to see which activities are critical and sub-critical, and the float path where they reside.

ID - Description	Actions	Start	Finish	At Comple... tion	Total Fl... oat	Free Float
▼ No Float Path	...	23 May 2014 A	9 May 2017	748		
▼ 9	...	28 Jul 2015 A	20 Apr 2017	402		
▼ 8	...	8 Sep 2014 A	21 Apr 2017	663		
▼ 4	...	6 Jul 2016 A	13 Apr 2017	179		
^ 3	...	22 Sep 2014 A	17 May 2017	619		
Install Civil U/G Aggregates	3 Oct 2016 A	20 Apr 2017	125	124	0
Install Civil U/G Aggregates	3 Nov 2016 A	20 Apr 2017	103	124	0
Install Civil U/G Aggregates	1 Sep 2015 A	20 Apr 2017	378	124	0
Install Civil U/G Load at Sto...	...	3 Mar 2015 A	20 Apr 2017	499	124	0
Paving	...	19 Oct 2016 A	20 Apr 2017	114	124	0
Stockpile / Waste Knockdo...	...	22 Sep 2014 A	20 Apr 2017	601	124	0
Structural Backfill - Water T...	...	16 Apr 2015 A	20 Apr 2017	470	124	0
SUB.Final Site Seeding & La...	...	21 Apr 2017	17 May 2017	18	124	124
^ 2	...	18 Dec 2015 A	19 Jun 2017	348		
Install Misc Metals NE Mezz	18 Dec 2015 A	20 Apr 2017	309	103	0
Install Misc Metals North O...	...	18 Mar 2016 A	13 Apr 2017	252	103	0
Site Finish / Paving	...	3 Oct 2016 A	19 Jun 2017	164	103	0
SUB.Project Painting Plant	28 Sep 2016 A	19 Jun 2017	167	103	0
▼ 10	...	4 Dec 2015 A	14 Apr 2017	313		
▼ 5	...	10 Dec 2015 A	21 Apr 2017	315		
▼ 6	...	27 Mar 2017	1 May 2017	25		
^ 1	...	23 May 2014	27 Nov 2017	885		
Contract Final Acceptance 1...	...		27 Nov 2017*	0		
PP: Contract Administratio...	...	23 May 2014	23 May 2014	0	0	885
PP: Contract Administratio...	...	23 May 2014	23 May 2014	0	0	885
^ 7	...	27 Aug 2015 A	31 Mar 2017	368		
Install Civil U/G Subgrade Fi...	...	27 Aug 2015 A	31 Mar 2017	368	137	13

5. Clicking **Schedule** updates the data date and logic based on the settings selected.

Critical Path - Driving Indicator

The driving indicator (steering wheel) appears in the Logic section of the IRIS panel. The driving indicator indicates that a predecessor or successor is on the critical path.



Progressing

To begin Progressing, select the activity that you want to progress, and reference the smart planning panel.

ID
1.1. A3320

Description
Activity A3320

Calendar test.7 day.1874 **Constraint** None

Smart Planning

Planned (d) 120	Cost (\$) 7515000 
Remaining (d) 0 	Start  09 Oct 2017
Actual (d) 167	Finish  24 Mar 2018
At Complete (d) 167	Percent Complete Phys  100

Early Start None	Late Start None	Planned Start 09 Oct 2017
Early Finish None	Late Finish None	Planned Finish 05 Feb 2018
Total Float 0	Free Float -	

Logic >

Knowledge Tags  >

Project Register  >

Delegation >

Activities can be marked as started by clicking the **Start** toggle. As activities progress, they can be updated by changing the remaining duration, the finish date, or the Percent Complete fields. When a task is finished, the Finish flag can be switched to *On* to indicate this in the system.

Smart Planning

Planned (d)	120	Cost (\$)	0
Remaining (d)	0	Start	<input checked="" type="checkbox"/>
Actual (d)	167	Finish	<input checked="" type="checkbox"/>
At Complete (d)	167	Percent Complete	Phys ▾ 100

Percent Complete

Percent complete can be calculated in three different ways:

- Duration
- Units
- Physical

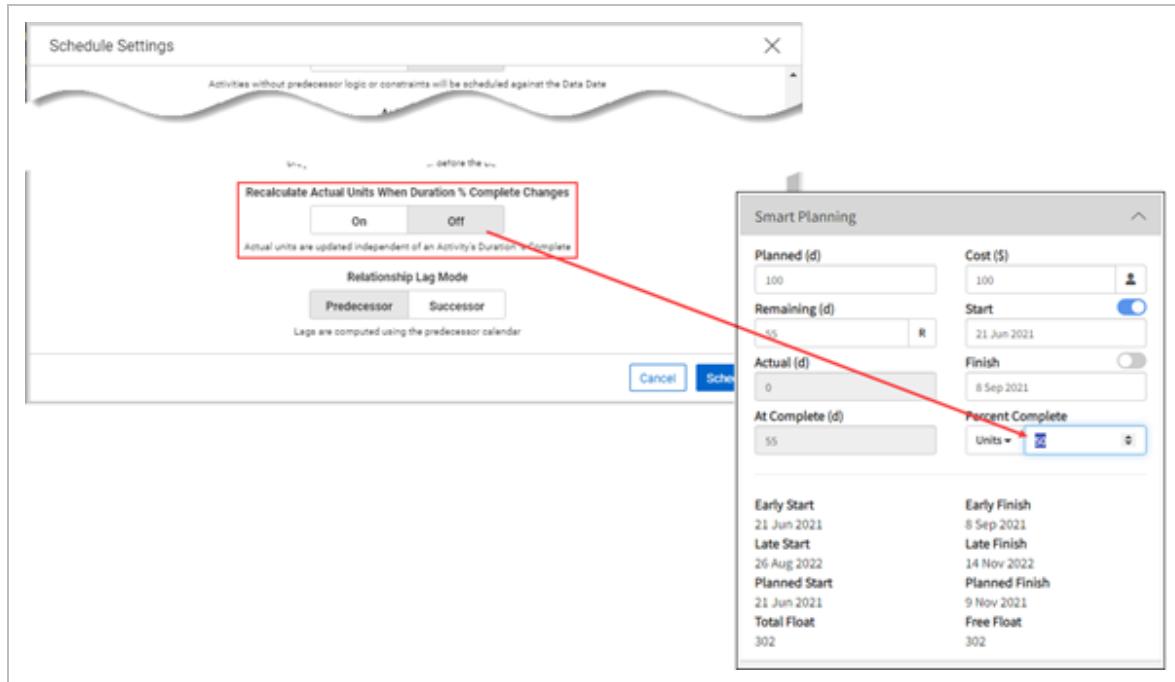
Smart Planning

Planned (d) <input type="text" value="120"/>	Cost (\$) <input type="text" value="0"/>
Remaining (d) <input type="text" value="0"/>	Start <input type="text" value="09 Oct 2017"/>
Actual (d) <input type="text" value="167"/>	Finish <input type="text" value="24 Mar 2018"/>
At Complete (d) <input type="text" value="167"/>	Percent Complete <div style="display: flex; align-items: center;"> Phys ▼ 100 </div>
Duration Physical Units	
Early Start None	Planned Start 09 Oct 2017
Early Finish None	Planned Finish 05 Feb 2018
Total Float 0	Free Float -

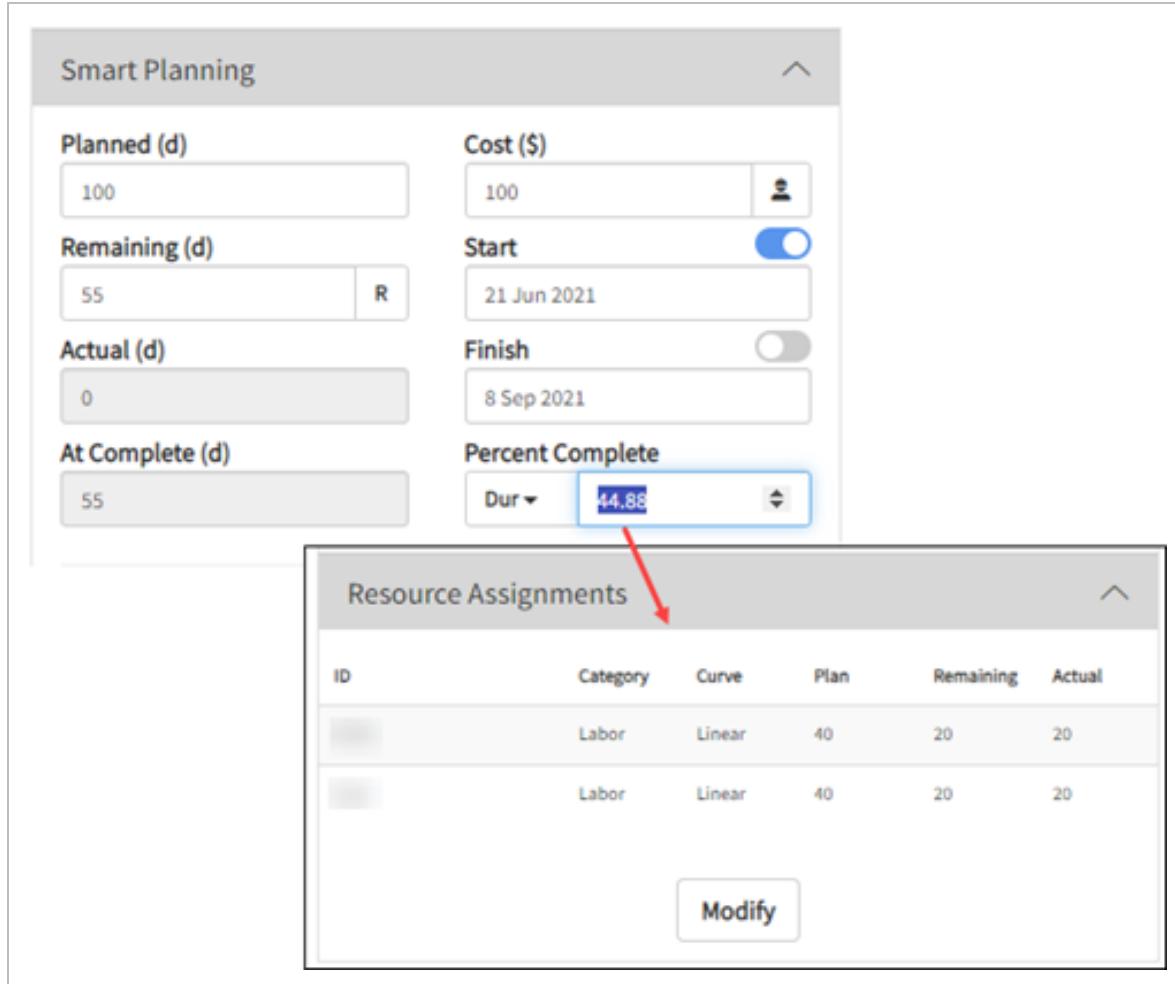
Duration percent complete uses the duration that was originally loaded onto the activity. For example, if the duration was set to ten days for completion and only five days have been completed, the system automatically sets duration to 50 percent complete.

Units percent complete uses the resource budgeted units. Schedule uses any units that have been budgeted to that activity to automatically calculate the percent complete. For example, if there are 100 man hours someone needs to work and they only worked 50 hours, the system would calculate it to 50% complete.

You can also update the Units Percent Complete at the activity level. When the Recalculate Actual Units When Duration % Complete Changes toggle in Schedule Settings is set to Off, you can manually edit the Unit Percent Complete field in Smart Planning.



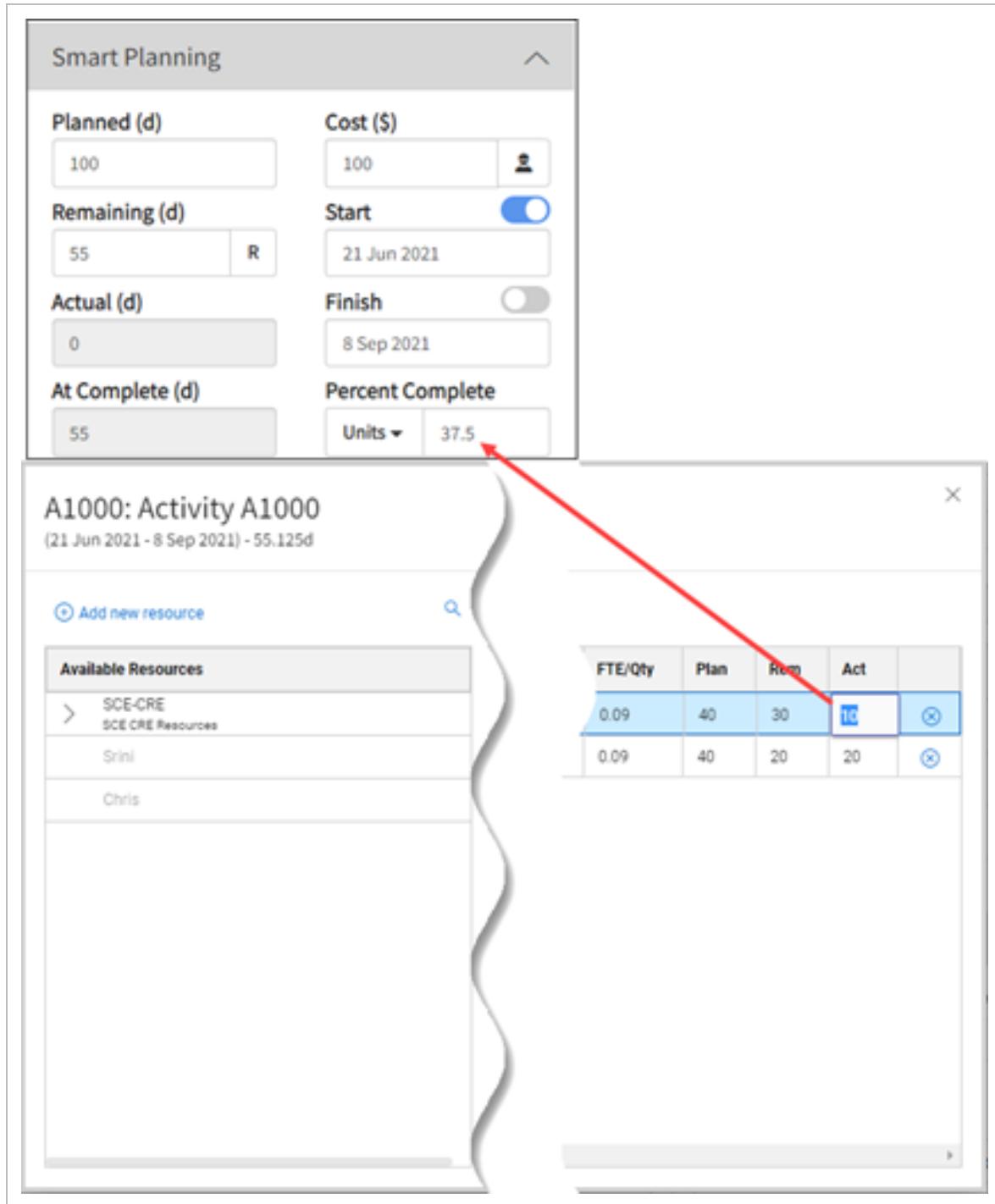
Updating the Units Percent Complete at the activity level in Smart Planning also updates the actual and remaining for the associated resource assignments.



The image shows a screenshot of the Smart Planning and Resource Assignments interface. The Smart Planning section contains fields for Planned (d), Cost (\$), Remaining (d), Start, Actual (d), Finish, and At Complete (d). The Percent Complete field is highlighted with a blue border and a red arrow points from it to the Resource Assignments section. The Resource Assignments section shows a table with columns: ID, Category, Curve, Plan, Remaining, and Actual. Two rows are listed, both assigned to the 'Labor' category with a 'Linear' curve, a plan of 40, and remaining and actual values of 20. A 'Modify' button is at the bottom of the table.

ID	Category	Curve	Plan	Remaining	Actual
1	Labor	Linear	40	20	20
2	Labor	Linear	40	20	20

You can modify the resource assignment, which automatically recalculates and updates the Duration Percent Complete in Smart Planning.



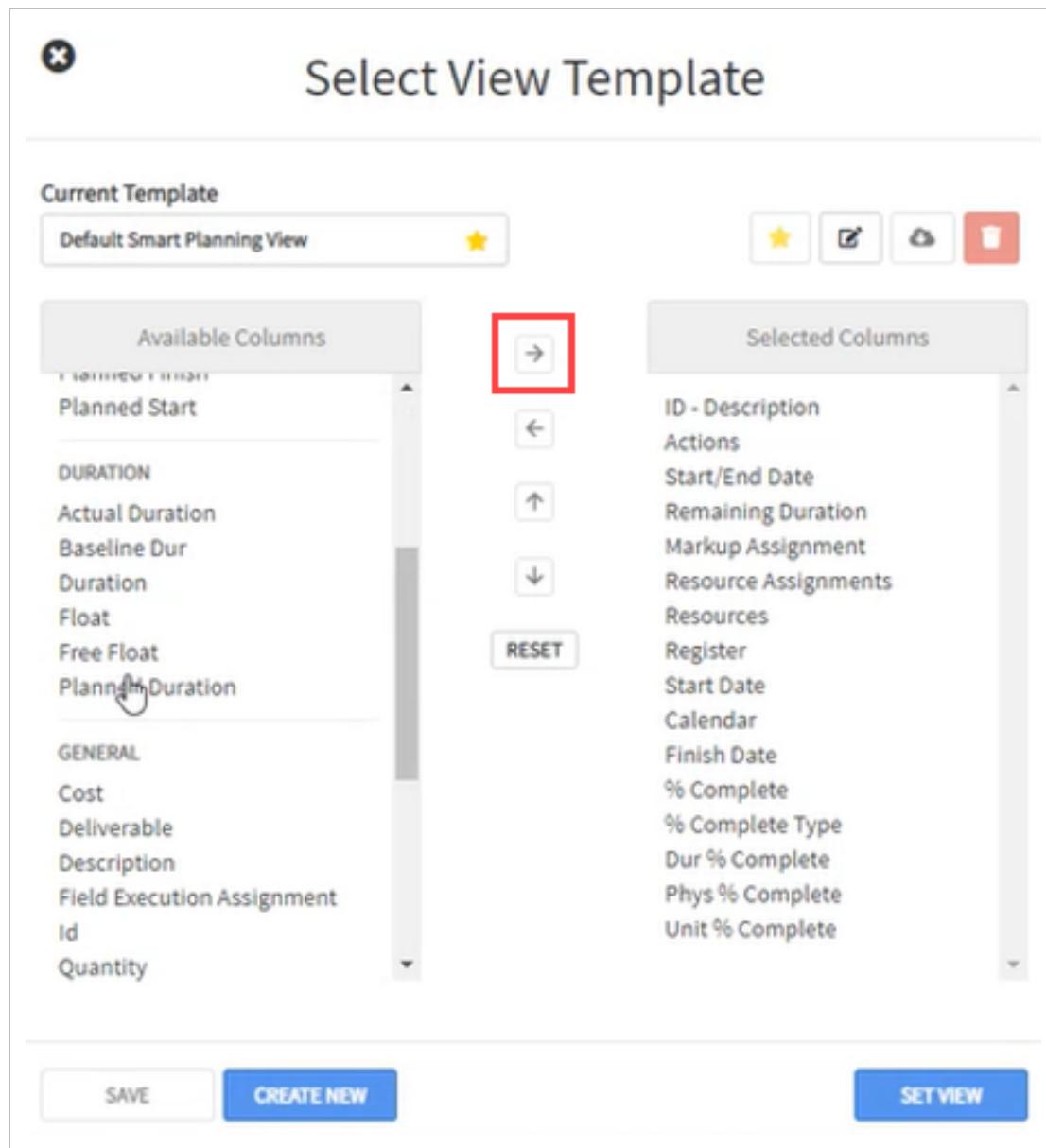
Physical percent complete uses the Phys % Complete column as a text field to type in the percent complete. This only applies to an activity that has started and is not completed. Physical percent complete interacts with earned value management. For example, if you have 20% physical complete and 5% duration complete, there are three ways of updating this. You can change the remaining duration, you can change the finish date, or you can change the duration percent complete. The system automatically adjusts the math.

Adding % Complete columns to the Gantt Chart

1. From the Gantt Chart, select the **Select View Template** icon.



2. In the Available Columns column, scroll to the Duration section. Then select the following columns for percent complete:
 - % Complete
 - % Complete Type
 - Dur % Complete
 - Phys % Complete
 - Unit % Complete
3. Use the arrows to move the columns to the Selected Columns column.



4. Select **Set View** to add the percent complete columns to the Gantt chart.

7.0.2 Snapshot And Schedule Settings

7.0.2.1 Set Snapshot

Setting the snapshot lets you compare any future changes that we make to the plan to our current plan.

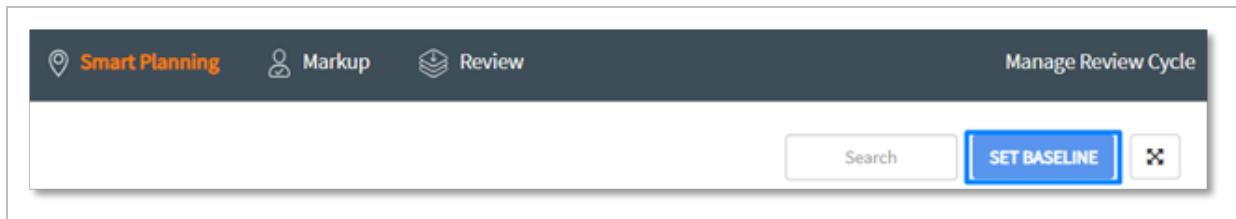
It is important to set the snapshot before applying any progress to the schedule. This lets you compare the current progress against the snapshot plan.

Before setting the snapshot, the SN1 Start and SN1 End dates columns show no values.

ID - Description	Rem Dur	Progress	Start Date	Finish Date	Baseline Start	Baseline End	New
● North Tower Commercial Building			01 Aug 19	31 Mar 22			— — ◆
● Multi-level			01 Aug 19	31 Mar 22			— — ◆
● Preconstruction			01 Aug 19	07 May 20			— — ◆
● Design			01 Aug 19	31 Dec 19			— — ◆
Proposal Submissions	9	0%	01 Aug 19	13 Aug 19			
Proposal Reviews & Approvals from Bo	23	0%	14 Aug 19	13 Sep 19			
Establish Permitting Documents	32	0%	16 Sep 19	29 Oct 19			
Create Early Stage Construction Docs	45	0%	30 Oct 19	31 Dec 19			
● Permitting			30 Oct 19	07 May 20			— — ◆
Fire Permit	25	0%	30 Oct 19	03 Dec 19			
Sitetwork Permit	17	0%	01 Jan 20	23 Jan 20			
Building Permit	41	0%	24 Jan 20	20 Mar 20			
Foundation Permit	21	0%	23 Mar 20	20 Apr 20			

Set the Snapshot

1. Click Snapshot icon > Set Snapshot..



- After the snapshot is set, you can view the SN1 Start and SN1 End dates shown in the column. The snapshot dates are now populated in Schedule.

ID - Description	Rem Dur	Progress	Start Date	Finish Date	Baseline Start	Baseline End	New
● North Tower Commercial Building			01 Aug 19	31 Mar 22			— — ◆
● Multi-level			01 Aug 19	31 Mar 22			— — ◆
● Preconstruction			01 Aug 19	07 May 20			— — ◆
● Design			01 Aug 19	31 Dec 19			— — ◆
Proposal Submissions	9	0%	01 Aug 19	13 Aug 19	01 Aug 19	14 Aug 19	
Proposal Reviews & Approvals from Bo	23	0%	14 Aug 19	13 Sep 19	14 Aug 19	14 Sep 19	
Establish Permitting Documents	32	0%	16 Sep 19	29 Oct 19	16 Sep 19	30 Oct 19	
Create Early Stage Construction Docs	45	0%	30 Oct 19	31 Dec 19	30 Oct 19	01 Jan 20	
● Permitting			30 Oct 19	07 May 20			— — ◆
Fire Permit	25	0%	30 Oct 19	03 Dec 19	30 Oct 19	04 Dec 19	
Sitetwork Permit	17	0%	01 Jan 20	23 Jan 20	01 Jan 20	24 Jan 20	
Building Permit	41	0%	24 Jan 20	20 Mar 20	24 Jan 20	21 Mar 20	
Foundation Permit	21	0%	23 Mar 20	20 Apr 20	23 Mar 20	21 Apr 20	
Water Permit	13	0%	21 Apr 20	07 May 20	21 Apr 20	08 May 20	
Permit Completion Milestone			08 May 20	07 May 20	08 May 20	08 May 20	

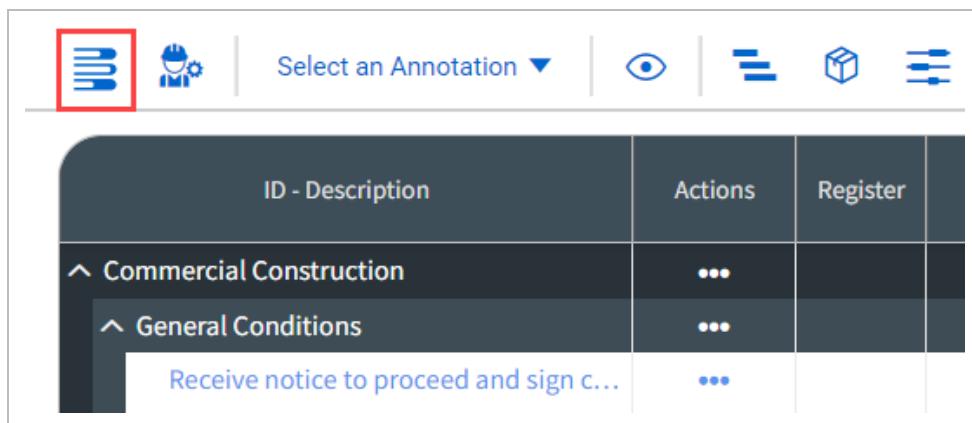
If the snapshot has not been set when a Markup Cycle is started, Schedule requests confirmation to establish the snapshot so any markups or changes to the schedule can be compared before and after review.

Gantt bars of up to 2 snapshots can be visualized against the current schedule Gantt bars for comparison. Gantt grid columns show variances between the current schedule and the snapshot columns.

7.0.2.2 Scheduling

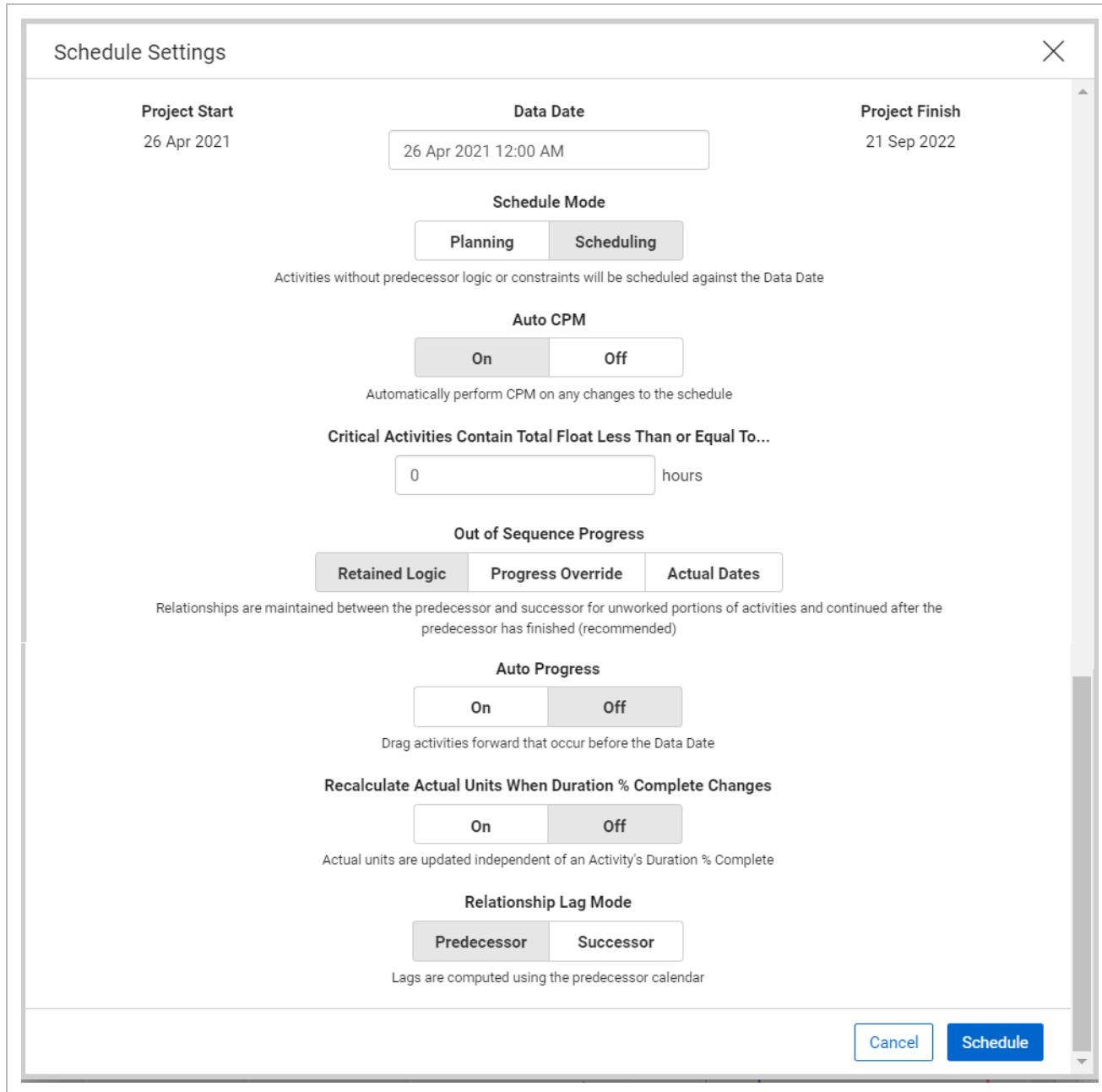
Schedule uses CPM for scheduling a set of activities. This method calculates the activity dates based on the durations and logic.

To schedule the project or review schedule options, click **Schedule**.

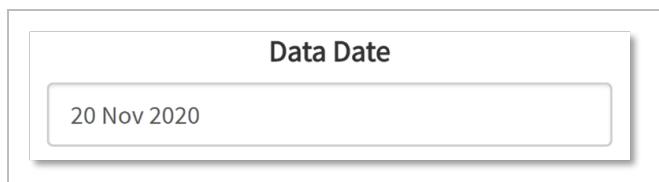


The screenshot shows a software interface for managing annotations in a schedule. At the top, there is a toolbar with various icons: a red-bordered document icon, a gear icon, a dropdown menu labeled "Select an Annotation", an eye icon, and three other icons. Below the toolbar is a table with three columns: "ID - Description", "Actions", and "Register". The table has three rows. The first row is collapsed, showing a plus sign and the text "Commercial Construction". The second row is collapsed, showing a plus sign and the text "General Conditions". The third row is expanded, showing the text "Receive notice to proceed and sign c...". Each row in the "Actions" and "Register" columns contains three dots, indicating more options.

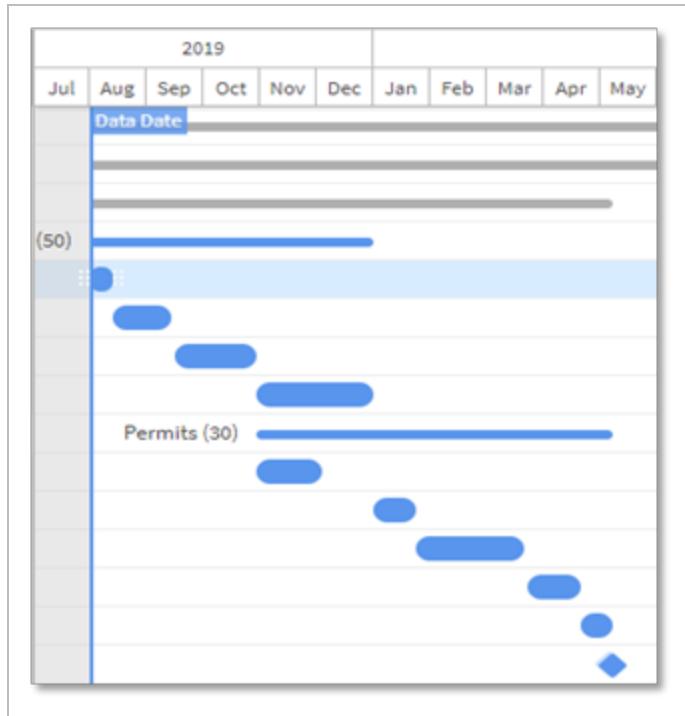
ID - Description	Actions	Register
^ Commercial Construction	...	
^ General Conditions	...	
Receive notice to proceed and sign c...	...	



7.0.2.3 Data Date

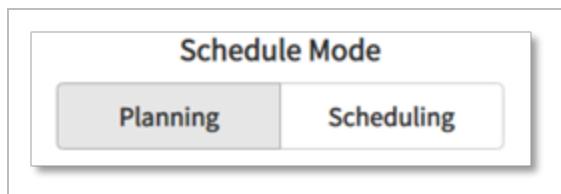


Set the Data Date to the day and hour you want to update the schedule to. The Data Date is used as the starting point to calculate the dates of all remaining activities. The Data Date is represented by the blue vertical line on the Gantt chart



7.0.2.4 Schedule Mode (Planning vs. Scheduling Mode)

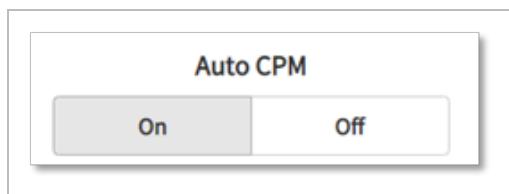
The Schedule Mode determines how activities without predecessor logic or constraints will respond to the updates being made to the schedule.



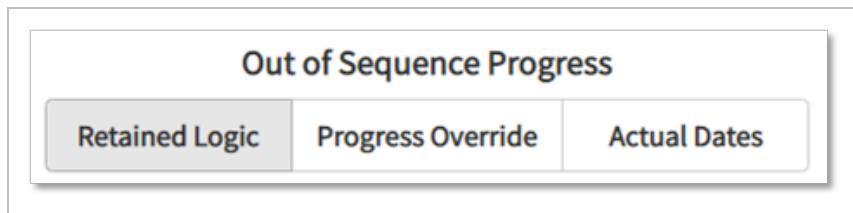
- In **Planning Mode**: Activities without predecessor logic or constraints do not snap back to the Data Date. This allows activities without predecessors to be scheduled throughout the project's timeline.
- In **Scheduling Mode**: Activities without predecessor logic or constraints are scheduled against the Data Date.

7.0.2.5 Auto CPM

Selecting the Auto CPM option *On* updates activity duration and sequence as actual progress is entered into Schedule. Switching this to *Off* prevents the schedule from automatically adjusting when activity is updated, and it must be adjusted manually. This is particularly useful if schedulers plan to update multiple activities in bulk, and then determine the CPM.



Out of Sequence Progress



- **Retained Logic:** Relationships are maintained between the predecessor and successor for unworked portions of activities and continued after the predecessor has finished.
- **Progress Override:** Relationships between the predecessor and successor are disregarded, and unworked portions of activities continue before the predecessor has finished.
- **Actual Dates:** When actual dates in the future occur, the remaining duration of in-progress activities are calculated after the conclusion of the future activity.

7.0.2.6 Auto Progress

Auto Progress determines if activities automatically start and progress when the Data Date has passed.

- If Auto Progress is *On*, activities that occur before the Data Date will automatically start progressing.
- If Auto Progress is *Off*, activities that occur before the Data Date will be pushed forward to the current Data Date without having started.

7.0.3 Baseline/Snapshot

Snapshots take all information from your current project file and saves it to the Snapshot Management menu. After a snapshot is saved, you can set another snapshot, overwrite a snapshot, delete a snapshot, save as a new schedule, or promote to a schedule.

There are only two snapshot slots available per project. The information on the snapshot cannot be edited after it has been created. Only the name of the snapshot can be changed.

The active baseline and any available snapshots are in a grid format, in addition to a color-coded metric table. This lets you see a comparison between the current schedule, active baseline, and available snapshots.

1 active user |

Baseline/Snapshot Management X

Active Baseline

Baseline based on Copy 1221 Gemini Solar - Co... Gopala Penmesta - 2 Feb 2023

[Assign schedule](#)

Snapshot 1
Snapshot - 18 Apr 2023: Paul [redacted] - 18 Apr 2023
[Overwrite snapshot](#) [Promote to project list](#)

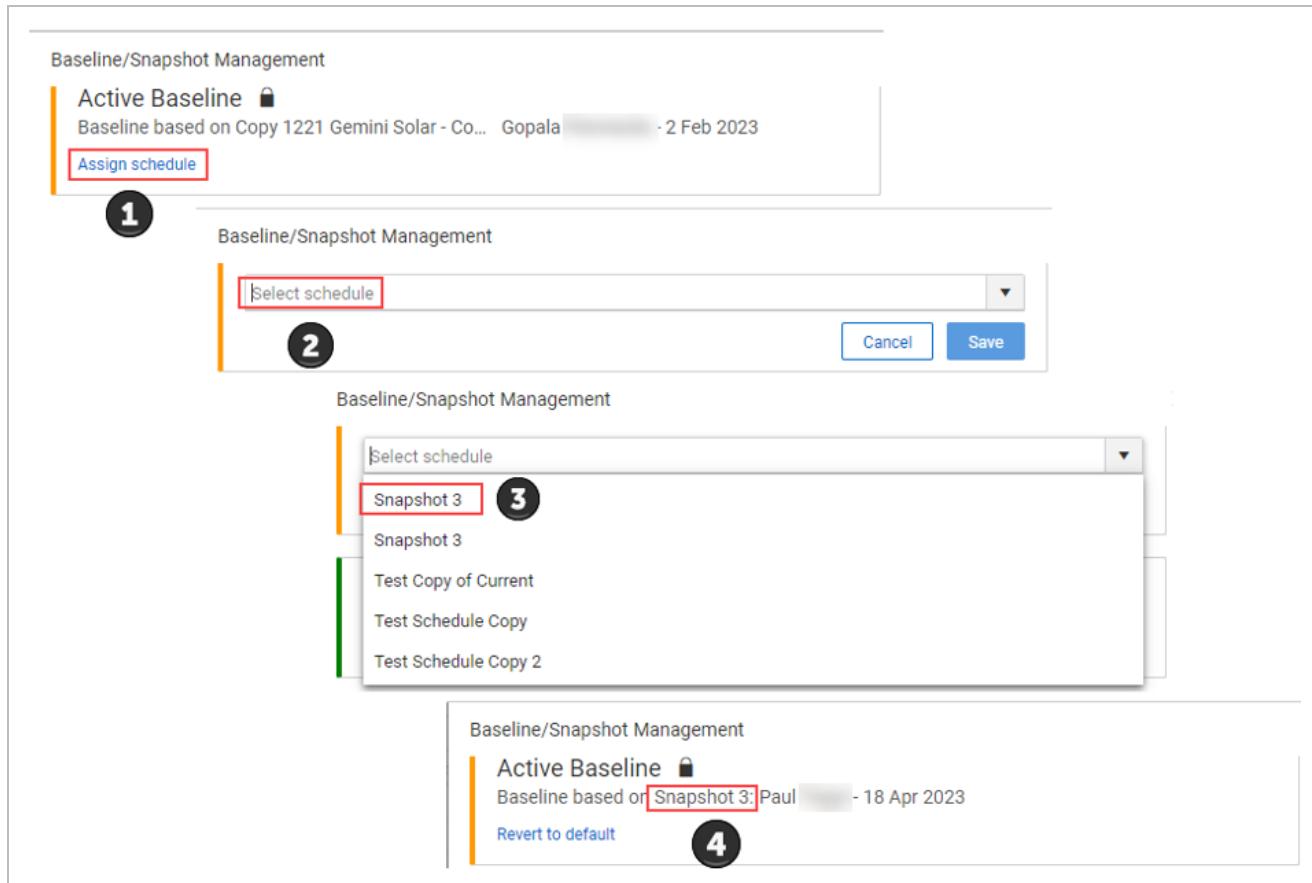
Snapshot 2
Snapshot - 18 Apr 2023 (1): Paul [redacted] - 18 Apr 2023
[Overwrite snapshot](#) [Promote to project list](#)

Set or overwrite snapshot above, or [Create copy of current schedule](#)

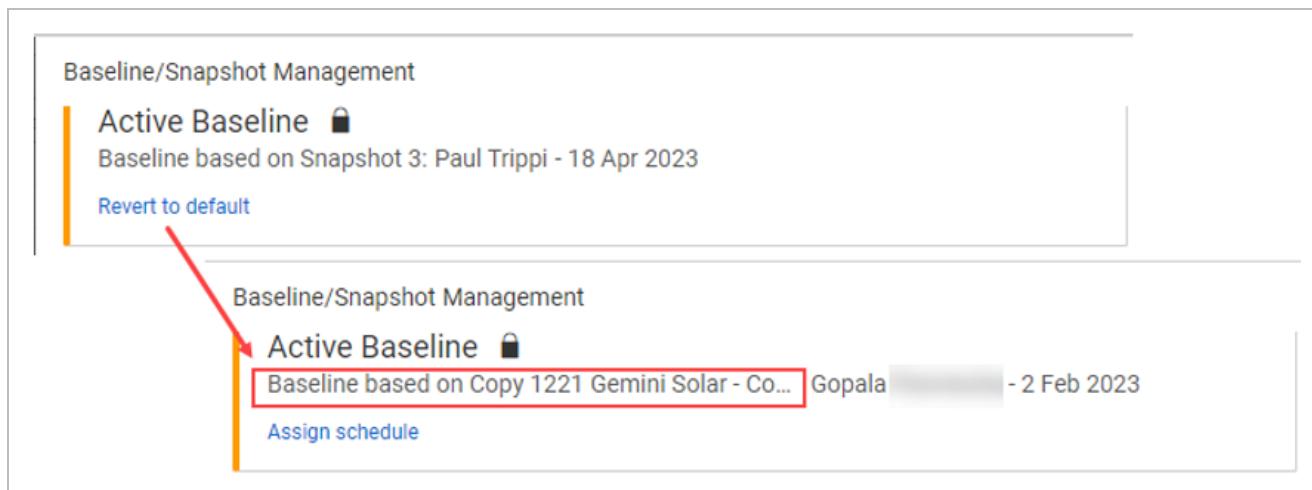
Snapshot 3 has been saved to your schedule list [View in schedule list](#)

	Current Schedule	Active Baseline	Snapshot 1	Snapshot 2
Data Date	30 Jun 2022	20 May 2022	30 Jun 2022	30 Jun 2022
Number of Activities	9	9	9	9
Start Date	30 Jun 2022	20 May 2022	30 Jun 2022	30 Jun 2022
Finish Date	13 Dec 2022	2 Nov 2022	13 Dec 2022	13 Dec 2022
Remaining Duration	167 days	167 days	167 days	167 days
Average Float	35 days	10 days	35 days	35 days
Labor Resource Units	0	0	0	0
Total Cost	\$0	\$0	\$0	\$0
Critical Activities	4	4	4	4
Activities Completed	1	0	1	1
Activities in progress	1	0	1	1
Activities not started	7	9	7	7
Constraints	3	3	3	3

You can also assign other schedules that are part of the same project workspace as the current schedule to your active baseline and snapshots using the assign schedule function.

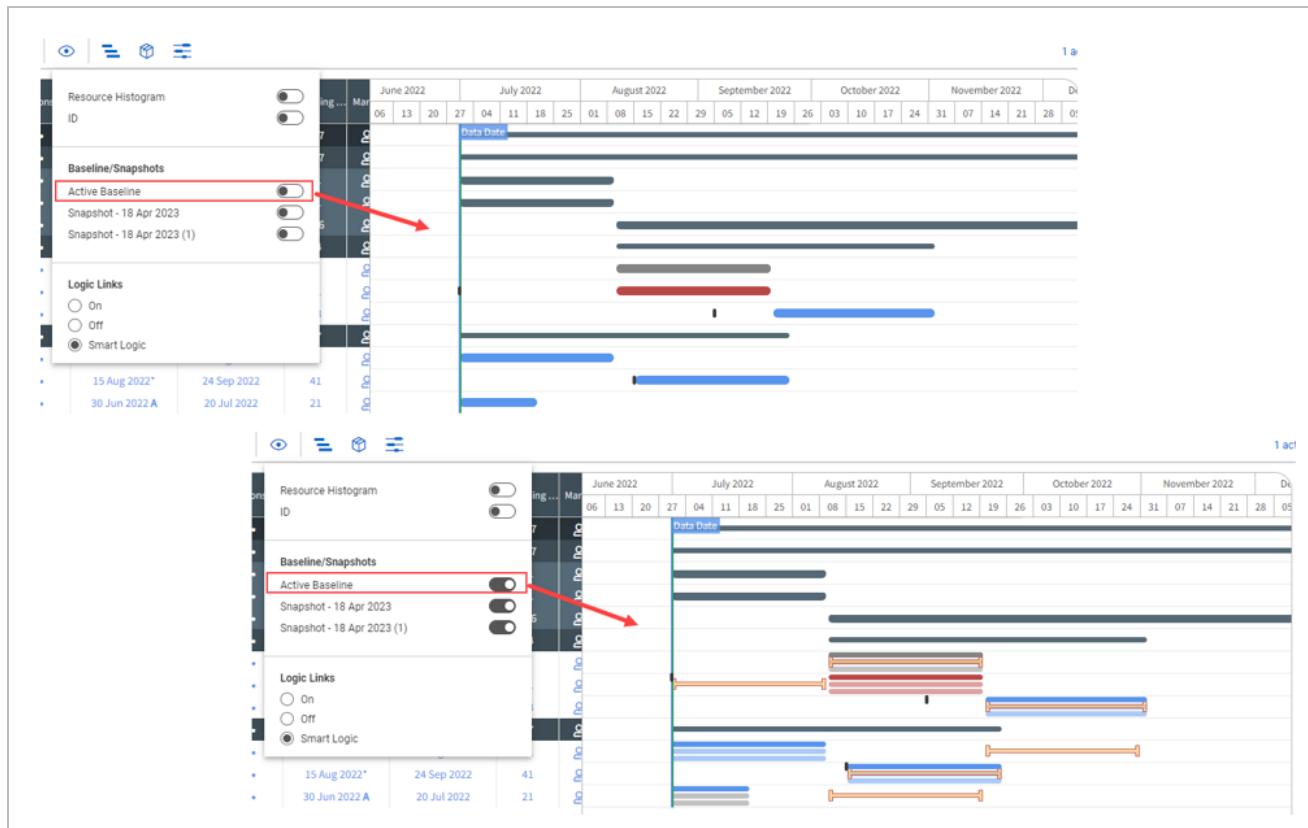


Select *Revert to default* to return to the previously assigned defaulted schedule.



Active baseline

The images below show what the Gantt chart illustrates when the active baseline is turned off and then on.



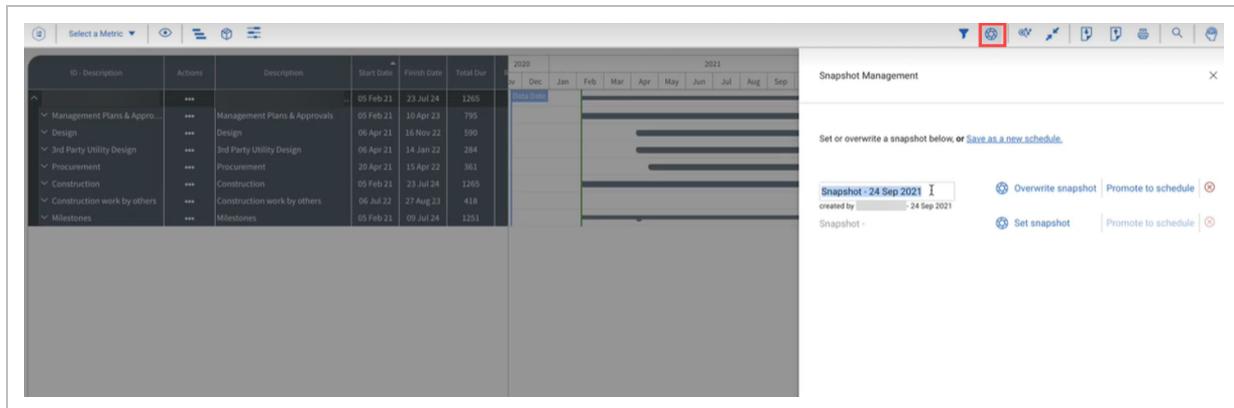
7.0.3.7 Create a snapshot

The following step-by-step walks you through how to create a snapshot.

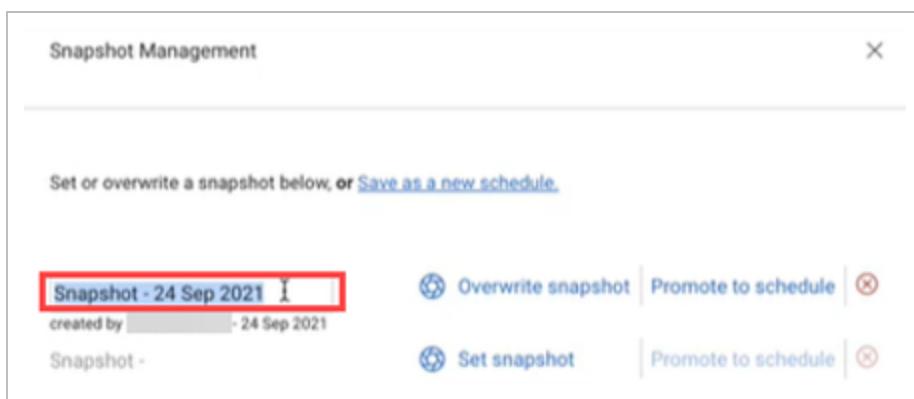
You can only create snapshots from the Plan view.

Create a snapshot

1. From the Plan view, select the **Snapshot** button in the toolbar. The Snapshot Management menu opens.



2. In the Snapshot Management menu, select **Set snapshot**. The snapshot automatically saves as Snapshot – [date].
3. Click the **Edit** icon next to the snapshot name to change the dialog box into an editable text box.



7.0.3.8 Overwrite a snapshot

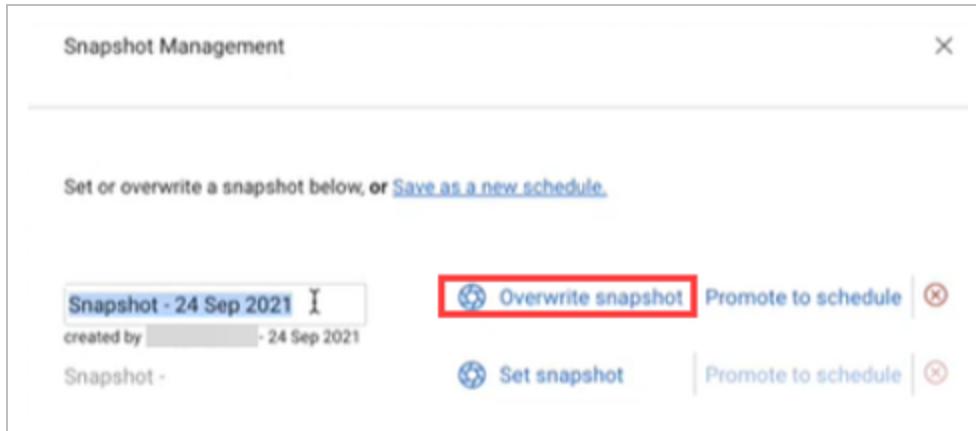
You can overwrite a previous snapshot if the information saved in the first snapshot does not have the most up-to-date information.

If another user saved the snapshot you want to overwrite, confirm with that user that the information in the snapshot to be overwritten is no longer needed.

The following step-by-step walks you through how to overwrite an existing snapshot.

Overwrite a snapshot

1. From the snapshot Management menu, find the snapshot you want to overwrite.
2. Select **Overwrite snapshot**.



The old snapshot is overwritten and a new snapshot is saved in that snapshot slot.

Analysis View template

The Analysis View template works alongside the snapshots. This view lets you bring in new columns from SN1 Actual Finish to the additional variance columns. These columns are used in snapshots to compare information between snapshots and the current project. This template includes anything with a snapshot or a variance.

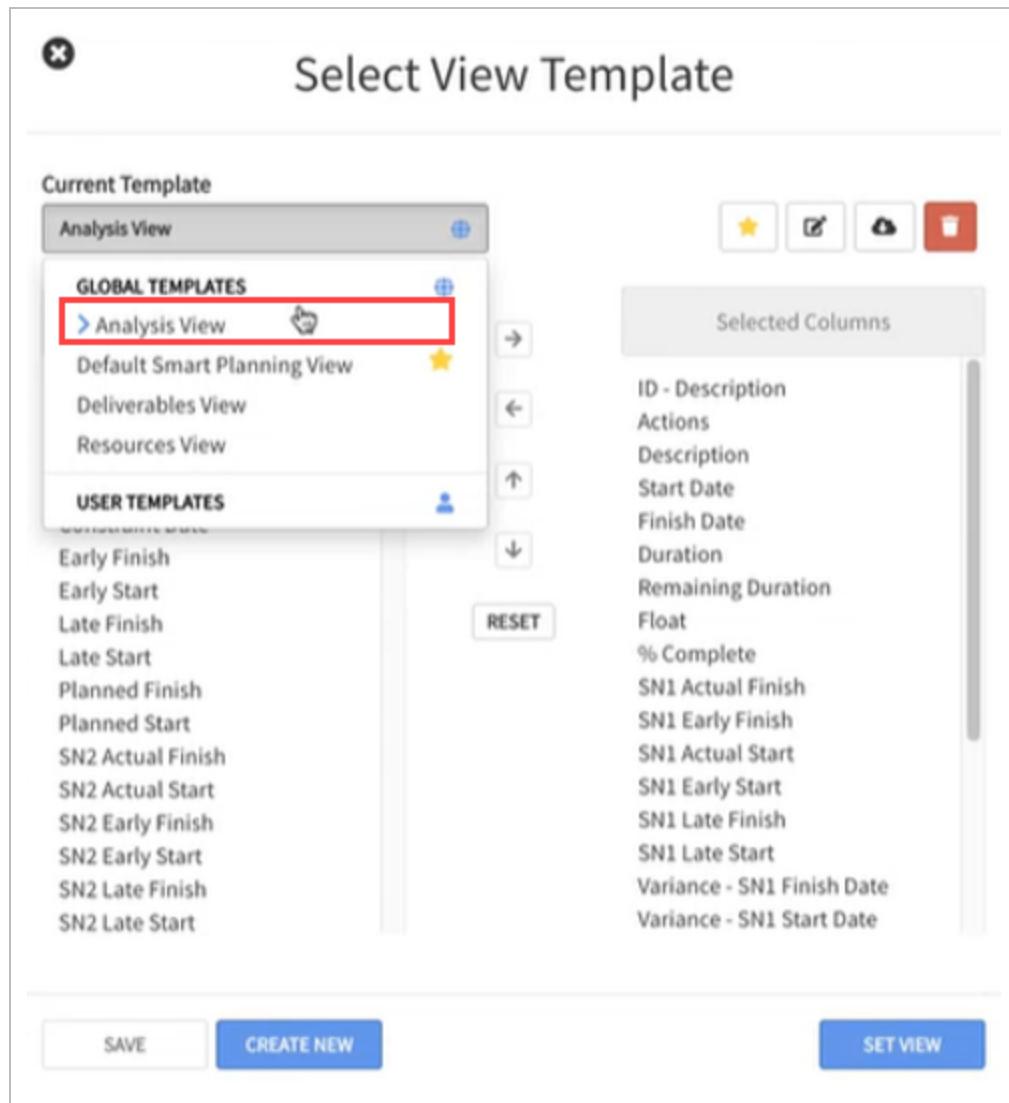
The following step-by-step walks you through how to select the Analysis View template.

Analysis View template

1. In the toolbar, select the **Select View Template** icon.

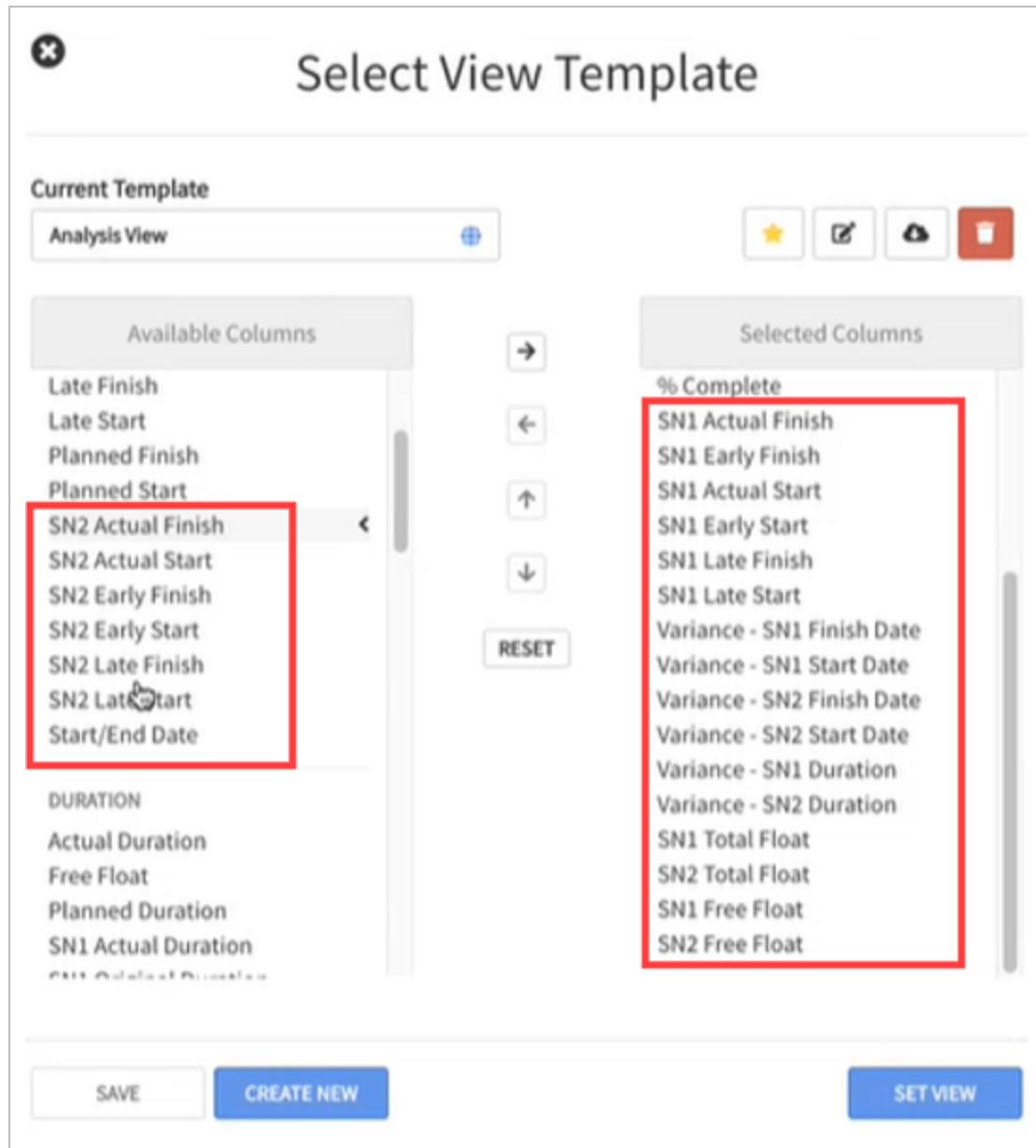


2. In the Current Template field, select the blue icon on the right. A drop-down menu opens.



3. Under Global Templates, select **Analysis View**.

Columns that are available for viewing snapshot changes are available in this template. You can also add any available columns to the template as needed.

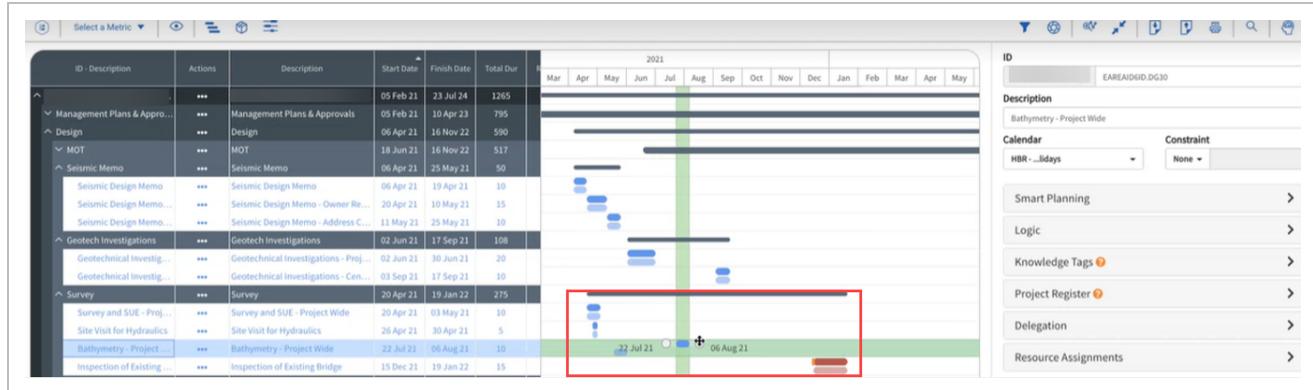


4. Use the arrows to move the columns over to the Selected Columns column as needed.
5. After the Analysis View template has been edited, select **Set View** to add the columns to the Gantt chart.

7.0.3.9 View snapshots in the Gantt Chart

After the snapshot has been created, your Gantt chart is updated with bars for the information that relates to the current schedule status and the snapshot status. The darker bars can be moved to

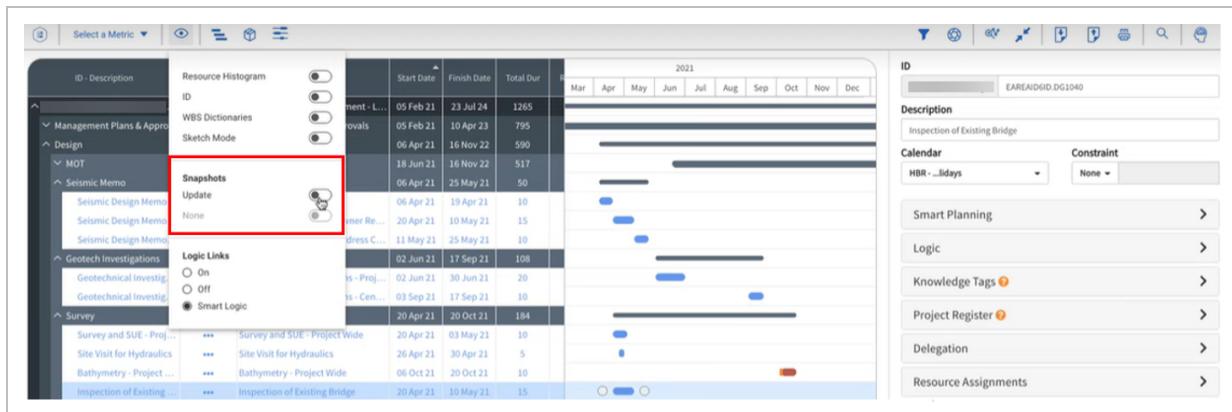
change the schedule on the Gantt Chart. The lighter bars represent the snapshot. The bars are blue when the schedule is not critical and red if they are critical.



The following step-by-step walks you through how to view existing snapshots on the Gantt Chart.

View snapshots

1. In the toolbar, select the **View options** icon.
2. Under the **Snapshots** section, select the slider for the snapshot you prefer to see in the Gantt chart. A drop-down menu opens.

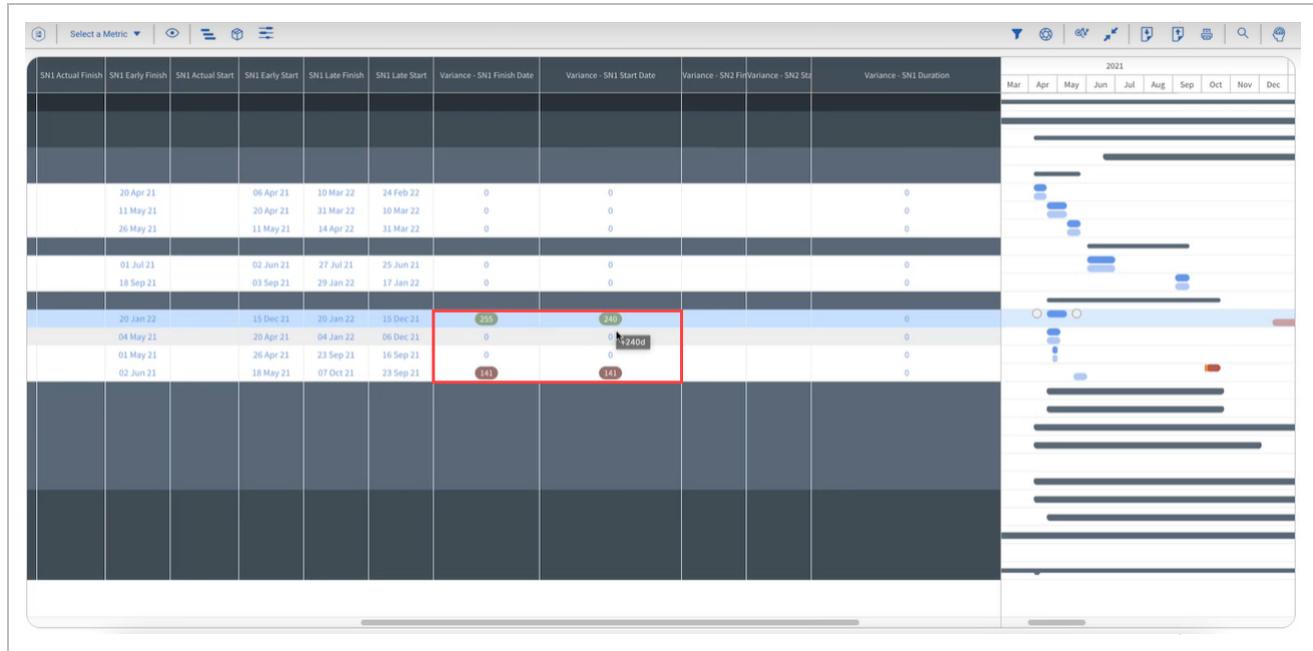


Two bars now show for items in the Gantt chart. You can move around the darker blue or darker red bars. The lighter bars represent the information saved in the snapshot and cannot be moved.

7.0.3.10 Variance Columns

Each variance column compares the snapshot to the current project.

The columns show a badge depending on how the information changed. If there is a net zero change, then no badge appears. For example, the variance columns might show a green badge number if there is a decrease in duration between the snapshot and the current project. The badge numbers could also show in red if the duration increased between the snapshot and the current project. If there is no change between the snapshot and project, the number shows as 0.



7.0.4 Promote to Schedule

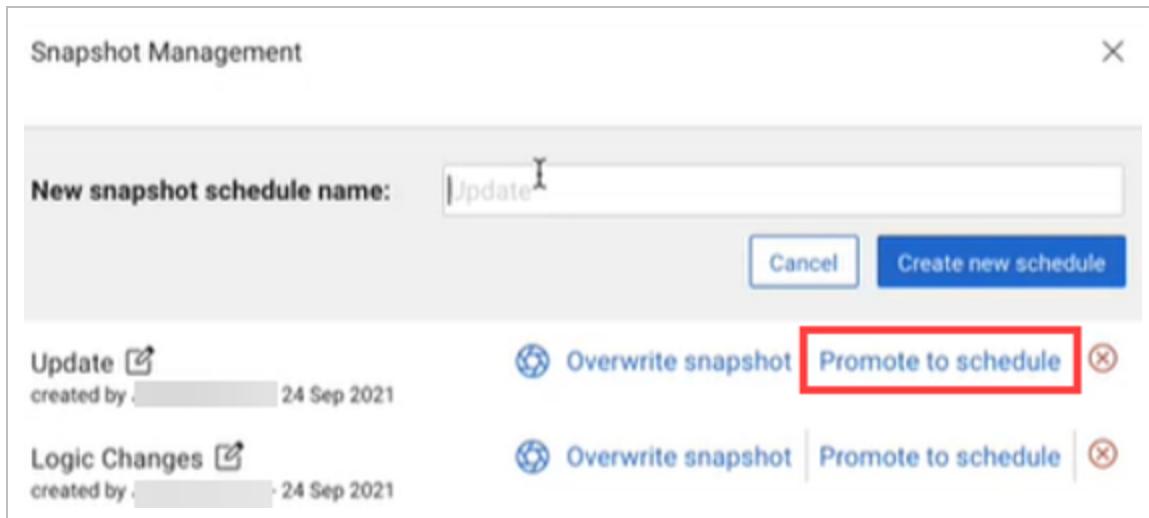
When you choose to promote a snapshot to schedule or to save a snapshot as a new schedule, the snapshot selected is then saved to the project list.

Promote to Schedule saves a snapshot to the project list. If you select **Save as a new schedule**, this option saves the current project as a copy onto the project list view as a new schedule.

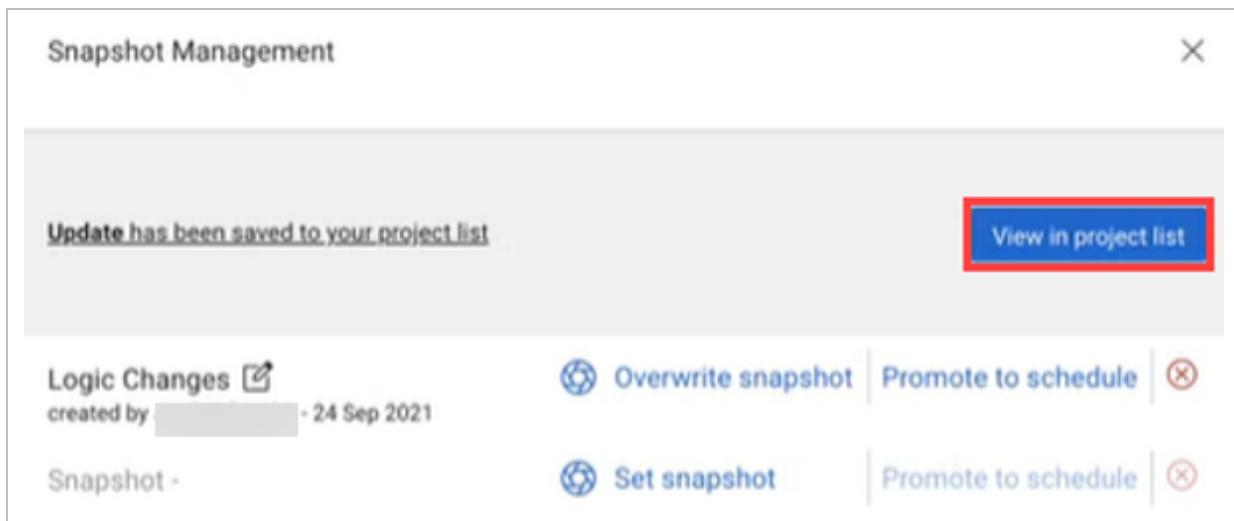
The following step-by-step walks you through how to save a snapshot to the project list.

Promote to Schedule

1. In the Snapshot Management menu, click the **Promote to Schedule** button.



2. If preferred, enter a new name for the snapshot in the New snapshot schedule name field.
3. Click **Create new schedule**. The new schedule has been saved to the project list.
4. Click **View in Project List** to view the new schedule.



7.0.4.11 Project list view

You can organize your schedules in project folders. Project folders can be created in the project list to better organize schedules into a project hierarchy. You can list as many schedules as needed under

each project workspace.

The projects can be organized alphabetically using the column header sort function. Use the options from the Action menu on folders to perform the following:

- Edit Project Workspace Name
- Move schedules
- Delete

Projects	Schedule ID	Start	Finish	Schedule Type	Data Date	Markup
new workspace						
1	SCHED-130					
1	SCHED-129					
1 - Promo 2						

A context menu is open over the '1' folder, with the 'Edit Project Workspace Name' option highlighted. The 'Edit Project Workspace Name' option is highlighted with a red box.

Use the options from the Action menu on individual schedules to perform the following:

- Edit Schedule Name
- Edit Schedule ID
- Move schedule
- Copy
- Delete

Projects	Schedule ID	Start	Finish	Schedule Type	Data Date	Markup
new workspace						
1	SCHED-130	23 Sep 2021	23 Sep 2022	Estimate	23 Sep 2021	● ★
1	SCHED-129	13 Jul 2021	30 Jul 2022	Estimate	13 Jul 2021	● ★
Test						
duplicate name	12345678910111213141-1	24 Sep 2021	24 Sep 2022	Estimate	24 Sep 2021	● ★
duplicate name Copy	12345678910111213141-1	24 Sep 2021	24 Sep 2022	Estimate	24 Sep 2021	● ★

A context menu is open over the 'SCHED-130' schedule, with the 'Move schedule' option highlighted. The 'Move schedule' option is highlighted with a red box.

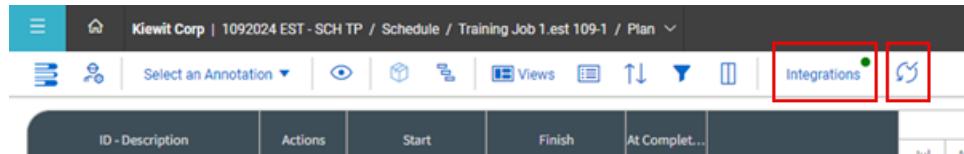
You can also edit the Schedule Type for each schedule. By default, the Schedule Type field is set to **Estimate**.

If you do not organize your schedules into specific project folders, then the schedule is placed under the None folder by default.

If you import a project file into Schedule, you must include the Schedule ID, Schedule Name, and a Project Workspace.

Integrations

The Integrations and Update buttons show in the Plan view toolbar. Click **Integrations** to see the InEight products currently integrated with Schedule, which currently only includes InEight Estimate. The green circle icon on the button indicates there is an active integration in Schedule. The Update button is used to pull the data changes made to the InEight product (Estimate) in to Schedule.



After you click **Update**, changes cannot be made to the schedule until the update is completed.

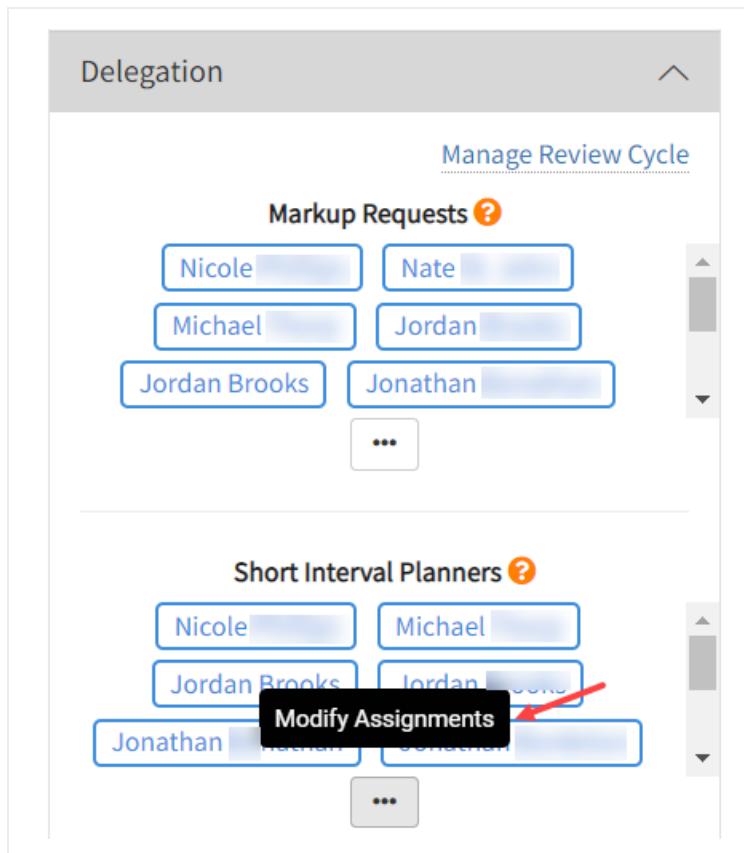
To integrate Estimate job data with Schedule workspaces, see Integrated Solutions [InEight Integration Estimate-Schedule](#) for more information.

CHAPTER 8 – SCHEDULE MARKUP PROCESS

Markup Process Overview

Assigning Markup

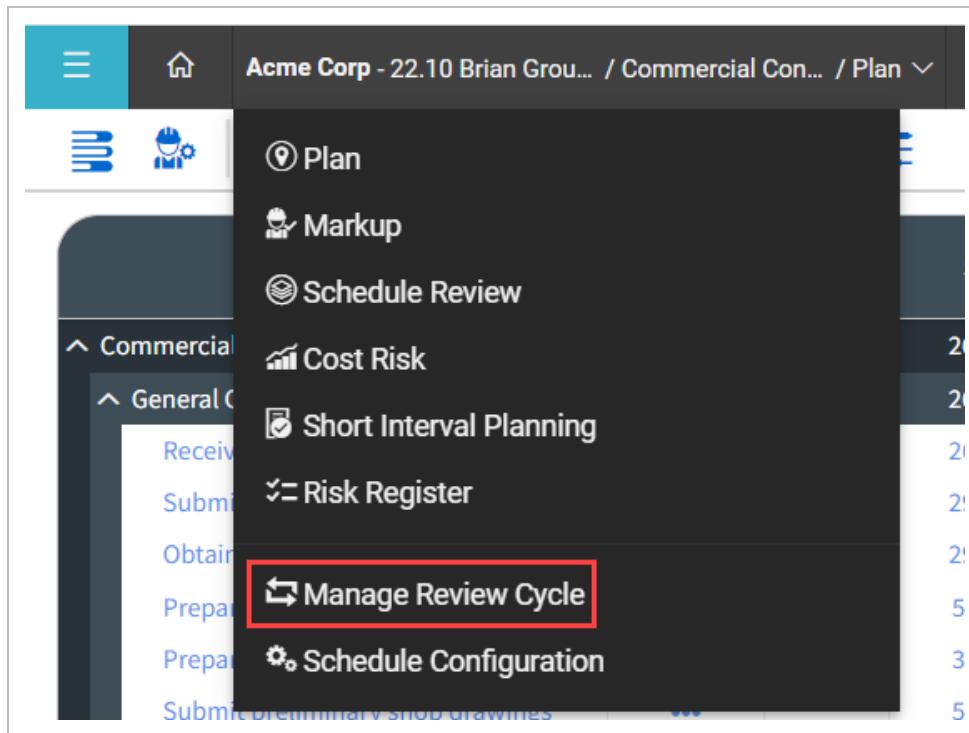
Markup is assigned in the plan project view from the first level drop-down menu in a project. Select a project WBS summary level, then expand the delegation panel and click the **Modify Assignments** icon, where users can be assigned at various levels within the schedule to provide markup.



Click the **blue ellipse** icon and select users to assign to WBS elements.

Initiating the 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.



Assigned contributors and a review message can be validated here. After the Start Review Cycle button is clicked, an invitation email is sent to contributors.

Schedule User Guide

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

Please review before end of week

Register Threshold
Difference in BASIS Duration and Team Member Markup that requires a Register entry

Team Member Markup

Assignee	Team Contribution			Last Accessed	Ready For Review?	Show Whole Project	Show Cost	Clear Markup
Ben Heights	38% (3)	50% (4)	13%	4 months ago	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Allen Paddock	38% (3)	13%	50% (4)	1 week ago	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Paul Self	13%	50% (4)	38% (3)	4 months ago	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Christy Tuppence	100% (8)			4 months ago	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Overall	22% (7)	53% (17)	25% (8)			REMOVE ALL		

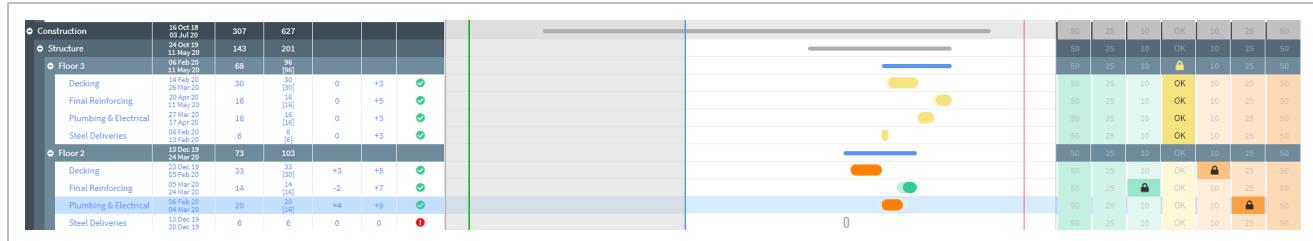
Uncertainty
Export project uncertainty ranges generated from team member markup to a risk analysis tools - Oracle PRA (Pertmaster) or Deltek Acumen Risk

EXPORT USER MARKUP

EXPORT FORMAT

Marking up the Schedule

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



Reviewing Markup

After Markup is complete, group consensus and individual responses can be assessed from the Review project view from the first level drop-down menu in a project. Consensus is indicated by the signal bars in the tabular WBS view, and individual responses can be viewed by selecting a WBS element and looking in the Duration Uncertainty slide-out panel to the left.

The screenshot shows a detailed project schedule for 'Vasey Building (Exp. Confidence Scenario)' with tasks like Steel Deliveries, Foundations, and Early Sitework. On the right, a 'Duration Uncertainty' dialog box is open, allowing users to set uncertainty types (Markup or Manual), layers (Deterministic, AP, BH, ST), and distribution types (Triangular or Uniform). It also includes a histogram for visualizing the distribution between minimum and maximum values, and a 'Commit' button to apply changes.

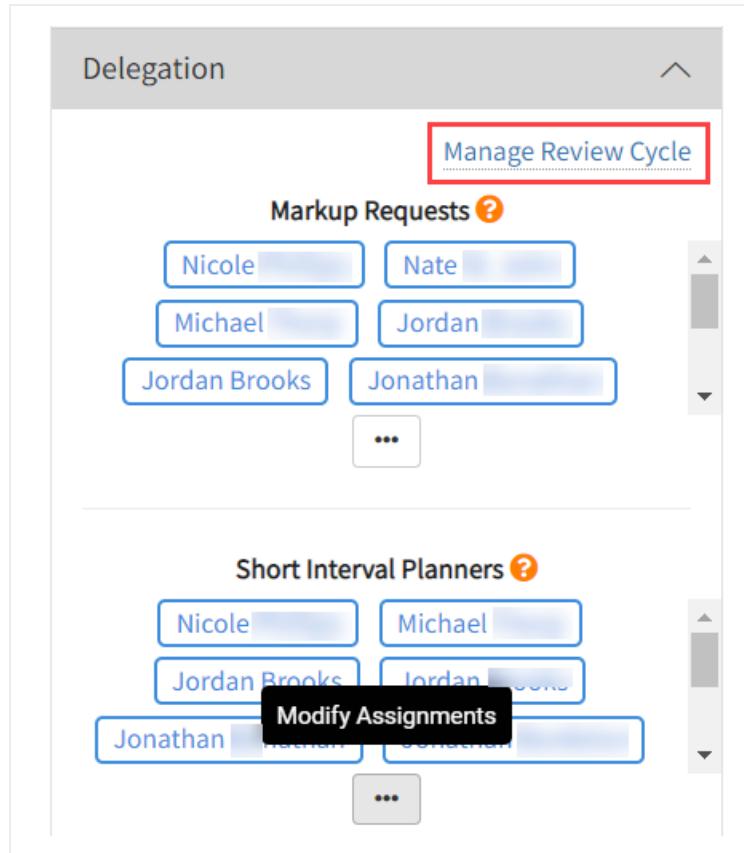
After a review is complete, the cycle can be ended by returning to the Manage Review Cycle page, and clicking **End Review Cycle**.

Initiating the Review Cycle

Now that users have been assigned to various sections of the schedule, you can initiate a review cycle. This will send a notice (email) to contributors assigned to provide markup, notifying them that they may start their review.

Opening the View Cycle

1. To access the Review Cycle settings, open the **Delegation tab** from Iris and select **Manage Review Cycle**.



In the Manage Review Cycle screen, settings can be adjusted prior to initiating the cycle.

The Manage Review Cycle window opens.

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

22.10 Markup Group Testing! Let's Markup!

Register Threshold
Difference in Schedule Duration and Team Member Markup that requires a Register entry

Team Member Markup

Assignee	Team Contribution	Last Accessed	Ready For Rev...	Show Whole P...	Show Cost	Clear Markup
Brian Mikinski	66% (85) 17% (22) 12%	9/30/22	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Nicole Phillips	51% (66) 16% (21) 27% (35)	10/12/22	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Jonathan Bordelon	29% (38) 50% (64) 16% (20)	10/12/22	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Brian Basis Planning Mikinski	36% (47) 11% 39% (50)	10/27/22	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Nate St. John	15% (19)	10/19/22	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Jonathan Bonathan	Not started		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Jonathan Bordelon	Not started		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Jordan Brooks	Not started	11/9/22	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Register Threshold

If a markup is provided with a schedule duration adjustment more higher than the value defined, a Project Register Event is required with the markup.

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

22.10 Markup Group Testing! Let's Markup!

Register Threshold
Difference in Schedule Duration and Team Member Markup that requires a Register entry

Team Member Markup

Assignee	Team Contribution	Last Accessed	Ready For Rev...	Show Whole P...	Show Cost	Clear Markup
Brian	66% (85) 17% (22) 12%	9/30/22	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

A red box highlights the "Register Threshold" section. A red arrow points from this box to a dropdown menu on the right, which is also highlighted with a red box. The dropdown menu shows the following options: "None" (selected), "+/- 10%", "+/- 25%", and "+/- 50%".

Team Member Markup

The Team Member Markup, shows a list of users who have permissions to provide feedback.

To remove reviewers, go back to Plan view and use the Iris to unassign them as Markup Contributors.

Team Member Markup								
Assignee	Team Contribution			Last Accessed	Ready For Rev...	Show Whole P...	Show Cost	Clear Markup
Brian [REDACTED]	66% (85)	17% (22)	12%	9/30/22	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="checked" type="checkbox"/>	
Nicole [REDACTED]	51% (66)	16% (21)	27% (35)	10/12/22	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Jonathan [REDACTED]	29% (38)	50% (64)	16% (20)	10/12/22	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Brian [REDACTED]	36% (47)	11%	39% (50)	10/27/22	<input checked="checked" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Column	Description
Assignee	First and Last name of contributor.
Team Contribution	Visual percent complete of items reviewed vs assigned.
Last Accessed	Last instance the contributor was in the Schedule system.
Ready for Review?	Confirmation the contributor has finished their markups.
Show Whole Project	Toggle if contributors see the whole project or only items they are assigned to.
Show Cost	Toggles if cost is shown when providing markups.
Clear Markup	Clear/delete markups made.

Export Options

The Export User Markup function lets you export the markup data to excel after the review has been completed. This creates an archive of the data for reference.

EXPORT USER MARKUP

Markups can only be exported per cycle. Once a new cycle is initiated, the previous cycle is overwritten. Exporting after a cycle saves the data before it is overwritten.

8.0.0.1 Start/Stop a Review Cycle

Once all the Review Cycle settings have been set, select the Start Review Cycle button at the top of the page in . This will begin the review cycle for Project Contributors to provide feedback and markup the schedule.

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

22.10 Markup Group Testing! Let's Markup!

Generate a Review Cycle

1. **Select Manage Review Cycle.** The team members that you added are listed but they have not taken any action yet

Team Member Markup								
Assignee	Team Contribution			Last Accessed	Ready For Rev...	Show Whole P...	Show Cost	Clear Markup
Brian Mikinski	66% (85)	17% (22)	12%	9/30/22	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Nicole Phillips	51% (66)	16% (21)	27% (35)	10/12/22	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Jonathan Bordelon	29% (38)	50% (64)	16% (20)	10/12/22	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Brian Basis Planning Mikinski	36% (47)	11%	39% (50)	10/27/22	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

2. Switch the Show Whole Project to **ON** for the persons you want to be able to view the entire project schedule. By default the markup users only see the section of the project that you have assigned them to

Team Member Markup								
Assignee	Team Contribution			Last Accessed	Ready For Rev...	Show Whole P...	Show Cost	Clear Markup
Brian Mikinski	66% (85)	17% (22)	12%	9/30/22	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Nicole Phillips	51% (66)	16% (21)	27% (35)	10/12/22	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Jonathan Bordelon	29% (38)	50% (64)	16% (20)	10/12/22	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Brian Basis Planning Mikinski	36% (47)	11%	39% (50)	10/27/22	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3. Enter your message to provide guidance to the 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

Please review.

4. Click **Start Review Cycle**.
5. Click **Yes** to updating the project baseline.

Do you want to update the Project Baseline before beginning this Review Cycle?

Project Baselines allow you to visualize the impact of the Markup Review process.

YES **NO**

As markups are being made, you can refresh the Manage Review Cycle page to see what percent complete contributors are with their markups

Team Member Markup						Show Whole Project	Show Cost	Clear Markup
Assignee	Team Contribution	Last Accessed	Ready For Review?					
Allen Paddock	25% 15% 58% (28)	2 years ago	<input type="checkbox"/>	<input type="checkbox"/>	Delete			
Ben Heights	17% 29% (14) 52% (25)	2 years ago	<input type="checkbox"/>	<input type="checkbox"/>	Delete			
Christy Tuppance	31% 15% 40% (19)	2 years ago	<input type="checkbox"/>	<input type="checkbox"/>	Delete			
Bridgette Quintero	10% 24%	5 months ago	<input type="checkbox"/>	<input type="checkbox"/>	Delete			
Susan Cappelloni	20%	2 years ago	<input type="checkbox"/>	<input type="checkbox"/>	Delete			
Overall	22% 16% 46% (78)			REMOVE ALL				

EXPORT USER MARKUP

The color coding of the Team Contribution visualizes the summaries:

- Green:** Percent of items marked up reducing duration
- Orange:** Percent of items marked up increasing duration
- Yellow:** Percent of items marked as planned duration is OK
- White:** Percent of items pending review

6. Click **End Review Cycle** after markups have been submitted.

End Review Cycle

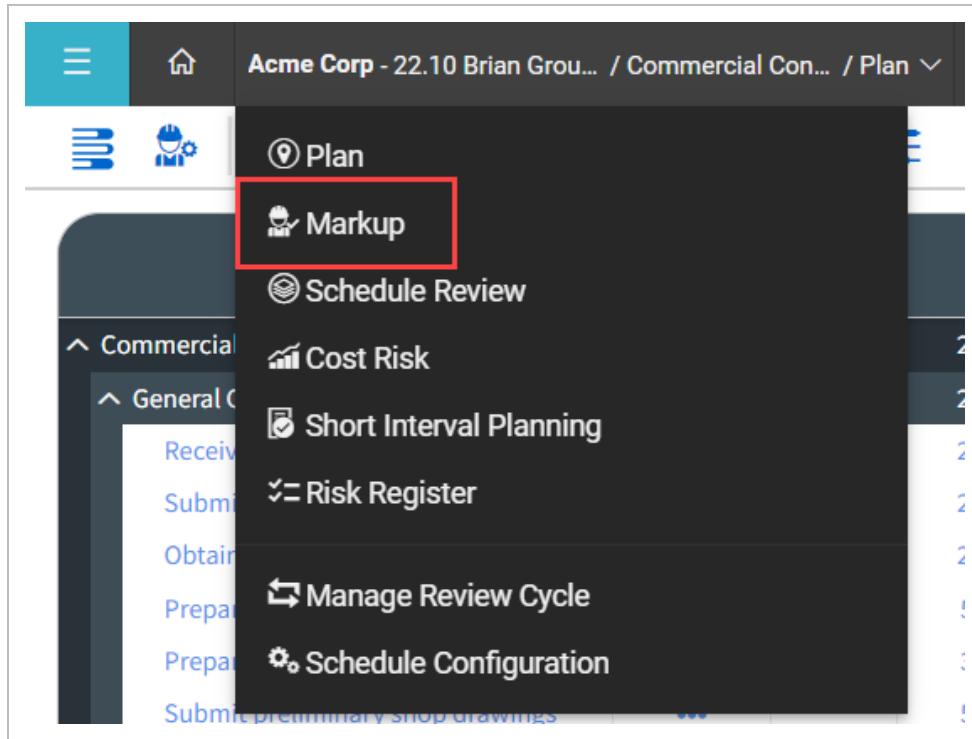
End Review Cycle to review Markup from team members

END REVIEW CYCLE

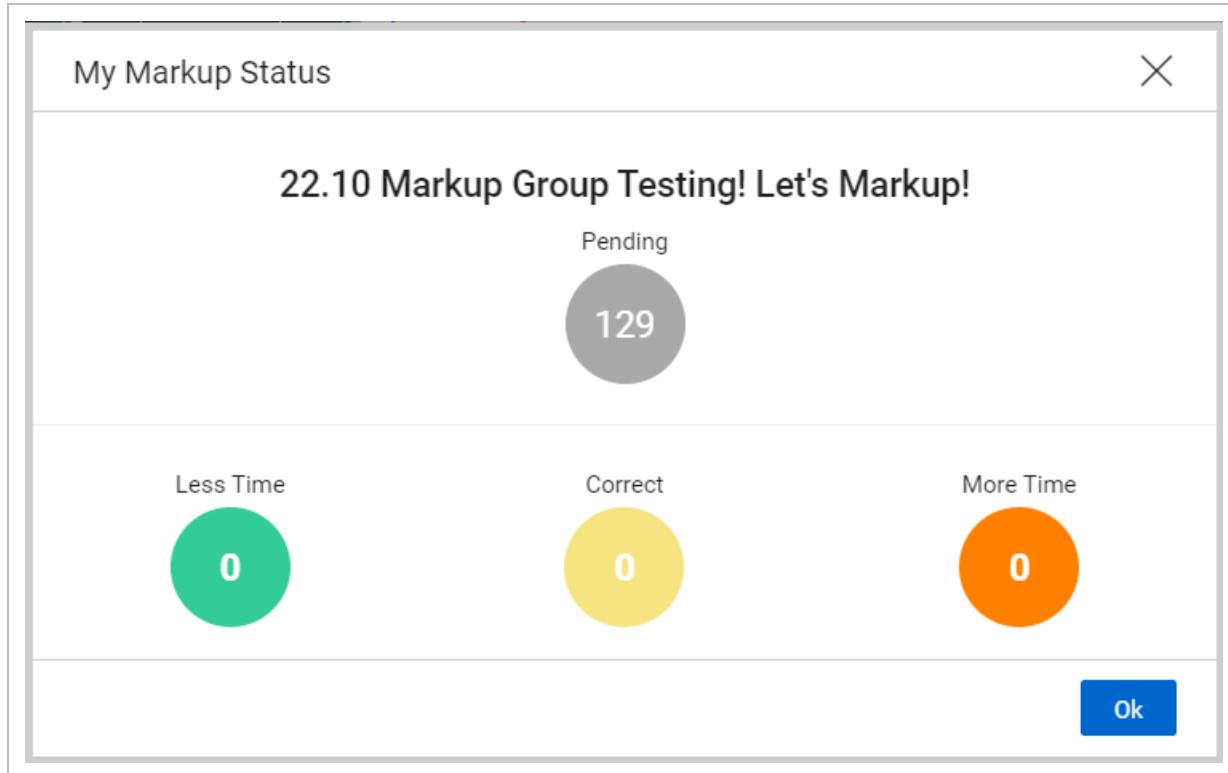
Marking Up the Schedule

8.0.0.2 Uncertainty

User assigned sections for markup and review can begin to provide feedback in the Markup view.

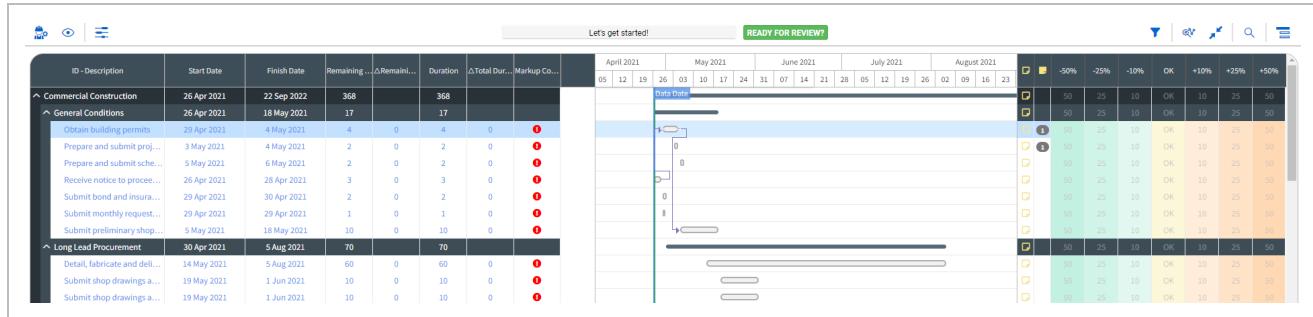


The My Markup Status confirmation box opens to show markup status information.



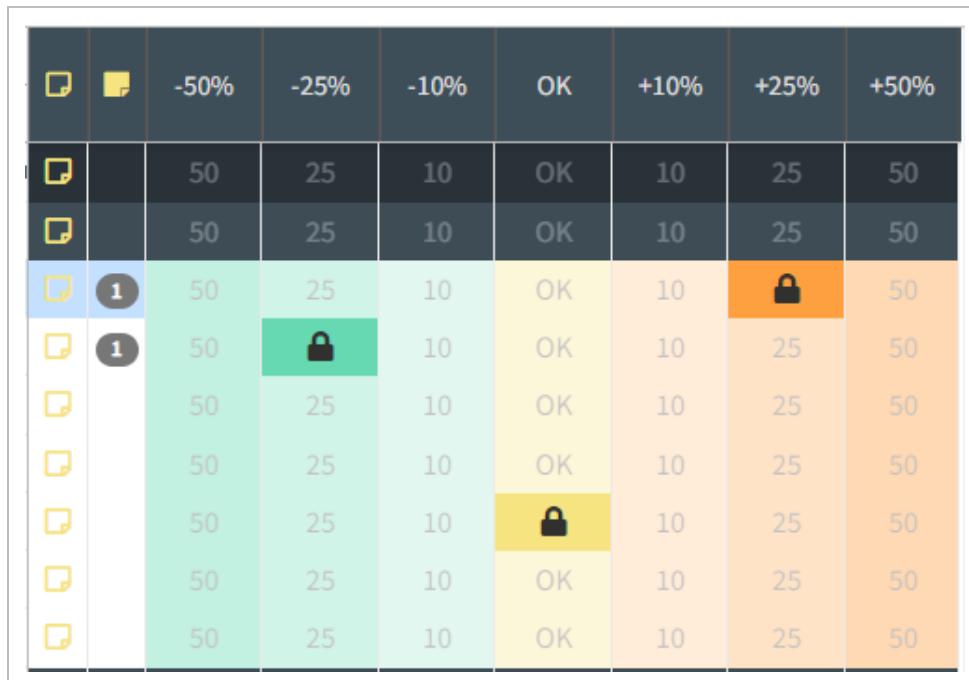
After the schedule is in the Markup view, contributors can begin to give feedback on the schedule. Markups made to increase or decrease durations on the schedule in turn generate uncertainty.

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

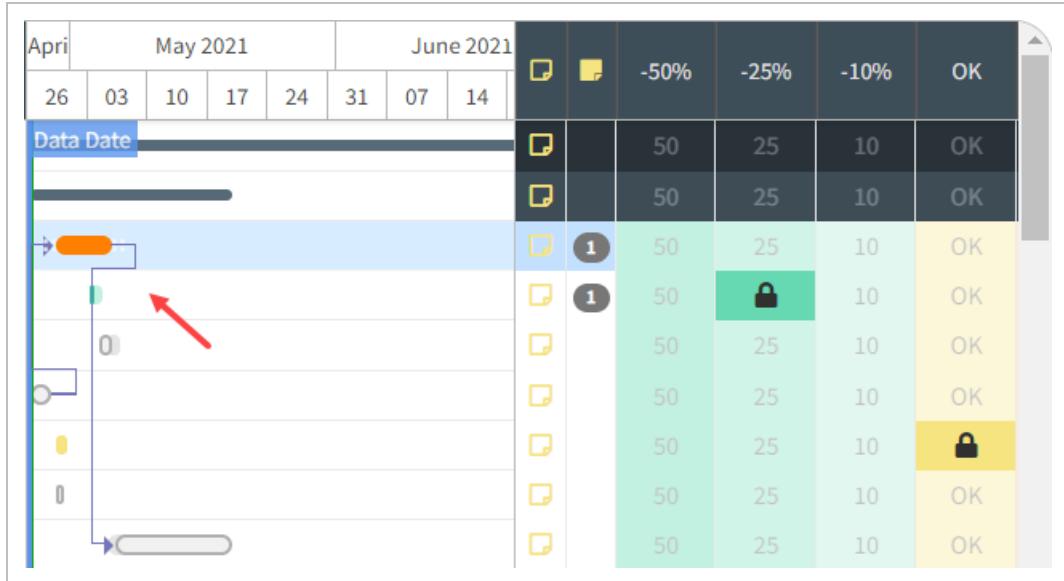


Scorecard Values

The scorecard provides a quick and easy way to give an estimate of whether the planned durations need to be increased or decreased. Selecting a percentage increases or decreases the duration by that amount.

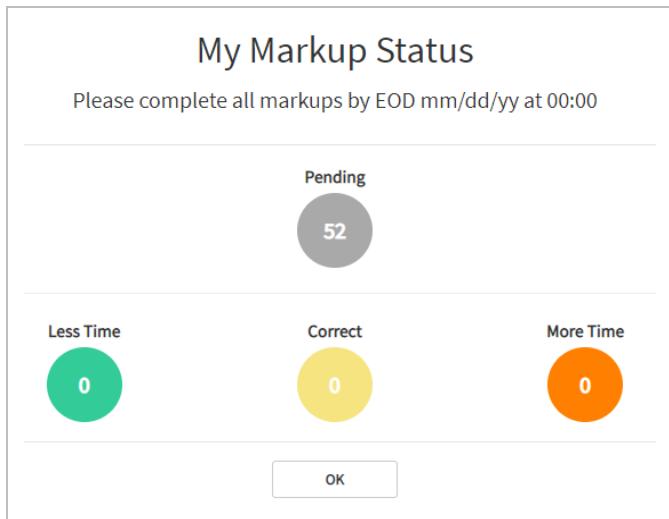


As markups are made on the scorecard, the bars on the Gantt chart adjust accordingly. This gives project contributors a live view of how the schedule is impacted by their markups.

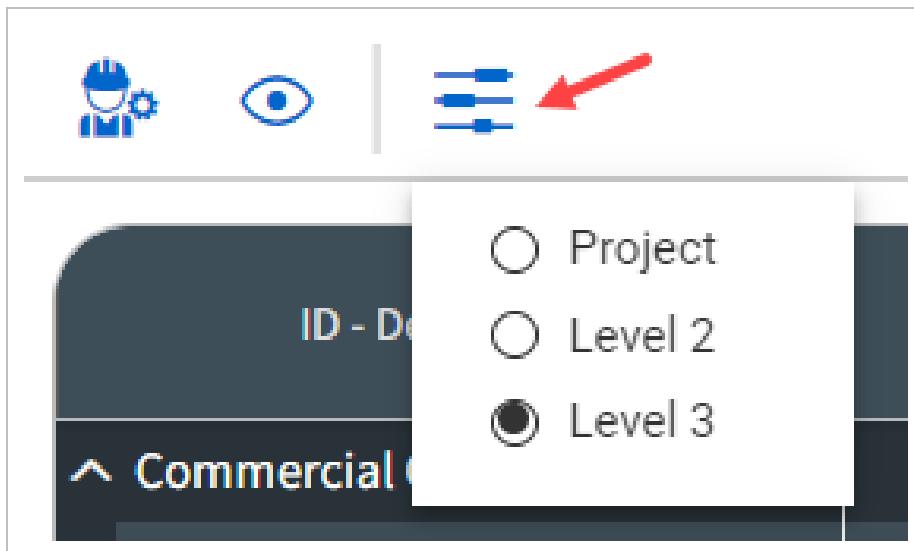


Marking Up the Schedule via the scorecard

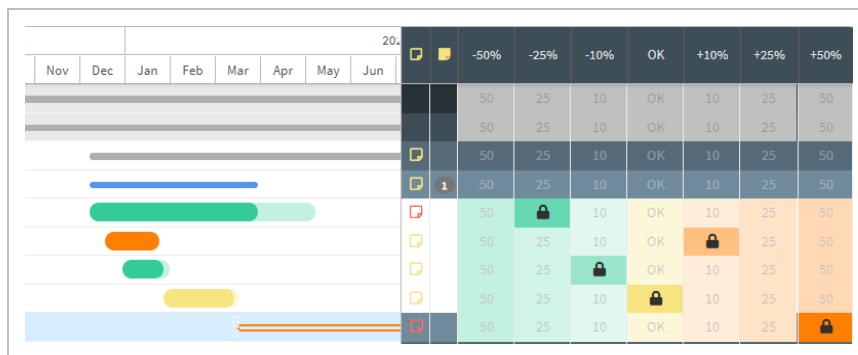
1. Open the Markup view. The markups made by the individual user are summarized
2. Under My Markup Status, look for Review Cycle Notes.
3. Click **OK** to close.



4. Adjust the detail slider to the right to see all activities assigned for review.

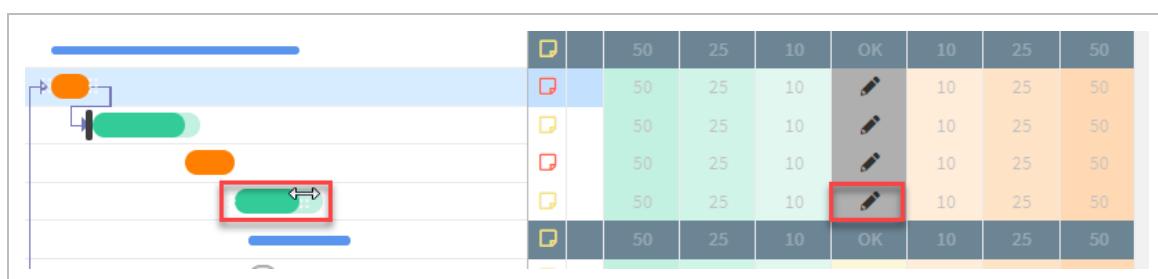


5. Go to the scorecard and adjust activities by selecting a markup score. Activities should show a Lock icon once selected, confirming the markup made.



6. Go to the Gantt chart and slide the start or end bars around to adjust duration.

- The scorecard will change the icons to a pencil, signifying a custom duration adjustment was made.



Markups meeting or exceeding the threshold, established in the Manage Review Cycle settings, will change the Event Register icon to red, signifying the user is to add an event to the Events Register.

	50		10	OK	10	25	50
	50	25	10	OK		25	50
	50	25		OK	10	25	50
	50	25	10		10	25	50
	50	25	10	OK	10	25	

This page intentionally left blank.

CHAPTER 9 – SCHEDULE REVIEW PROCESS - RISK OVERVIEW

Review And Risk Process Overview

The Review process is where you can review feedback from markup, and apply a variety of intelligence rankings in order to run a risk assessment on your project.

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

A **Risk Event** is an external factor where events are discrete and measurable, such as third-party delays or unexpected labor shortages. It evaluates the probability of the event occurring, the schedule impact should the event occur, and any impact in associated costs.

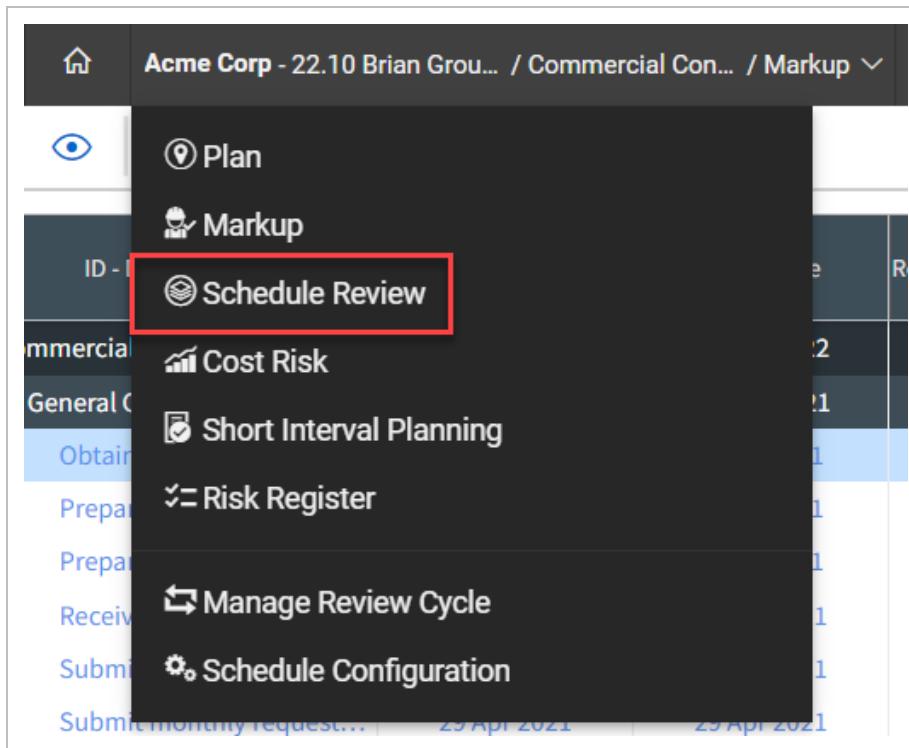
Projects often tend to mix uncertainty and risks events together resulting in less accurate mapping of risk characteristics to projects. It is important to evaluate risk items and place each in their appropriate categories, Uncertainty or Risk Event.

Uncertainty Category	Risk Event Category
 <ul style="list-style-type: none">• Quantity growth• Productivity loss/gain• Evaluates duration/cost realism & plan confidence	 <ul style="list-style-type: none">• External factors such as:<ul style="list-style-type: none">◦ 3rd party delays◦ Labor shortages• Evaluates probability of occurring event plus schedule impact & associated impact costs

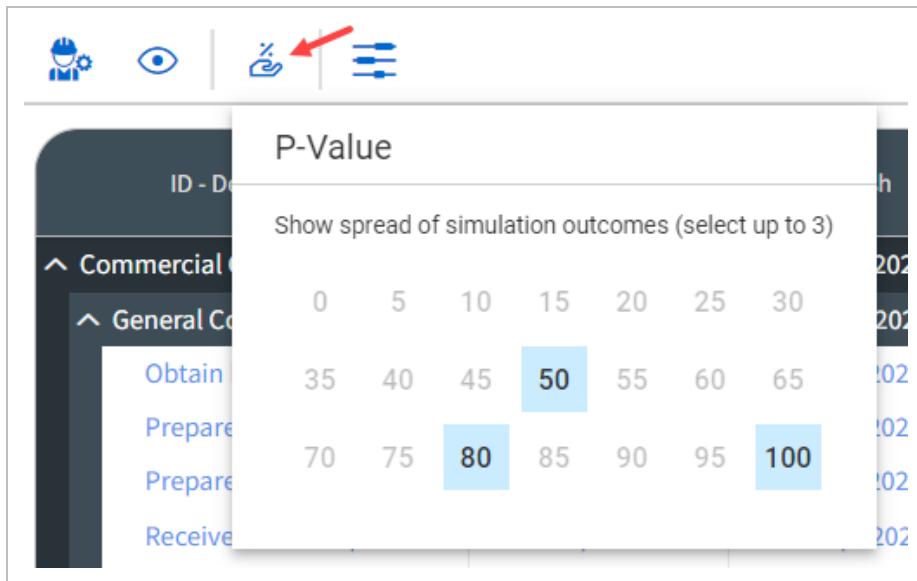
This feedback can come from the Markup process outlined in other topics. From here, the following review process steps can help you conduct a risk assessment utilizing a confidence level, called a **P-value**.

The below steps explain how to generate a Risk Adjust project:

1. From the Project View drop-down, select **Review**.



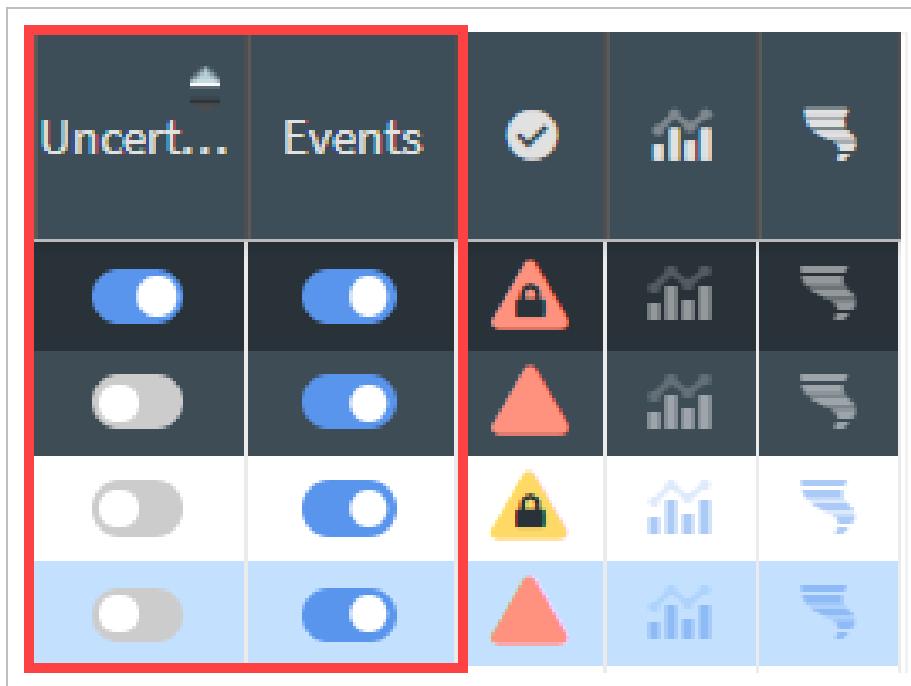
2. Select a P-value for instant insight during the review process by first selecting the **P-value** icon .



- A P-value of 100 represents a worst case scenario, while a value zero represents a best case scenario
- You are assigning a confidence level against a target goal

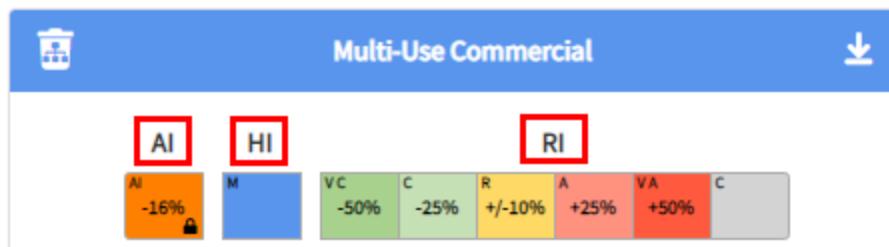
3. Switch the **Uncert** and **Events On/Off** to be applied to the corresponding work package or terminal level.

- This feature includes or excludes that detail in the risk model. It is recommended to begin analysis with both options switched to the *On* position.



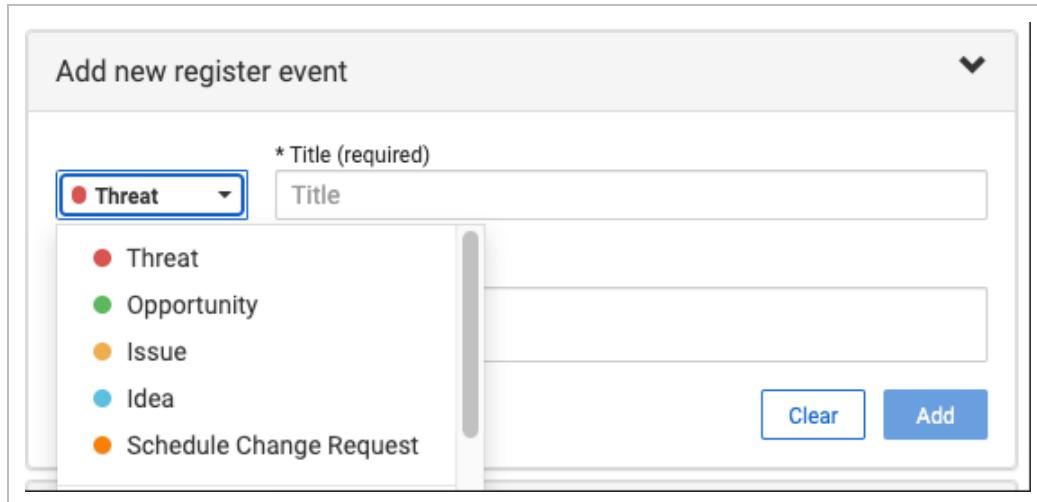
4. Move down the project and review contributor's Uncertainty rankings for each line item.

- When reviewing Uncertainty, there are three main options for generating adjustments to the project: Artificial Intelligence (AI), Human Intelligence (HI), and Risk Intelligence (RI)



5. As needed, assign **Register Events** to project items.

- Any item in a project may be assigned a Register Event
- The default categories are shown below:



Add new register event

* Title (required)

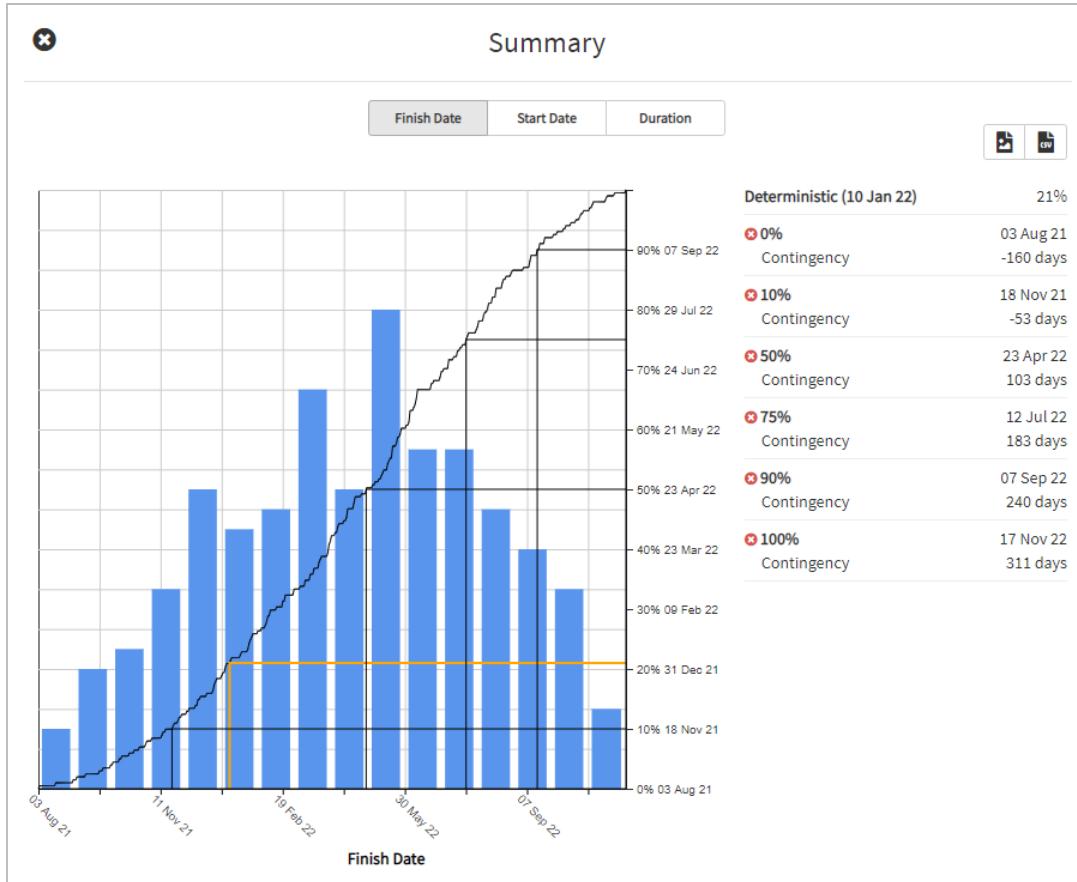
Threat

Threat
Opportunity
Issue
Idea
Schedule Change Request

Clear Add

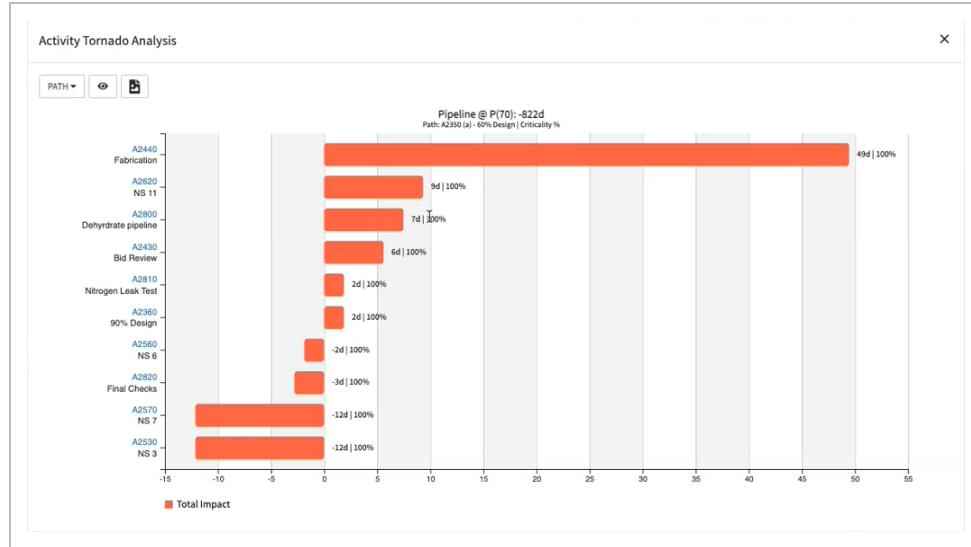
- After all uncertainty and events have been agreed to, you can access two main reports that provide insight into the project's risk:

- Risk histogram 

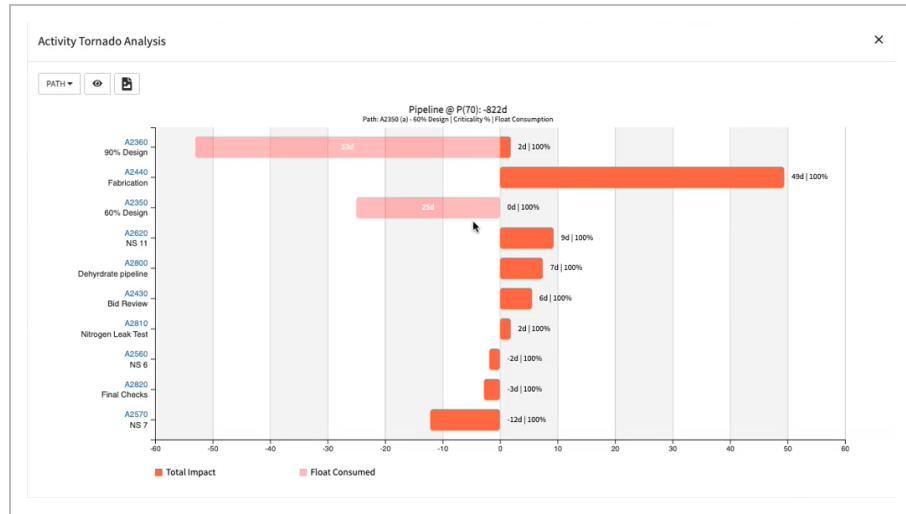


- Tornado analysis 

You can identify how often activities fall upon the critical path during Monte Carlo simulation runs. The image below shows the Criticality % view active.



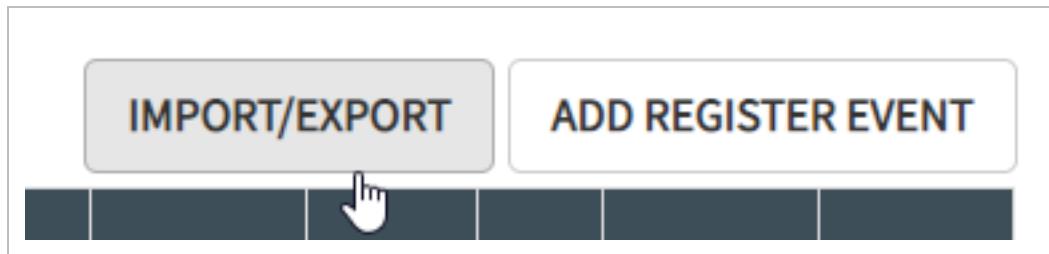
Using Float Consumption, you can visualize hidden risk assignments due to float consumption and compare activity risk tolerance versus net impacts. The image below shows the Float Consumed and the Criticality % views active.



6. Adopt any part of the risk model by selecting **Adopt Markup** or **Apply Uncertainty adjustments to deterministic schedule**. Both options will run a Critical Path Method schedule calculation and generate a new risk adjusted project schedule.

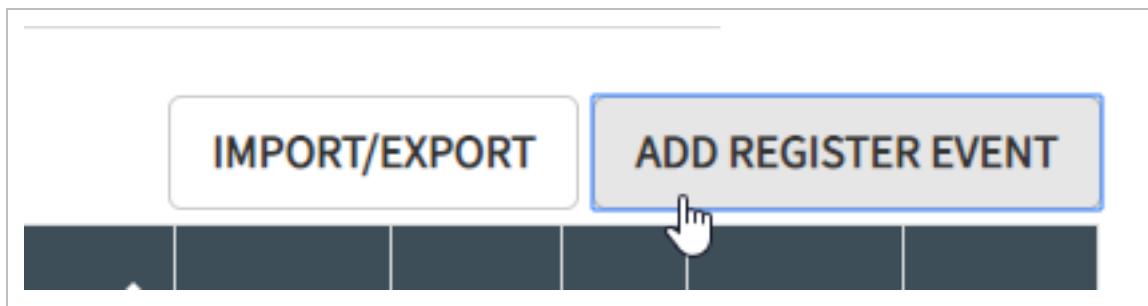
Import/Export

You can Import and Export risks in the project register. There are options for Oracle PRA – Pertmaster and Deltek Acumen. These are simple Excel formats that can also be generated outside of any tool and used for importing into Schedule.

A screenshot of a 'Import' dialog box. It features a close button (X) in the top-left corner and a blue 'Import' icon with a file and arrow symbol in the center. Below the icon is a section labeled 'Action' with 'Import' and 'Export' buttons. A descriptive text below the buttons reads: 'Import new or updated register events and their associations to activities within this project'. Under 'File Format', there are two options: 'Oracle PRA - Pertmaster' and 'Deltek Acumen'. A 'File (.xlsx)' label is followed by a 'Choose File' button and the text 'No file chosen'. At the bottom of the dialog is a large green 'IMPORT' button.

Add Register Event

You can manually add a register event to the project register. Select **Add Register Event** and then define the event type and description.



Risk

of

Event

Cause

Effect

Risk of _____ due to _____ resulting in _____

ADD CANCEL

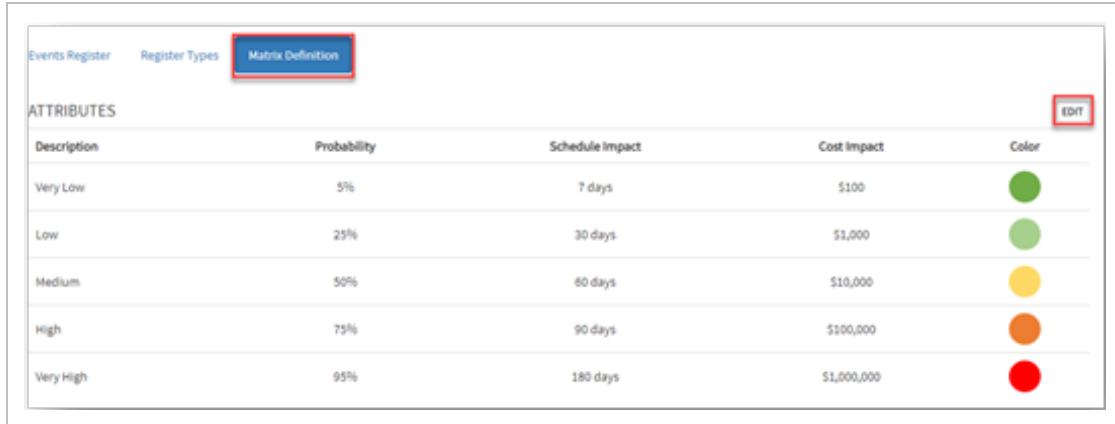
Filter

Select the **filter** icon to enable filtering for the register view.

Active	Id	Type	Description	Mitigation	Probability	Schedule Impact	Cost Impact	Score	Markup	Basis		Publish	Delete

Matrix Definition

The default matrix in the Knowledge Library is adopted when the project is created. The matrix can be tailored by project to create a probability and severity range that is appropriate for the project.



Description	Probability	Schedule Impact	Cost Impact	Color
Very Low	5%	7 days	\$100	Green
Low	25%	30 days	\$1,000	Light Green
Medium	50%	60 days	\$10,000	Yellow
High	75%	90 days	\$100,000	Orange
Very High	95%	180 days	\$1,000,000	Red

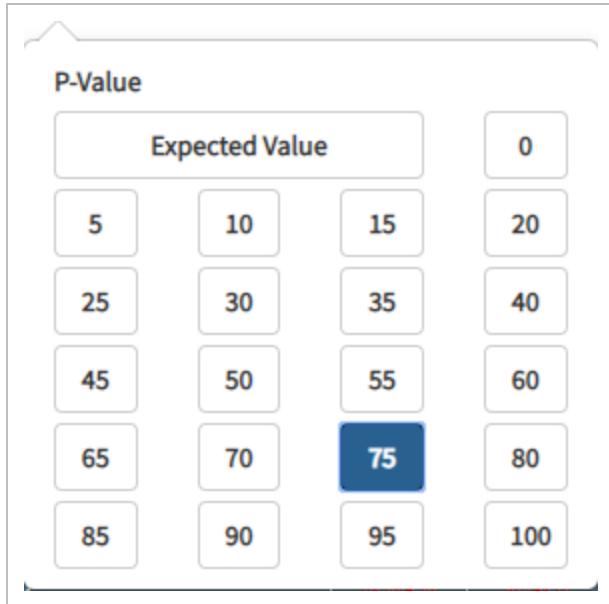
P-Value Overview

Probability Values or **P-values** are the lens with which you can view instant feedback related to the affects risk or opportunity items have on the planned schedule and/or cost structure.

You can interact with P-Value to manipulate your visibility into a risk-adjusted project.



Select a P-value by clicking on the P-value icon to show a drop-down displaying the options for selecting a value.



A P-value of 75 can be interpreted as “we are 75% confident in hitting or beating a target goal”.

The selected P-value shows adjustments to items such as dates and durations. When a risk assignment has an effect to the project, the P-value lens shows in red, how it affects the project. In this example, the duration for “Create Early Stage Construction Docs” increases from a planned duration of 63 to a P-value 75 adjusted duration of 91.

ID - Description	Start Date	Finish Date	Dur	Float	Uncert	Events
Multi-Use Commercial	18 Feb 19 A	07 Jan 22	1055		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	18 Feb 19 A	17 Jan 23	1430			
Preconstruction	18 Feb 19 A	21 Feb 20	369		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	18 Feb 19 A	11 Dec 20	663			
Design	18 Feb 19 A	17 Sep 19	212		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	18 Feb 19 A	26 Jun 20	495			
Create Early Stage Construction Docs	21 Jun 19	17 Sep 19	63	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	21 Feb 20	26 Jun 20	91	0		

Markup Feedback and Consensus

Once a markup cycle has been completed, it is ready for review. When selecting a line item for review, options appear in IRIS located on the right of the panel.

↓

Sitework Permit

AI
HI
RI

AI +4%
HI +14%
VC -50%
C -25%
R +/-10%
A +25%
VA +50%
C

A +14% Markup distribution will be applied.

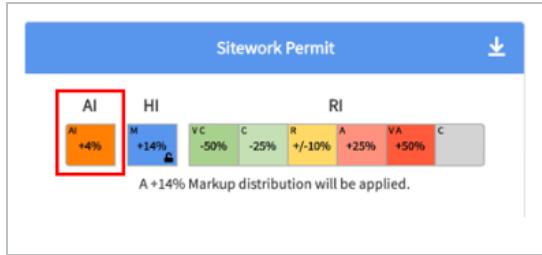
Layer	Rem Dur	Constraint
Deterministic	21	
+3 AA	24	

The reviewer has three options for providing markup feedback:

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

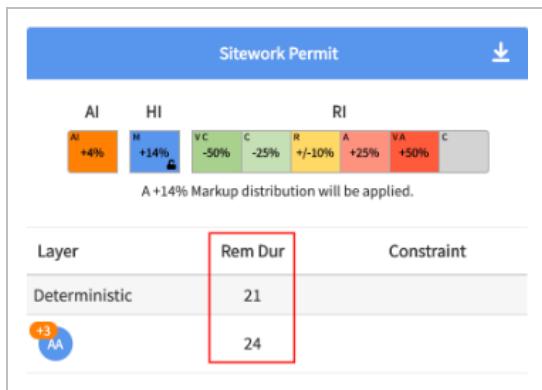
Inference Engine (AI)

In this example, if you use the Inference Engine (AI), it applies the suggested distribution of 4%.



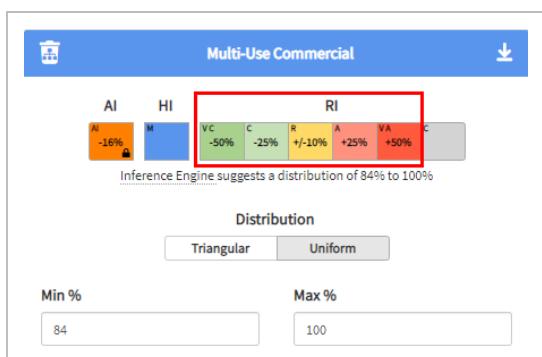
Human Intelligence (HI)

If you use the **Human Intelligence (HI)** of +14%, using AA's (delegate's initials) feedback, that Remaining Duration will take +3 days longer (24d v 21d).



Risk Intelligence (RI)

By selecting RI, you have chosen to not use HI or AI for that line item.



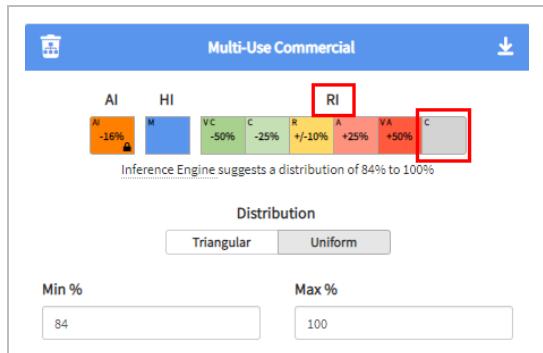
Uncertainty ranges are based on one of five categories the following categories:

Classification	Range	Guidance
Very Conservative	50% - 100%	Could take as little as 50% less
Conservative	75% - 105%	Most likely less
Realistic	90% - 110%	Within +/- 10%
Aggressive	95% - 125%	Most likely more
Very Aggressive	100% - 150%	Could take up to 50% more

You may only use one type of intelligence source per line. By selecting RI, you have chosen to not use HI or AI for that line item.

Custom

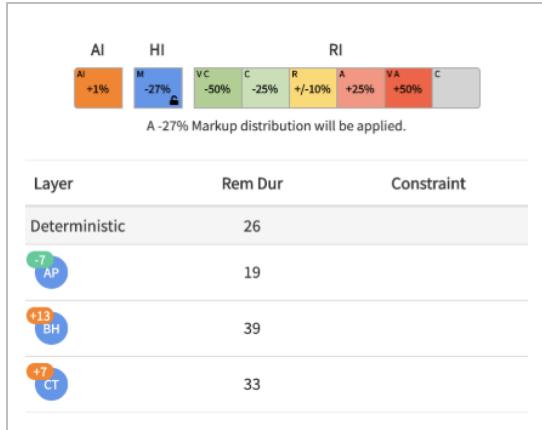
Using the Custom Intelligence lets you use a user defined level of risk.



Any changes that impact the project, either positive or negative, are shown in red.

Multiple User Feedback

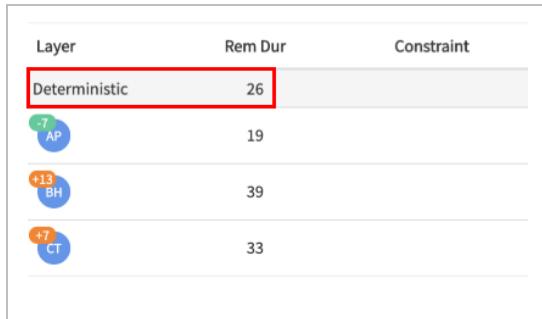
In the event an item contains more than one member's feedback, you can still decide between the different intelligence types. The Layer column shows all the members that contributed to that item.



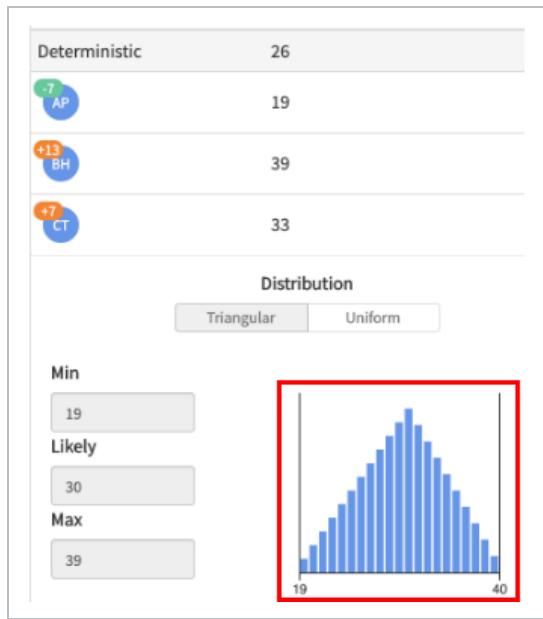
Notice here where three members contributed their feedback:

- AP (-7)
- BH (+13)
- CT (+7)

These values are added to the deterministic value to generate corresponding values.

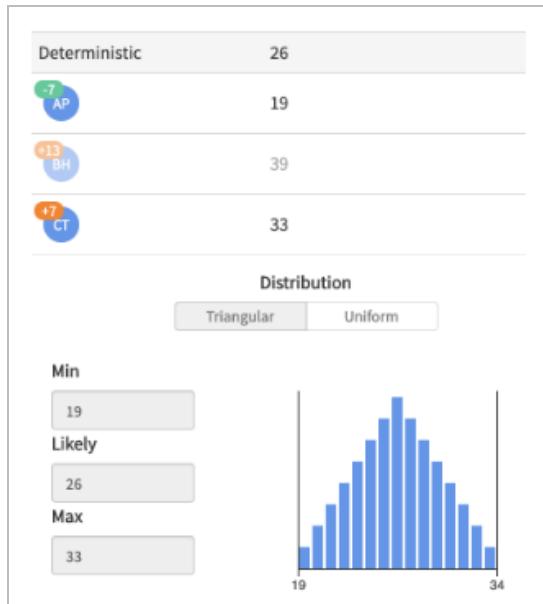


If you decide to consider all the HI feedback, then a distribution triangle is automatically applied for the risk simulation distribution.



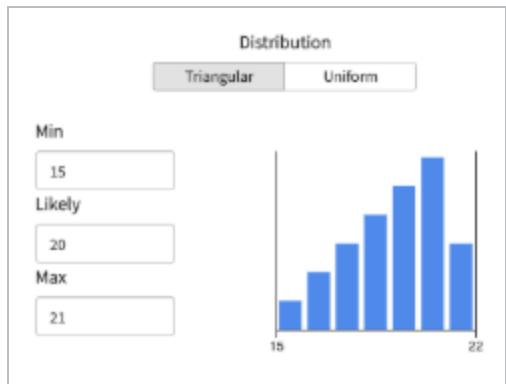
In some scenarios you have the option of setting a distribution to a triangular or uniform curve. A triangle uses the three points (min, likely, max) to generate a weighted distribution. A uniform distribution will use two points (min,max) as limits to a range and set the probability to an equal state for within the parameters.

If you want to discount or ignore a particular feedback, click on the contributor to remove them from the feedback. The distribution triangle adjusts automatically.



Distribution Options

When applying RI to a project item, you have the options to either set distribution to triangular or uniform distribution. A triangle uses three points of information, Min, Likely, and Max, to form a weighted distribution.



A uniform distribution uses two points, Min and Max to set limits on the range and models an even likelihood of hitting any points along the distribution.



Uncertainty Status

The Uncertainty Status column indicates what type of markup feedback is applied to each line item, using one of the following symbols:

Symbol	Markup Feedback Assigned
	Inference Engine (AI)

Symbol	Markup Feedback Assigned
	Human Intelligence (HI) with no markup values
	Human Intelligence (HI) with strong consensus, with little variations
	Human Intelligence (HI) with a large variation
	Risk Intelligence (RI) Very Conservative (-50%)
	Risk Intelligence (RI) Conservative (-25%)
	Risk Intelligence (RI) Realistic (+/-10%)
	Risk Intelligence (RI) Aggressive (+25%)
	Risk Intelligence (RI) Very Aggressive (+50%)
	Risk Intelligence (RI) Custom

For Human Intelligence (HI) feedback, you can hover over the symbol to find the variation percentage.

For Inference Engine (AI) and Risk Intelligence (RI) feedback, the Uncertainty Status Symbol will

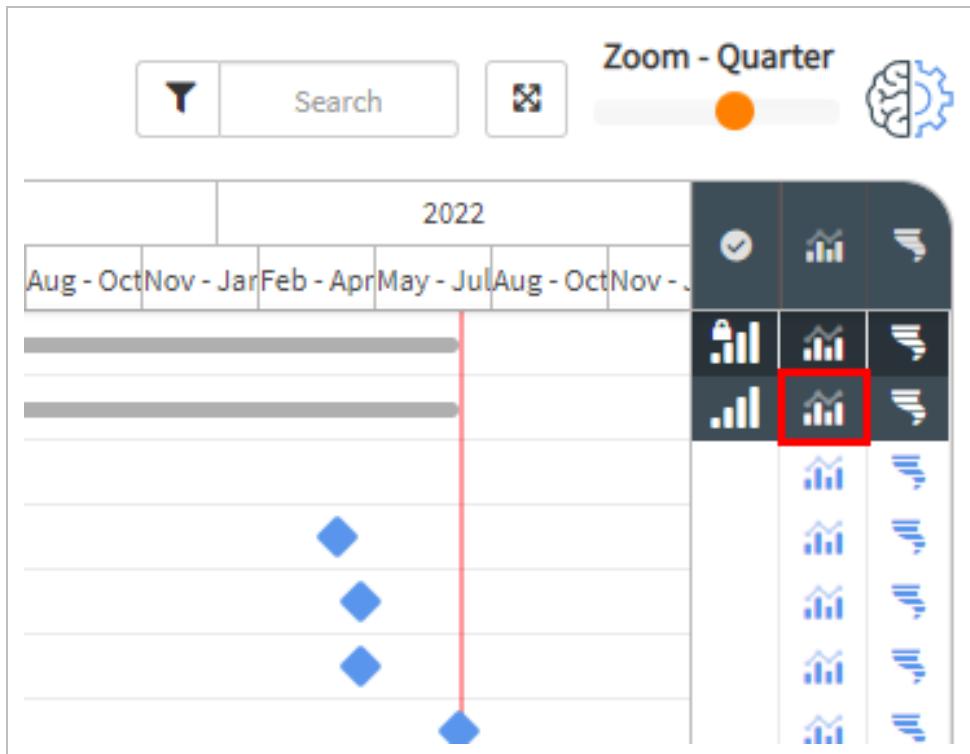
be a  if using Triangular distribution and a square  if using Uniform distribution.

The lock symbol represents that an uncertainty value has been applied to that line item and locks that value in place. For example, if a user assigns an uncertainty value to a parent line item, that value will be assigned to all its' children lines, expect for those that are locked in with a value previously assigned.

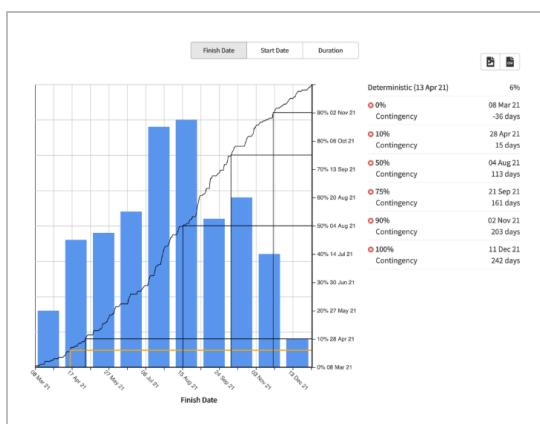
Once feedback on uncertainty and events are reviewed, you are ready to generate outcomes via Risk Histograms and Tornado Analysis.

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.

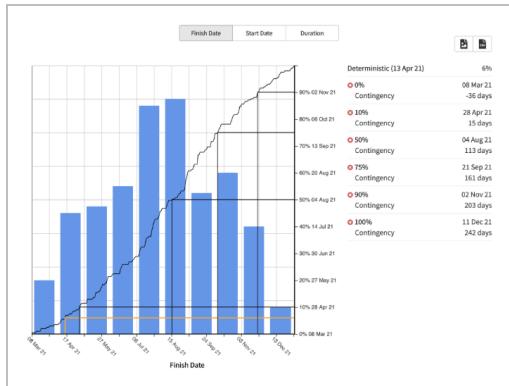


By clicking on the Risk histogram icon at the top level, you can report on the total project, as shown below.



Blue bars indicate the number of iterations that land on a specific date; for this example, finish date. The information on the right provides insight into the probability of hitting the deterministic end date and indicate which dates align with various P-values. This example shows the following:

- A 6% chance of completing the project by the deterministic date of 13 Apr 21.
- P-75% shows a date of 21 Sep 21, a 161-day extension upon the deterministic date. This corresponds to the need for a contingency value of 161 days to be 75% confident in finishing the project on 21 Sep 21 or earlier.
- P-0% is best case scenario and conversely, P-100% is worst case.



Tornado Analysis

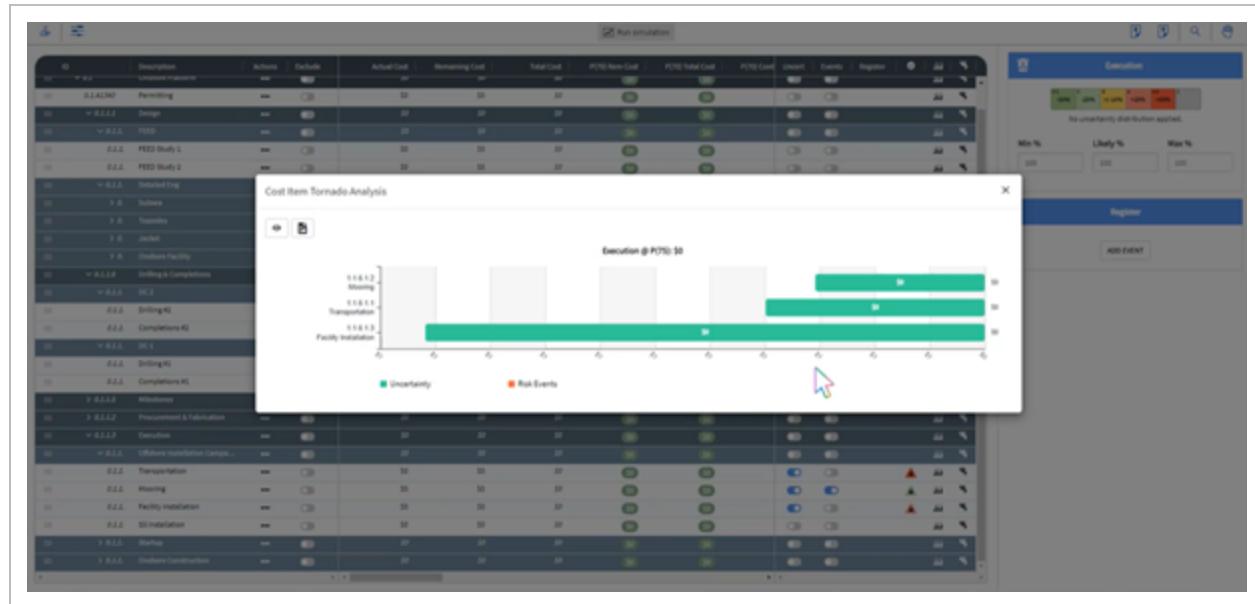
Tornado Analysis shows key drivers that are responsible for the largest impact to a risk model. There are two main modes to choose from, Activity Mode or Risk Mode. Click on the **Tornado analysis** icon to select a mode. Similar to Risk Histogram, selecting a tornado icon at the top level will report on the total project.

Cost Item Mode

Analyze the impact that terminal cost items have on the selected cost item.

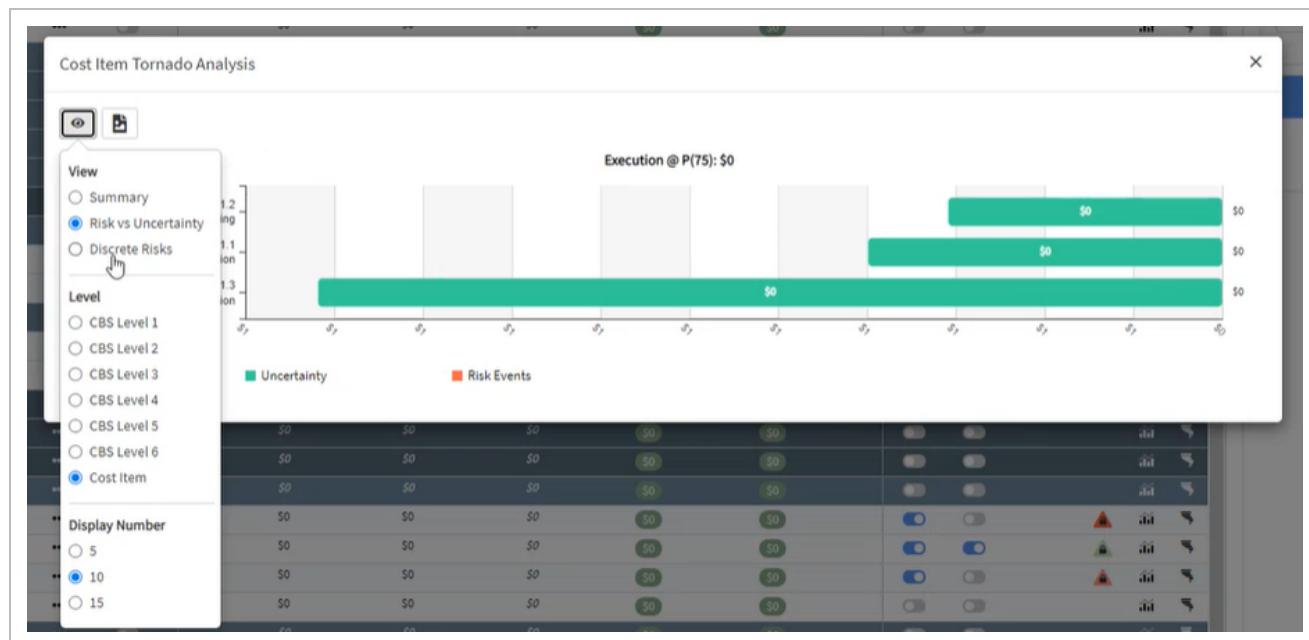


In this example, the P-Value is set to 75 based on the selected P-Values Markers. Selecting **Analyze** shows the Uncertainties and Risk Events for the Cost Item Tornado Analysis.



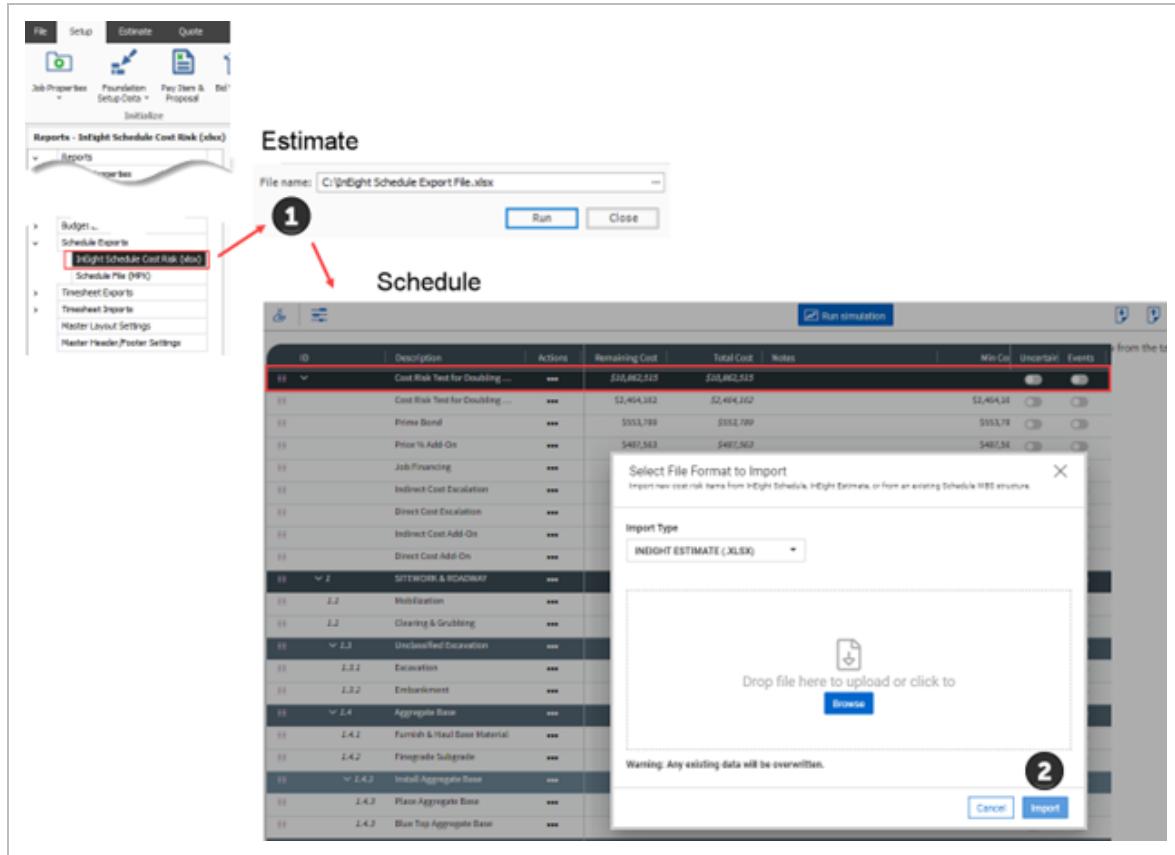
Interact with the following options to explore your project in Cost Item Mode:

- View
- Level
- Display Number



9.0.0.1 Root node in Cost Risk

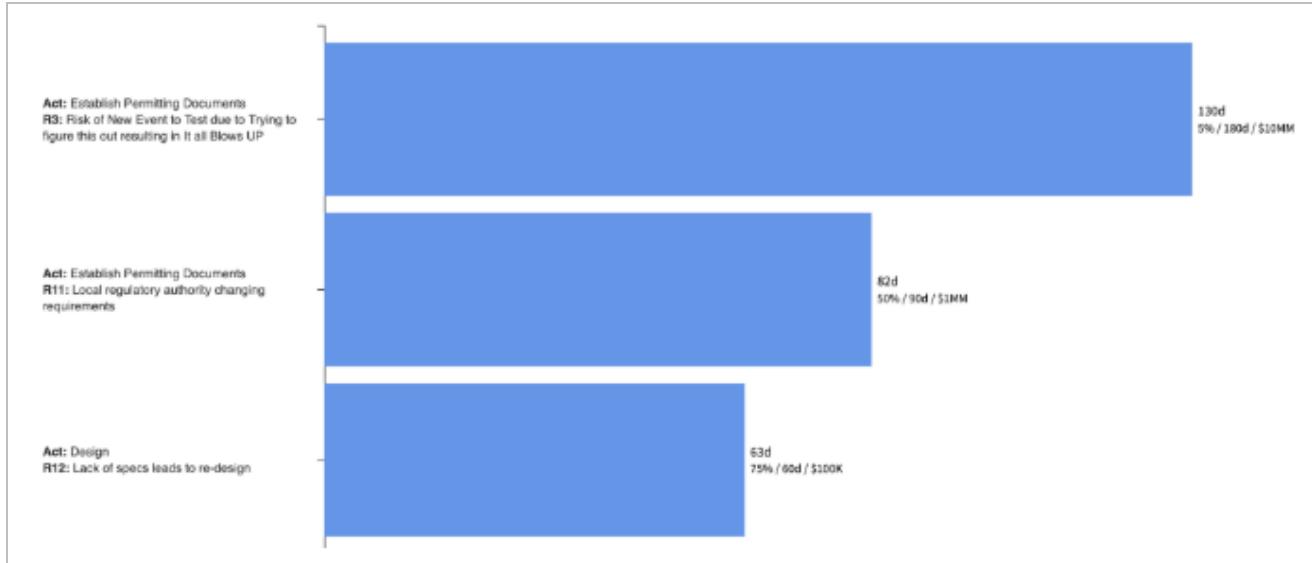
Importing the Schedule Export report from Estimate to Schedule > **Cost Risk** inserts a root node into the project. The root node captures project-level data in Cost Risk for you to reference and report on. It also retains the hierarchical breakdown of the Estimate file.



Risk Mode

Analyze the impact that risks have on the selected line item.

In the example below, you can visualize the most impactful risk events and their corresponding activities. The largest driver is Risk #3 (R3) on activity Establish Permitting Documents and accounts for 130d of risk exposure.



CHAPTER 9 – COST RISK

Cost Risk Overview

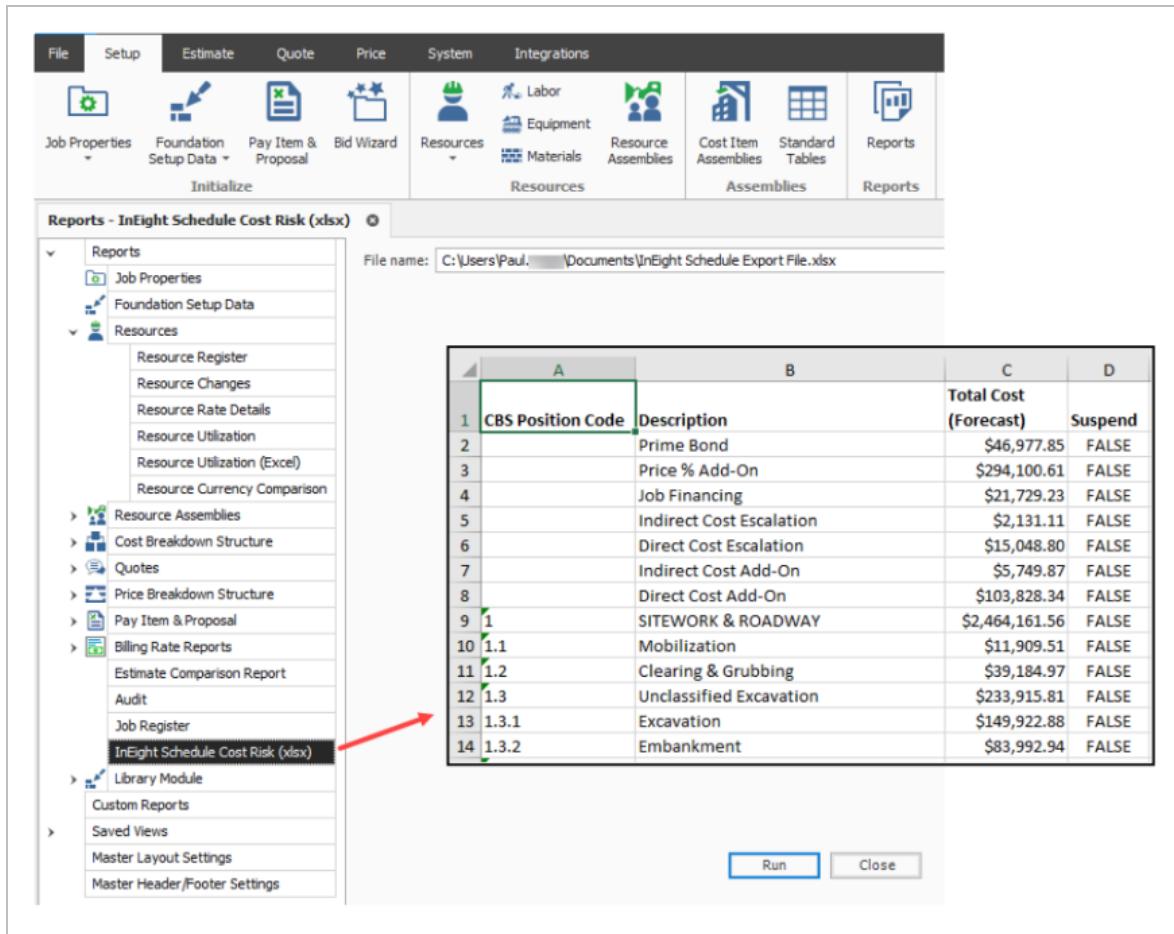
Cost Risk lets you conduct risk analysis and update cost based on review.

The Actual Cost column represents the actual cost for a selected cost item prior to simulations with the option to display risk adjusted amounts based on use selection.

This column can also be edited directly on the page.

ID	Description	Actions	Exclude	Actual Cost
104969_01.01.00.00	I-15 Tropicana_Re...	...		\$4,323
1.0100	Project Management	...	<input checked="" type="checkbox"/>	\$4,323
1.1.0100	Contract Milestones	...	<input checked="" type="checkbox"/>	\$4,323
1.1.1.DS	Design Start	...	<input checked="" type="checkbox"/>	4323

You can also generate an InEight Schedule Cost Risk Excel file that allows you to import it into Schedule Cost Risk view and produce risk adjusted estimates. These risk adjusted estimates let you adjust contingency in an estimate to cover risk identified in a project.



The screenshot shows the InEight software interface with the 'Reports' module open. The left sidebar lists various report categories, and the main area displays a table of cost risk items. A red arrow points from the 'InEight Schedule Cost Risk (xlsx)' item in the sidebar to the table.

Reports - InEight Schedule Cost Risk (xlsx)

File name: C:\Users\Paul...\Documents\InEight Schedule Export File.xlsx

A	B	C	D
1	CBS Position Code	Description	
2		Prime Bond	\$46,977.85 FALSE
3		Price % Add-On	\$294,100.61 FALSE
4		Job Financing	\$21,729.23 FALSE
5		Indirect Cost Escalation	\$2,131.11 FALSE
6		Direct Cost Escalation	\$15,048.80 FALSE
7		Indirect Cost Add-On	\$5,749.87 FALSE
8		Direct Cost Add-On	\$103,828.34 FALSE
9 1		SITEWORK & ROADWAY	\$2,464,161.56 FALSE
10 1.1		Mobilization	\$11,909.51 FALSE
11 1.2		Clearing & Grubbing	\$39,184.97 FALSE
12 1.3		Unclassified Excavation	\$233,915.81 FALSE
13 1.3.1		Excavation	\$149,922.88 FALSE
14 1.3.2		Embankment	\$83,992.94 FALSE

Run Close

Import Cost Risk Items

Select the import icon to import a Cost Breakdown Structure into the Cost Risk page, which helps you produce a risk adjusted estimate.

The screenshot shows the InEight Cost Risk application. On the left is a Gantt chart with tasks like '1.0100 Project Management' and '1.1.0100 Contract Milestones'. In the center is a risk matrix with columns for 'R', 'C', 'A', 'VA', and 'C'. On the right is a 'Design Start' risk distribution table with columns for 'Min (\$)', 'Likely (\$)', 'Max (\$)', 'Min (%)', 'Likely (%)', and 'Max (%)'. The top right of the interface has a toolbar with various icons, one of which is highlighted with a red box.

The cost risk file format import lets you import four different file types, which include InEight Schedule, InEight Estimate, InEight Control, and InEight Schedule.

The screenshot shows a 'Import Type' dialog box. At the top, a dropdown menu is set to 'INEIGHT SCHEDULE (.XLSX)'. Below it, four options are listed: 'InEight Schedule (.xlsx)', 'InEight Estimate (.xlsx)', 'InEight Control (.csv)', and 'InEight Schedule (WBS)'. The 'InEight Schedule (.xlsx)' option is highlighted with a blue arrow pointing to it.

InEight Schedule imports the WBS from the Plan view page.

The Schedule .xlsx import lets you export an existing snapshot of the current cost risk schedule state, make any adjustments in Excel, and then import directly into the Cost Risk page.

You can import from Estimate and Control which imports values from each of these applications via .xlsx and .csv imports.

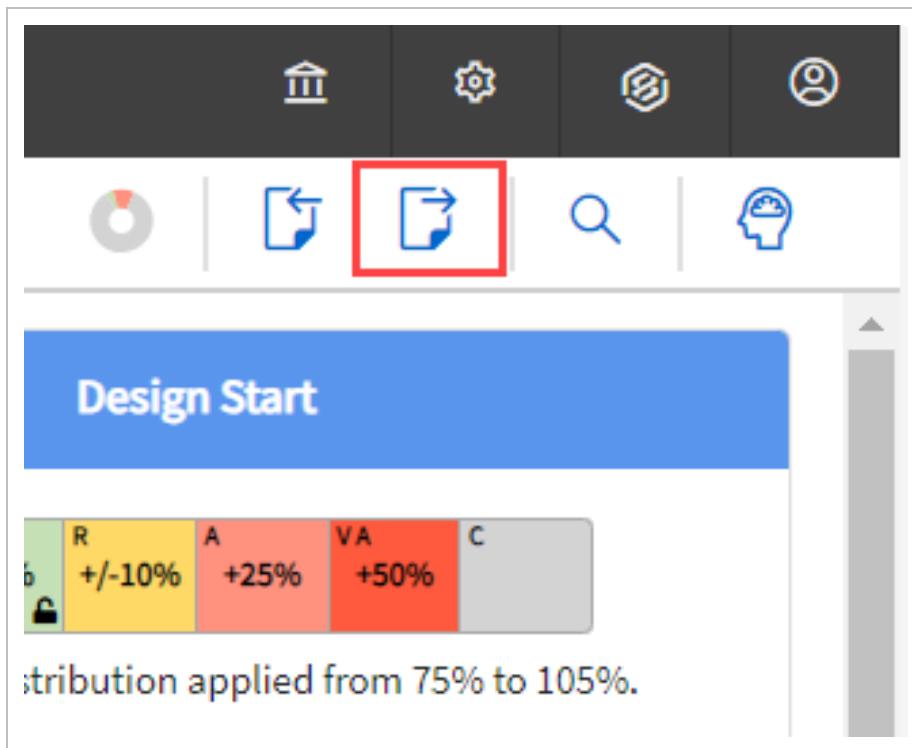
Only the InEight Schedule export type can be imported back in, and not the export.

If min/likely/max values or percentages are used, when importing from Schedule, ensure the use min, likely, max percentages toggle is turned *On*. If the .xlsx file being imported has a custom range, the uncertainty status must read *Custom*, then the pre-defined values configurations can be used.

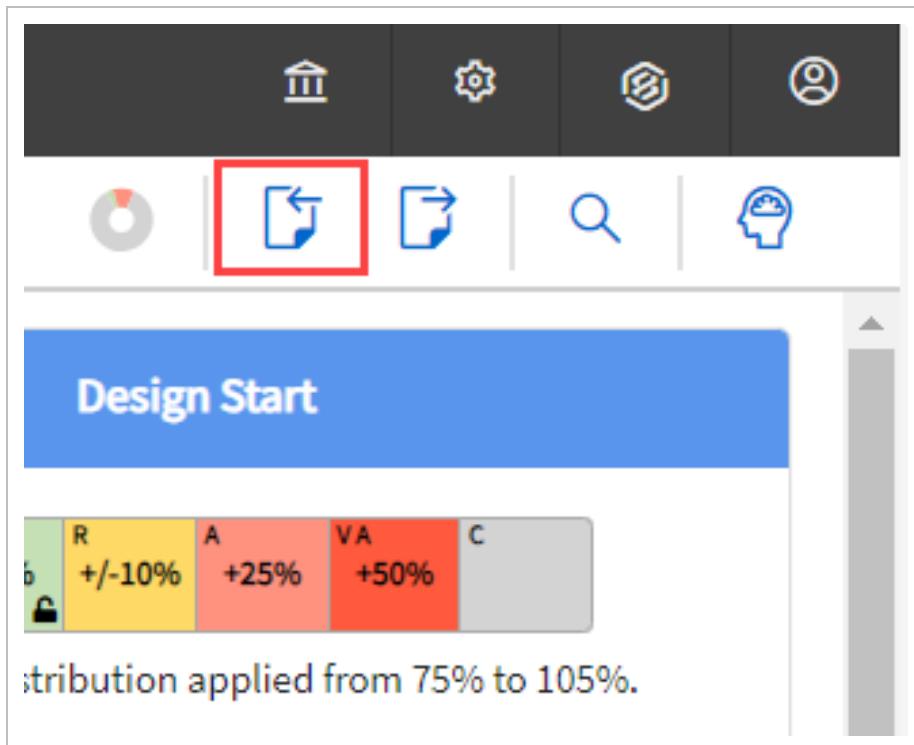
The Schedule WBS import pulls the Actual Cost and Remaining Cost values, based on the assigned resources from the schedule.

Step by Step – Import Cost Risk Items

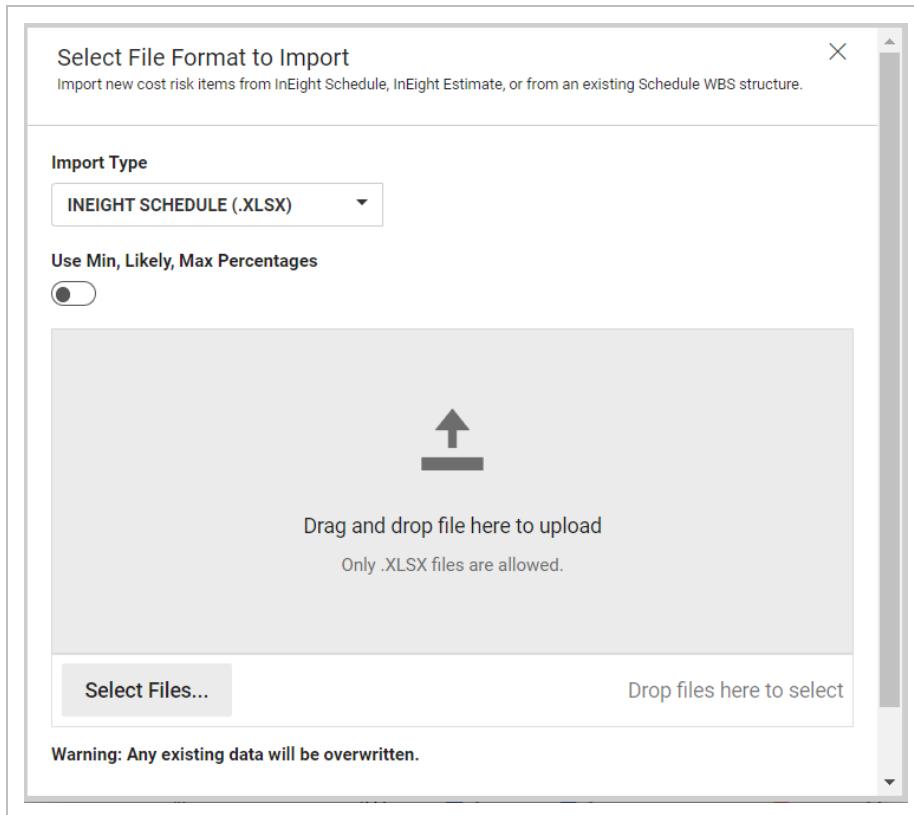
1. From the Schedule > **Cost Risk**, click the **Export** icon.



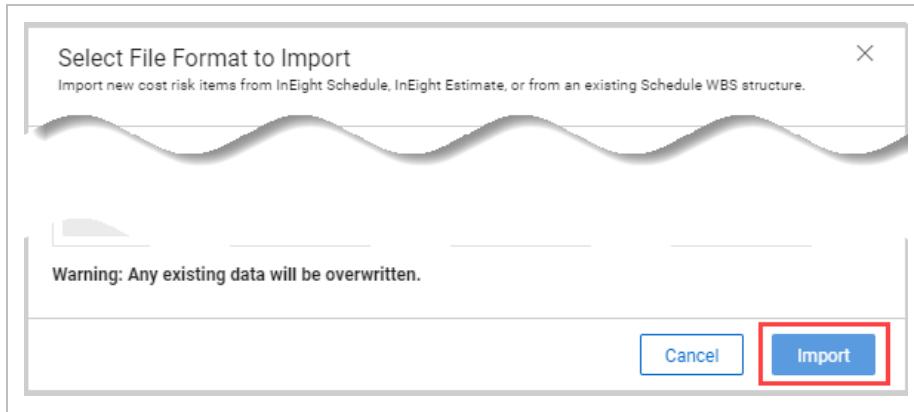
2. From the Export Type drop-down, select either **Data Import** or **InEight Schedule**. Open either file to change the contents of the file for step 4 below.
3. Click the **Import** icon.



4. The Select File Format to Import pop-up window shows. The import type of InEight Schedule (.XLSX) is the default import type, and only accepts .XLSX file types. InEight Estimate also only accepts .XLSX file types. InEight Control only accepts .CSV file types, while InEight Schedule accepts only WBS file types.



5. You can either drag and drop a file into the upload portion of the window, or you can select the **Select Files** button to select a file.
6. Click **Import**.

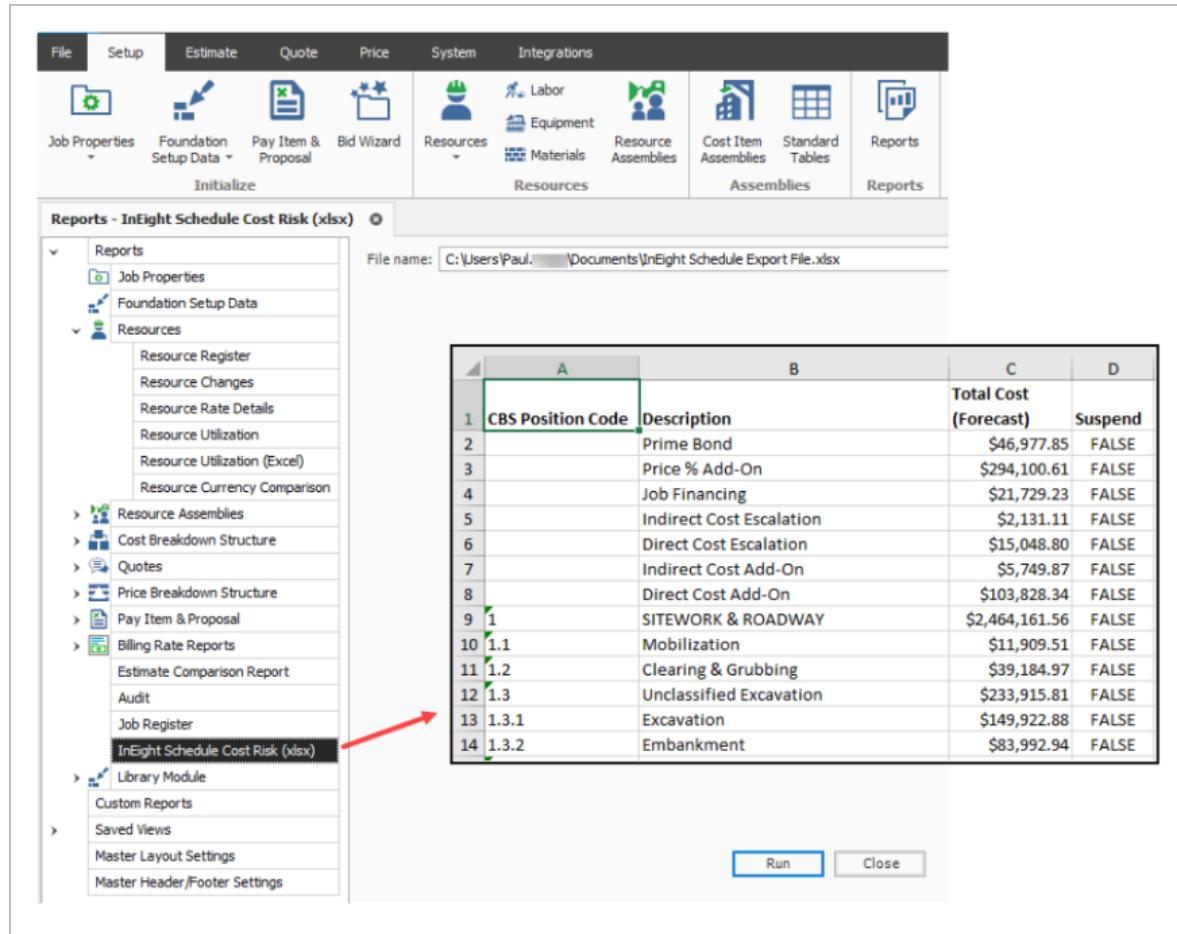


Estimate Cost Risk Export

You can generate a Schedule Cost Risk Excel file in Estimate, which lets you import it into the Schedule Cost Risk view and produce risk adjusted estimates. This can be accessed in Estimate > Setup > Reports > **InEight Schedule Cost Risk (.xlsx)**.

These risk adjusted estimates let you adjust contingency in an estimate to cover risk identified in a project.

The InEight Schedule Cost risk (.xlsx) file can be generated from



The screenshot shows the InEight Estimate software interface. The top navigation bar includes File, Setup, Estimate, Quote, Price, System, and Integrations. Below the navigation bar are various icons for Job Properties, Foundation Setup Data, Pay Item & Proposal, Bid Wizard, Resources, Labor, Equipment, Materials, Resource Assemblies, Cost Item Assemblies, Standard Tables, and Reports. The 'Initialize' button is also present. The main area is titled 'Reports - InEight Schedule Cost Risk (.xlsx)'. On the left, a sidebar lists 'Reports' (Job Properties, Foundation Setup Data, Resources, Resource Register, Resource Changes, Resource Rate Details, Resource Utilization, Resource Utilization (Excel), Resource Currency Comparison, Resource Assemblies, Cost Breakdown Structure, Quotes, Price Breakdown Structure, Pay Item & Proposal, Billing Rate Reports, Estimate Comparison Report, Audit, Job Register, InEight Schedule Cost Risk (.xlsx), Library Module, Custom Reports, Saved Views, Master Layout Settings, and Master Header/Footer Settings). A red arrow points from the 'InEight Schedule Cost Risk (.xlsx)' item in the sidebar to the 'Run' button in the dialog. The dialog itself shows a table with the following data:

A	B	C	D
1	CBS Position Code	Description	Total Cost (Forecast)
2		Prime Bond	\$46,977.85
3		Price % Add-On	\$294,100.61
4		Job Financing	\$21,729.23
5		Indirect Cost Escalation	\$2,131.11
6		Direct Cost Escalation	\$15,048.80
7		Indirect Cost Add-On	\$5,749.87
8		Direct Cost Add-On	\$103,828.34
9	1	SITEWORK & ROADWAY	\$2,464,161.56
10	1.1	Mobilization	\$11,909.51
11	1.2	Clearing & Grubbing	\$39,184.97
12	1.3	Unclassified Excavation	\$233,915.81
13	1.3.1	Excavation	\$149,922.88
14	1.3.2	Embankment	\$83,992.94

At the bottom of the dialog are 'Run' and 'Close' buttons.

Control Cost Risk Export

You can create a Cost Risk .CSV export specific view from Control in Control Workspaces. See the [Viewsets](#) topic to view more information on how to create viewsets. This helps you to more quickly revert to the Cost Risk Export Workspace view, when you need to export the cost risk associated data from Control.

Tasks

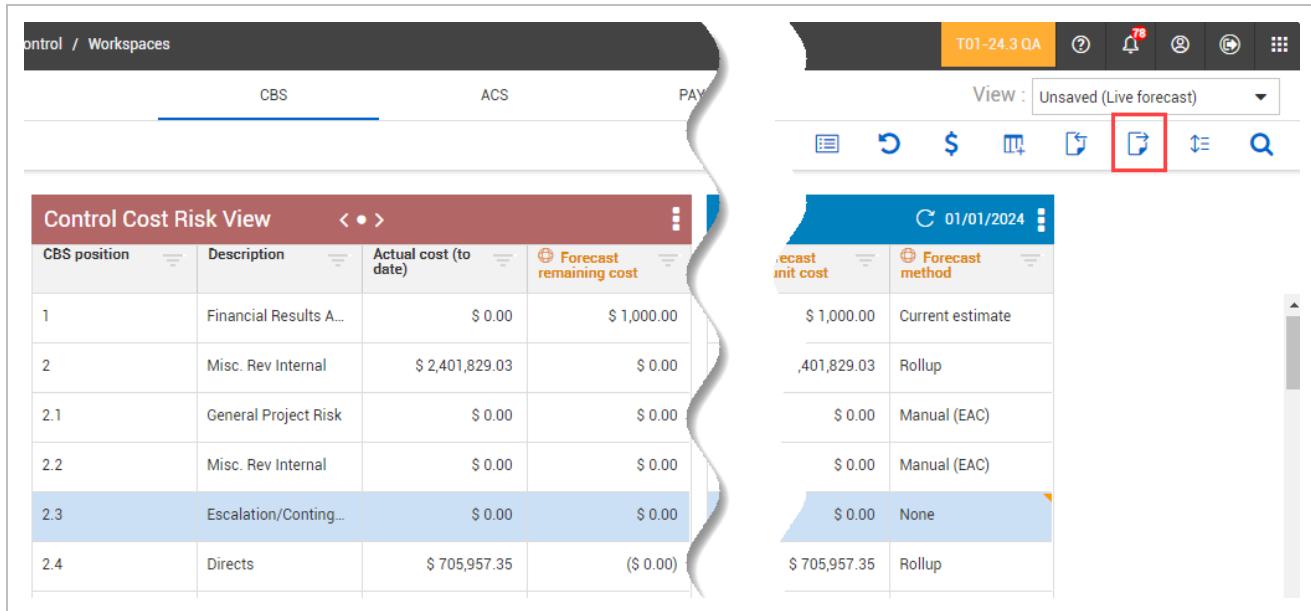
CBS position	Description	Actual cost (to date)	Forecast remaining cost	Forecast total productivity	Forecast total unit cost
1	Financial Results ...	\$ 0.00	\$ 1,000.00	0.00	\$ 2,000.00
2	Misc. Rev Internal	\$ 7,030.50	\$ 0.00	1.15	\$ 2,400.00
2.1	General Project Ri...	\$ 0.00	\$ 0.00	0.00	\$ 0.00

Create a new datablock to show the CBS Position Code, Description, Actual Cost (to date), and the Forecast Remaining Cost columns. View the [Datablocks](#) topic to view more information how to to create datablocks.

Tasks

CBS position	Description	Actual cost (to date)	Forecast remaining cost
1	Financial Results A...	\$ 0.00	\$ 1,000.00
2	Misc. Rev Internal	\$ 2,401,829.03	\$ 0.00
2.1	General Project Risk	\$ 0.00	\$ 0.00
2.2	Misc. Rev Internal	\$ 0.00	\$ 0.00

Select the Export icon to export the Control Cost Risk View data from Control.



The screenshot shows the InEight software interface. On the left, the 'Control / Workspaces' sidebar is visible with 'CBS' selected. The main area displays the 'Control Cost Risk View' with a table of data. On the right, a forecast table is shown with a date of 01/01/2024. The top toolbar includes various icons, and a red box highlights the export icon (a blue arrow pointing right) in the toolbar.

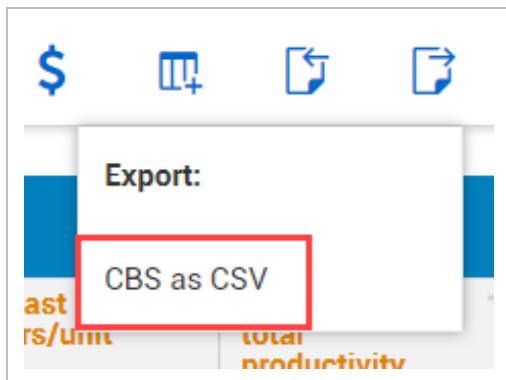
Control Cost Risk View

CBS position	Description	Actual cost (to date)	Forecast remaining cost
1	Financial Results A...	\$ 0.00	\$ 1,000.00
2	Misc. Rev Internal	\$ 2,401,829.03	\$ 0.00
2.1	General Project Risk	\$ 0.00	\$ 0.00
2.2	Misc. Rev Internal	\$ 0.00	\$ 0.00
2.3	Escalation/Conting...	\$ 0.00	\$ 0.00
2.4	Directs	\$ 705,957.35	(\$ 0.00)

Forecast Table

Forecast init cost	Forecast method
\$ 1,000.00	Current estimate
\$ 2,401,829.03	Rollup
\$ 0.00	Manual (EAC)
\$ 0.00	Manual (EAC)
\$ 0.00	None
\$ 705,957.35	Rollup

Select Export: **CBS as CSV**.



The screenshot shows an 'Export' dialog box. The 'Export:' dropdown menu is open, and the 'CBS as CSV' option is highlighted with a red box. The dialog box also contains other options like 'Print', 'Email', and 'Copy'.

Export:

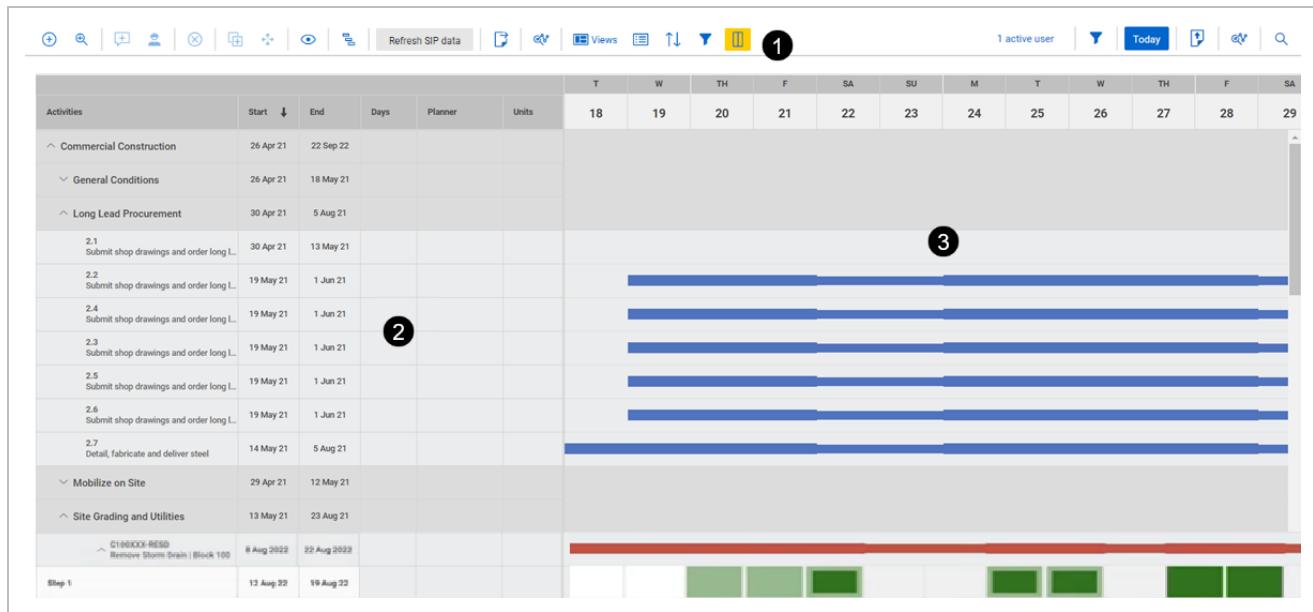
- CBS as CSV
- Print
- Email
- Copy

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CHAPTER 10 – SHORT INTERVAL PLANNING

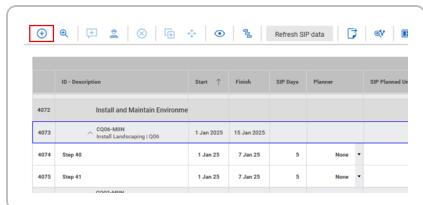
10.0.1 SIP Overview

Activities from the CPM Schedule show in the Short Interval Planning (SIP) view that are grouped, based on how the Plan view WBS is organized. Each activity can be planned daily by adding the specific steps, or tasks, to be completed. Red and blue bars represent the CPM planned duration. The green colored boxes represent the days that tasks for the step will be done.



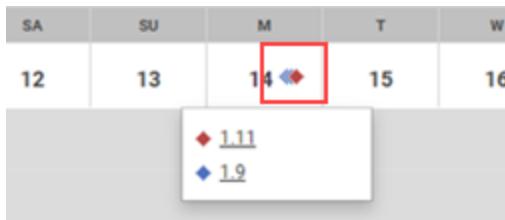
10.0.1.1 Planning Steps/Tasks

Steps are created by selecting the Add icon in the toolbar. After steps are added, you can then select the step to fill in information for description, dates, duration, planner, and SIP units or quantities for the task to be completed.



10.0.1.2 Milestones

Milestones are visually indicated on the SIP timeline and in the SIP activities. This provides clarity and reference to important dates when updating the short term plan on a project. When a blue milestone icon (◆) or a red critical milestone icon (◆) shows in the date timeline, you can click the icon to open a link and jump to the milestone in the step task chart.



10.0.1.3 Resources

When adding steps, you can assign predefined SIP resources to complete the steps or create and assign them in real time. If the resource does not exist in the schedule, enter a UoM and units, save the resource, and then apply it to steps while planning. You can also enter SIP units to set and track daily progress for the resource.

Add SIP Resource

Step 2
18 February 2019 - 22 February 2019
A3050 | Proposal Submissions

* SIP Resource name
Add and/or assign a SIP resource

UOM ? Units 0

Color assignment

Days	Units
18 February 2019	0
19 February 2019	0
20 February 2019	0
21 February 2019	0
22 February 2019	0

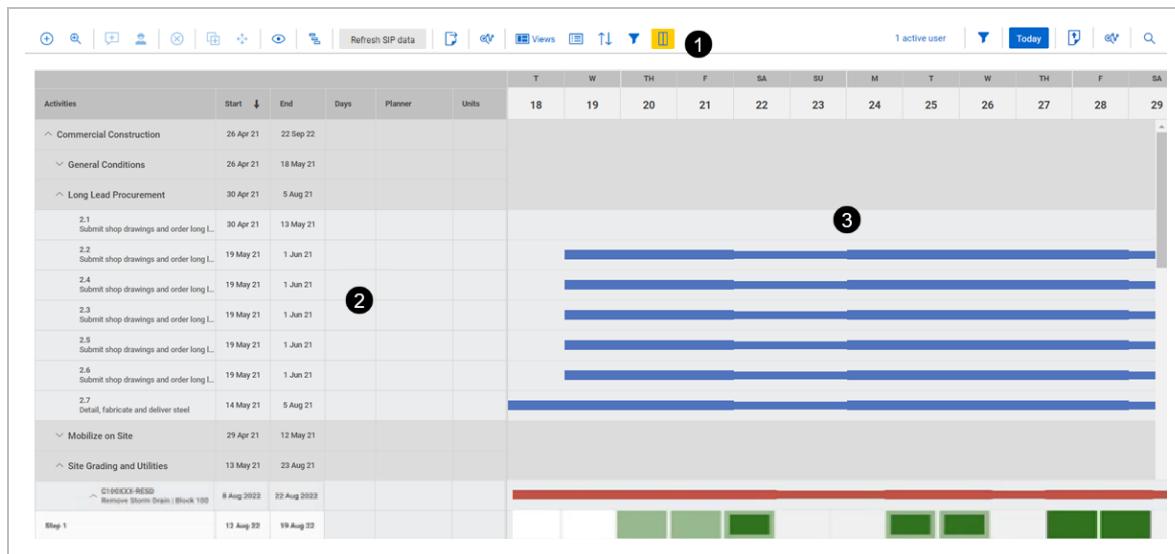
TOTAL: 0

Cancel
Save

10.0.2 Short Interval Planning View

When a schedule is ready for production, schedulers can move to the Short Interval Planning (SIP) view to begin planning out the day-to-day tasks involved with completing scheduled activities. This type of planning can be done in intervals of 17, 25, and 50 days based on a selected interval.

To open the Short Interval Planning view, go to the project navigation menu and select **Short Interval Planning** from the list.



In the SIP view there are three primary sections:

1	Toolbar	Contains view adjustment settings such as, filtering, grouping, annotations, and date range.
2	Activities	Work package and activity structure are brought in from the Plan view. Tasks are further broken out in the SIP view.
3	Calendar	Shows a segment, or interval, of the schedule based on settings in the toolbar.

Step actions and functions

The toolbar shows SIP step and action icons, view options, and other functions.



The SIP step action icons show enabled in the toolbar when you are actively in a step.

Description	Function
Add step	Adds a step under the selected activity.
Zoom to start	Moves the Gantt chart to show one day prior to the step start date.

Description	Function
Add comment	Opens a dialog box where you can type text and save a comment for the step.
Add SIP resource	Opens the Add SIP Resource dialog box where you can select and assign an existing SIP resource for the task. Add values for units or quantities to track progress at a granular level.
Remove step	Deletes the selected step.
Copy	Opens a dialog box that lets you copy the selected step or steps into other activities.
Snap To	Lets you select multiple steps in an activity and move them to new dates while maintaining the relationship relative to the initial step in the activity.

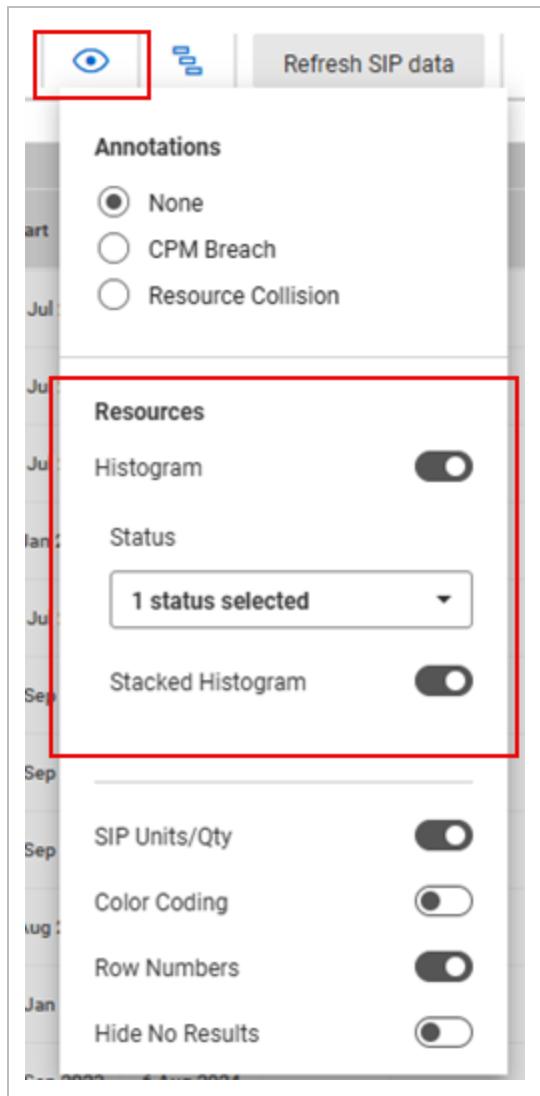
The SIP functions include [Builder Menus](#) with SIP view variations that have similar functionality to those in other Schedule views.

Description	Function
View options	Select metrics, view row numbers, annotations, color coding for the view, and resource histogram.
Detail level	Select the level of detail shown in the Activities section.
Refresh SIP data	Click to update the view with the latest changes.
Export	Exports the current view to an Excel spreadsheet.
Zoom level	Sets the date range interval shown in the calendar.
Views	Use column filters to group and sort, then save as a view. Can also use templates and View builder. By default, the SIP Units/Qty and Row Numbers toggles are set to <i>On</i> .
Group By	Allows you to see activities grouped together based on the option selected. This functionality provides flexibility to schedulers and execution planners in how they want to organize and assess tasks, resource utilization, and activity progress. You can also group activities and tasks by codes when knowledge tags are used on the project.
Sort	Filters the columns according to the parameters selected.
Filter	Opens the filter function to set parameters for the activities and tasks that

Description	Function
	show in the view.
Column Set	Allows you to add and remove columns to customize the view. Column sets can be saved and reused.
Search	Search and find a specific task or step.

SIP resource histogram

The SIP resource histogram lets you perform resource management at a short-term plan level that gives you another level of granularity when analyzing resources. The SIP resource histogram shows the assigned SIP resources for the project with functionality like the Plan view resource histogram. In SIP view, click the **View options** icon. Under Resources, select **Histogram** to show SIP planned units in the view. In the Status drop-down list, you choose additional SIP data to show in the histogram.



Activities and steps

In the Activities section, Schedule activities from the CPM are shown. Each of these activities can be broken into steps or tasks for more detail when planning field execution.

Planning packages and activities are shown in a hierarchy. Planning packages group activities the same way as in the CPM schedule. Each activity line shows a planned start date, end date, activity ID, and the activity description.

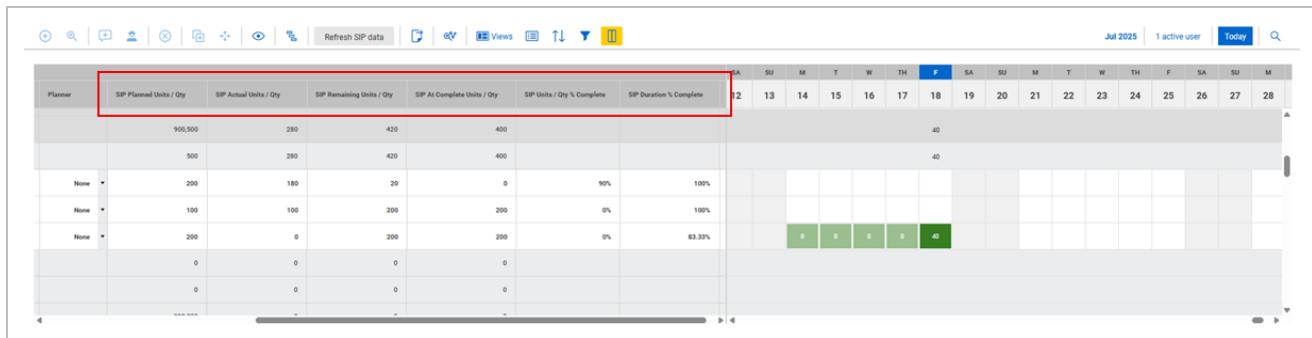
When steps are defined, they show as a subordinate of the activity. An overview of the step details are noted that includes, start date, end date, duration, planner, and quantity.

Activities	Start	End	Days	Planner	Units
~ Pipeline	1 Jun 18 A	1 Nov 33			22,600
~ Design	1 Jun 18 A	10 Feb 23			17,600
~ Piping	1 Jun 18 A	7 Jun 22			17,600
~ A2340 30% Design	1 Jun 18 A	12 Jul 18 A			
Step 38	1 Jun 18	7 Jun 18	5	None	▼
Step 37	1 Jun 18	7 Jun 18	5	None	▼
Step 36	1 Jun 18	7 Jun 18	5	None	▼
Step 26	1 Jun 18	7 Jun 18	5	None	▼

In the SIP step, you can track progress of a resource for the task. Values can be edited directly in the step and depending on the field that is changed they are calculated as follows:

- SIP Planned Units/Qty – Values entered are spread evenly across all days.
- SIP Actual Units/Qty – Values entered are spread evenly across all days prior to current day.
- SIP Remaining Units/Qty – Values entered are spread evenly across days after current day.
- SIP At Complete Units/Qty – Shows the value entered. Use to adjust for a forecast that is greater than the budgeted value in SIP Planned Units/Qty.
- SIP Units/Qty % Complete – Updates both actual and remaining units. The percentage shown is value of $(\text{SIP Planned Units/Qty} - \text{SIP Remaining Units/Qty}) \div \text{SIP Planned Units/Qty}$.
- SIP Duration % Complete – Shows the percentage calculated value of the number of SIP dates prior to current day \div total number of SIP steps.

Use the column chooser to select the SIP Units/Qty columns you want to show.



When the SIP Units/Qty toggle is enabled, the Show Planned Unit toggle also shows. Set the Show Planned Unit toggle to *On* to show planned units in the (past) activity segments that are prior to today's date.

You also have the option to track actuals at a more granular level if needed. Click the **Add SIP resource** icon and enter values for the specific dates.

Days	SIP Planned Units/Qty	SIP Actual Units/Qty	SIP Remaining Units/Qty
11 July 2025	200	0	200
12 July 2025	200	20	180
13 July 2025	200	10	190
14 July 2025	200	25	175
15 July 2025	200	25	175
16 July 2025	200	20	180
17 July 2025	200	0	200

Copy

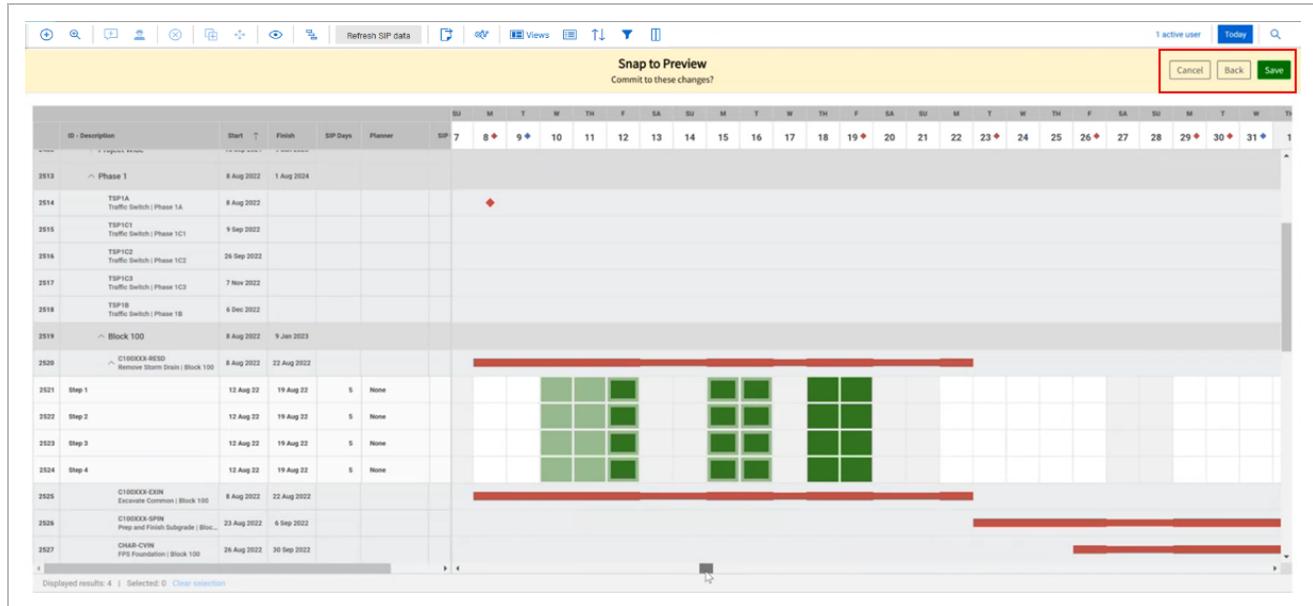
Select rows in an activity to copy, and then click the **Copy** icon to open the Copy SIP Steps dialog box. In the dialog box, you can select up to ten activities to copy the rows into. You can also choose to remove steps that are selected from the list to be copied.

Snap To

You can select and move individual activity steps to a new date on the timeline. The Snap To feature lets you select multiple steps in an activity and move them all to new dates, maintaining the relationship relative to the initial step in the activity.

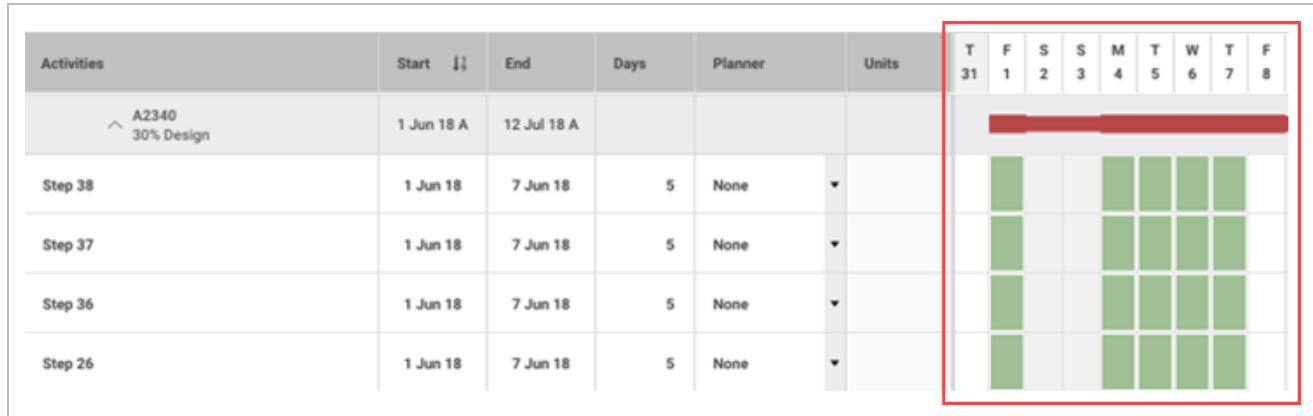
After you select the steps to move in the activity, click the **Snap To** icon to open the dialog box. Click in the **Snap to Start Date** field to open the calendar, and then select the new start date for the initial step. In the Include column, use the toggle to add or remove steps to move.

After selecting the new start date, click **Preview** to show an overlay of the steps with the new start date. You can save the changes in the preview or click **Back** to close the preview and open the dialog box again to make additional changes as needed.



Calendar

Click the **Zoom level** icon in the toolbar and select the calendar date range of the SIP view header to 3 weeks, 30 days or 60 days. In the calendar there are two primary indicators, the blue and red CPM schedule activity bars, and the colored step bars.



The blue and red CPM schedule activity bars represent working days and non-working days. The thicker segments indicate working days in the activity's calendar and thinner segments are non-working days.

The colored bars in the step indicate the days that work is being done for the activity. As a Planner, you can click and drag the bars along the timeline to adjust the start date and end date of the step and add or delete days for the step.

Weather Settings

Schedule has built in functionality to pull in weather data when a project location has been set up in Project Settings > **Project configuration**. When this function is setup, the weather shows in the date column header for the current day and a forecast for the next seven days.

F	S	S	M	T  14	W  15	T  16	F  17	S  18	S  19	M  20	T  21	W 22	T 23	F 24	S 25	S 26
10	11	12	13													

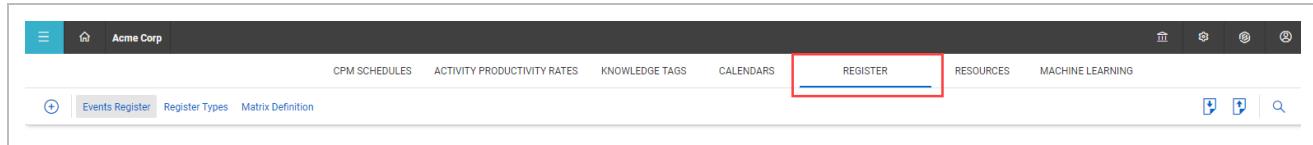
Click the **Weather** icon to open the selected day's weather forecast. This data is powered by Open Weather.

CHAPTER 11 – REGISTER ITEMS

Organizational Register Items

Events Register

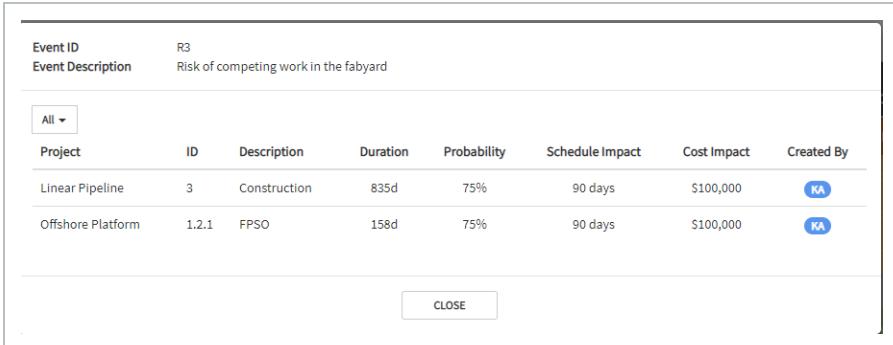
Knowledge Library Register Items can be viewed by accessing the Knowledge Library, and clicking on the **Register** tab



From the Knowledge Library, items can quickly be edited using the following fields:

1	2	3	4	5	6	7	8	9
Verified	Id	Type	Description	Mitigation	Probability	Schedule Impact	Cost Impact	Score
<input checked="" type="checkbox"/>	R3	Risk	▼ Risk of competing work in the fabyard	Identify overflow yards	High	High	High	16
<input checked="" type="checkbox"/>	R2	Risk	▼ Risk of change in permitting authority	Schedule review with permitting office	Medium	High	Medium	12
<input checked="" type="checkbox"/>	R7	Risk	▼ Risk of unknown soil conditions		Medium	High	Medium	12
<input checked="" type="checkbox"/>	R4	Risk	▼ Risk of final route may not be known until 30 days before site access		Low	High	Medium	8
<input checked="" type="checkbox"/>	O2	Opportunity	▼ Opportunity of identify third party engineering firm to support design		Medium	Low	▼	6
<input checked="" type="checkbox"/>	R1	Risk	▼ Risk of design rework due to first of a kind design resulting in engineering dela	Work with client to refine requirements prior to design	Low	Medium	Low	6
<input checked="" type="checkbox"/>	R6	Risk	▼ Risk of weld issues causing rework		Low	Medium	Low	6
<input checked="" type="checkbox"/>	R5	Risk	▼ Risk of local regulatory changing requirements		Very Low	Medium	Low	3
<input checked="" type="checkbox"/>	O1	Opportunity	▼ Opportunity of use alternate pre-fab modules to accelerate delivery		Medium	▼		KA
<input checked="" type="checkbox"/>	R10	Risk	▼ Risk of Hurricane due to weather resulting in destruction					1 BH

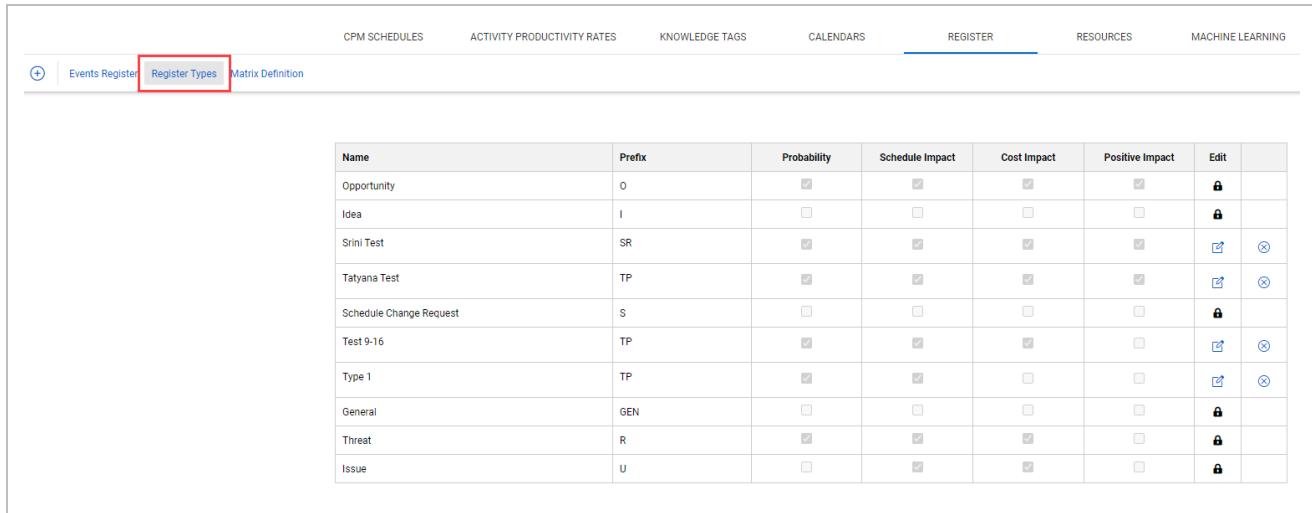
Name	Description
Verified	Items can be either created directly in the Knolwedge Library, or pushed from individual projects. Items pushed from projects shows here as unverified, and are not used as Smart Suggestion options in other projects until verified.
Type	This describes the type of register item, such as Risk, Opportunity, and Action Item.

Name	Description																								
Description	Items descriptions can be edited at any time.																								
Mitigation	Mitigation strategies can be captured here.																								
Probability/Schedule Impact/Cost Impact	Probability and impact can be reviewed and edited in a centralized view. The scoring here becomes the default score when the risk is applied to a project.																								
Score	Based on the probability and impact of items, a score is automatically generated.																								
Activities	The number of times the register item appears schedules are shown here. Specific Project and WBS element appearances can be reviewed by clicking on the number. You can select the All drop-down to filter the list by project.																								
 <p>The screenshot shows a modal dialog box with the following details:</p> <p>Event ID: R3 Event Description: Risk of competing work in the fabyard</p> <p>Activities:</p> <table border="1"> <thead> <tr> <th>Project</th> <th>ID</th> <th>Description</th> <th>Duration</th> <th>Probability</th> <th>Schedule Impact</th> <th>Cost Impact</th> <th>Created By</th> </tr> </thead> <tbody> <tr> <td>Linear Pipeline</td> <td>3</td> <td>Construction</td> <td>835d</td> <td>75%</td> <td>90 days</td> <td>\$100,000</td> <td></td> </tr> <tr> <td>Offshore Platform</td> <td>1.2.1</td> <td>FPSO</td> <td>158d</td> <td>75%</td> <td>90 days</td> <td>\$100,000</td> <td></td> </tr> </tbody> </table> <p>Buttons: CLOSE</p>		Project	ID	Description	Duration	Probability	Schedule Impact	Cost Impact	Created By	Linear Pipeline	3	Construction	835d	75%	90 days	\$100,000		Offshore Platform	1.2.1	FPSO	158d	75%	90 days	\$100,000	
Project	ID	Description	Duration	Probability	Schedule Impact	Cost Impact	Created By																		
Linear Pipeline	3	Construction	835d	75%	90 days	\$100,000																			
Offshore Platform	1.2.1	FPSO	158d	75%	90 days	\$100,000																			
Created By	The name of the user that raised the register item.																								
Delete	Deletes the item.																								

Register Types

Additional Register Types can be defined by selecting the **Register type** tab.

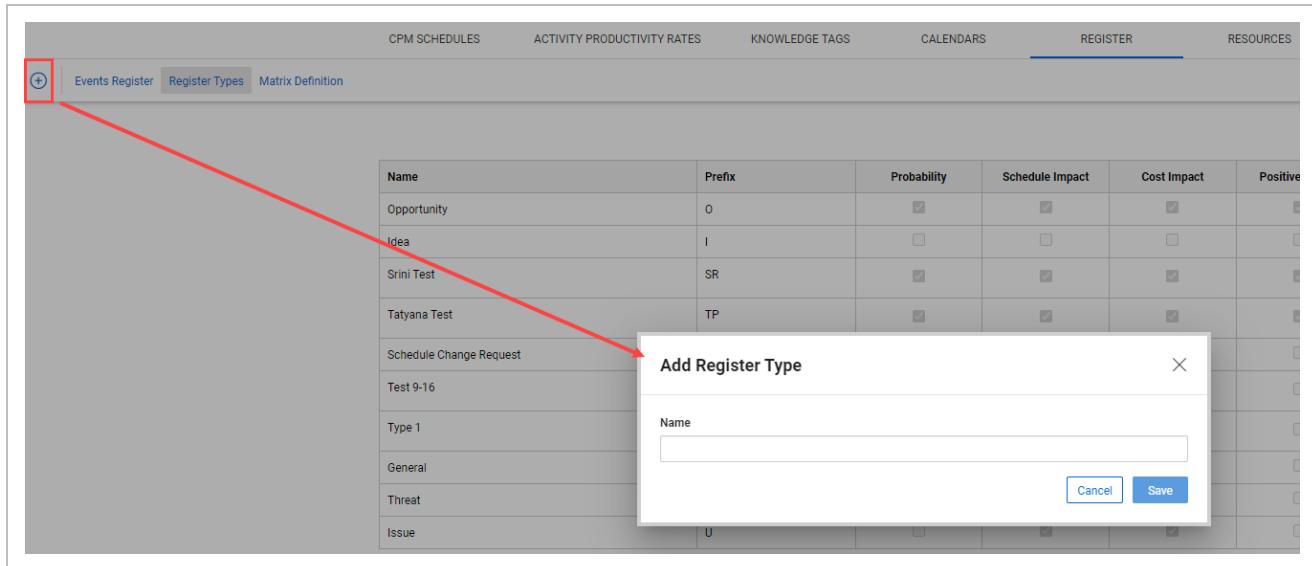
Schedule User Guide



The screenshot shows the 'Register Types' page. At the top, there are tabs for 'Events Register', 'Register Types' (which is highlighted with a red box), and 'Matrix Definition'. Below the tabs is a table with columns: Name, Prefix, Probability, Schedule Impact, Cost Impact, Positive Impact, Edit, and Delete. The table contains rows for various items like Opportunity, Idea, Srinivas Test, etc. Each row has an 'Edit' icon in the last column.

Name	Prefix	Probability	Schedule Impact	Cost Impact	Positive Impact	Edit	Delete
Opportunity	O	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Idea	I	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Srinivas Test	SR	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Tatyana Test	TP	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Schedule Change Request	S	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Test 9-16	TP	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Type 1	TP	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
General	GEN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Threat	R	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Issue	U	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		

Click **Add Register Item** to create a new register item with a custom defined caption and code prefix.



Click the **Edit** icon to define which qualifiers apply to that particular item.

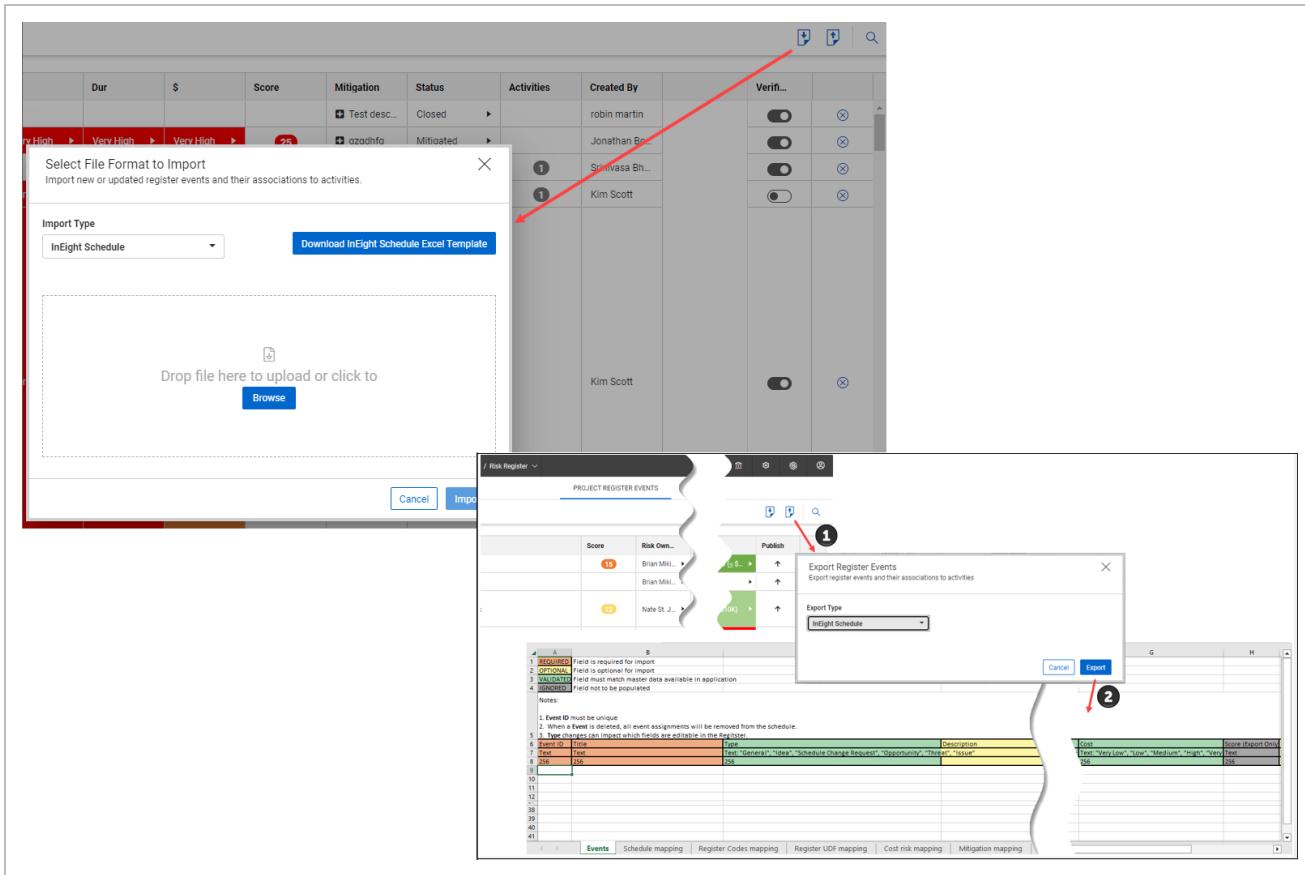
Name	Prefix	Probability	Schedule Impact	Cost Impact	Positive Impact	Edit	
Opportunity	O	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Idea	I	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Srini Test	SR	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Tatyana Test	TP	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Schedule Change Request	S	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Test 9-16	TP	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Type 1	TP	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
General	GEN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Threat	R	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Issue	U	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		

Import and Export

You can import and export risks in the project register.

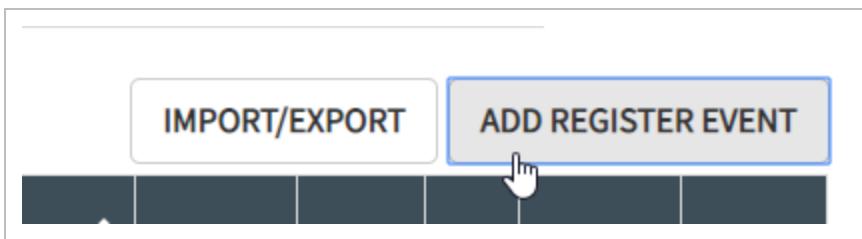
There are options for Oracle PRA – Pertmaster as well as Deltek Acumen. These are Excel formats that can also be generated outside of any tool and used for importing into Schedule.

The export file closely reflects what is exported from the Schedule Plan view. A color-coded key has been added in the upper left corner in the export file that shows you the required, optional, validated, and ignored records. Additional mapping tabs are also included at the bottom of the Microsoft Excel file.



Add Register Event

You can manually add a register event to the project register. Select **Add Register Event** and define the event type and description.



Risk
of

Event

Cause

Effect

Risk of _____ due to _____ resulting in _____

ADD
CANCEL

Filter

Select the **Filter** icon to enable filtering for the register view.

Filter Import/Export Add Register Event																
Active	Id	Type	Description			Mitigation	Probability	Schedule Impact	Cost Impact	Score	Markup	Basis				

Matrix Definition

Qualifiers applied to register items can have the Probability percentage, schedule impact, and cost impact updated to reflect your organization's preferred values. This becomes the default matrix when creating a new project.

Events Register Register Types Matrix Definition					
Description	Probability	Schedule Impact	Cost Impact	Color	
Very Low	10%	≤ 11 days	≤ \$13		
Low	25%	≤ 30 days	≤ \$10,000		
Medium	50%	≤ 60 days	≤ \$100,000		
High	75%	≤ 90 days	≤ \$1,000,000		
Very High	95%	≤ 180 days	≤ \$10,000,000		

11.0.1 Project Register Events

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

11.0.1.1 Event Types

There are several Event types available in the Project Register. Of the available events, the following three are focused on: Idea, Opportunity, and Threat.

The screenshot shows the Project Register interface with a modal dialog box for adding a new event. The main table lists various events with columns for Event ID, Title, %, Dur, \$, Score, Mitigation, Status, and Activity. A red arrow points from the 'Add' button in the top right of the dialog to the 'Add' button in the top right of the main interface. Another red arrow points from the 'Title' input field in the dialog to the 'Title' input field in the main interface. The dialog box has fields for 'Title (required)', 'Type' (set to Threat), 'Description' (optional), and 'Impact' (2000). A list of event types is shown, with 'Threat' being the selected option and highlighted with a red box.

Idea

Ideas are events that do not necessarily yield a positive or negative schedule impact. Often, ideas are schedule notes regarding an activity. They might have a favorable or unfavorable outcome in the schedule and can be replaced with a Threat or Opportunity event if circumstance dictates it.

Opportunity

Opportunities are events with the potential to yield a favorable schedule outcome such as time savings or cost reduction.

Threat

Threats are events that may occur, posing possible schedule delays or increased cost on the project.

Event Values

When assigning an event to an activity, there are three additional fields to be populated depending on the type of event: Probability, Duration and Cost. These fields vary from event type to event type and not always need to be filled out. However, it is in the best interest of the team input as much information as possible for the Risk Analysis to be conducted.

Lack of specs leads to re-design				SCORE
ID	Prob.	Dur.	Cost	
R5	%	1	1	

- **Probability:** Likeliness of the listed event to occur and impact the schedule.
- **Duration:** Estimated days increased or decreased due to the event
- **Cost:** Estimated cost associated with the event
- **Score:** System generated value based on the Probability, Duration, and Cost Factors involved

Event Values

11.0.1.2 Events Library

In the Project Register Events Library, all events on the project and from the Knowledge Library are listed. These events can be selected and assigned to activities.

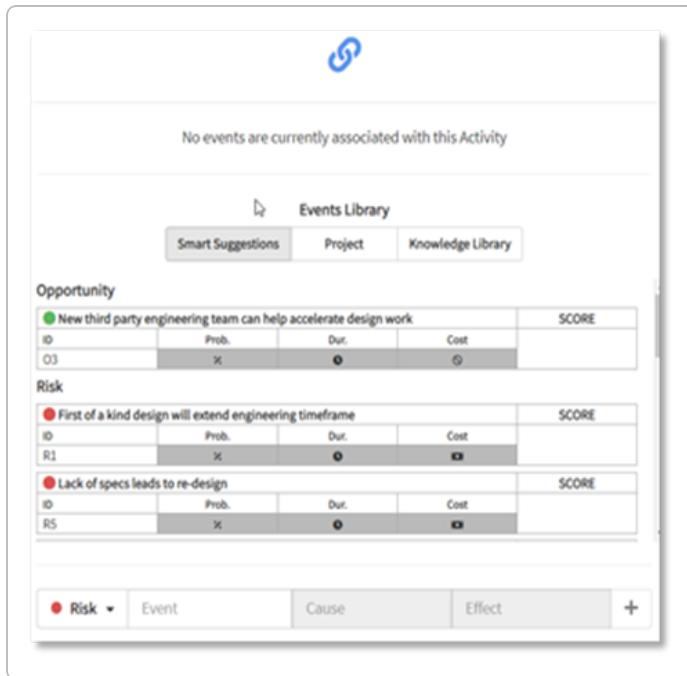
If a new event is to be created, the Project Register has an input field for new events.

Create an Event

1. To open the Project Register Events Library from the Markup Screen, click on the **Sticky note** icon of the activity or planning package the event will be associated to.

This icon might be red or yellow depending on the markup provided.

2. A new window opens with the Events Library.



No events are currently associated with this Activity

Events Library

Smart Suggestions Project Knowledge Library

Opportunity

ID	Prob.	Dur.	Cost	SCORE
O3	X	●	○	

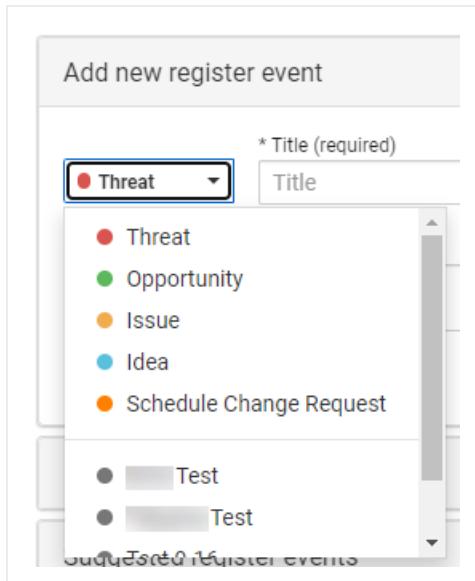
Risk

ID	Prob.	Dur.	Cost	SCORE
R1	X	●	●	

ID	Prob.	Dur.	Cost	SCORE
R5	X	●	●	

Risk Event Cause Effect +

3. At the bottom of the Events Library is the **Event Creation** function.
4. Click the **Event Type** drop-down menu to select from Risk, Opportunity, Issue, Idea and Schedule Change Request.



Add new register event

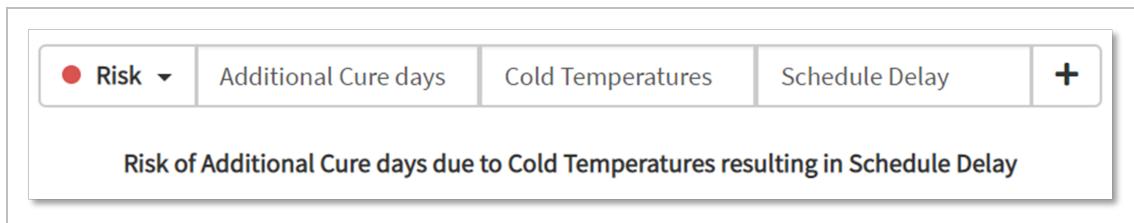
* Title (required)

Threat

- Threat
- Opportunity
- Issue
- Idea
- Schedule Change Request

- Test
- Test

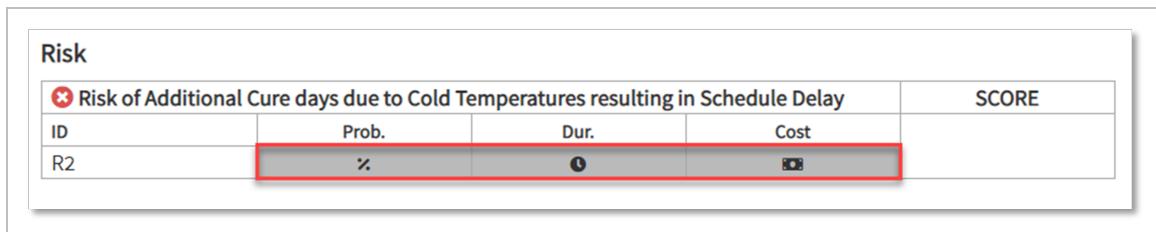
5. Fill out the Event, Cause, and Effect fields. As these fields are populated, a summary of the event is shown below.



The screenshot shows a top navigation bar with a dropdown menu set to 'Risk'. Below the bar, a message box displays the text: 'Risk of Additional Cure days due to Cold Temperatures resulting in Schedule Delay'.

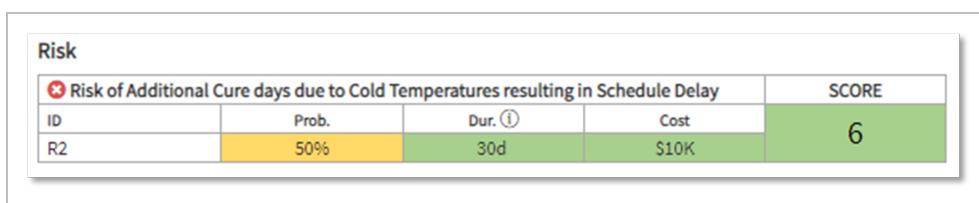
6. Click the Add icon.

7. Your selection now appears at the top of the window. Fill out the remaining fields (i.e. Risk - Probability, Duration, and Cost).



The screenshot shows a 'Risk' table with one row. The first column contains the ID 'R2'. The second column contains the probability '%'. The third column contains the duration 'Dur.' with a help icon. The fourth column contains the cost 'Cost' with a help icon. The last column is labeled 'SCORE'.

Risk				
Risk of Additional Cure days due to Cold Temperatures resulting in Schedule Delay				SCORE
ID	Prob.	Dur.	Cost	
R2	%	?	?	



The screenshot shows the same 'Risk' table as the previous screenshot, but with values filled in. The first column contains the ID 'R2'. The second column contains the probability '50%'. The third column contains the duration '30d'. The fourth column contains the cost '\$10K'. The last column is labeled 'SCORE' and contains the value '6'.

Risk				SCORE
Risk of Additional Cure days due to Cold Temperatures resulting in Schedule Delay				
ID	Prob.	Dur.	Cost	
R2	50%	30d	\$10K	6

8. Close when finished.

11.0.1.3 Risk Range Scoring

The score calculation for risk range scoring is: Probability "%" times the greater of (Duration "Dur" range OR Cost "\$").

5 point = Very Low to Very High

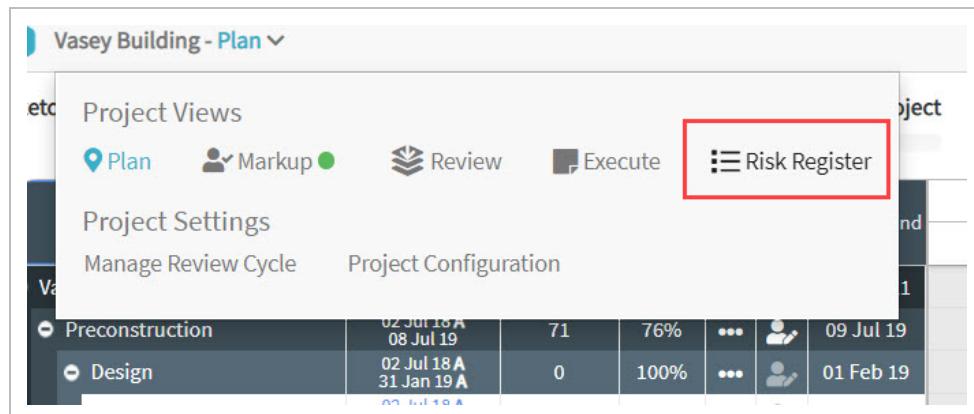
7 Point = Extremely Low to Extremely High

9 Point = Ultra Low to Ultra High

Range	Score
Ultra Low	1
Extremely Low	2
Very Low	3
Low	4
Medium	5
High	6
Very High	7
Extremely High	8
Ultra High	9

Project Register Items

Project register items (Risks, Opportunities, Action Items, etc.) can be reviewed at any point by clicking on the project view Risk Register link from the 1st level drop-down menu within a project.



The screenshot shows the InEight software interface for the 'Vasey Building - Plan' project. The top navigation bar includes links for 'Project Views' (highlighted in blue), 'Plan', 'Markup', 'Review', 'Execute', and 'Risk Register' (highlighted with a red box). Below the navigation bar, there are sections for 'Project Settings' (with 'Manage Review Cycle' and 'Project Configuration' buttons), 'Preconstruction' (with tasks for 'Preconstruction' and 'Design'), and 'Design' (with tasks for 'Design' and 'Architectural').

From the Project Register, items can quickly be edited using the following fields:

1	2	3	4	5	6	7	8	9	10	11			
Active	ID	Type	Description	Mitigation	Probability	Schedule Impact	Cost Impact	Score	Markup	Basis	User	Publish	Delete
<input checked="" type="checkbox"/>	R2	Risk	Risk of change in permitting authority	Schedule review with permitting office	50%	90 days	\$10,000	12		1	ZR	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	R3	Risk	Risk of Steel Market Condition due to High Demand resulting in Delayed Deliv		50%	60 days	\$100,000	12		1	ZR	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	R4	Risk	Risk of Soil Condition due to Incomplete Survey resulting in Potential Delays		50%	90 days	\$1,000	12		1	ZR	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	O2	Opportunity	Opportunity of identify third party engineering firm to support design		50%	30 days		6		1	ZR	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	R1	Risk	Risk of design rework due to first of a kind design resulting in engineering del		25%	60 days	\$1,000	6		1	ZR	<input checked="" type="checkbox"/>	<input type="checkbox"/>

	Name	Description
Active		Items can be deactivated here if they pass without impacting the project.
Type		This describes the type of register item e.g. Risk, Opportunity, Action Item, etc.
Description		Items descriptions can be edited at any time.
Mitigation		Mitigation strategies can be captured here.
Probability/Schedule Impact/Cost Impact		Probability and impact can be reviewed and edited in a centralized view.
Score		Based on the probability and impact of items, a score will be automatically generated.
Markup		The Markup status will appear here. This indicates how many times a register item appears in Markup.
BASIS		The number of times the register item appears in the schedule will show up here. Specific WBS elements can be reviewed by clicking on the number.
User		The user that raised the register item will appear here.

Event ID	R2						
Event Description	Risk of change in permitting authority						
ID	Description	Duration	Probability	Schedule Impact	Cost Impact	Created By	Remove
2	Permitting	198d	50%	90 days	\$10,000	ZR	<input type="checkbox"/>
		CLOSE					

Name	Description
Publish	If the register item is applicable outside of the scope of the current project, the item can be published to the Knowledge Library for use in Schedule recommendations in future projects.
Delete	Deletes the item.

Import/Export

You can Import and Export risks in the project register. There are options for Oracle PRA – Pertmaster as well as Deltek Acumen. These are simple excel formats that can also be generated outside of any tool and used for importing into Schedule.

IMPORT/EXPORT
ADD REGISTER EVENT

Import
Export

Import
Export

Import new or updated register events and their associations to activities within this project

File Format

Oracle PRA - Pertmaster
Deltek Acumen

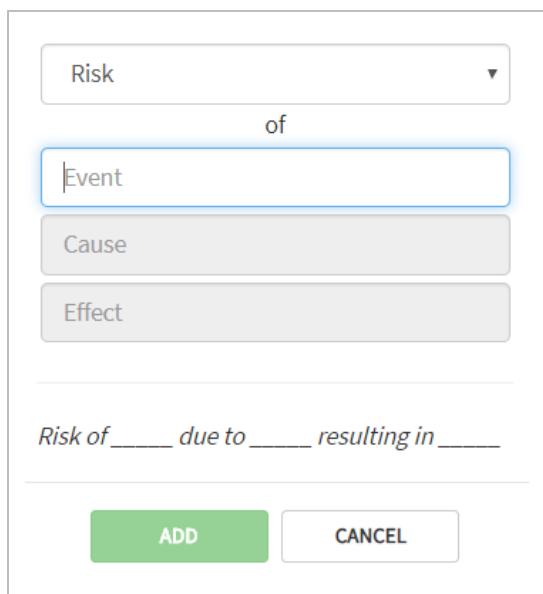
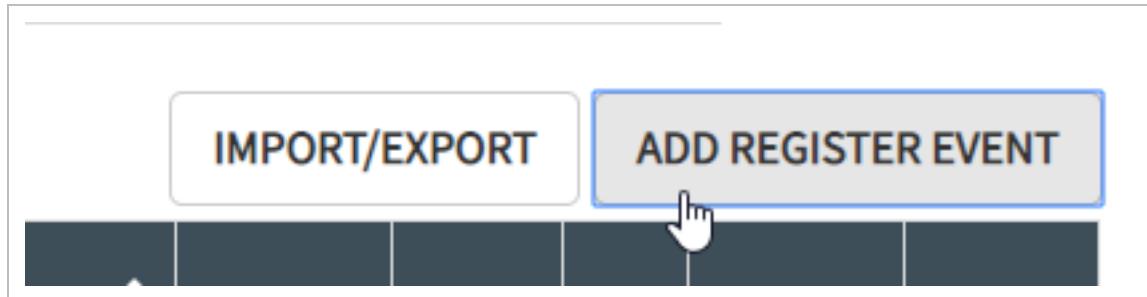
File (.xlsx)

Choose File
No file chosen

IMPORT

Add Register Event

You can manually add a register event to the project register. Simply select Add Register Event and define the event type and description.



Risk of _____ due to _____ resulting in _____

ADD CANCEL

Filter

Select the filter icon to enable filtering for the register view.



Matrix Definition

The default matrix in the Knowledge Library is adopted when the project is created. The matrix can be tailored by project to create a probability and severity range that is appropriate for the project.



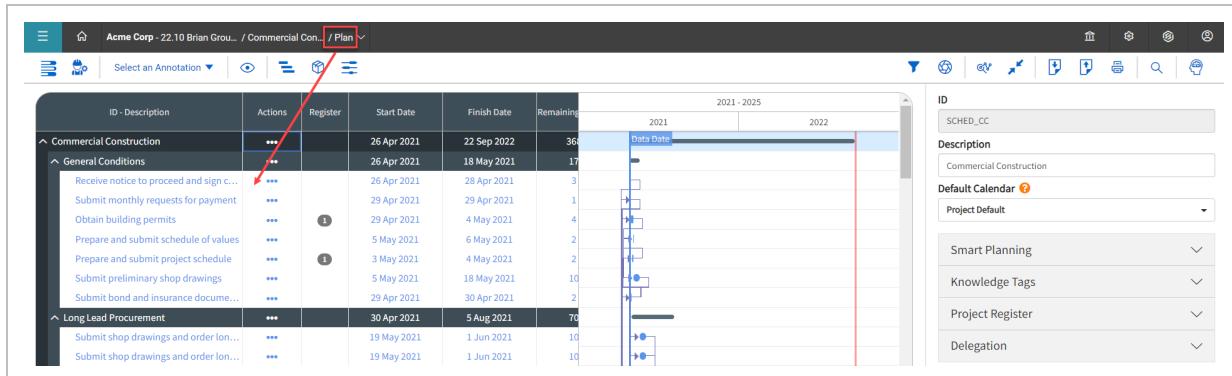
Description	Probability	Schedule Impact	Cost Impact	Color
Very Low	5%	7 days	\$100	●
Low	25%	30 days	\$1,000	●
Medium	50%	60 days	\$10,000	●
High	75%	90 days	\$100,000	●
Very High	95%	180 days	\$1,000,000	●

Assign Register Items

Register items consist of risks, opportunities, change orders, and any other qualifiers that your organization has defined.

Assign a Register Item

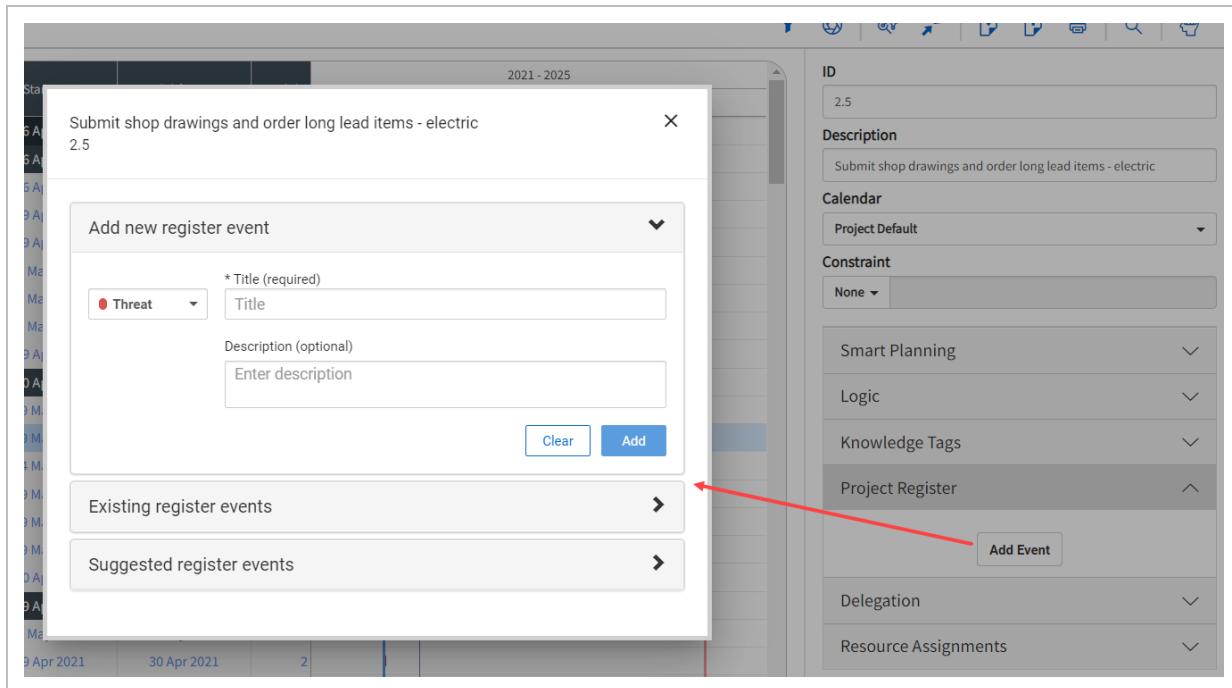
1. Go to the Plan view from the first level drop-down menu in a project, and then select a WBS element.



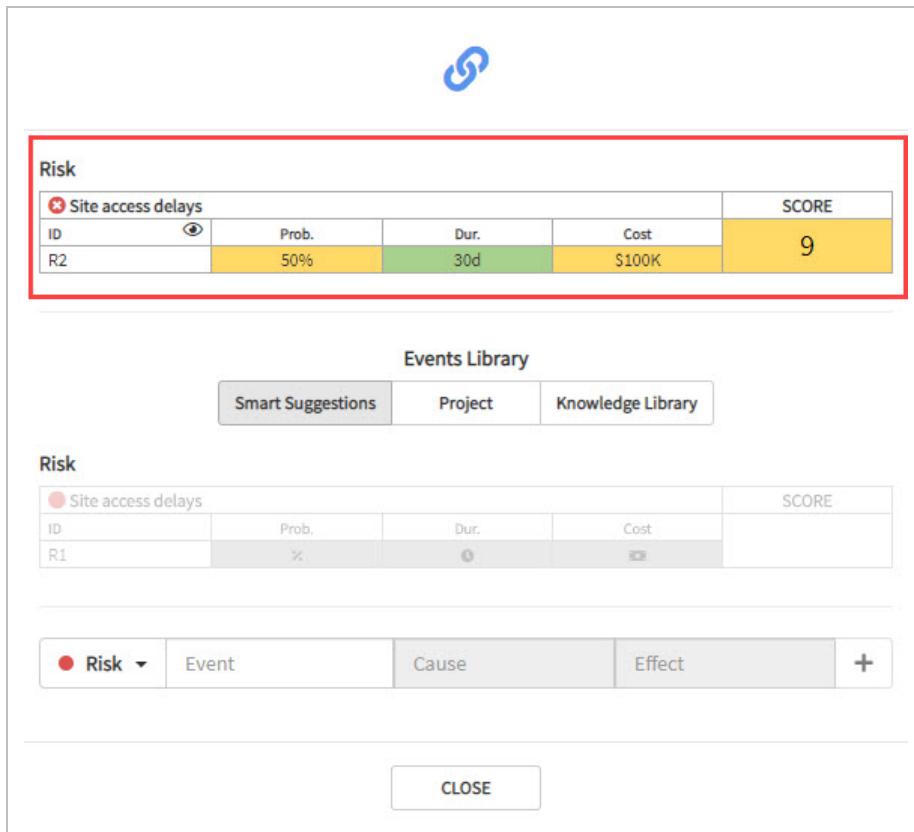
ID - Description	Actions	Register	Start Date	Finish Date	Remaining
Commercial Construction	...		26 Apr 2021	22 Sep 2022	36
General Conditions	...		26 Apr 2021	18 May 2021	17
Receive notice to proceed and sign c...	...		26 Apr 2021	28 Apr 2021	3
Submit monthly requests for payment	...		29 Apr 2021	29 Apr 2021	1
Obtain building permits	...	1	29 Apr 2021	4 May 2021	4
Prepare and submit schedule of values	...		5 May 2021	6 May 2021	2
Prepare and submit project schedule	...	1	3 May 2021	4 May 2021	2
Submit preliminary shop drawings	...		5 May 2021	18 May 2021	10
Submit bond and insurance docume...	...		29 Apr 2021	30 Apr 2021	2
Long Lead Procurement	...		30 Apr 2021	5 Aug 2021	70
Submit shop drawings and order ion...	...		19 May 2021	1 Jun 2021	10
Submit shop drawings and order ion...	...		19 May 2021	1 Jun 2021	10

2. In the rightmost panel, expand project register, and click **Add event**. This causes a dialog box to open, showing any currently existing register items. New items can be added by selecting the

item type, and typing in the event, cause, and effect.



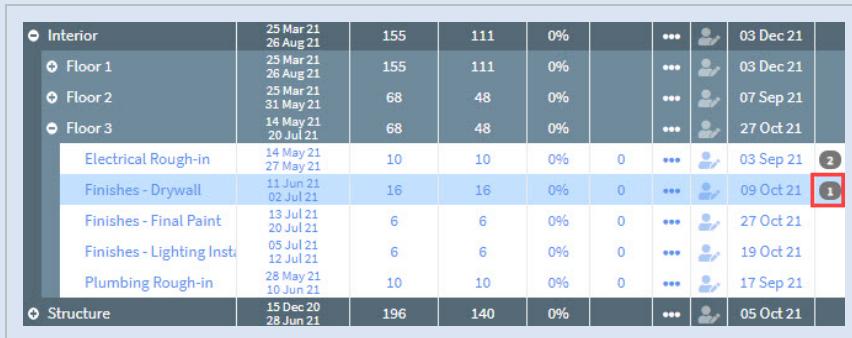
3. Click the icon to add the register item to the WBS element. Enter a probability, schedule impact, and cost impact to quantify the event. The available quantifiers are set up by your administrator based on the register item type.



The screenshot shows the InEight software interface. At the top, there is a blue circular icon with a white 'S' symbol. Below it, a red box highlights a table in the 'Risk' section. The table has a header row 'Site access delays' with a red 'X' icon. The data rows show an ID of 'R2', a probability of '50%', a duration of '30d', and a cost of '\$100K', with a 'SCORE' of '9'. Below this, the 'Events Library' section is visible, featuring tabs for 'Smart Suggestions', 'Project', and 'Knowledge Library'. Another 'Risk' section is shown below, with a table for 'Site access delays' and a 'Score' of '0'. A search bar at the bottom left includes a 'Risk' dropdown, an 'Event' input field, a 'Cause' input field, an 'Effect' input field, and a '+' button. A 'CLOSE' button is at the bottom right.

- An item has now been added to this WBS element.

When the Register column is in the gantt view there is an indicator on the line, telling other users that the WBS element has register items associated with it.



The screenshot shows a Gantt chart view of a Work Breakdown Structure (WBS). The structure is as follows:

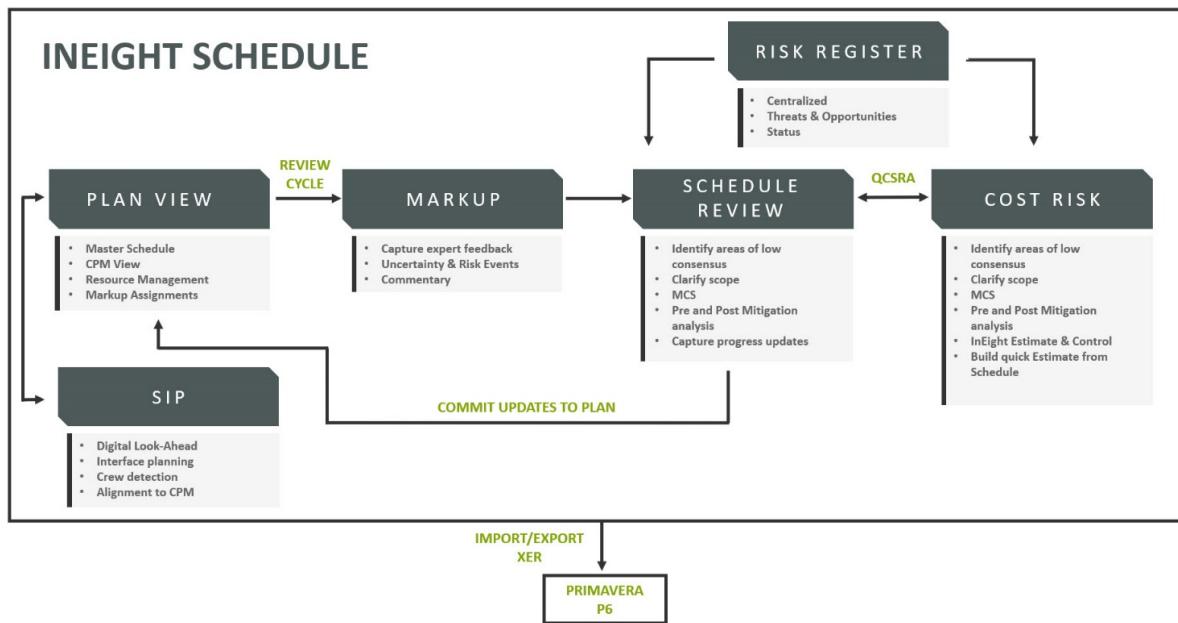
- Interior
 - Floor 1
 - Electrical Rough-in (with a red box around the '2' icon in the Register column)
 - Finishes - Drywall (with a red box around the '1' icon in the Register column)
 - Finishes - Final Paint
 - Finishes - Lighting Insta
 - Plumbing Rough-in
 - Floor 2
 - Floor 3
- Structure

The Gantt chart columns include: Start Date, End Date, Duration, Progress, and Register (indicated by the red boxes).

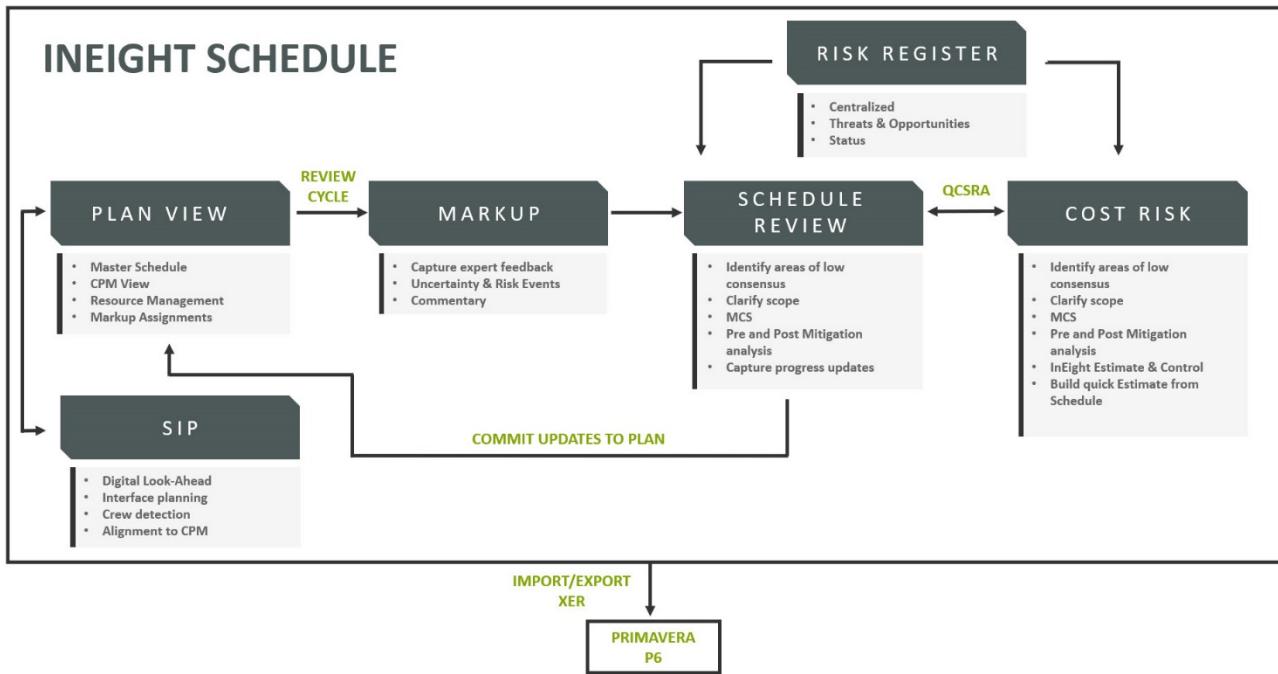
11.1 INEIGHT SCHEDULE WORKFLOWS

11.1.1 InEight Schedule - Focused Workflow

This workflow shows the modules (or views) that make up the InEight Schedule application. It lists the key functions of each view and the relationships the views have to each other.

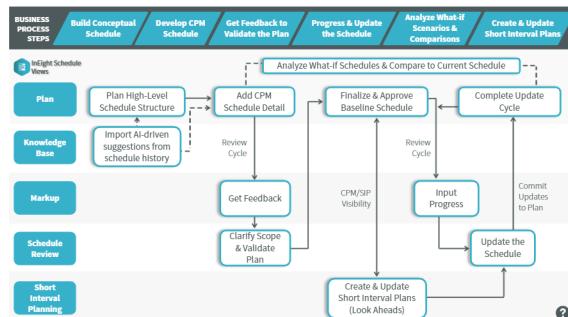


InEight Control General Workflow



11.1.2 Scheduling & Short Interval Planning Workflow

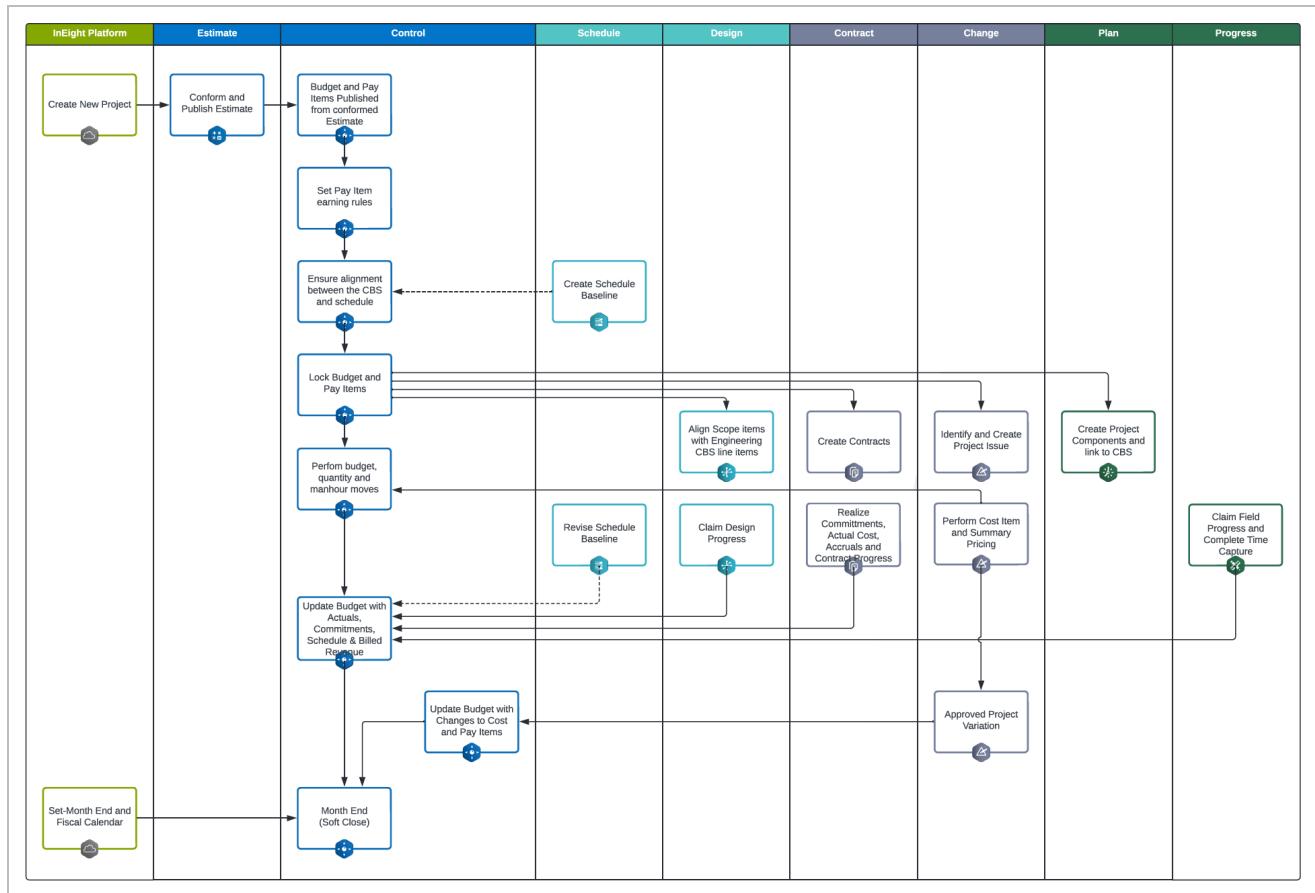
This interactive workflow looks at the key functions of InEight Schedule through the lens of a typical scheduling business process. As you click on each business process step, the workflow highlights the key functions involved, along with the InEight Schedule view you would use for that step.



Scheduling & Short Interval Planning Business Process

11.1.3 Scheduling Business Process Workflow

Similar to the previous workflow, this workflow also diagrams out the typical steps involved in a scheduling business process, but includes additional detail, including touchpoints between InEight Schedule and other InEight applications.



11.2 VIDEO INDEX

This is an index of video transcript pages. For the full video gallery, see the [main video page](#).

- [Assigning project events video](#)
- [Create a schedule video](#)
- [Detail planning video](#)
- [High level planning video](#)
- [Manage review cycle video](#)

- [Markup assignment video](#)
- [Markup video](#)
- [Productivity rates video](#)
- [Project list video](#)
- [Relationships video](#)
- [Reorder project summaries video](#)
- [Schedule overview video](#)
- [Schedule review video](#)
- [Short interval planning resources video](#)
- [Short interval planning steps video](#)
- [Short interval planning video](#)
- [Snapshot overview video](#)

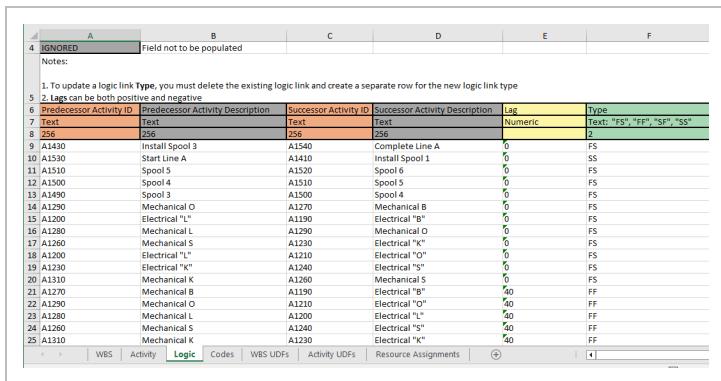
11.3 SCHEDULE FREQUENTLY ASKED QUESTIONS

How can I get schedule changes in and out of InEight Schedule?

As you manage a detailed schedule within the Plan view of InEight Schedule, you will need to make adjustments and changes. You may need to import change information from other sources, or export schedule changes to use in other applications.

You can import and export schedule data using the Import and Export options in the right toolbar within the Plan view.

For import, you have the options to import WBS items, activities, logic, codes, user-defined fields and resource assignments, using an Excel import file.



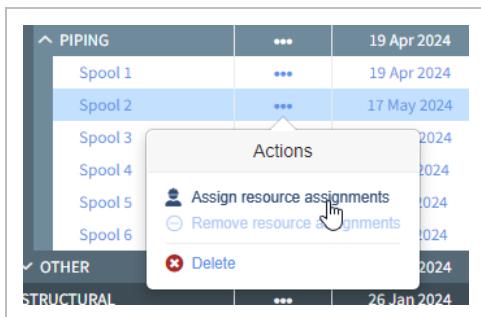
Predecessor Activity ID	Predecessor Activity Description	Successor Activity ID	Successor Activity Description	Lag	Type
Text	Text	Text	Text	Numeric	Text: "FS", "FF", "SF", "SS"
1	Start	2	End	0	FS
9	Install Spool 3	A1540	Complete Line A	0	FS
10	Start Line A	A1410	Install Spool 1	0	SS
11	A1510	A1520	Spool 6	0	FS
12	A1500	A1510	Spool 5	0	FS
13	A1490	A1500	Spool 4	0	FS
14	A1290	A1270	Mechanical B	0	FS
15	A1280	A1290	Electrical "B"	0	FS
16	A1280	A1290	Mechanical O	0	FS
17	A1280	A1290	Electrical "K"	0	FS
18	A1200	A1210	Electrical "O"	0	FS
19	A1230	A1240	Electrical "S"	0	FS
20	A1310	A1260	Mechanical S	0	FS
21	A1270	A1190	Electrical "B"	0	FF
22	A1280	A1290	Electrical "O"	0	FF
23	A1280	A1290	Electrical "L"	0	FF
24	A1280	A1340	Electrical "S"	0	FF
25	A1310	A1220	Electrical "K"	0	FF

For export, you have several options, including:

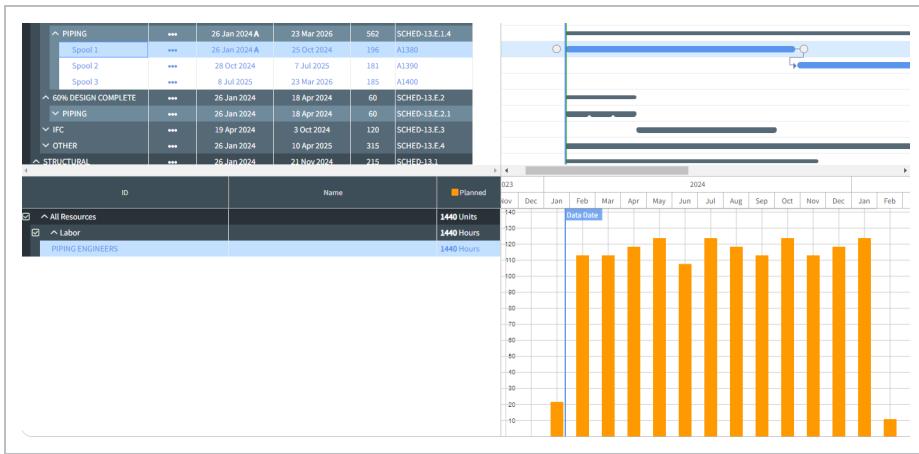
- Primavera P6 XER
- Excel Export
- MS Project MPP

How can I manage my resources in the Schedule Plan view?

From the Plan view of InEight Schedule, you can assign resources to an activity by selecting the **Actions** ellipses and selecting **Assign resource assignments**. This opens a window where you can select from available resources or add new ones to the activity, along with productivity and cost information.



Once added, you can review your resources' planned and actual productivity by turning on the Resources Histogram from the View Option menu.

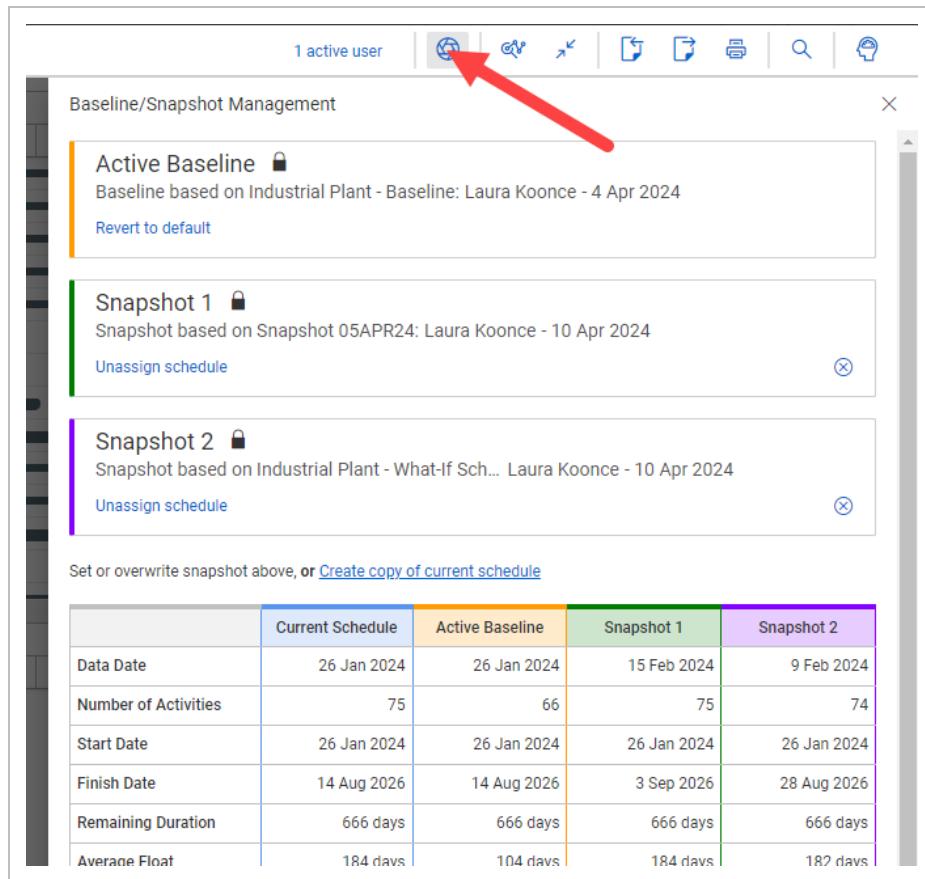


I've set up groupings, filters, and column sets in my Plan view. How can I save them?

If you've customized your Plan view by applying groupings, filters or columns sets, you can save the view by selecting **Views** from the left toolbar and selecting **Save current view**.

How can I compare multiple schedules?

To compare multiple schedules, you can take snapshots and designate which ones to compare on the Baseline/Snapshot Management slide-out panel in the Plan view. You access this slide-out panel from the right toolbar.



1 active user

Baseline/Snapshot Management

Active Baseline Baseline based on Industrial Plant - Baseline: Laura Koonce - 4 Apr 2024
Revert to default

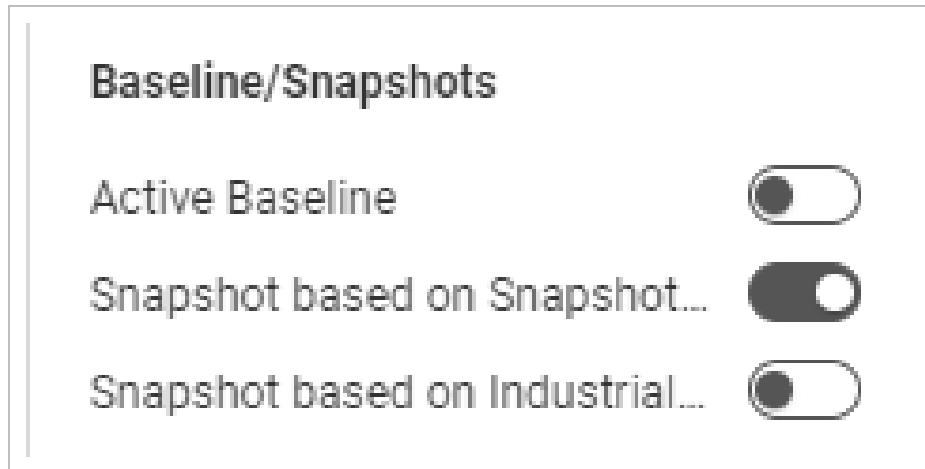
Snapshot 1 Snapshot based on Snapshot 05APR24: Laura Koonce - 10 Apr 2024
Unassign schedule

Snapshot 2 Snapshot based on Industrial Plant - What-If Sch... Laura Koonce - 10 Apr 2024
Unassign schedule

Set or overwrite snapshot above, or [Create copy of current schedule](#)

	Current Schedule	Active Baseline	Snapshot 1	Snapshot 2
Data Date	26 Jan 2024	26 Jan 2024	15 Feb 2024	9 Feb 2024
Number of Activities	75	66	75	74
Start Date	26 Jan 2024	26 Jan 2024	26 Jan 2024	26 Jan 2024
Finish Date	14 Aug 2026	14 Aug 2026	3 Sep 2026	28 Aug 2026
Remaining Duration	666 days	666 days	666 days	666 days
Average Float	184 days	104 days	184 days	182 days

Once designated, you can select which snapshots to include in your view by selecting them in the View Options menu.



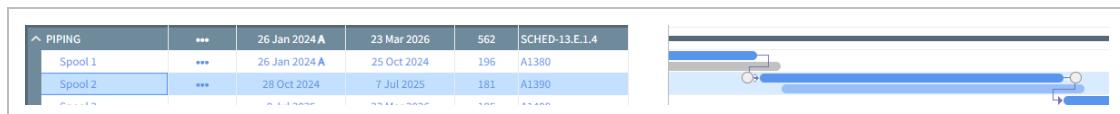
Baseline/Snapshots

Active Baseline

Snapshot based on Snapshot...

Snapshot based on Industrial...

You can then compare the activities of each schedule next to each other in the Gantt chart.



See Also:

[Baseline/Snapshot](#)

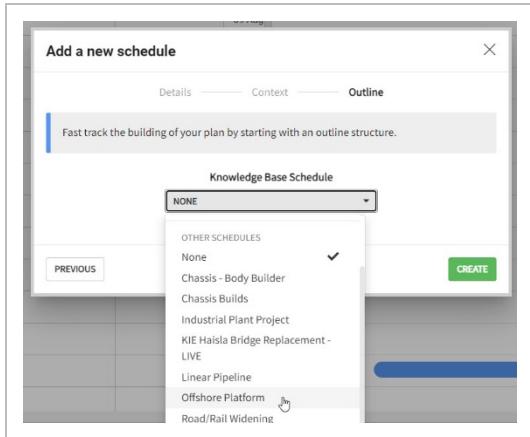
How can I store past schedules to be used as templates?

You can save your entire schedule, or portions of it, to the Knowledge Base for future use. To save the entire schedule, click the Actions ellipses on the highest level (first row) of the schedule and select **Publish to the knowledge base**.

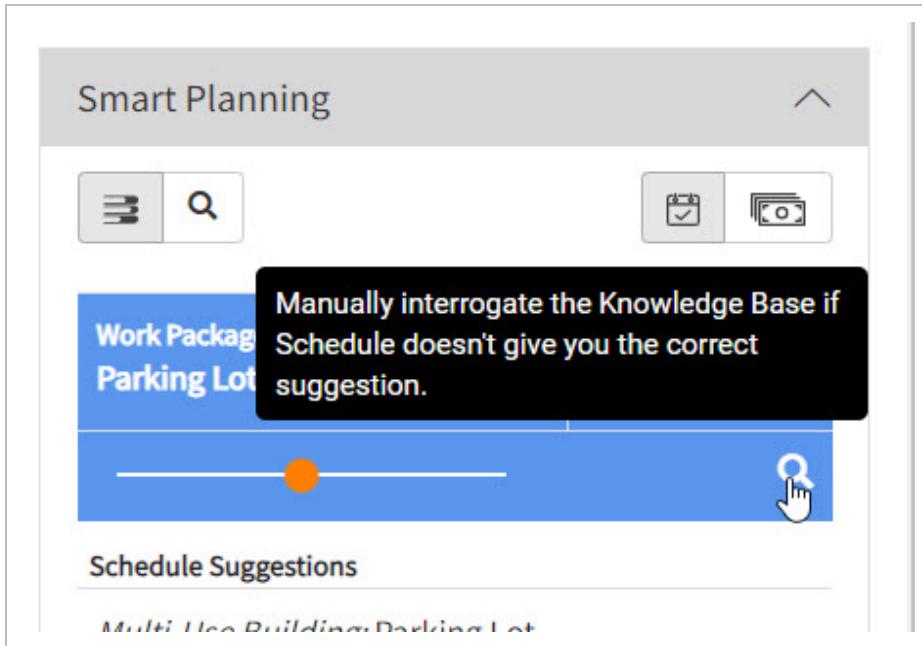
Schedules ↓	Schedule ID	Start	Finish	Data Date	Verified
30% Design Complete - MST	SCHED	26 Jan 2024	23 May 2024	26 Jan 2024	●
60% Design Complete - MST	SCHED-8	26 Jan 2024	8 May 2024	26 Jan 2024	●
AIAL_DP001_BL00_REV0_23 Feb 24 - Cos...	DP.001.93343.4.501-3	31 Oct 2022	15 Feb 2029	23 Feb 2024	●
Chassis - Body Builder	SCHED-1	26 May 2021	8 Sep 2021	26 May 2021	●
Chassis Builds	SCHED-2	26 May 2021	26 May 2021	26 May 2021	●
Combined Cycle Estimate Schedule	CC Power Plant Bid	2 Oct 2023	20 Oct 2026	2 Oct 2023	●
Commercial Building	SCHED-3	12 Jun 2018	17 Feb 2021	12 Jun 2018	●
IFC - MST	SCHED-9	19 Apr 2024	19 Aug 2024	26 Jan 2024	●
Industrial Plant Project	SCHED-10	26 Jan 2024	28 Aug 2026	9 Feb 2024	●
KIE Haisla Bridge Replacement - LIVE	KIEHBR	20 Apr 2021	23 Jul 2024	21 May 2021	●
Linear Pipeline	SCHED-4	12 Jun 2018	25 Apr 2023	12 Jun 2018	●

You can perform this same function at any WBS level.

Published schedules (or portions of a schedule) are stored on the CPM Schedules tab in the Knowledge Base. An Administrator must review the schedule and mark it as Verified prior to it being used.



In existing schedules, at the WBS level, you can add portions of a schedule from the Knowledge Base. This is done from the Iris panel, under the Smart Planning section.



See Also:

[Knowledge Base](#)

Can InEight Schedule integrate with other InEight applications?

InEight Schedule currently includes import/export functionality to share schedule data between applications via Microsoft Excel and .XER files. Development is underway to more tightly integrate InEight Schedule with other applications including InEight Estimate and InEight Plan.

What is the difference between Short Interval Planning (SIP) resources and resources?

Resources used for scheduling in the Plan view are for considering durations, productivity and costs for the entire CPM schedule for the project and are assigned at the higher activity level.

SIP resources represent the labor, equipment and materials tracked on look-ahead schedules managed by the field team. These look-ahead or short interval plans break schedule activities down into the day-to-day steps to execute the work in the field and track the SIP resources at the step or task level.

Is there a standardized fill-down option in InEight Schedule?

Yes, there is a fill-down feature for calendars, codes and resources, where you can specify a value at a summary level and have it apply to the child elements below it. You access the Fill down feature by clicking on the Actions ellipses of your summary level item.

See Also:

[Project Resources](#)

How do we manage multiple schedules with external relationships?

InEight Schedule does not support a program level of schedule management, where distinct schedules for different projects are managed under a single program and have external relationships between them. You can still manage multiple schedules with relationships between them, however, by importing the individual schedules into one “master” schedule and then establishing logic links between them as needed.

Use Case 1: InEight Schedule only

Publish each schedule to the Knowledge Base, then add WBS items representing each schedule and import the corresponding schedule from the Knowledge Base for each WBS item using the Smart Planning feature.

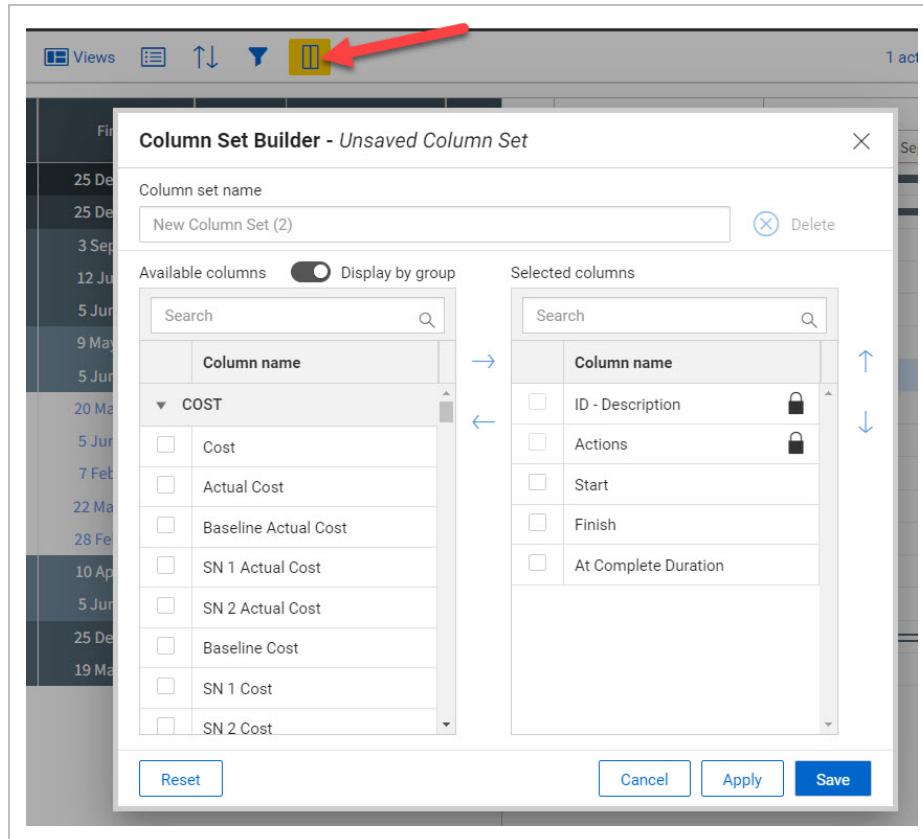
Use Case 2: InEight Schedule and Primavera

Select multiple schedules in Primavera and export them as a single structure in an XER file. Then import the .XER file into InEight Schedule, where it becomes a single “master” schedule structure containing the individual schedules exported from Primavera.

Can we copy/paste data from the InEight Schedule Plan view to Excel?

You can send data from the InEight Schedule Plan view to Excel using the **Column Set Builder** and the Export feature. From the Column Set Builder Menu, select the Column Set Builder to specify

what columns you would like to include for exporting to Excel.



Then, you can export that set of columns and their related data to Excel, by selecting **Export** on the right toolbar.

How do I capture progress from field personnel?

InEight Schedule includes a review cycle feature that can be used to obtain progress updates from the field.

See Also:

[Input Progress](#)

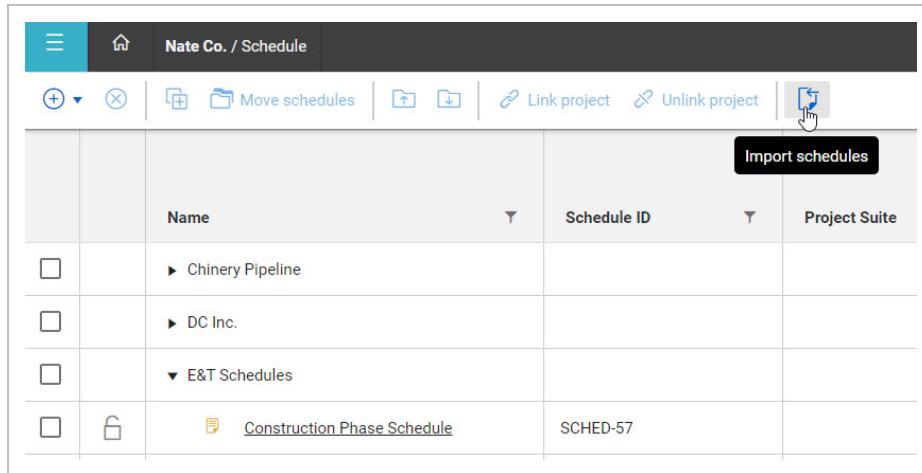
Are my resources the same resources as are in InEight Control/Cloud Platform?

The resources used in InEight Schedule (both at the Knowledge Base and Project levels) are distinct from the resources used in other InEight applications. Any coordination of resources used by the different apps would therefore need to be managed via internal processes within your organization. For example, your organization could define a standard set of resources used by the

company and share that list out to the various project teams to import or manually input within each application.

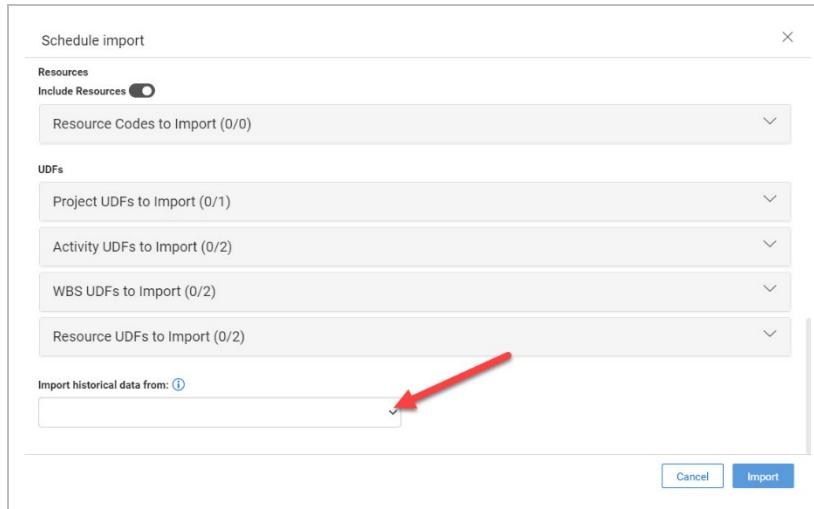
How do I update my InEight Schedule from an .XER file?

You can import schedule data via an .XER file using the Import schedules function on the left toolbar of the Project List page.



The screenshot shows the InEight Project List page. At the top, there is a toolbar with various icons: a plus sign, a minus sign, a refresh, a move schedules icon, a file icon, a link project icon, an unlink project icon, and an import icon. The import icon is highlighted with a mouse cursor. Below the toolbar is a table with columns: Name, Schedule ID, and Project Suite. The table contains several rows of project data, including 'Chinery Pipeline', 'DC Inc.', 'E&T Schedules', and 'Construction Phase Schedule' (which is selected and highlighted with a lock icon). A 'Import schedules' button is located at the top right of the table area.

Note that when importing you can import historical data from another schedule to bring in additional information including planners, assignments, and short interval plans.



The screenshot shows the 'Schedule import' dialog box. It has several sections: 'Resources' (with a 'Include Resources' toggle), 'UDFs' (with sections for 'Project UDFs', 'Activity UDFs', 'WBS UDFs', and 'Resource UDFs'), and 'Import historical data from' (with a dropdown menu). A red arrow points to the 'Import historical data from' dropdown. At the bottom right are 'Cancel' and 'Import' buttons.

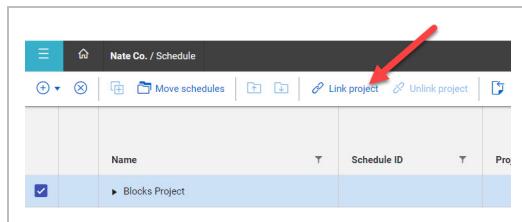
How do I get access to a schedule from within the InEight Cloud Platform?

You can access InEight Schedule from the InEight Cloud Platform, either from an organization or project level. If you select Schedule from the Organization home page, it takes you to the Project

List page within InEight Schedule, where you can then select your schedule as needed. If you select Schedule from a Project home page, it will take you to InEight Schedule, and will be filtered down to that specific project's workspace on the Project List page, making it easier to get to the schedules related to the project.

How do I link my schedule workspace to a project in InEight Platform? In the future, will schedule workspaces be created automatically when an InEight Platform project is created?

From the Project List page of InEight Schedule, you can link a schedule workspace to a project in InEight Platform by selecting Link project on the left toolbar.



In the future, the schedule workspace will be created automatically when an InEight Platform project is created.

See Also:

[Advanced Work Packaging](#)