

# SCHEDULE USER GUIDE



Release 25.5  
Last Updated: 24 June 2025



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# LESSON 1 – SCHEDULE OVERVIEW

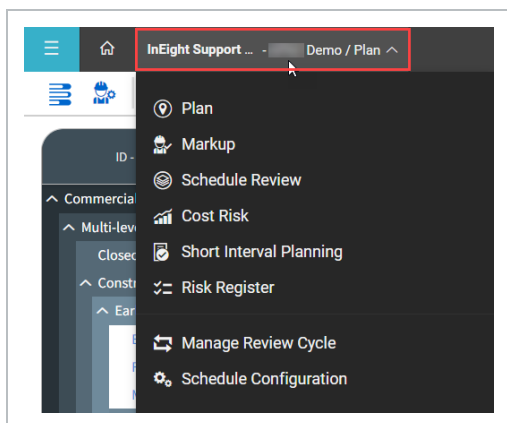
## OVERVIEW OF THE SCHEDULE AND RISK PROCESS

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:

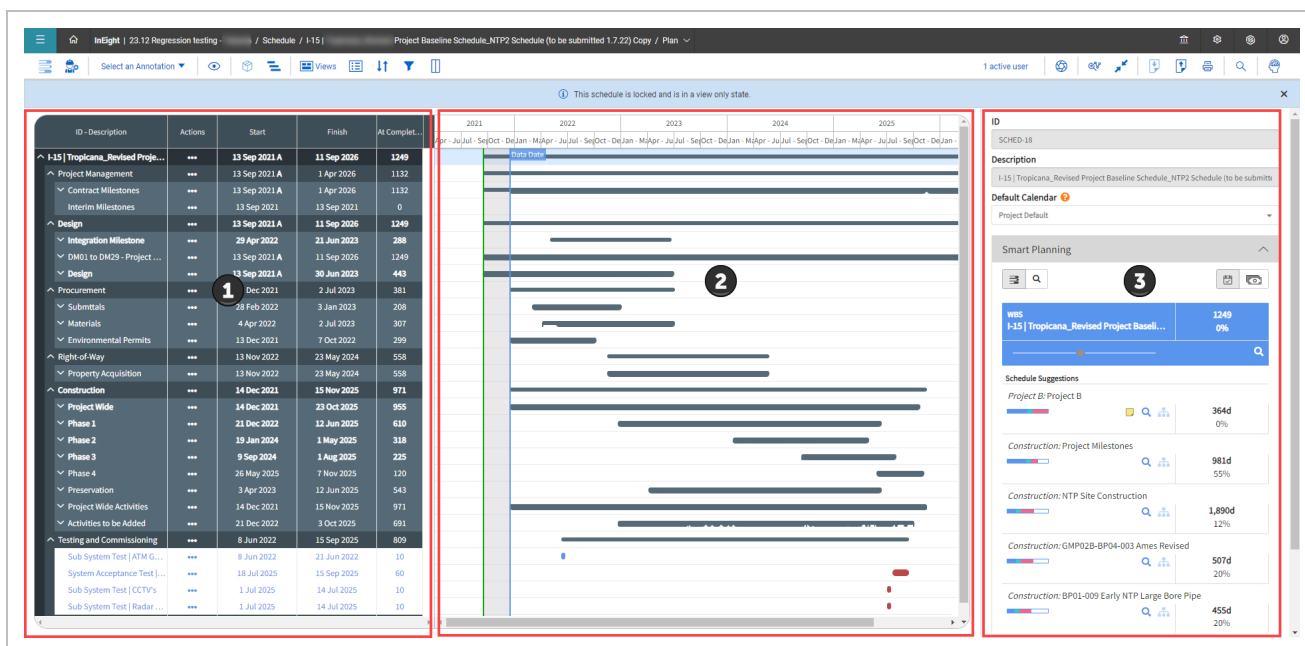
Project View	Description
Plan	Create, detail, and plan out the CPM schedule.
Markup	Assess, critique, and provide feedback on the planned CPM schedule.
Schedule Review	Consolidate markups, conduct risk analysis, and update the CPM Schedule based on review.
Cost Risk	Consolidate markups, conduct risk 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.



- 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.


NOTE


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
--	------------------

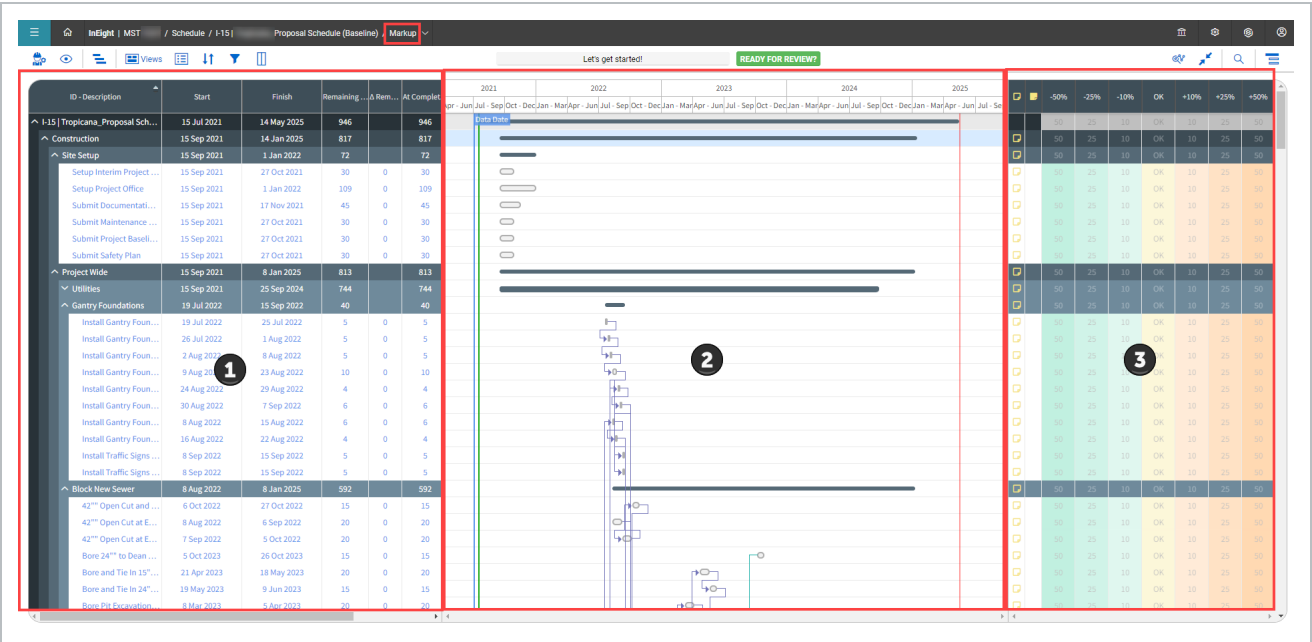
Orange 	Baseline activity
---	-------------------

Green 	LOE
--	-----

Horizontal Bar Type	Description
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.

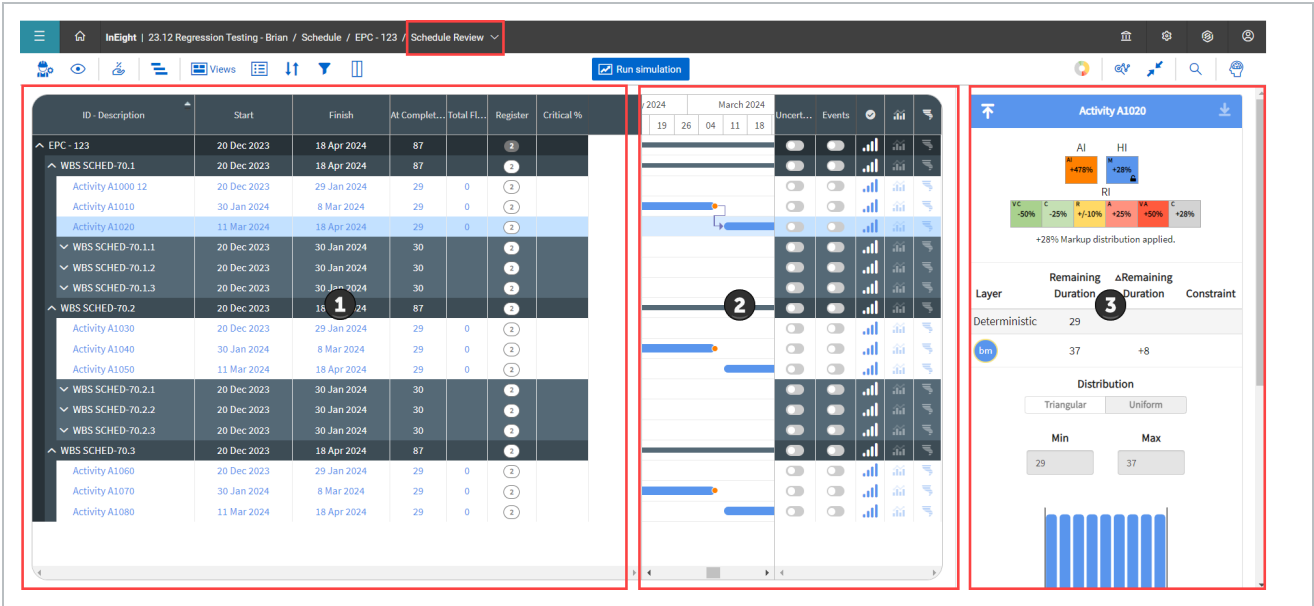


- 1 Gantt chart columns contain activity metadata: ID-description, dates, remaining duration, total duration, delta [change in] remaining duration, delta [change in] end date, and completed [markup status].
- 2 This Gantt chart provides a visual layout of how the schedule would be affected by the markups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



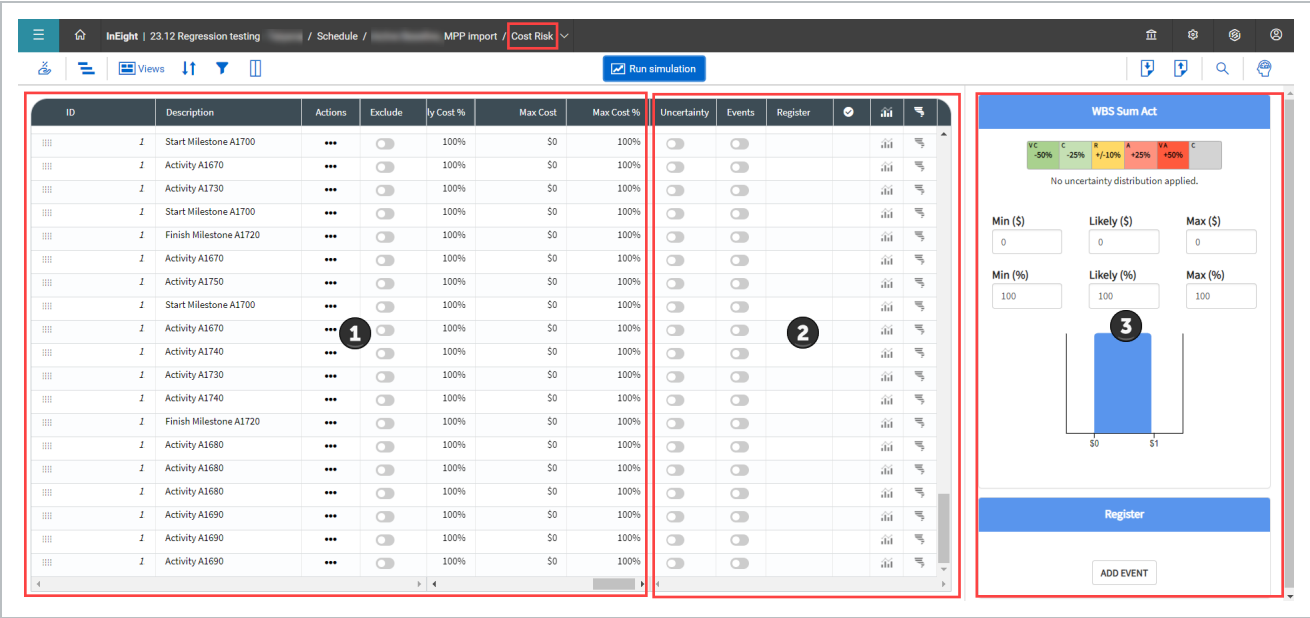
- 1 Gantt chart columns show the original start and finish dates but can have the uncertainty and events from the markups switched on and off to show the changes and impacts to the schedule.
- 2 This Gantt chart provides a visual layout using bars that adjust dependent upon the uncertainty and risk applied. 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.

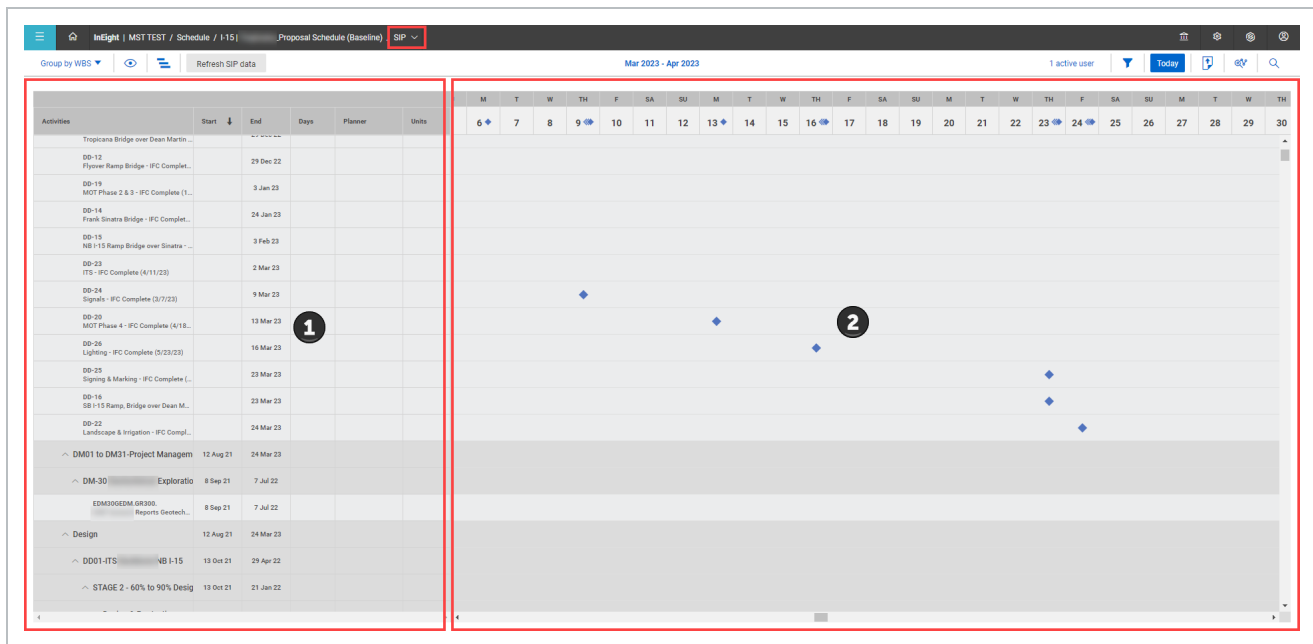


- 1 Columns for Cost Item information that shows actual, remaining, and totals of items prior to simulations with the option to display risk adjusted amounts based on user selection.
- 2 Provides toggles to turn on or off uncertainty or events and view events assigned to cost items. Users can also view 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.

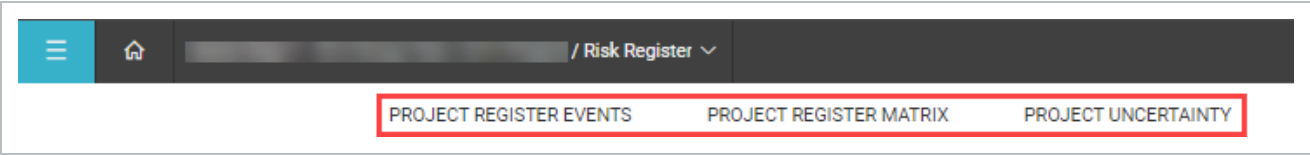


- 1 Contains all work packages, activities, and steps listed with dates and durations.
- 2 This visual represents how steps and crew activity are spread out over the coming weeks. Additionally, the original CPM dates have duration bars shown so users can visually see when steps to complete an activity 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

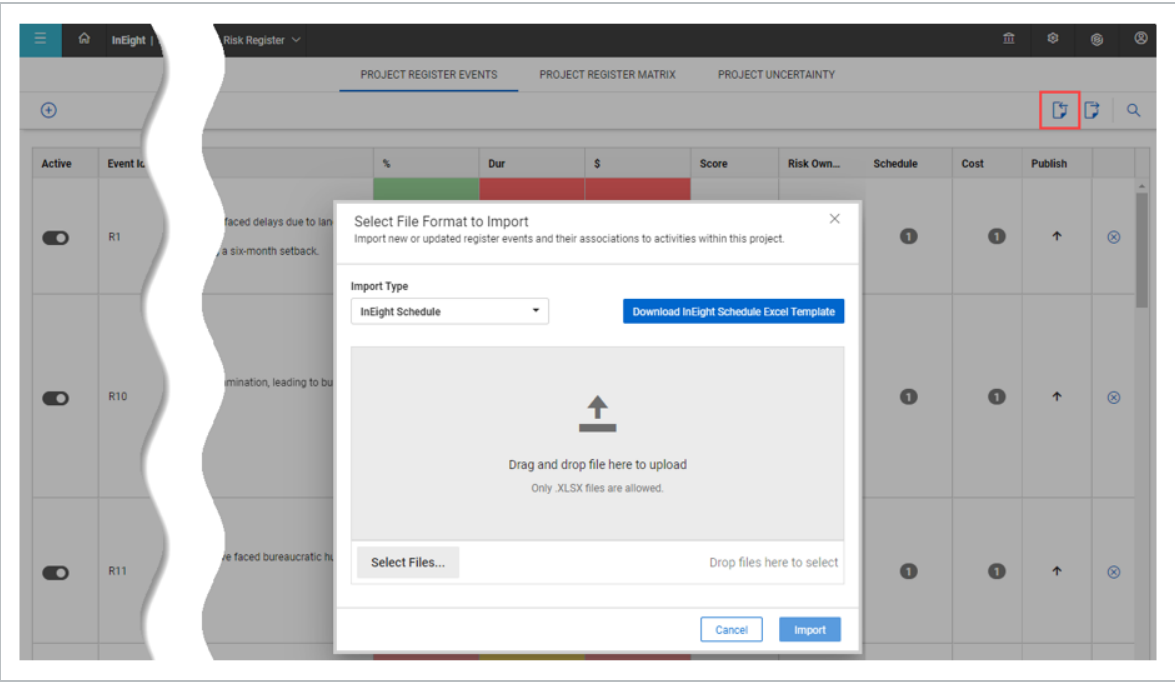
The Risk Register is where the schedule’s risk events, matrix settings, uncertainty values are stored and set.



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

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)	1	Garl...	Bring the crane	Mitigated		1		
<input checked="" type="checkbox"/>	O1	Rent equipment for 50% off	Opportunity	overbought!	Ultra Low (5%)	Ultra Low (≤ 7d)	Ultra Low (≤ \$...)	1	Garl...		Unmitigated				

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 EVENTSPROJECT REGISTER MATRIXPROJECT UNCERTAINTY

Number of ranges9

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 EVENTSPROJECT REGISTER MATRIXPROJECT UNCERTAINTY

Active

Event Id

Title

Type

Description

%

Dur

\$

Score

<input checked="" type="checkbox"/>	R1	MST Threat	Threat		Very Low (25%)	Very High (< 1...	Medium (< \$1...	21
<input checked="" type="checkbox"/>	O1	MST Opportunity	Opportunity		High (65%)	Very Low (< 4...	Medium (< \$1...	36

Publish

↑

⊗

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)

Unmitigated  
30

Add new value

ID	Mitigation	%	Dur	\$	S..	Cost	Owner	Start	End
M1	MST MIT2	High (65%)	Very Low (≤ ...	Medium (≤ \$10...	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.

PROJECT REGISTER EVENTS					PROJECT REGISTER MATRIX					PROJECT UNCERTAINTY				
Description					Min		Most Likely		Max		Color			
Very Conservative					50%		100%		100%		<div></div>			
Conservative					75%		100%		105%		<div></div>			
Realistic					90%		100%		110%		<div></div>			
Aggressive					95%		100%		125%		<div></div>			
Very Aggressive					100%		100%		150%		<div></div>			



# LESSON 2 – USER ACCESS

## SCHEDULE NAVIGATION

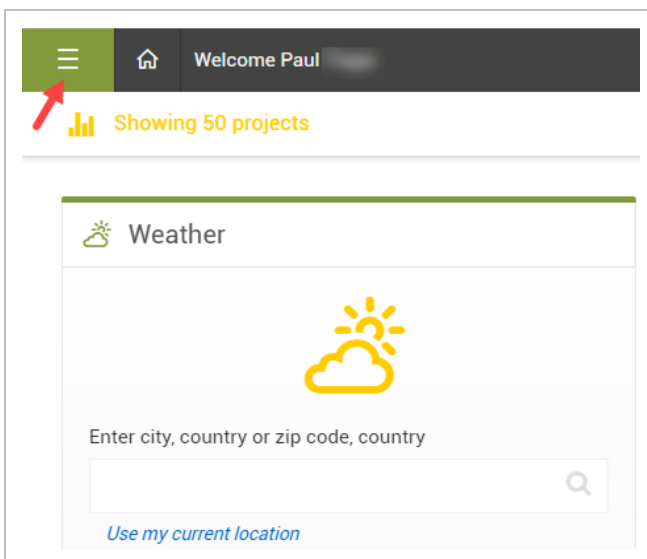
### 2.0.0.1 MAIN MENU

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](#).

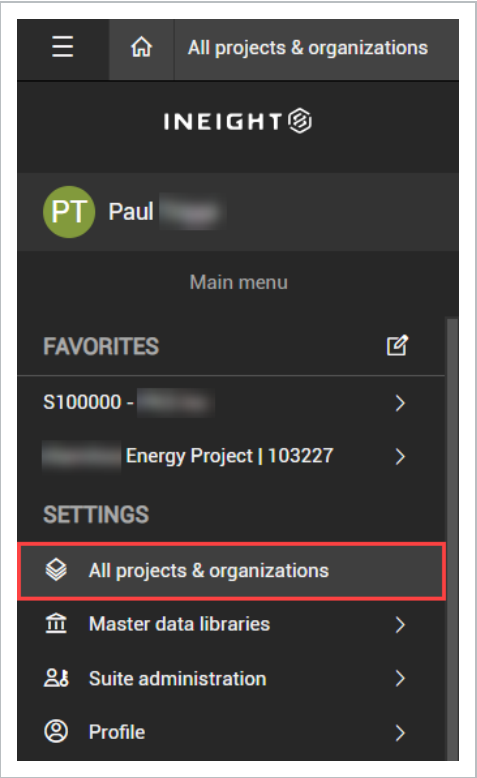
Schedule can be accessed from All projects & organizations in the Main menu, which opens to the Schedule Project List page. If a schedule is linked to a project, from the project home page the Main menu click **Schedule** to open to the project workspace.

## OPEN SCHEDULE FROM MAIN MENU

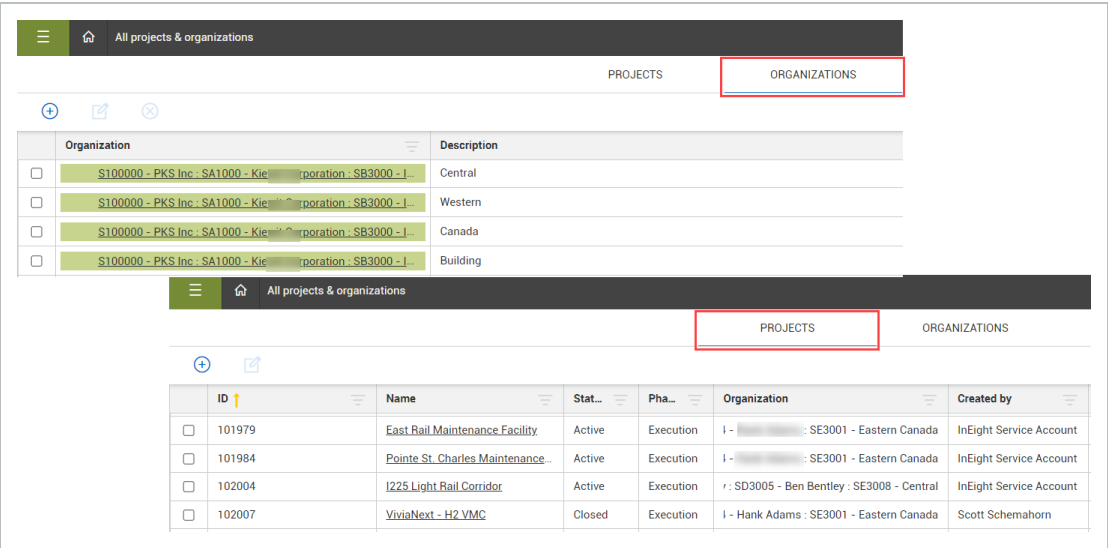
1. Click the Main menu icon.



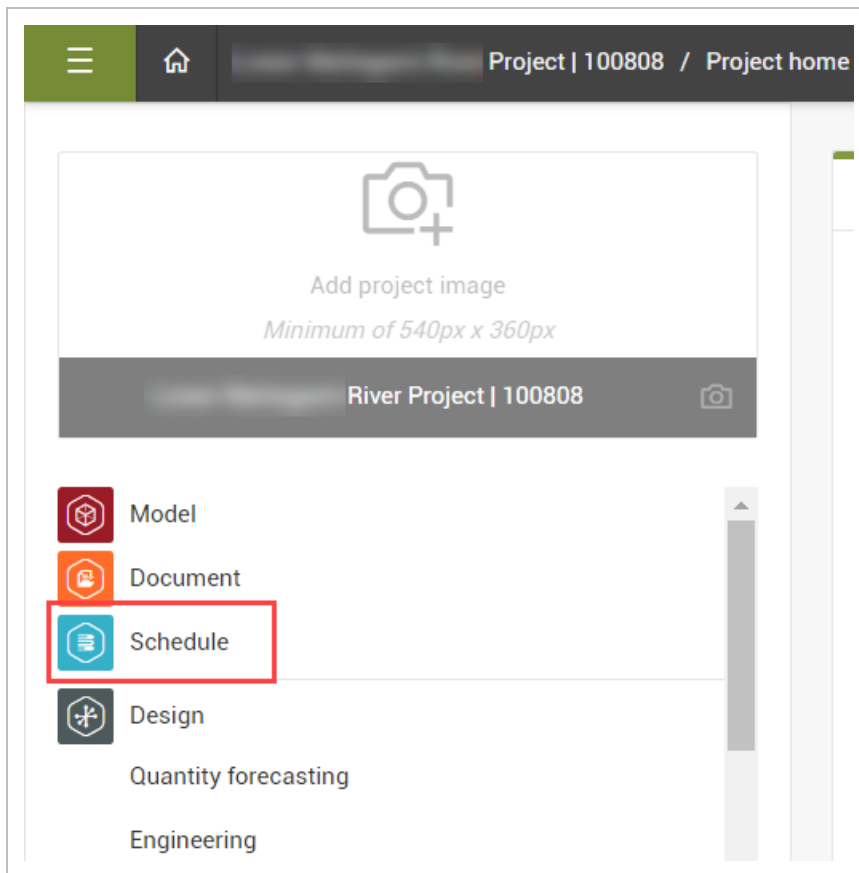
2. Select **All projects & organizations** from the Main menu.



3. Click on either a **project** or an **organization**.



## 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

### NOTE

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.

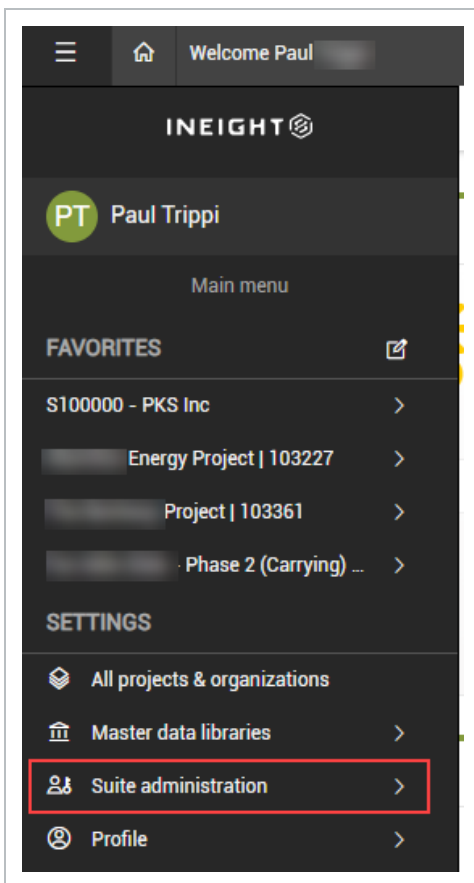
## KNOWLEDGE BASE ADMINISTRATOR

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

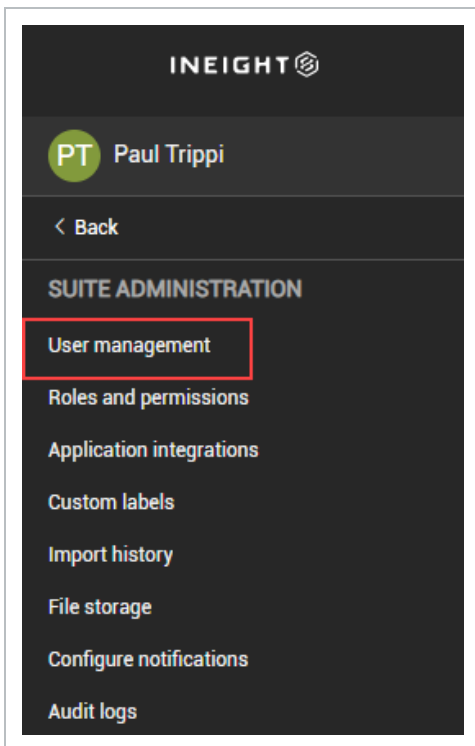
### USER CREATION

#### CREATE A NEW USER

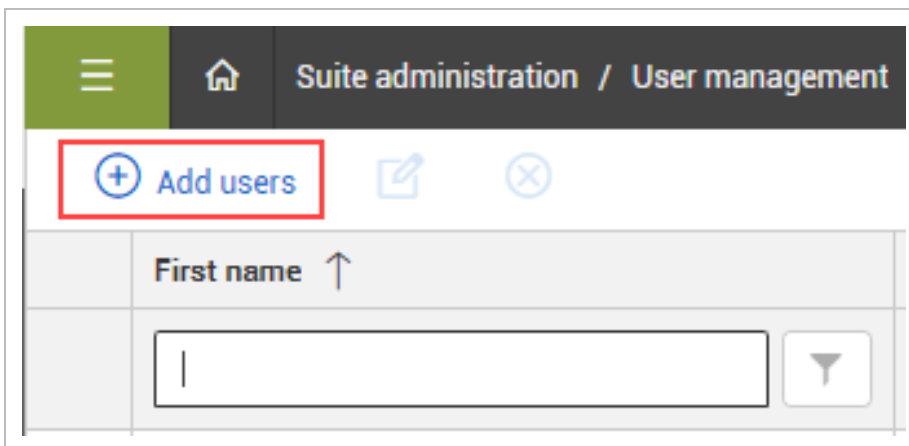
1. Click **Suite Administration**.



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**.

**Add users**

1 DETAILS 2 ROLES

Roles (1) [+ Add role](#)

\* Role: Administrator

\* Organization/Project: Desalination | 102035-DNU

Back Cancel Save

6. Select **Save**.

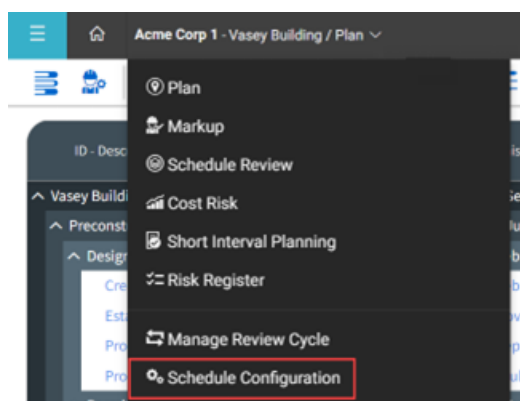
## RELEVANT LINKS

InEight Platform - Roles and Permissions Quick Guide

## 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

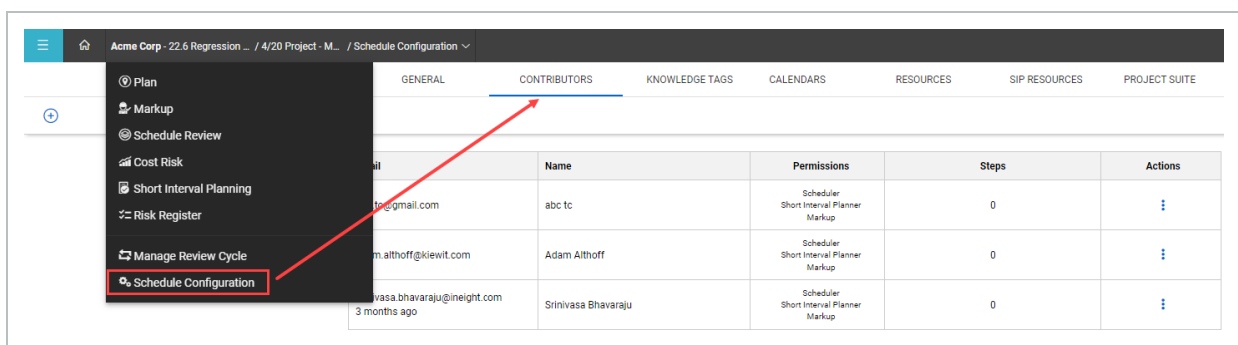
This role grants access to the Short Interval Planning (SIP) section of InEight Schedule. Users in this role can be assigned to activities for field execution planning. For details on how to use the SIP Functionality, see chapter 6.

## SCHEDULER

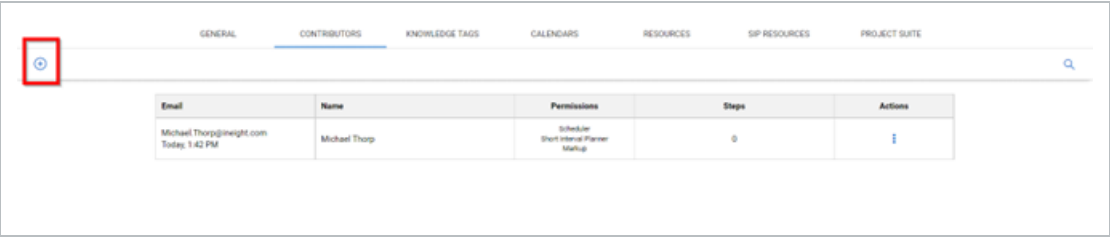
The Scheduler role has all access and privileges of the Markup and Field Execution Planner roles. Additionally, schedulers can adjust items in the Planning view, such as details in the Iris, logic in the Gantt chart, and resources.

## SELECTING PROJECT CONTRIBUTORS

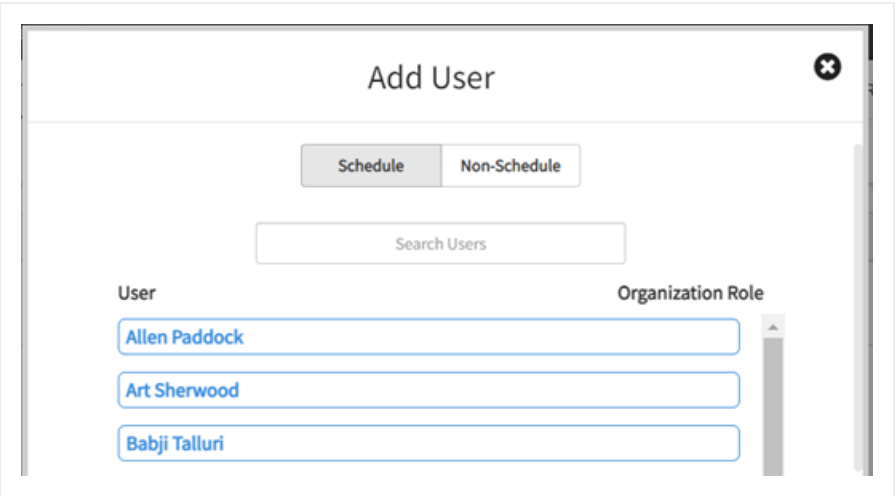
1. In Schedule Configuration, go to the **Contributors** tab.



- All Project Contributors are listed in the register
2. To add a new user, click **Add User**.

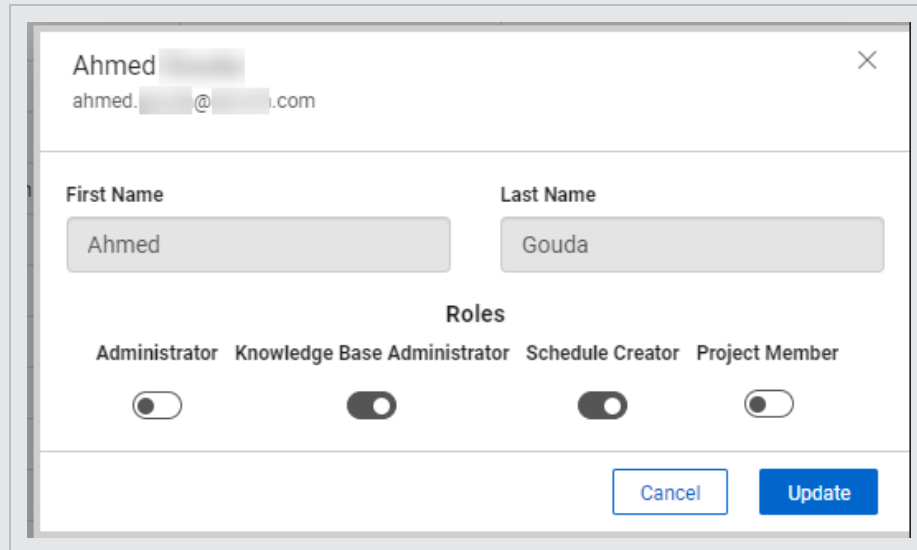


- The Add User Window opens
3. Schedule and Non-Schedule options are at the top of the window. Select **Schedule** to list all users currently registered in Schedule.
  4. Click on the user(s) to be added as project contributors.



**NOTE**

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*.



A screenshot of a user registration form. At the top, the name 'Ahmed' and email 'ahmed.@[redacted].com' are displayed. Below this, there are two input fields: 'First Name' containing 'Ahmed' and 'Last Name' containing 'Gouda'. Underneath these is a section titled 'Roles' with four toggle switches: 'Administrator', 'Knowledge Base Administrator', 'Schedule Creator', and 'Project Member'. All four toggles are currently in the 'Off' position (white). At the bottom right of the form are two buttons: 'Cancel' and 'Update'.

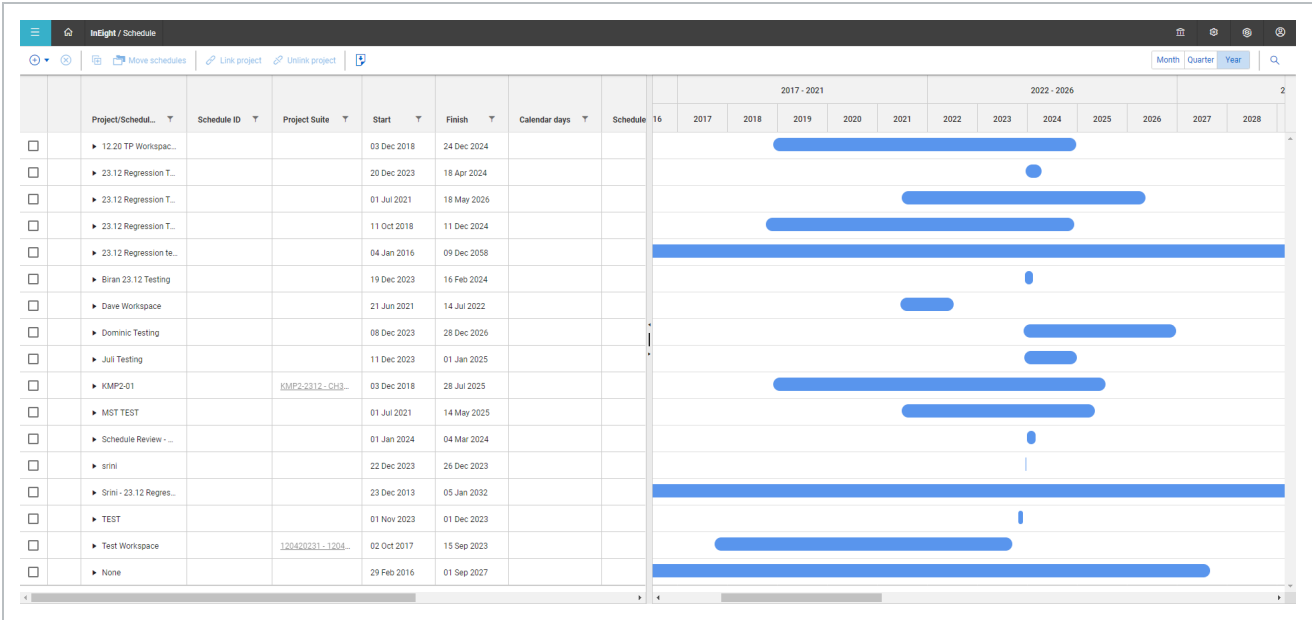
5. Once selected, select **On** each role the new user should have.
6. Click **Add**.

*This page intentionally left blank.*

# LESSON 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.



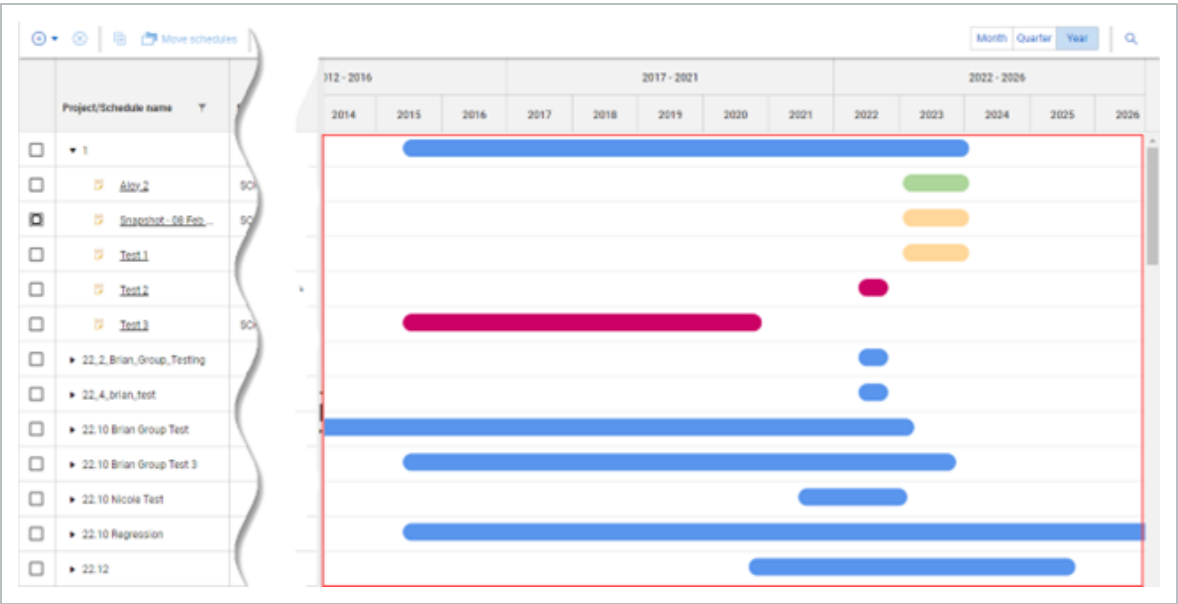
You can select multiple schedules on the Schedule home workspaces page, and then choose from the options to delete, copy or move. A locked schedule cannot be moved or deleted.

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

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

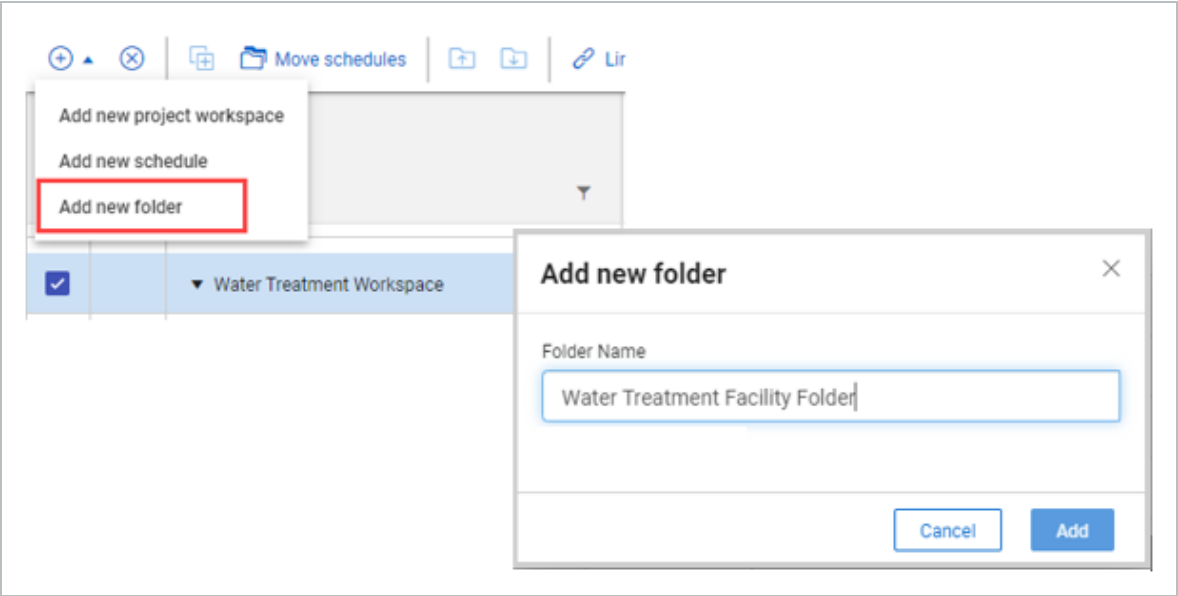
<div> <div> <div>⌵</div> <div>⊗</div> <div>📁</div> <div>📁</div> <div>Move schedules</div> </div> <div> <div>📁</div> <div>📁</div> <div>Link project</div> <div>🔗 Unlink</div> <div>📄</div> </div> </div>						
		Name	Schedule ID	Project Suite	Start	Finish
<input type="checkbox"/>		-DNU-		-DNU- -DNU-		
<input type="checkbox"/>		<input type="text" value="Dev Solar"/>		104726 -	23 Dec 2013	19 Feb 2014
<input type="checkbox"/>	🔒	📄 12-9	SCHED-486		09 Dec 2024	09 Dec 2024
<input type="checkbox"/>	🔒	📄 KB Schedule_1	SCHED-483		02 Dec 2024	31 Dec 2024

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

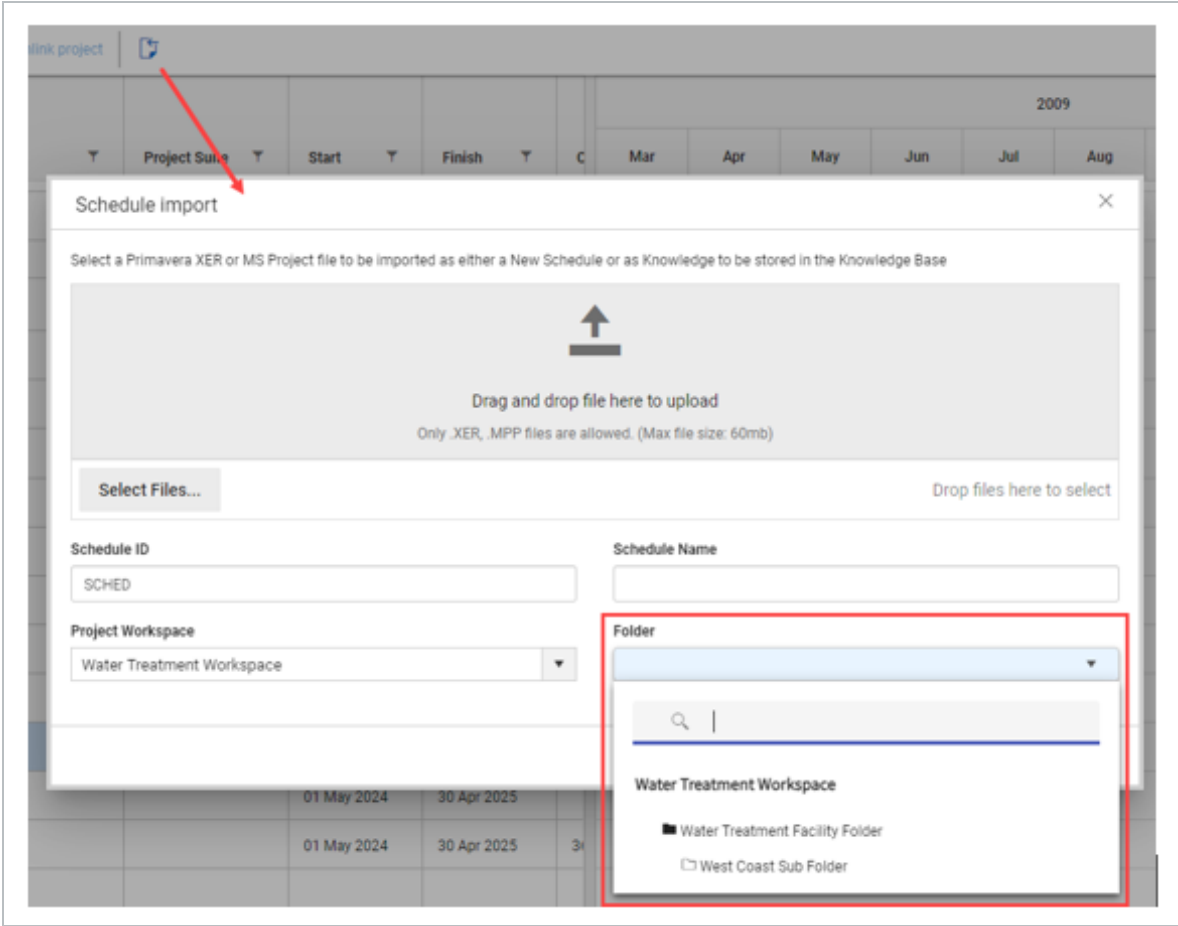
You can create and manage multiple project folders inside of a workspace to better organize your schedules. Schedule project folders act as storage containers that help you group like schedules into manageable repositories.



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.

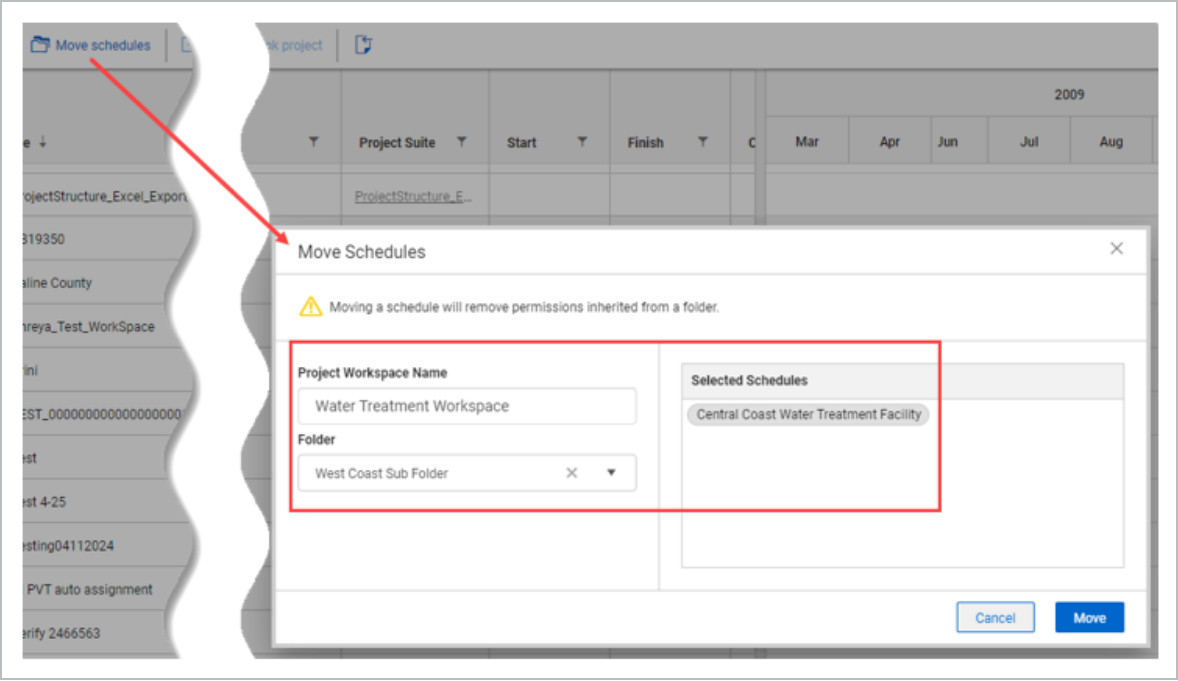
		Name ▾	Schedule ID ▾	Project Suite ▾	Start ▾	Finish ▾
<input type="checkbox"/>		▼ Water Treatment Workspace			01 May 2024	30 Apr 2025
<input type="checkbox"/>		▼ Water Treatment Facility Folder			01 May 2024	30 Apr 2025
<input type="checkbox"/>		▼ West Coast Sub Folder			01 May 2024	30 Apr 2025
<input type="checkbox"/>		<a href="#">Central Coast Water Treatment...</a>	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.













You can move schedules into specified folders.





### 3.0.0.2 SCHEDULE TYPE

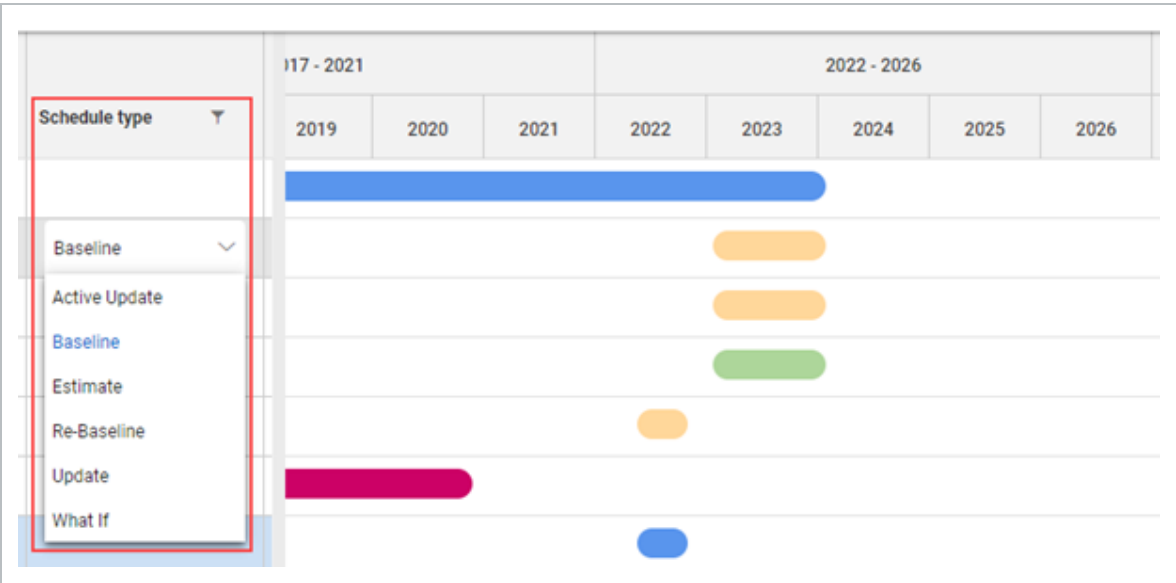
The schedule type shows a corresponding color scheme in the Gantt chart.

Schedule type ▼	
None ▼	
Active Estimate ▼	
Inactive Estimate ▼	
Active Baseline ▼	
Inactive Baseline ▼	
Re-Baseline ▼	
Active Update ▼	
Inactive Update ▼	
Planned ▼	
What If ▼	

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

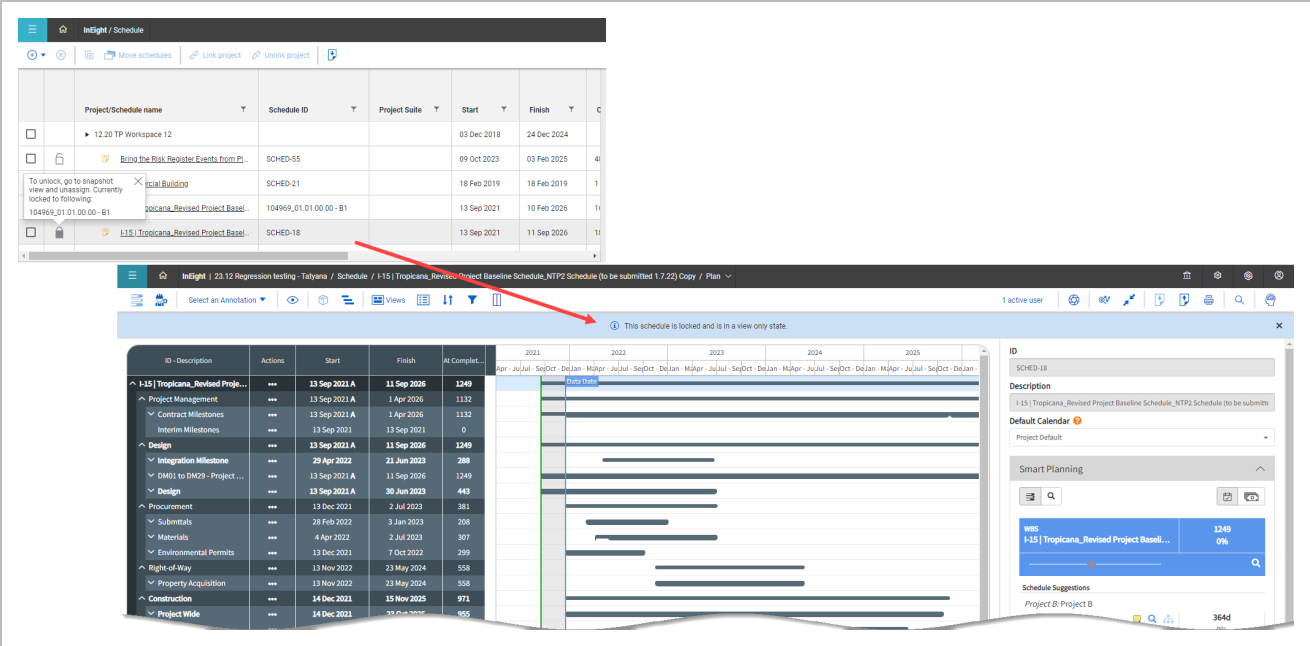
Schedule Type	Definition
	executed.
Inactive Update	Represents previous iterations of a schedule being executed.
Planned	Represents variations of schedules at conceptual phases of a project.
What If	Represents variations of schedules designed to test how different scenarios impact the overall time line.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



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.

Acme Corp | 22.10 Regression / Schedule / 10/12 Group test / Risk Register

This schedule is locked and is in a view only state.

PROJECT REGISTER EVENTSPROJECT REGISTER MATRIXPROJECT UNCERTAINTY

Active	Event Id	Title	Type	Description	%	Dur	\$	Score	Risk ...
<input type="checkbox"/>	R4	New Event	Threat						
<input type="checkbox"/>	07	Srini - ProjectOpe	Opportunity	Srini - ProjectIssue des	Low (25%)	Very High (< 180..	Very High (< \$10..	10	
<input type="checkbox"/>	629 Oppor	629 Oppor	Opportunity		Low (25%)	Low (< 30d)	Low (< \$10K)	4	
<input type="checkbox"/>	06	Srini Opp	Opportunity	Srini Opp	Low (25%)	Very Low (< 11d)	Low (< \$10K)	4	

Acme Corp | 22.10 Regression / Schedule / 10/12 Group test / Manage Review Cycle

This schedule is locked and is in a view only state.

End Review Cycle

End Review Cycle to review Markup from 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

Register Threshold

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

Team Member Markup

Assignee	Team Contribution	Last Accessed	Rea	Just	Clear Markup
Tatyana Pustovit	25% (12d) 15% (7d)	3/8/23			
Srinivasa Bhavaraju		12/21/22			
Overall	15% 7%				

Uncertainty

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

END REVIEW CYCLE

None

REMOVE ALL

EXPORT USER MARKUP

EXPORT FORMAT

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

Acme Corp | 22.10 Regression / Schedule / 10/12 Group test / Plan

Select an Annotation

Plan

Markup

Schedule Review

Cost Risk

Short Interval Planning

Risk Register

ID - Description

ABC Building Project Baseline

ABC Building

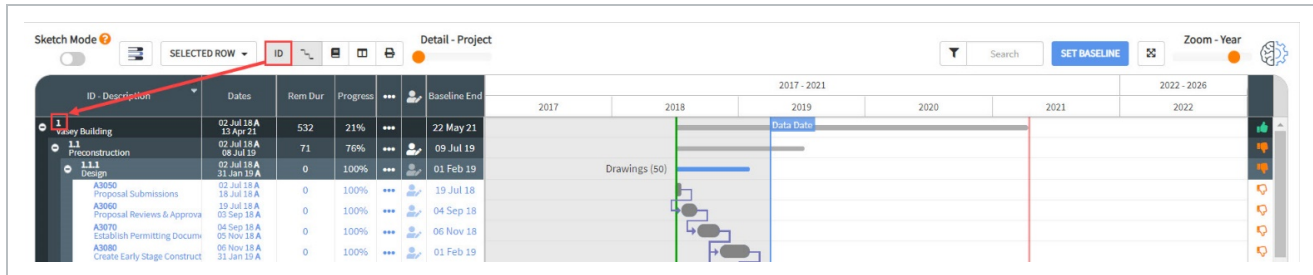
Summary & Milestones

InEight Inc. | Release 25.5

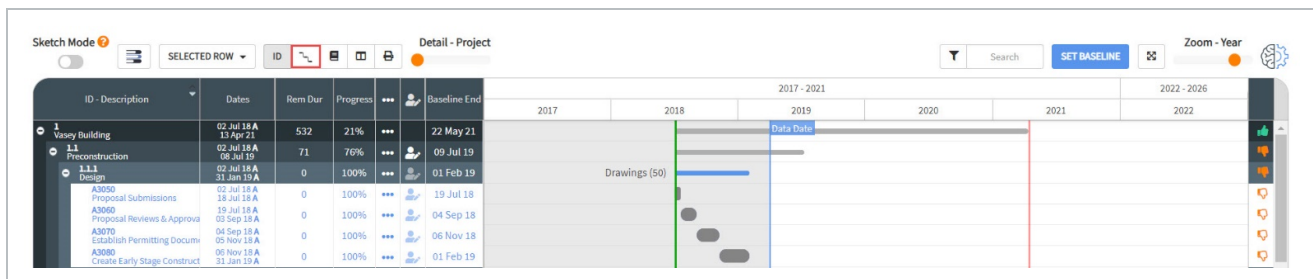
Page 43 of 291

### 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.

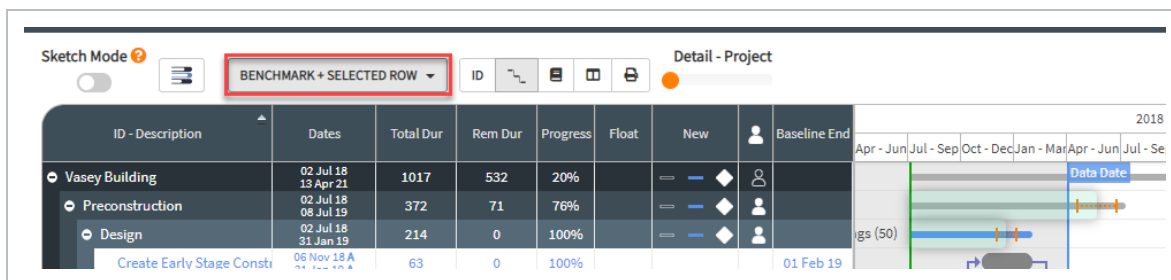


Click on the **Logic** icon to show or hide logic relationships.

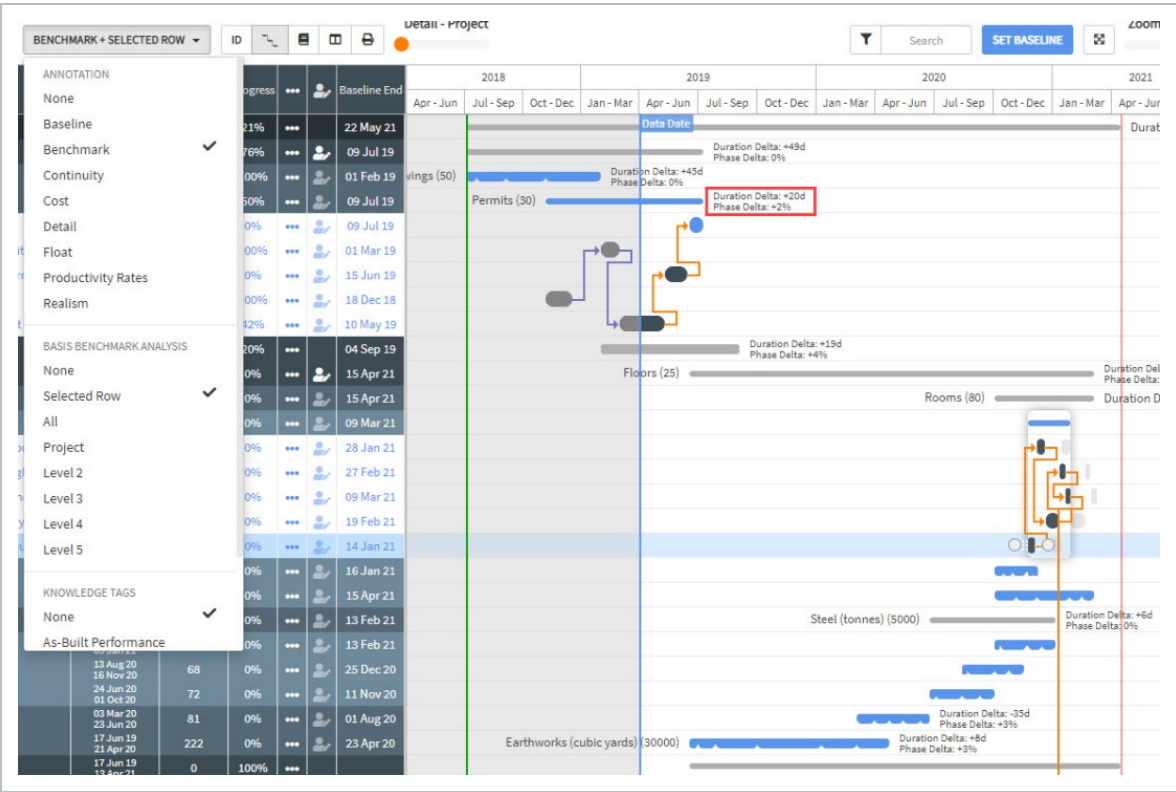


## ANNOTATIONS

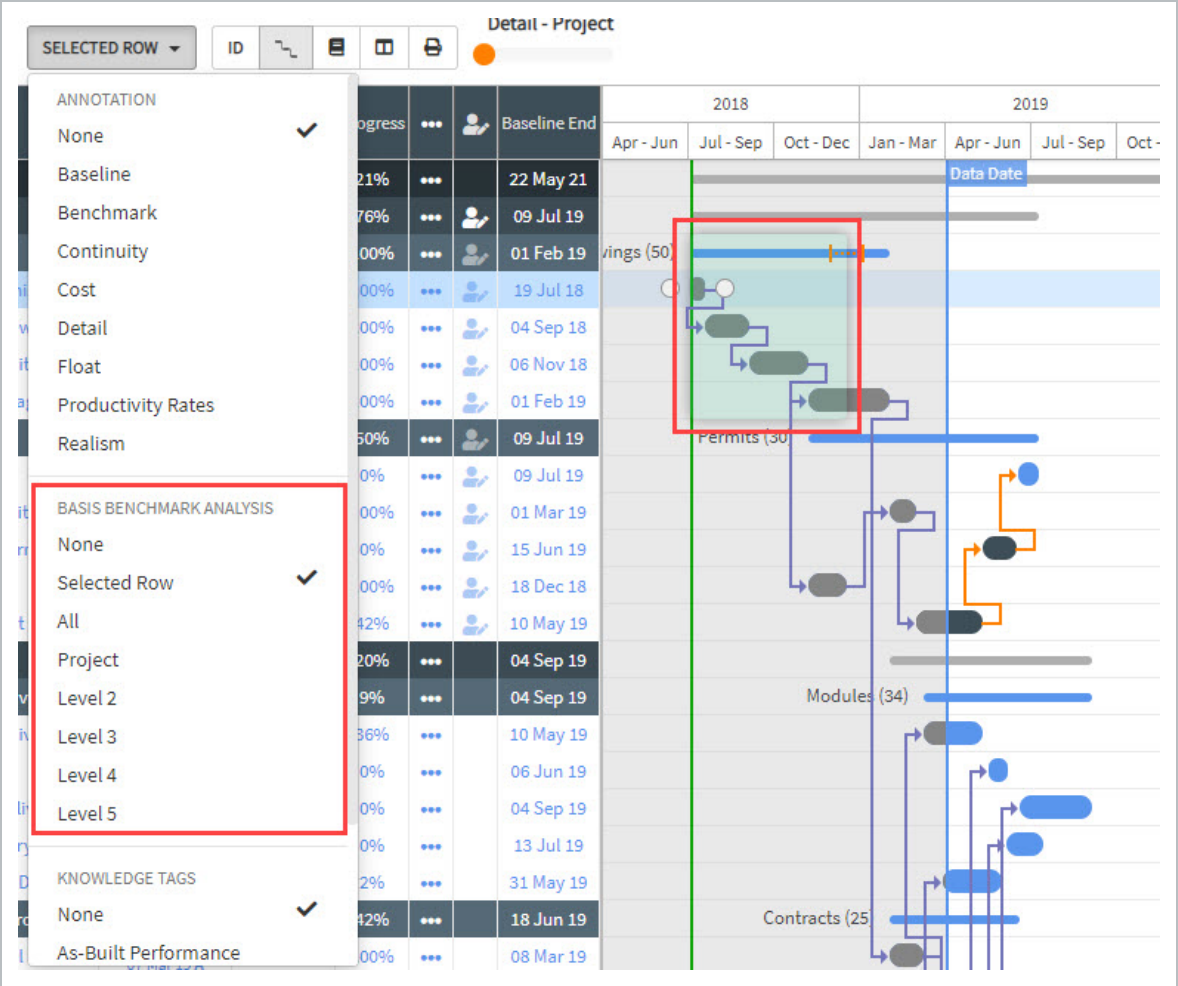
In the Plan view from the first level drop-down menu in a project, click the **Annotations** drop-down menu.



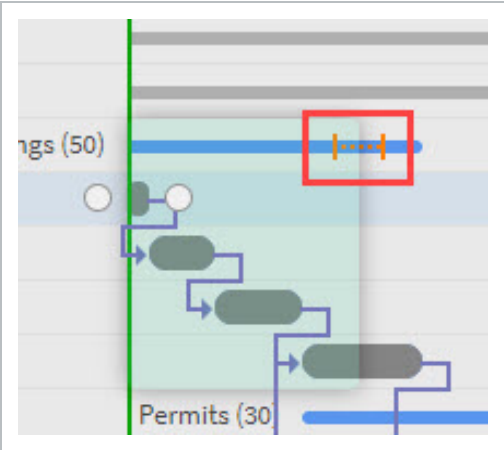
From here, Annotations can be changed by clicking the various options, which will update the information displayed on the Gantt Chart.



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.





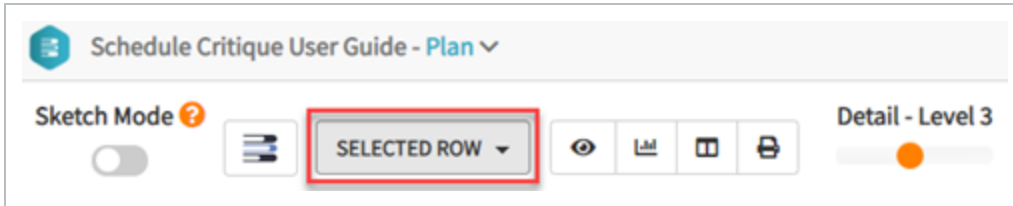
This is based on the % of tolerance defined in the project settings, the start date of the summary WBS in the current project, and the duration of the benchmark from the Knowledge Library.

### 3.0.2 SCHEDULE CRITIQUE OVERVIEW

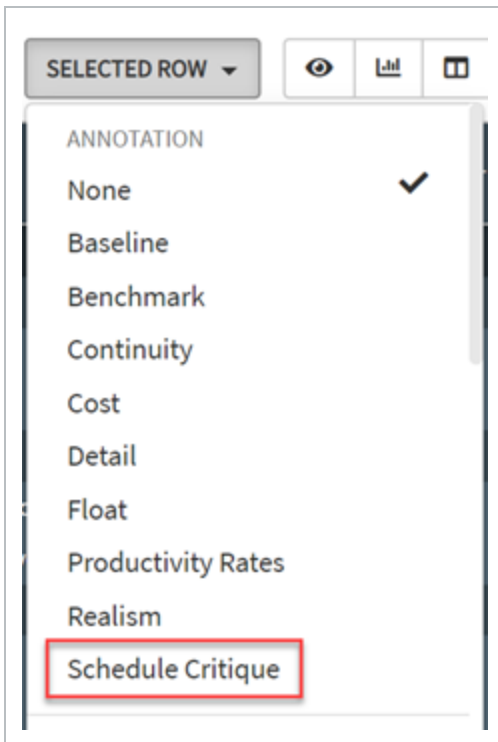
The **Schedule Critique** annotations and filters are available in the Plan view in Schedule. These functions aid schedulers in quickly identifying and isolating potential concerns with the current schedule logic.

#### 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.

Icon	Description	Definition
	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.

**NOTE**

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.

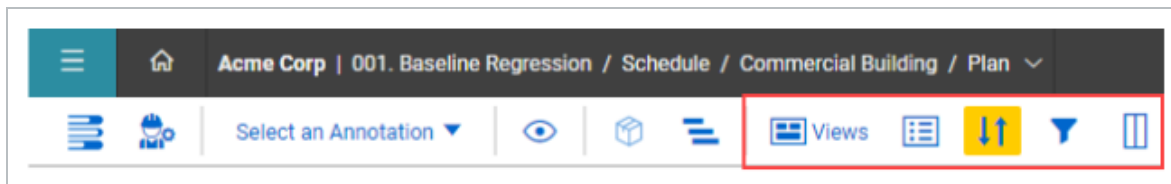
### 3.0.2.3 MISSING PREDECESSOR OR SUCCESSOR

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

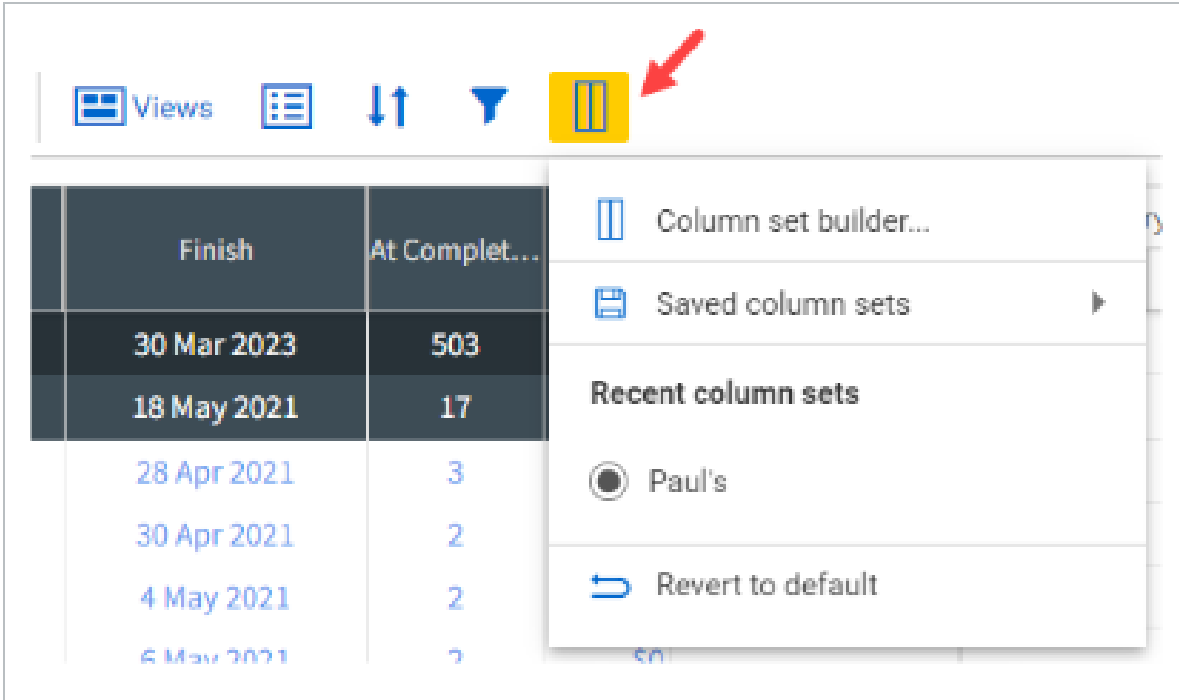
You can run advanced grouping, sorting, and query filters on multiple columns in several Schedule views, save as personal views and reuse in your assigned projects.

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

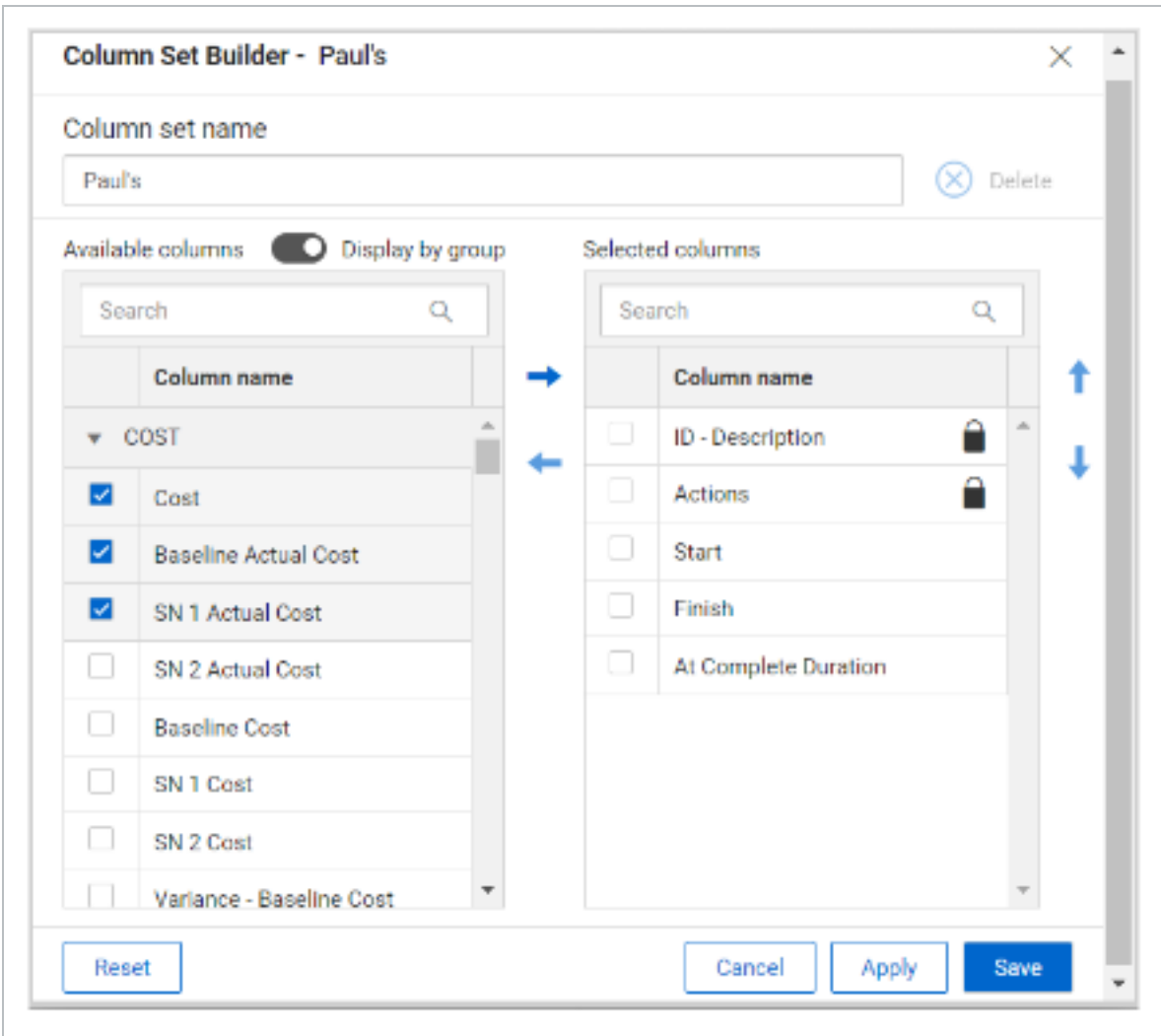


### 3.0.2.4 COLUMN SET BUILDER MENU

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

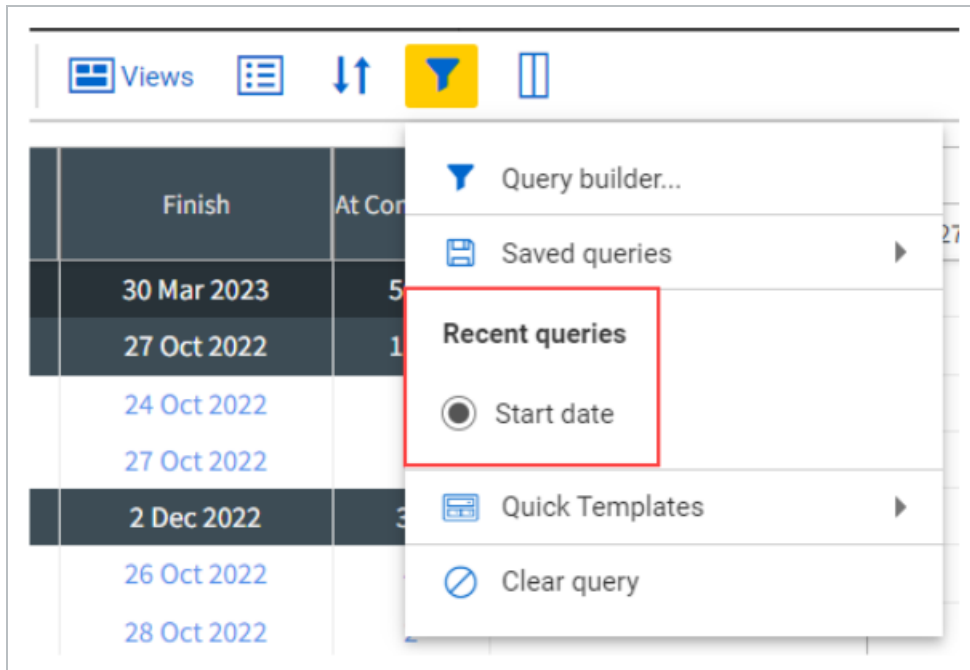


You can choose available columns in the Column set builder to create customized column page layouts.

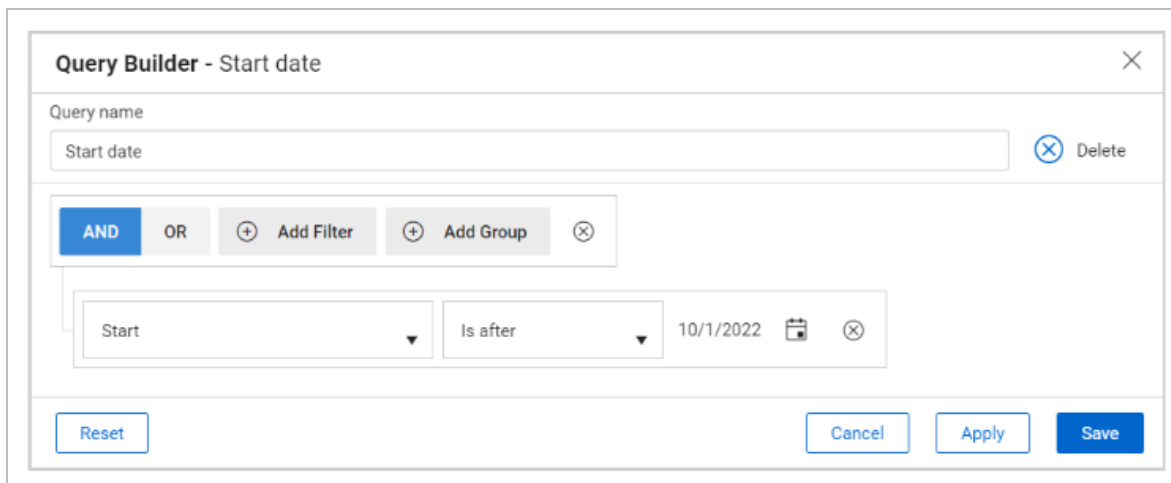


### 3.0.2.5 QUERY BUILDER MENU

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

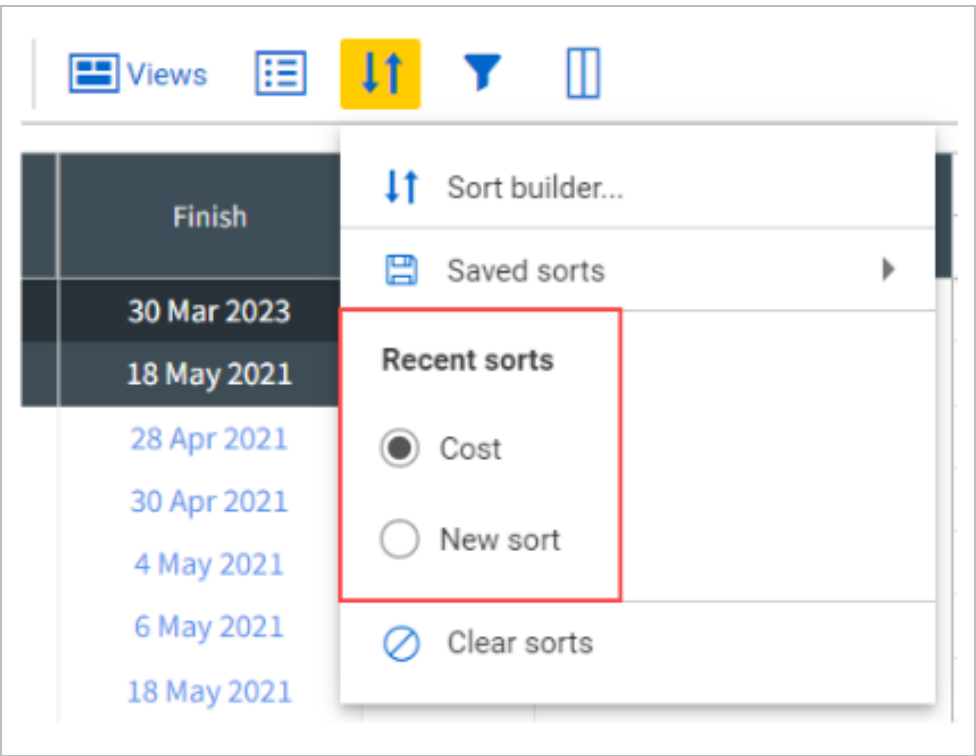


You can choose available columns in the Query builder to create customized page layout query.

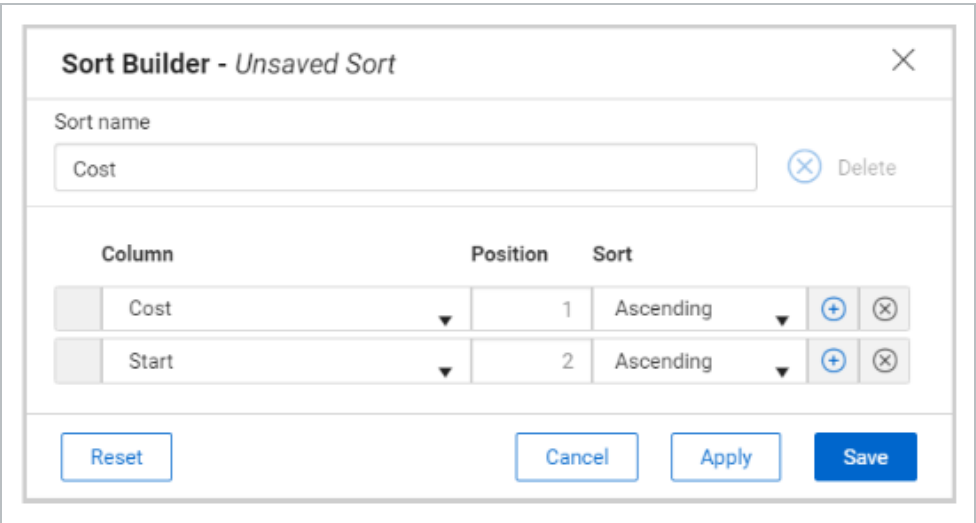


### 3.0.2.6 SORT BUILDER MENU

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

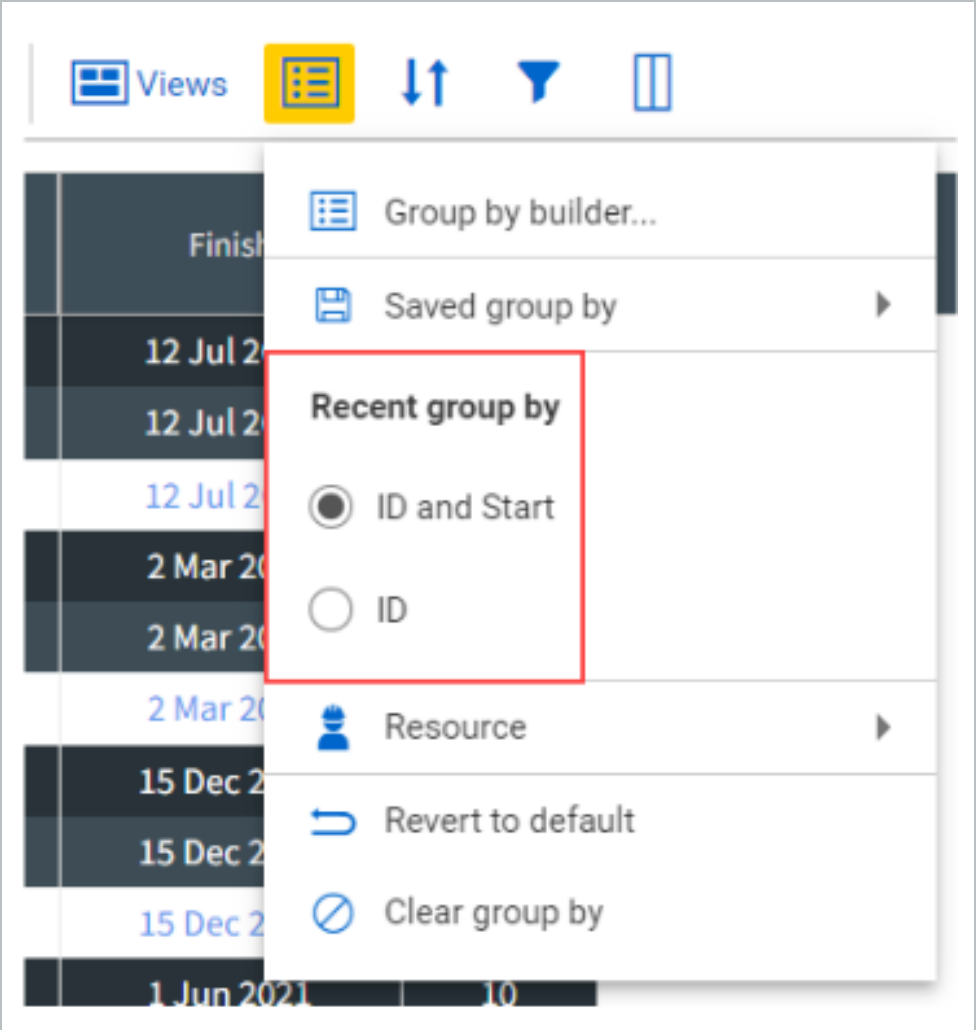


You can choose up to ten columns to sort in ascending and descending order.

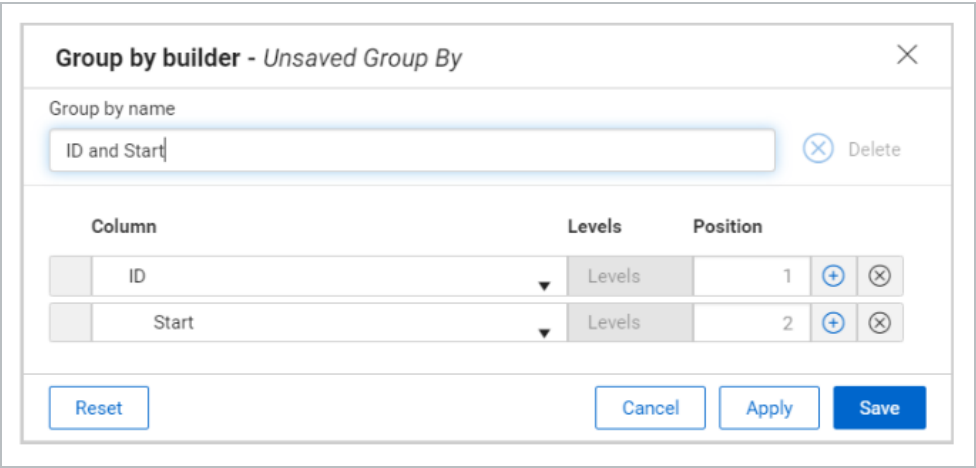


### 3.0.2.7 GROUP BY BUILDER MENU

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



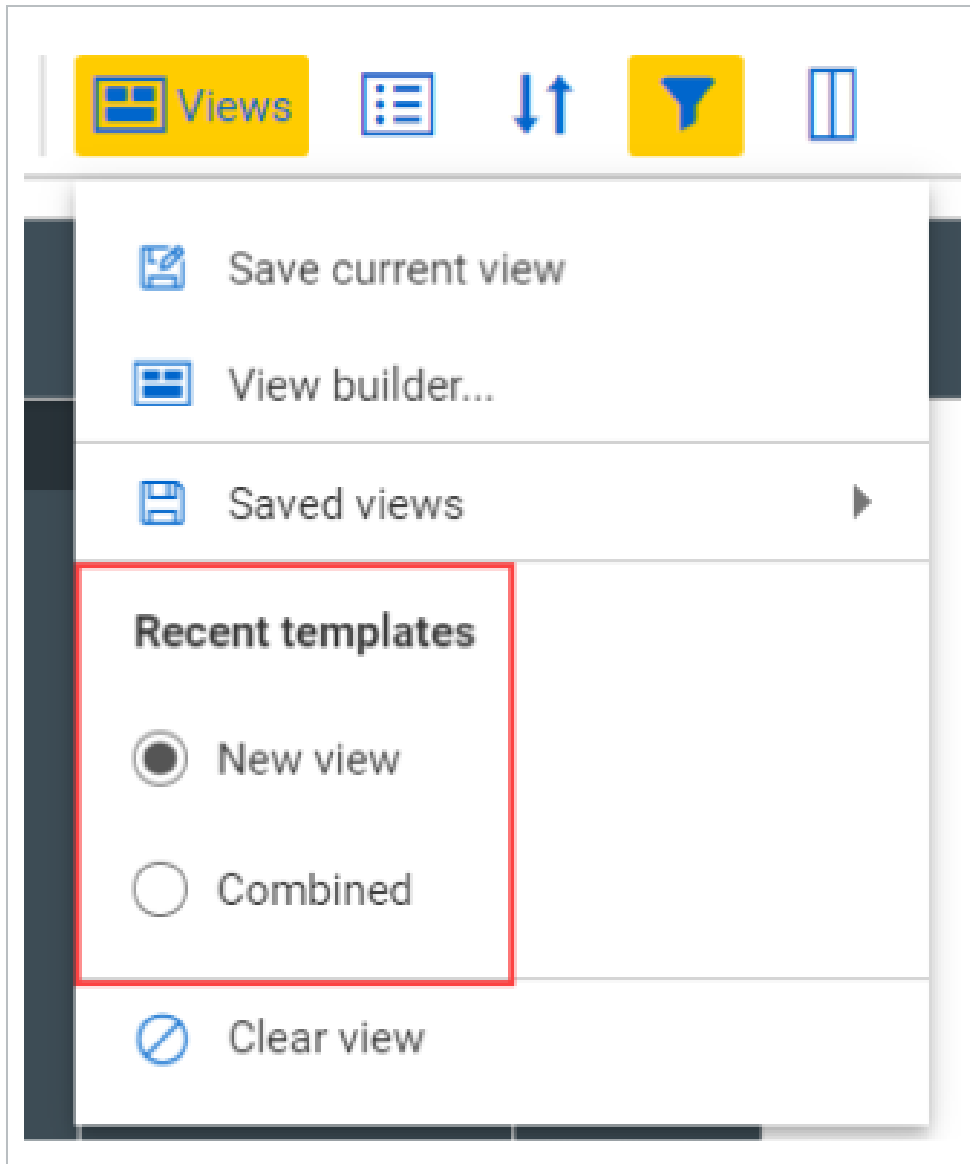
You can choose to group by one column or multiple columns.





### 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.

View Builder - *Unsaved View*

Name

New view (1)

ⓧ Delete

Group by

Select one

Sort

Select one

Query

Select one

Select one

Start date

Reset

Cancel

Save

HIDE NO RESULTS

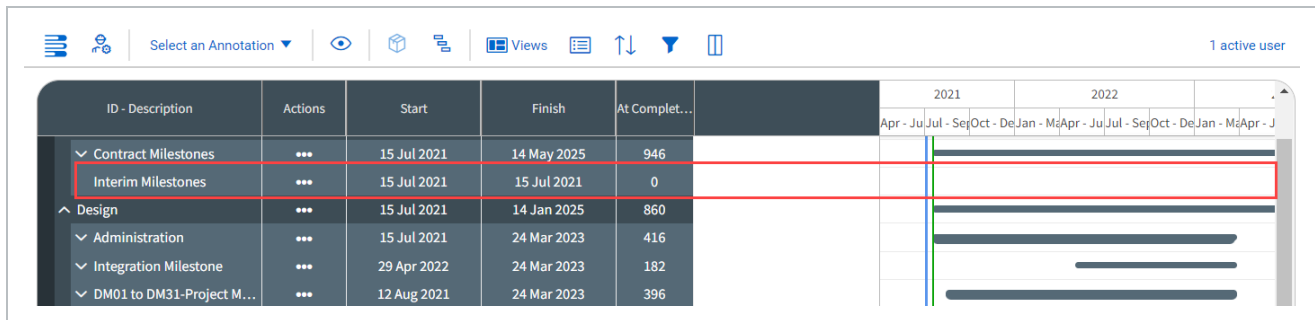
In View Options, the Hide No Results toggle lets you hide any WBS items or groupings on the Plan page that do not yield any results.

InEight | / Schedule / Commercial Building / Plan

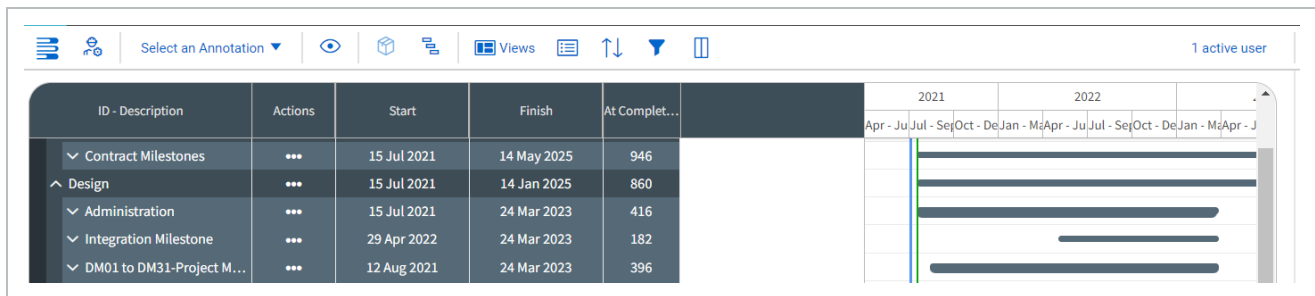
Select an Annotation Views

ID - Description	Actions	General	At Complet...
Commercial Building	...	ID	0
Preconstruction	...	Hide No Results	0
Design	...	Resources	0
Permitting	...	Histogram	0
Procurement	...	Baseline/Snapshots	0
Fabrication & Delivery	...	Active Baseline	0
Submittals & Approval	...		0

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



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



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



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	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	4	
22 Day	10	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	0	
3 Day	8	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	0	
4 Day	8	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	0	
5 Day	8	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	0	
6 Day	8	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	0	
7 Day	8	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	0	
Brian Default Work Schedule	1	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	0	
Global Calendar	8	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	0	
My calendar	5	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	2	
Tatyana's calendar	6	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	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.





CPM SCHEDULES    ACTIVITY PRODUCTIVITY RATES    KNOWLEDGE TAGS    CALENDARS    REGISTER    RESOURCES    MACHINE LEARNING							
<a href="#">Events Register</a> <a href="#">Register Types</a> <a href="#">Matrix Definition</a>							
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"/>		

## 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				
<a href="#">Events Register</a> <a href="#">Register Types</a> <a href="#">Matrix Definition</a>				
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

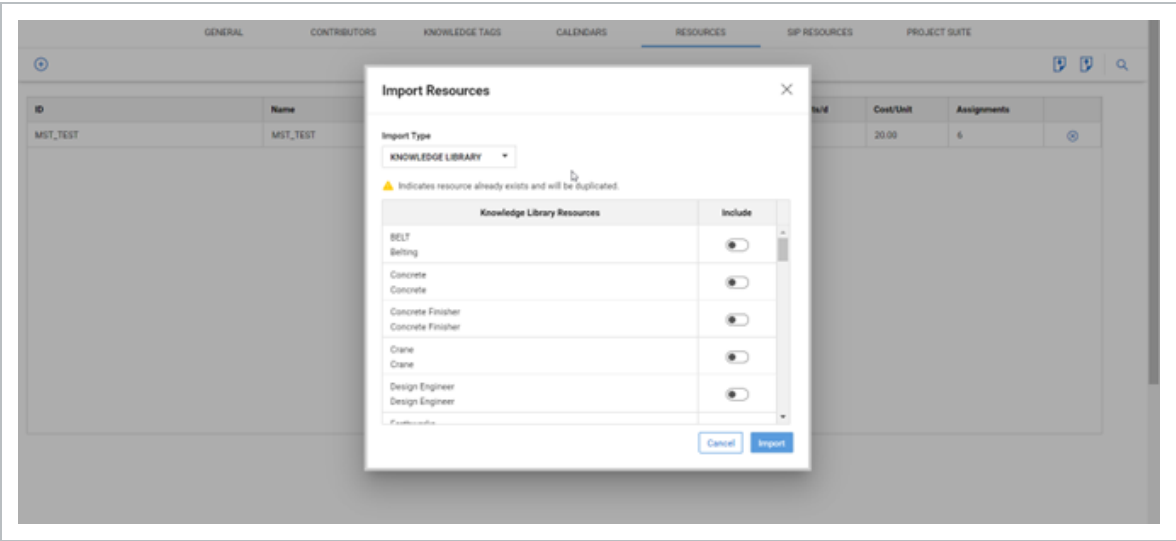
Resource details such as ID, Name, Category, Default Units, and Costs can be edited in the register. The indent arrows located on the far right of the screen are used to create child resources or to move the resource to a different part of the grid.

CPM SCHEDULES   ACTIVITY PRODUCTIVITY RATES   KNOWLEDGE TAGS   CALENDARS   REGISTER   RESOURCES   MACHINE LEARNING

Resources   Categories

ID	Name	Category	Color	UoM	Default Units/d	Cost/Unit	
Kim Test for Keith	Kim Test	Labor		Hours	8.00	1.00	
Robin Tester	Tester	Material		Each	1.00	200.00	
Project resource	project resource	Nonlabor		Each	1.00	75.00	
009	Resource 9	Nonlabor		Each	1.00	0	
Global	Global	New Category		Each	1.00	0	
Srini Import ID	Srini Import Desc	Unique		Each	1.00	0	
Indent	Indent	Labor		Hours	8.00	0	
Tatyana Reg Test	Resurs 009	Supply		Hiver	25.00	5080.00	
582		Labor		Hours	8.00	0	
SP	Ski Patrolier	Labor		Hours	8.00	25.00	
No UOM	UOM No	Labor			1.00	0	
Jonny B	Bonny J	Labor		Hours	8.00	0	
Baby jon	Jonny babe	Labor		Hours	2.00	3.00	
629 Res 1	Res 1	Labor		Hours	8.00	0	
629 Res 2	Res 2	Labor		Hours	8.00	0	
7/12	Resource 3	Labor		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.

NOTE

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

Category
Labor ✓ ▶
Material ▶
Nonlabor ▶
Installed Equipment ▶
Installed Material ▶
New Category ▶
Labor ▶
Supply ▶
Labor ▶
Labor ▶
Labor ▶
Labor ▶
Labor ▶
Labor ▶
Labor ▶
Labor ▶

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

CPM Schedules

Activity Productivity Rates

Knowledge Tags

Register

Resources

Machine Learning

Resources


Categories

Search

EXPORT

IMPORT

ADD RESOURCE

Name	Description	Category	Unit	Default Units/d	Cost/Unit	Assignments	Delete
ECR110	Crane 110 Ton	Equipment	Hour	8	224	0	

CPM SCHEDULES








RESOURCES

MACHINE LEARNING

+

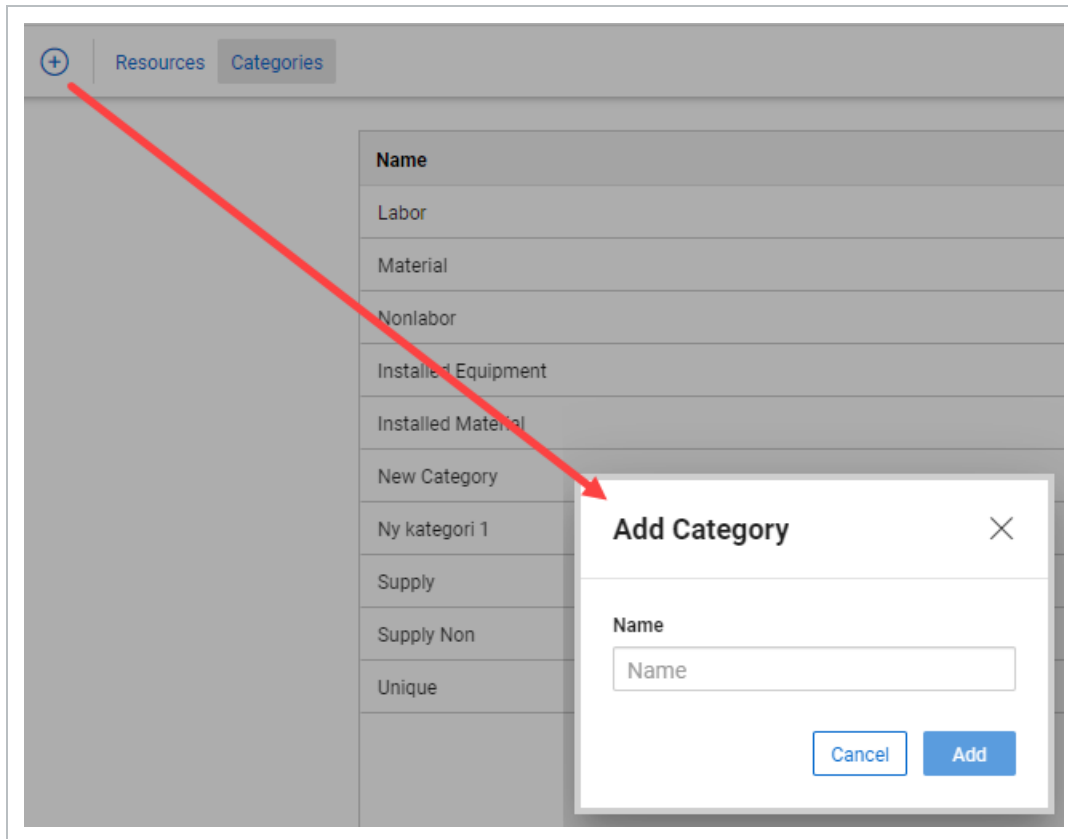
Resources

Categories

Name	
Labor	
Material	
Nonlabor	
Installed Equipment	
Installed Material	
New Category	
Ny kategori 1	
Supply	
Supply Non	
Unique	

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.

**NOTE** 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.

CPM SCHEDULES

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Enable Machine Learning

Schedule Machine Learning allows Inference Engine suggestions to be automatically tuned and calibrated by the selections you choose. The relative influence of each part that makes up a suggestion is detailed below.

Description

+12%

Less

Neutral

More

Duration

+3%

Less

Neutral

More

Parent Description

0%

Less

Neutral

More

Phase

+9%

Less

Neutral

More

Project Codes

-1%

Less

Neutral

More

Project Code Values

0%

Less

Neutral

More

SET UP RESOURCES

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

Acme Corp

CPM SCHEDULES

ACTIVITY PRODUCTIVITY RATES

KNOWLEDGE TAGS

CALENDARS

REGISTER

RESOURCES

MACHINE LEARNING

Resources

Categories





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

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

Resources

Categories

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 ▶		Hours	8.00
Robin Tester	Tester	Material ▶		Each	1.00
Project resource	project resource	Nonlabor ▶		Each	1.00
009	Resource 9	Nonlabor ▶		Each	1.00

- A dialog box opens.

Add Resource

ID

ID

Name

Name

Category

Labor ▼

Unit

Hours













Default Units/d

8

Cost/Unit

0

Color assignment



view more colors

Cancel

Add

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,



Field	Definition
	and material.
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

754

Name

Electric

Category

Material

Unit

Each

Default Units/d

1

Cost/Unit

0

Color assignment

view more colors

Cancel

Add

- The new resource is added to the Resource register

CPM SCHEDULES   ACTIVITY PRODUCTIVITY RATES   KNOWLEDGE TAGS   CALENDARS   REGISTER   RESOURCES   MACHINE LEARNING							
Resources		Categories					
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) Const ~ Earthworks	Installed Material		Square Meter	22.00	100.00	

**NOTE**

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.

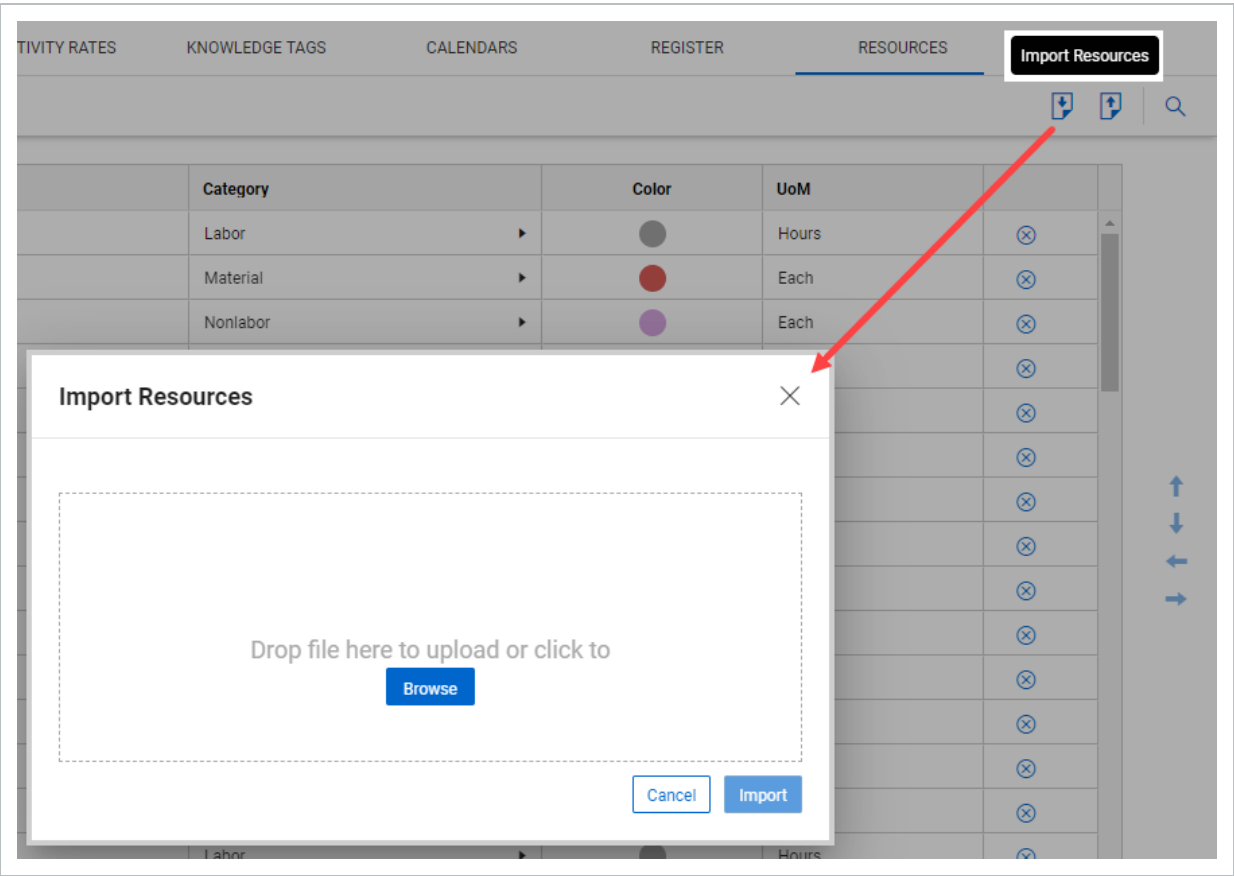
- Once selected, an Excel file downloads to your local drive. The file contains the list of resources currently in the organization's Resource register.

	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 <b>Labor</b>							
3. Colors are defined using predefined set of hexadecimal characters, the default <b>Color</b> is 0066CC							
6	ID	Name	Category	Color	Unit	Default Units Per Day	Cost Per Unit
7	Text	Text	Text: "Labor", "Construction Equi	Text: "0066CC", "800000"	Text	Numeric: > 0	Numeric: > 0
8	256	256		7			
9	Kim Test for Keith	Kim Test	Labor	a5a5a5	Hours	8	1
10	Robin Tester	Tester	Material	D85C57	Each	1	200
11	Project resource	project resource	Nonlabor	D8A6E2	Each	1	75

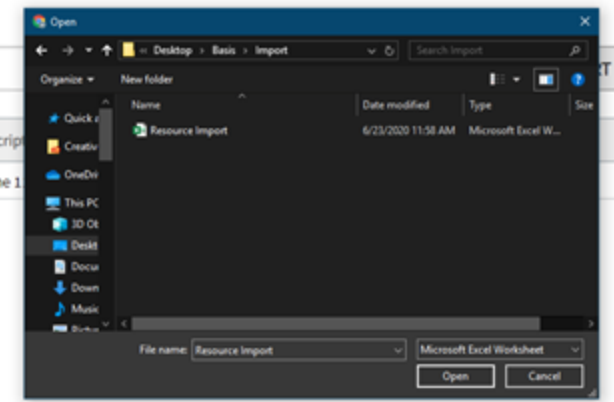
2. In Excel, populate the columns with additional resources and details.

- 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**.

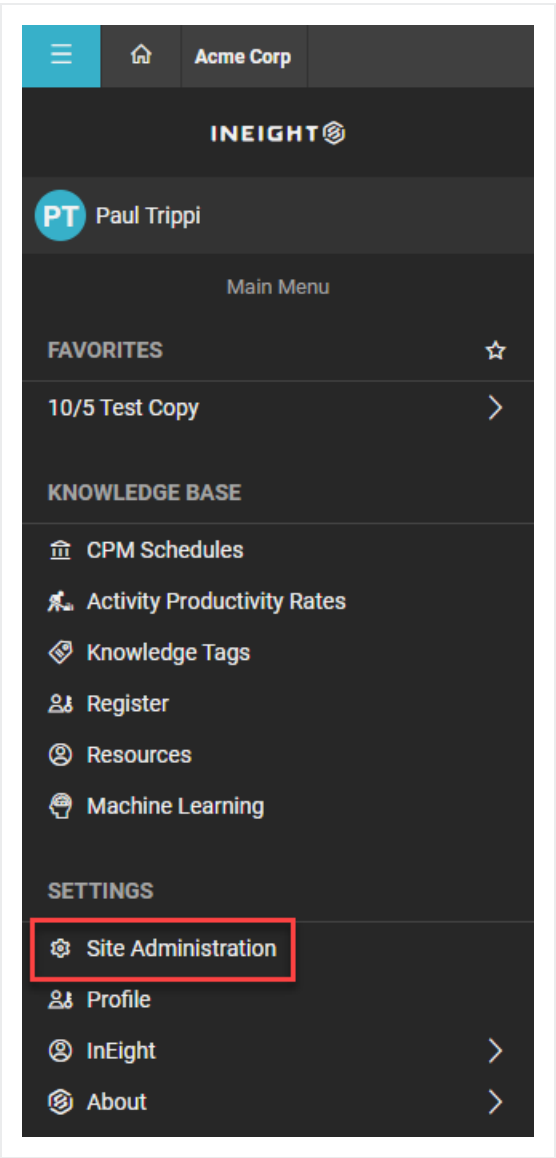


- Schedule processes the data and updates the register with new items and changes.

ID	Name	Category	Color	UoM	Default Units/d	Cost/Unit	
Kim Test for Keith	Kim Test	Labor		Hours	8.00	1.00	
Robin Tester	Tester	Material		Each	1.00	200.00	
Project resource	project resource	Nonlabor		Each	1.00	75.00	
009	Resource 9	Nonlabor		Each	1.00	0	
Global	Global	New Category		Each	1.00	0	
Site Import ID	Site Import Desc	Unique		Each	1.00	0	

# 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

Cancel

Save

Name

InEight

249 characters remaining

Cost Unit

\$

Allow Project Administrators to Invite Non-Schedule Users

☐

# 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
	<div></div>	<div></div>	<div>(All)</div>	<div>(All)</div>	<div></div>
<input type="checkbox"/>	aananthan	aan@pkglobal.com	Active	Project Member	9
<input type="checkbox"/>	Aaquibulla	Aaquibulla@INEIGHT.COM	Active	Project Member	6
<input type="checkbox"/>	Aaron J. J. J.	Aaron.J@INEIGHT.COM	Active	Project Member	2
<input type="checkbox"/>	abdul	abdul@ineight.com	Active	Project Member	0
<input type="checkbox"/>	abdulghani	abdulghani@ineight.com	Active	Administrator, Knowledge Base Administrator, Schedule Creator, Project Member	2
<input type="checkbox"/>	Adam	Adam.b@INEIGHT.COM	Active	Project Member	0
<input type="checkbox"/>	Adesh	Adesh.i@INEIGHT.COM	Active	Project Member	3

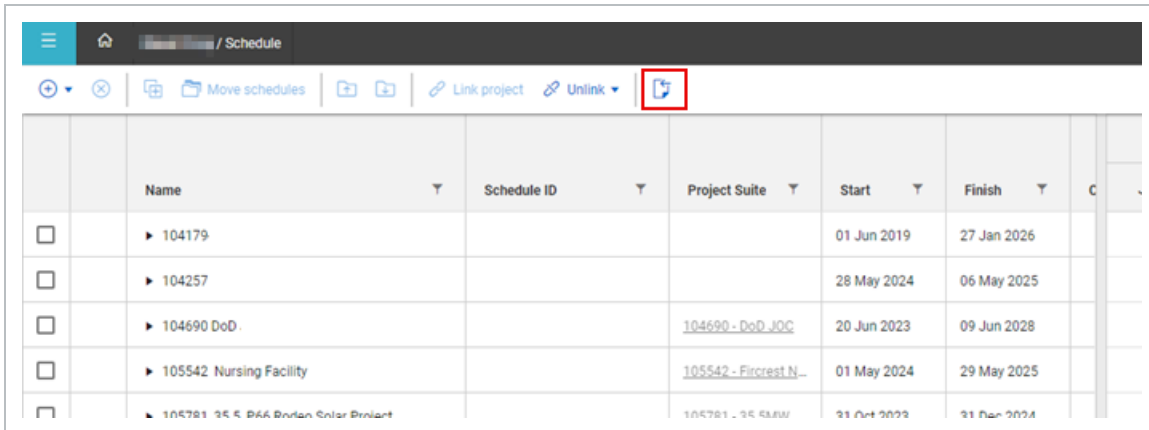
*This page intentionally left blank.*

# LESSON 4 – PROJECT CREATION

## IMPORT A SCHEDULE

### IMPORTING A SCHEDULE

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



The screenshot shows the InEight Schedule home page. The top navigation bar includes a home icon, a user profile icon, and the text "/ Schedule". Below the navigation bar is a toolbar with several icons: a plus icon, a minus icon, a folder icon, a "Move schedules" button, a link icon, a "Link project" button, an "Unlink" button with a dropdown arrow, and an "Import" icon (a document with a plus sign) which is highlighted with a red square. Below the toolbar is a table with the following columns: Name, Schedule ID, Project Suite, Start, Finish, and a partially visible "C" column. The table contains five rows of data, each with a checkbox in the first column.

	Name	Schedule ID	Project Suite	Start	Finish	C
<input type="checkbox"/>	▶ 104179			01 Jun 2019	27 Jan 2026	
<input type="checkbox"/>	▶ 104257			28 May 2024	06 May 2025	
<input type="checkbox"/>	▶ 104690 DoD		<a href="#">104690 - DoD JOC</a>	20 Jun 2023	09 Jun 2028	
<input type="checkbox"/>	▶ 105542 Nursing Facility		<a href="#">105542 - Fircrest N...</a>	01 May 2024	29 May 2025	
<input type="checkbox"/>	▶ 105781 35 E B&B Drivon Solar Plant		<a href="#">105781 - 35 E B&amp;B</a>	21 Oct 2023	21 Mar 2024	

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

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

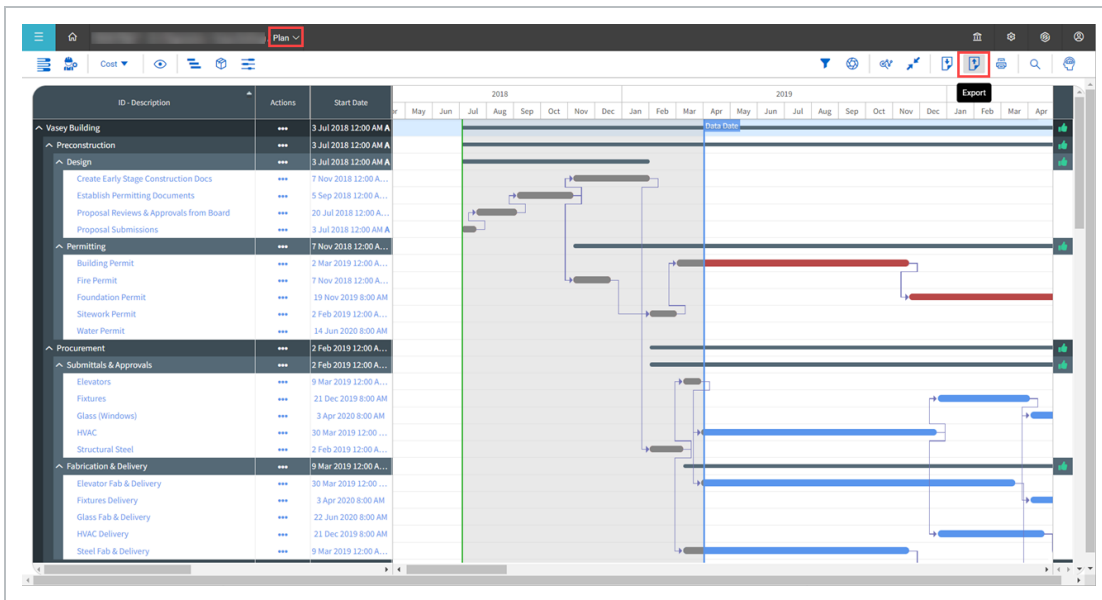
4. Click **Import**.



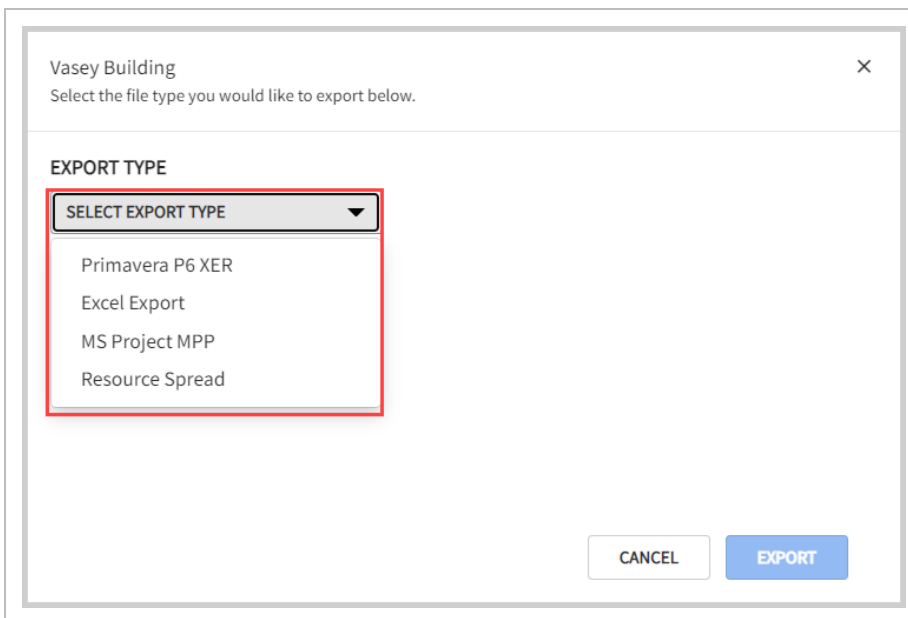
# EXPORT A SCHEDULE

## 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**.

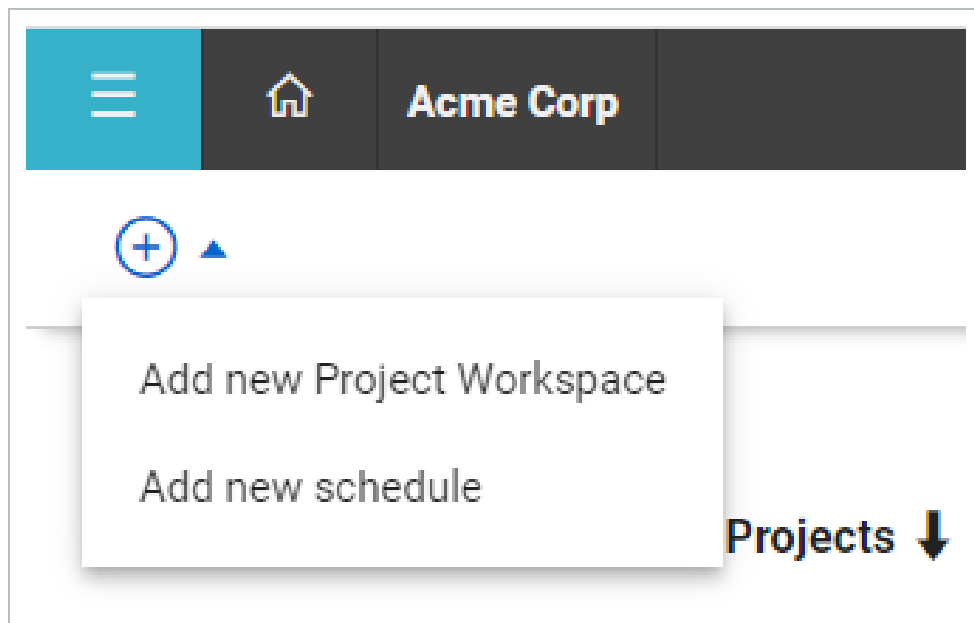


The export file is downloaded to your browser's download folder.

## 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

SCHED

Schedule Name

PT1

Project Workspace

22.10 Brian Group

Start Date

8 Dec 2022

NEXT

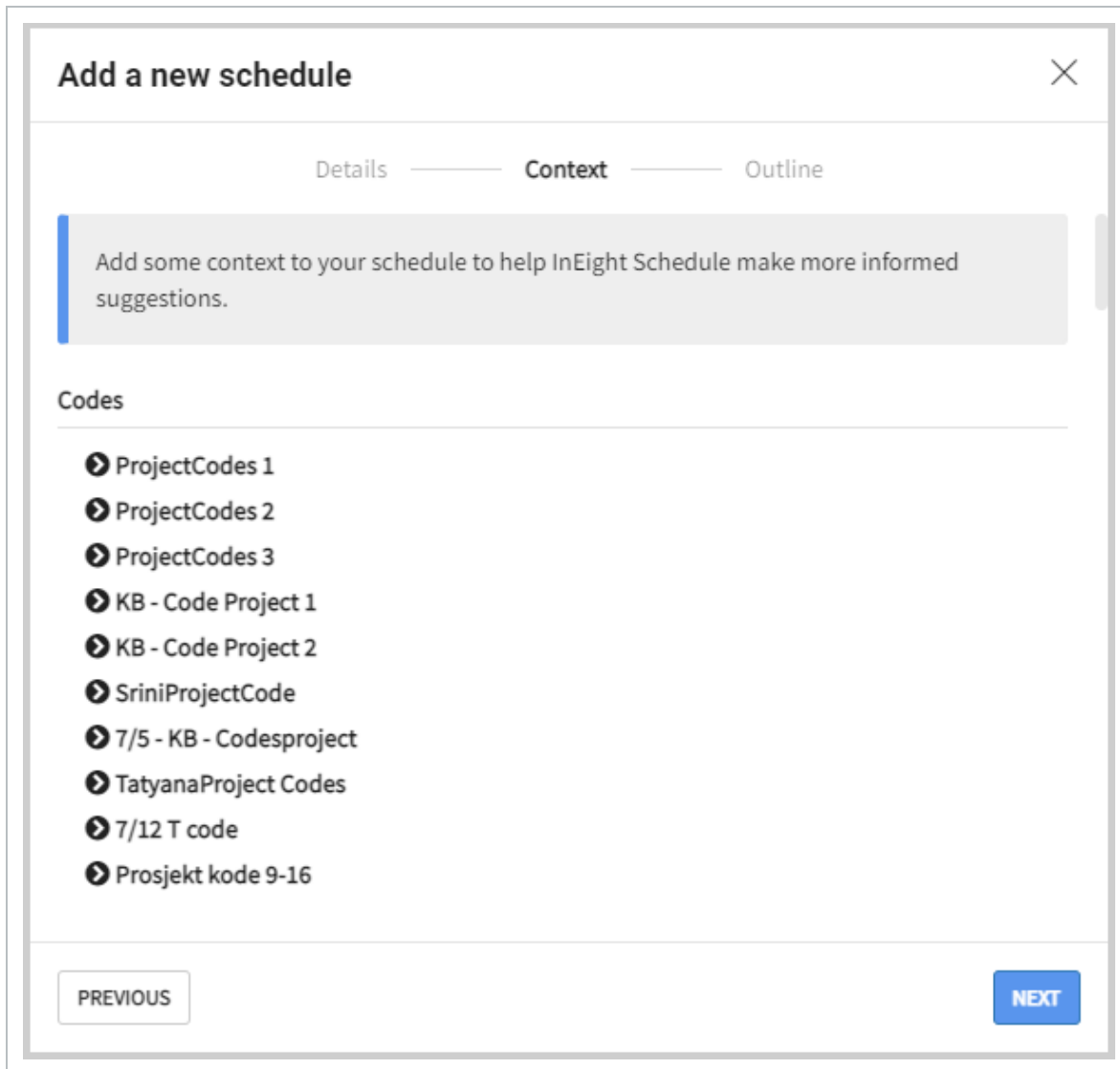
In the details section, complete the following information:

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 corner. Below the title bar, there are three tabs: "Details", "Context" (which is selected and bolded), and "Outline". A light gray instruction box with a blue vertical bar on the left contains the text: "Add some context to your schedule to help InEight Schedule make more informed suggestions." Below this, under the heading "Codes", there is a list of ten project codes, each preceded by a circular icon with a right-pointing arrow. The codes are: "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", and "Projekt kode 9-16". At the bottom of the dialog, there are two buttons: "PREVIOUS" on the left and "NEXT" on the right, which is highlighted in blue.

**Add a new schedule** [X]

Details — **Context** — Outline

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

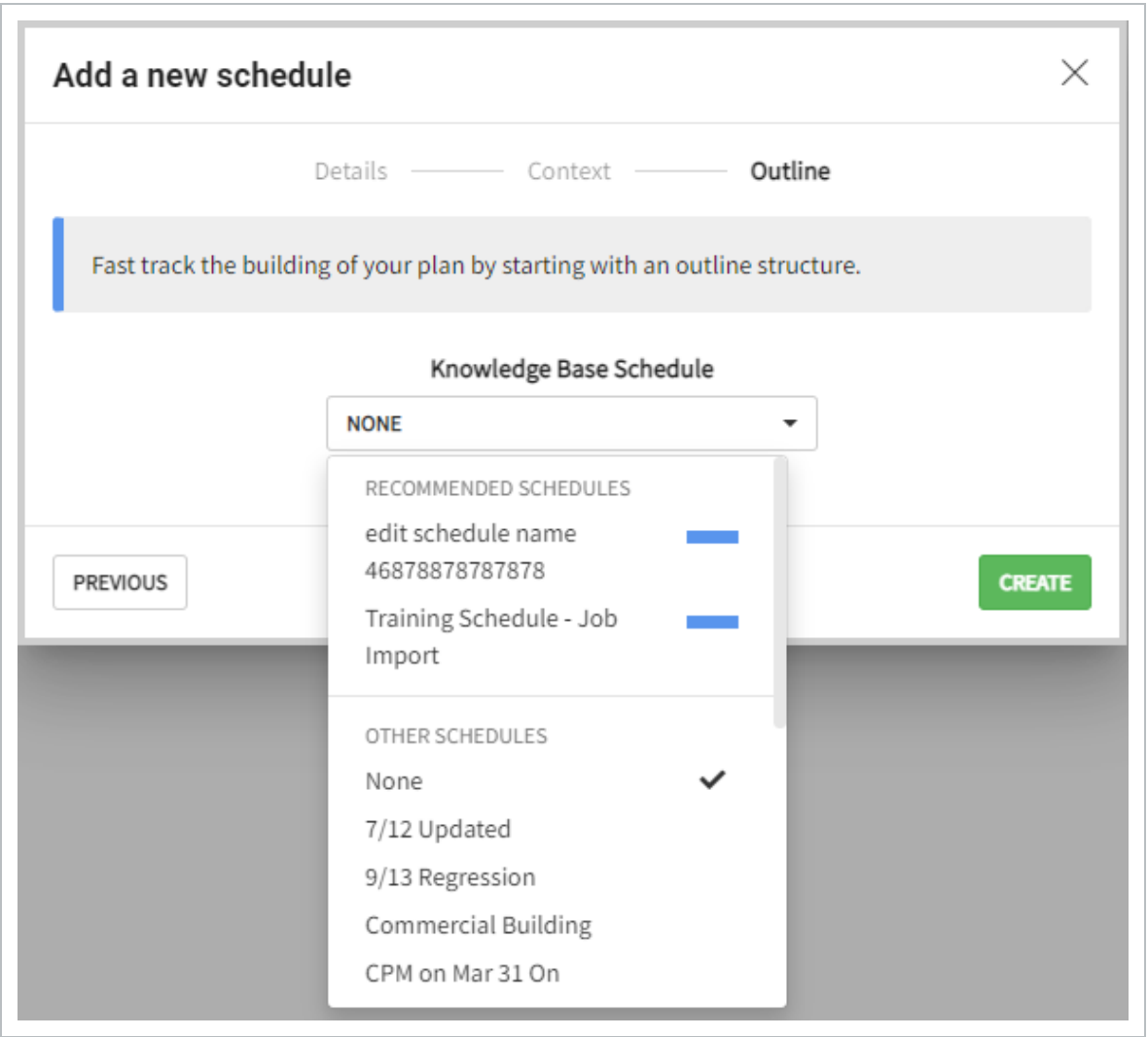
**Codes**

- 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
- Projekt kode 9-16

PREVIOUS NEXT

## 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

Commercial Building

Preconstruction

Procurement

Construction

Closeout

Summary

Include

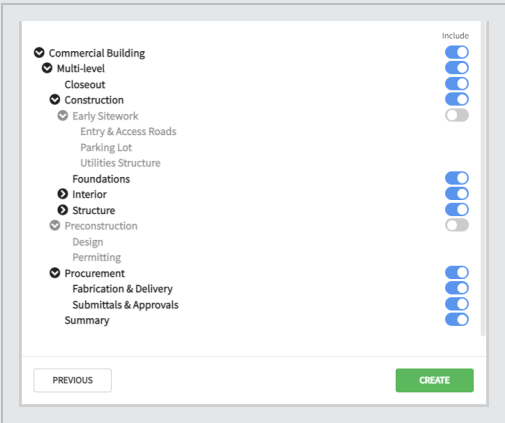
PREVIOUS

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.

NOTE

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.



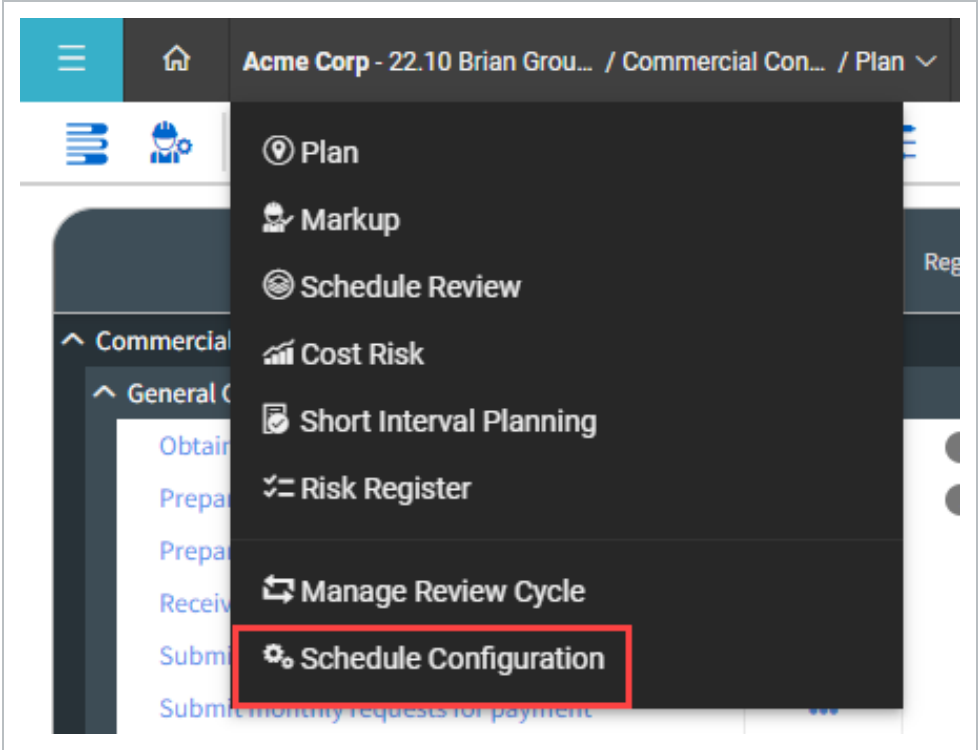
Any risks assigned to the Knowledge Library schedule are brought into the new schedule. Include Risk Register brings in the risk register items from the Knowledge Library Schedule into the new schedule.

NOTE

The available risk levels are configured at the organization level.

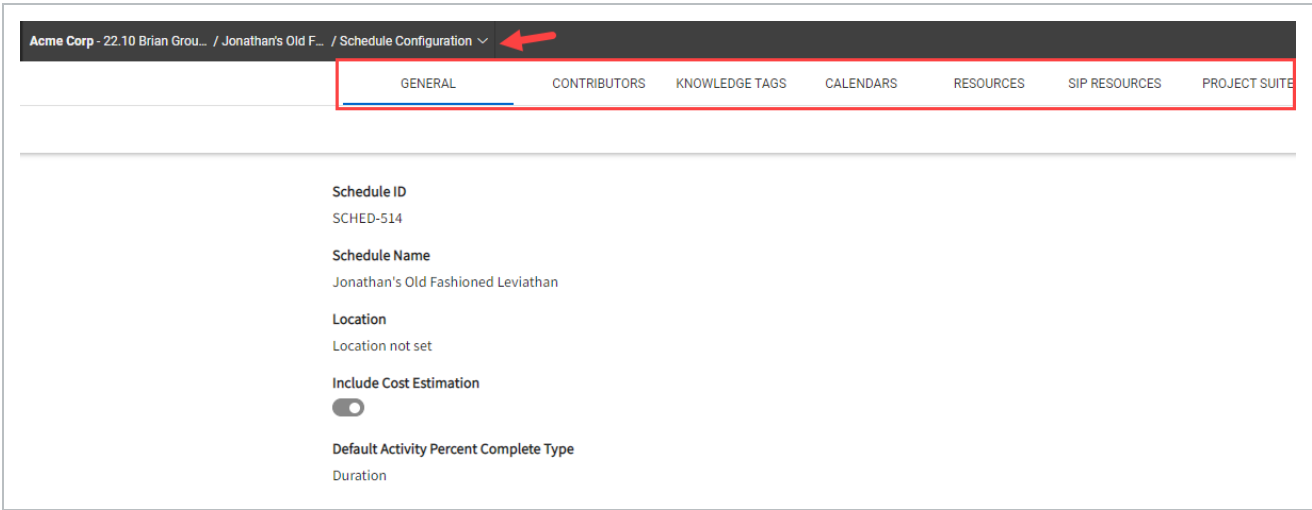
## SCHEDULE CONFIGURATION SETTINGS

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
---------	--------------	----------------	-----------	-----------	---------------	---------------

---

**Schedule ID**  
SCHED-512

**Schedule Name**  
Test Schedule

**Location**  
Location not set

**Include Cost Estimation**  
☐

**Default Activity Percent Complete Type**  
Duration

# 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					
+					
Email	Name	Permissions	Steps	Actions	
ben@basispm.com	Ben Heights	Markup	0	⋮	
david@ineight.com 1 day ago	David	Scheduler Short Interval Planner Markup	0	⋮	
Paul@ineight.com	Paul	Short Interval Planner	0	⋮	

# 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

Codes

Project

Activity

Register Event

Resource

UDFs

Project

WBS

Activity

Register Event

Resource

Project Codes

Business Unit / Region

Default for Scheduled Svcs

Development

Development Manager

MAdshead





















Major Projects

Project Lead Planner / Scheduler

# 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.













GENERALCONTRIBUTORSKNOWLEDGE TAGSCALENDARSRESOURCESSIP RESOURCESPROJECT SUITE

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

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.

GENERALCONTRIBUTORSKNOWLEDGE TAGSCALENDARSRESOURCESSIP RESOURCESPROJECT SUITE

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

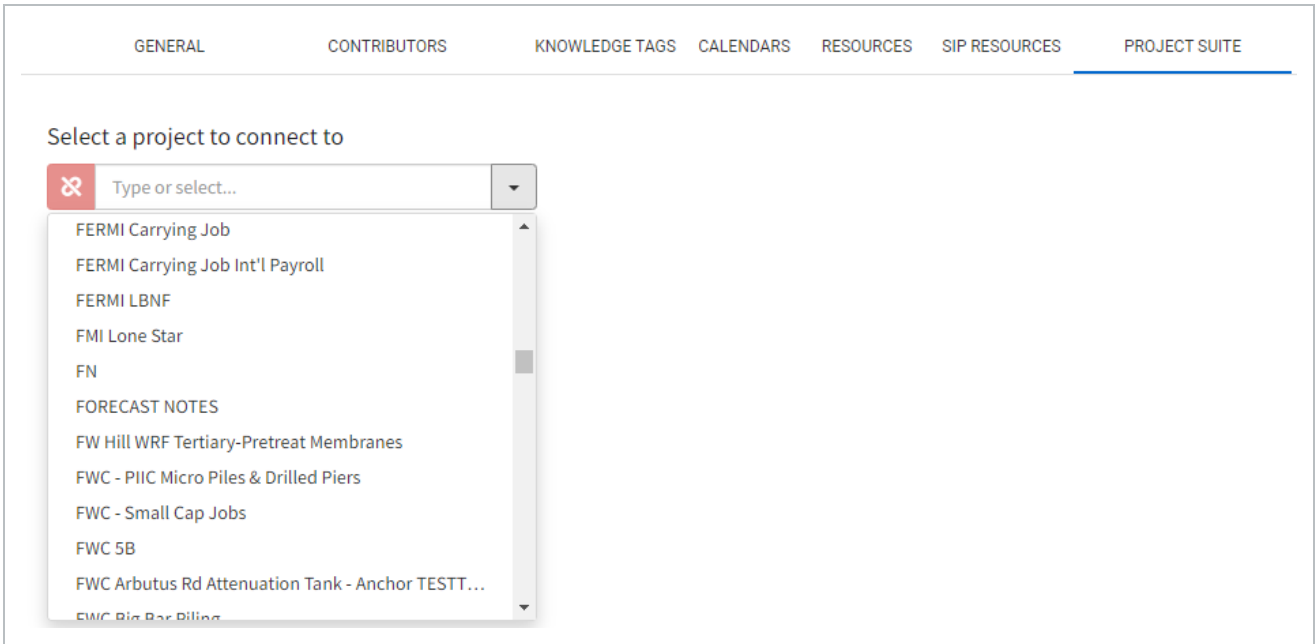
Use the indent arrows on the right to create a child resource from the selected resource or to move the resource to a different part of the grid.

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



# PROJECT SUITE



## 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.

Print settings

Print templates Save to PDF

Print settings

PAGE SETUP GANTT SETUP

Paper Size  
Letter (8.5 x 11.0 in)

Orientation  
Landscape

Scaling  
Default

Header  
None

Footer  
None

Letter (8.5 x 11.0 in) Landscape - 22 pages

ID	Description	Actions	Start	Finish	At Complet...	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr
...	...	...	9 Nov 2021 A	1 Jan 2028	1648									
...	...	...	9 Nov 2021 A	1 Jan 2028	1648									
...	...	...	9 Nov 2021 A	30 Jul 2024 A	681									
...	...	...	12 Nov 2024	1 Jan 2028	892									
...	...	...	12 Nov 2024	29 Nov 2027	764									
...	...	...	12 Nov 2024	1 Jan 2028	892									
...	...	...	13 Nov 2024	2 Jan 2027	932									
...	...	...	6 Jun 2022 A	15 Apr 2025	718									
...	...	...	9 Jan 2023 A	30 Apr 2024 A	335									
...	...	...	9 Jan 2023 A	10 May 2023 A	91									
...	...	...	9 Mar 2023 A	22 Aug 2023 A	134									
...	...	...	5 Jul 2023 A	22 Nov 2023 A	99									
...	...	...	20 Oct 2023 A	30 Apr 2024 A	132									
...	...	...	6 Jun 2022 A	15 Apr 2025	718									
...	...	...	20 Mar 2024 A	1 Jan 2028	1057									
...	...	...	27 Nov 2024	16 Jan 2027	932									
...	...	...	14 Jun 2024 A	29 Nov 2027	809									
...	...	...	20 Mar 2024 A	11 Mar 2026	510									
...	...	...	13 Nov 2024	11 Aug 2026	451									
...	...	...	17 Apr 2025	2 Jan 2027	534									
...	...	...	17 Apr 2025	2 Jan 2027	534									
...	...	...	10 Sep 2025	24 Sep 2026	263									
...	...	...	11 Mar 2027	1 Jan 2028	310									

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.

Print settings

Print templates Save to PDF

Print settings

PAGE SETUP GANTT SETUP

Paper Size  
Letter (8.5 x 11.0 in)

Orientation  
Landscape

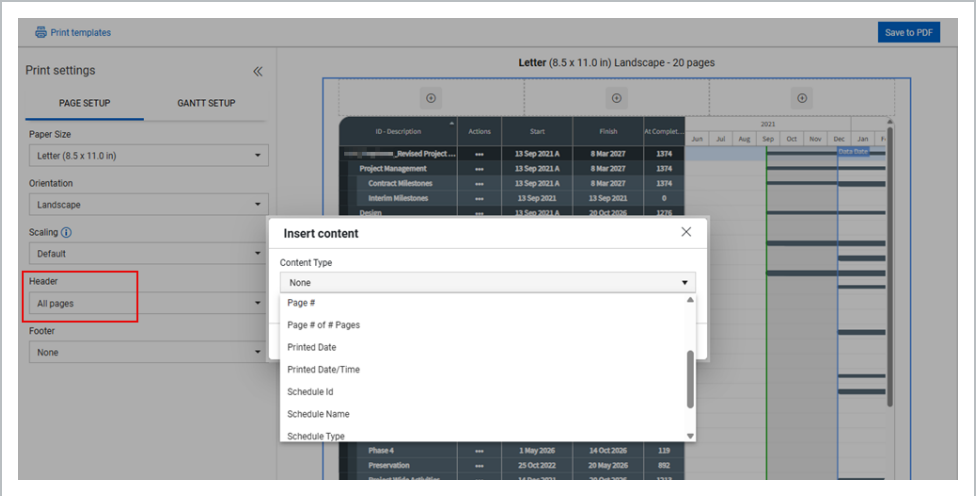
Scaling  
Default

Header  
All pages

Letter (8.5 x 11.0 in) Landscape - 20 pages

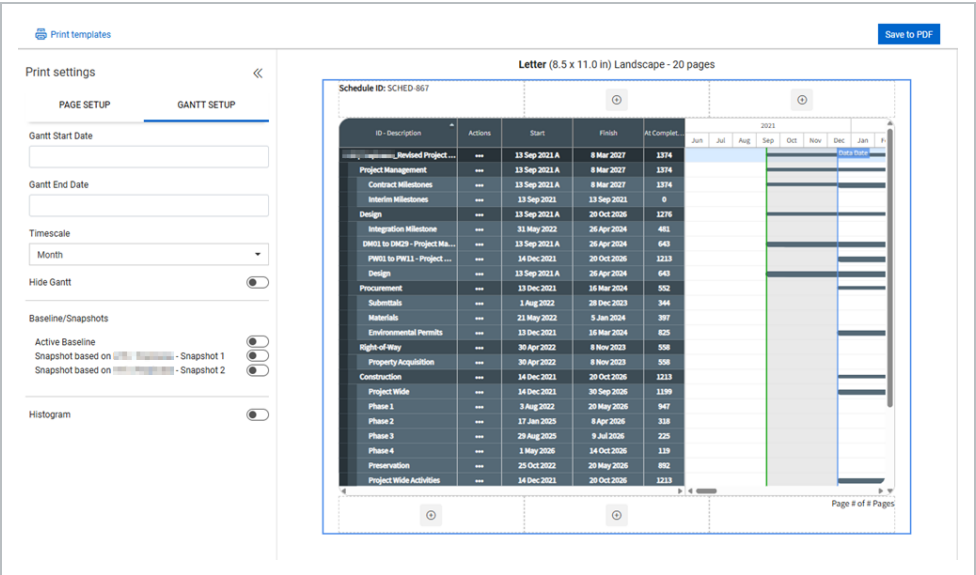
ID	Description	Actions	Start	Finish	At Complet...	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb
...	...	...	13 Sep 2021 A	8 Mar 2027	1374									
...	...	...	13 Sep 2021 A	8 Mar 2027	1374									
...	...	...	13 Sep 2021 A	8 Mar 2027	1374									
...	...	...	13 Sep 2021	13 Sep 2021	0									
...	...	...	13 Sep 2021 A	20 Oct 2026	1278									
...	...	...	31 May 2022	20 Apr 2024	481									
...	...	...	13 Sep 2021 A	20 Apr 2024	643									
...	...	...	14 Dec 2021	20 Oct 2026	1213									
...	...	...	13 Sep 2021 A	20 Apr 2024	643									
...	...	...	13 Dec 2021	10 Mar 2024	502									
...	...	...	1 Aug 2022	20 Dec 2023	346									
...	...	...	21 May 2022	5 Jan 2024	397									
...	...	...	13 Dec 2021	16 Mar 2024	625									
...	...	...	30 Apr 2022	8 Nov 2023	558									
...	...	...	30 Apr 2022	8 Nov 2023	558									
...	...	...	14 Nov 2021	24 Dec 2021	433									

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.



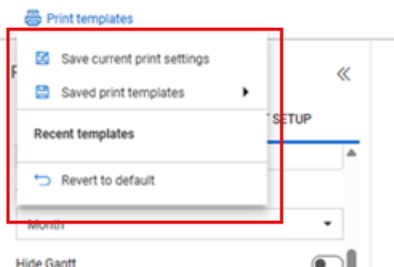
The Histogram toggle lets you hide or show the histogram. When showing the histogram, you have multiple configurations to choose from depending on the settings you choose.





### 4.0.0.1 PRINT TEMPLATES

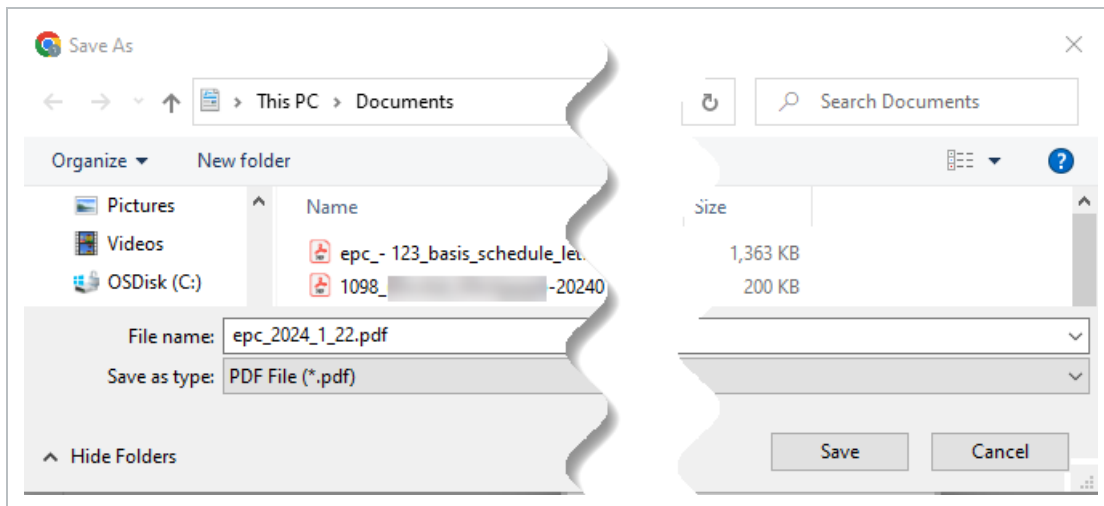
After you configure the print settings on the Page setup and Gantt setup tabs, you can then save them to a template that you can easily access and reuse. After you configure the print settings, click Print templates > **Save current print settings**, and then enter a name for the template. The settings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



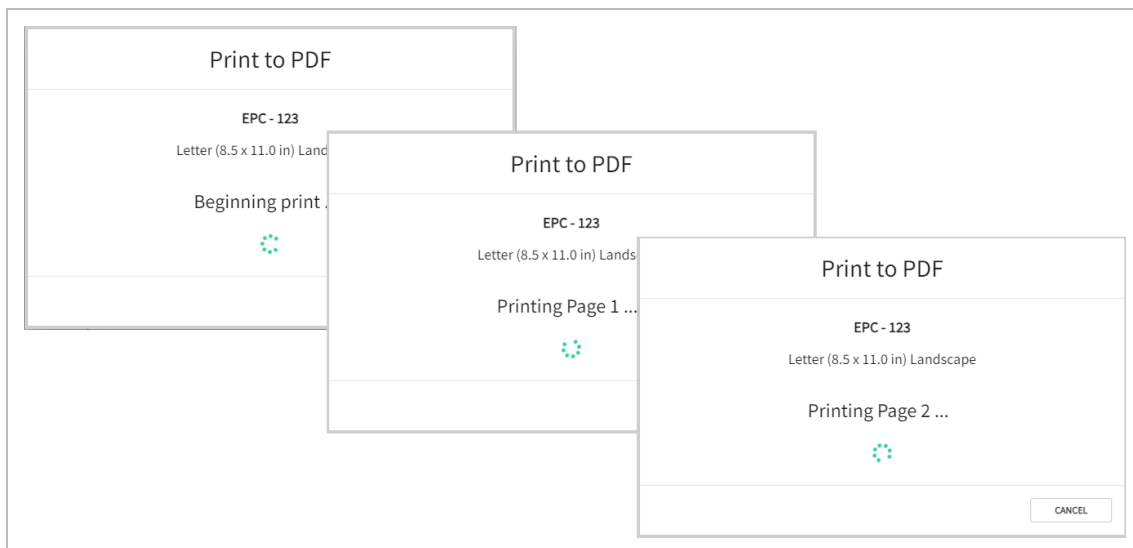
## SAVE TO PDF

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.



# LESSON 5 – PACKAGES AND ACTIVITIES

## ACTIVITY PRODUCTIVITY RATES

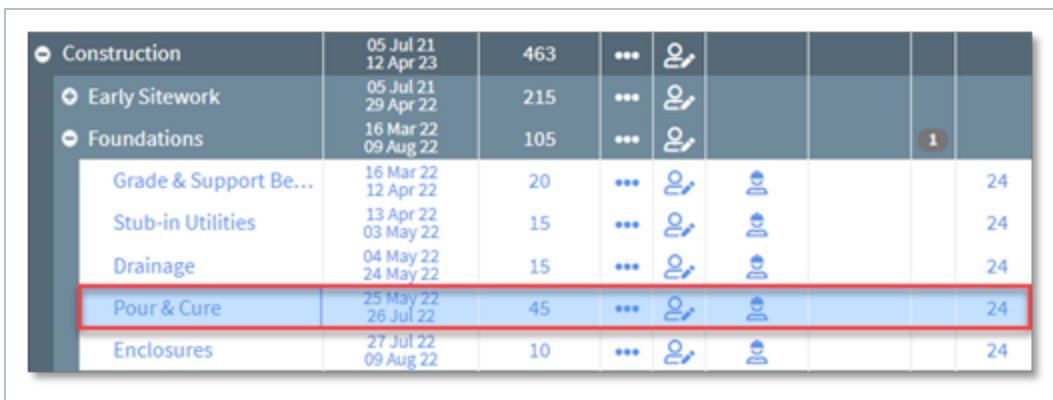
Productivity rates allow schedulers to establish a productivity factors for activities and thus scale durations accordingly.

**NOTE** 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)

0

Remaining (d)

0

R

Actual (d)

0

At Complete (d)

0

Cost (\$)

0

Start

0

Finish

0

Percent Complete

Dur

0

Early Start

6 Oct 2022

Late Start

31 Dec 1969

Planned Start

6 Oct 2022

Total Float

Early Finish

6 Oct 2022

Late Finish

31 Dec 1969

Planned Finish

6 Oct 2022

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

ADOPT

ADOPT

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?\*

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

Field	Description
Activity Description	Activity this Productivity Rate is for

Page 100 of 291

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Field	Description
Output	Output quantity for a single package (in the respective Unit of 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 ?\*

UOM ?

Manhours

\$/unit

1

2920

0

Work

How many manhours?\*

Crew/Equip Count \*

2920

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.

Q

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.

Output ?\*

UOM ?

Manhours

\$/unit

1

2920

0

Work

How many manhours?\*

Crew/Equip Count \*

2920

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

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


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

NOTE

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.



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**

ADOPT

ADOPT

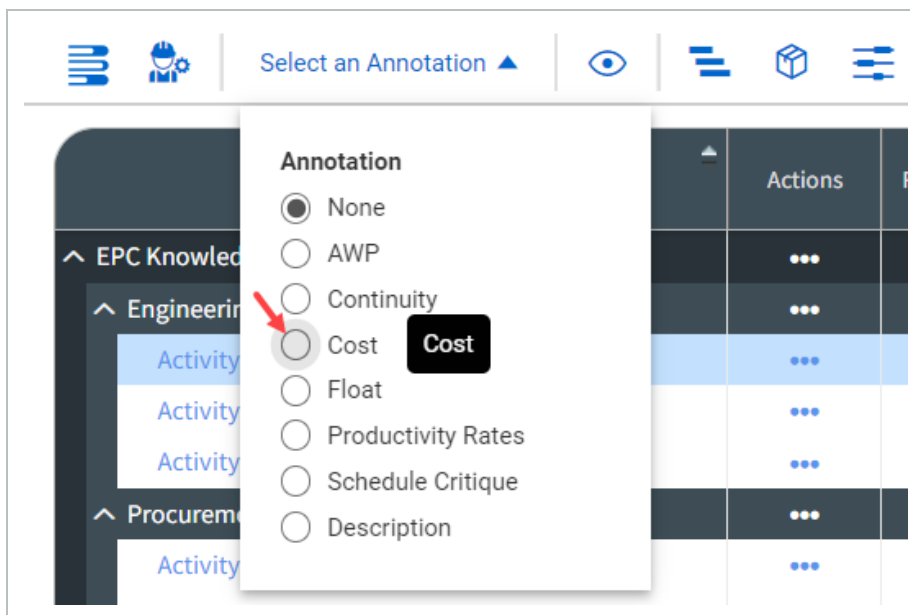
CANCEL

APPLY RATE

**NOTE**

Pay attention to how this impacts the activity duration and cost

- Click **Apply Rate** when complete.
- 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:

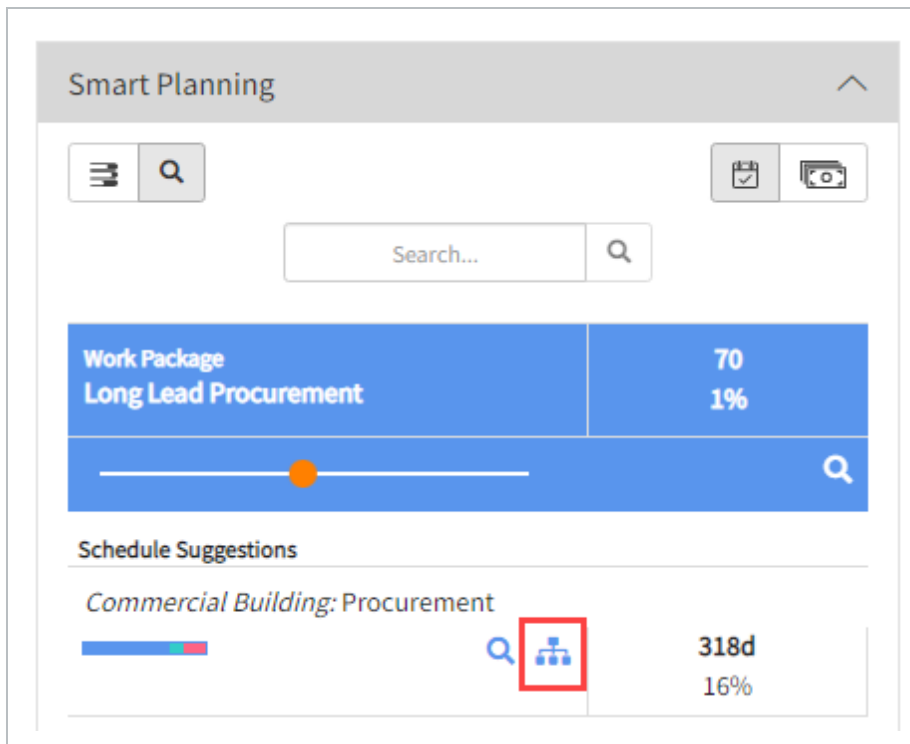
- Knowledge subnet
- Create form scratch

## KNOWLEDGE SUBNETS

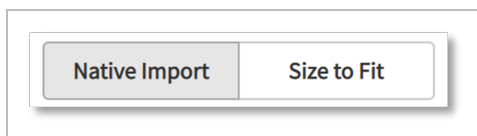
Schedule leverages the Knowledge Base to rapidly build a schedule based on historical projects or existing templates. This feature enables you to pull in similar activities from Knowledge Base projects and adjust them based on the parameters of the project being created.

## BUILDING A SCHEDULE

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

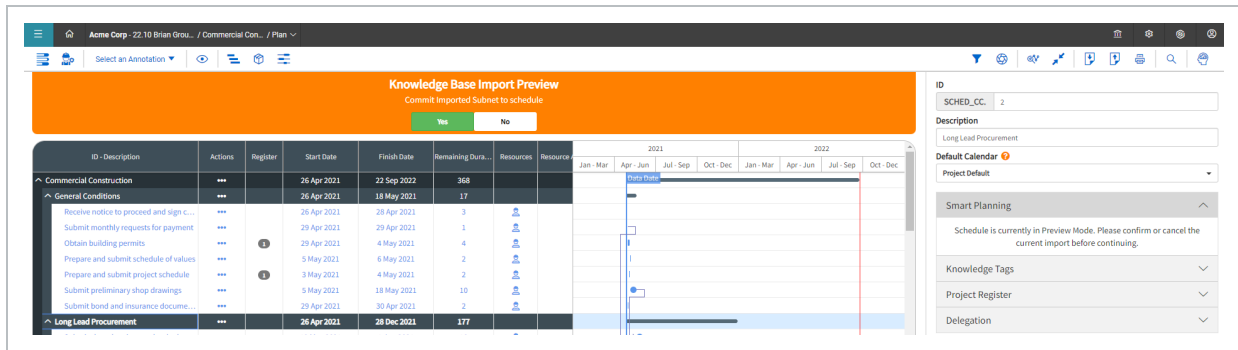


- The merge window opens, letting you customize your selection of planning packages and activities. For this example include all packages and activities in the subnet switched on
3. After the subnet selection is made, the option to bring in Knowledge Base subnet as *Native Import* or *Size to Fit* is available.

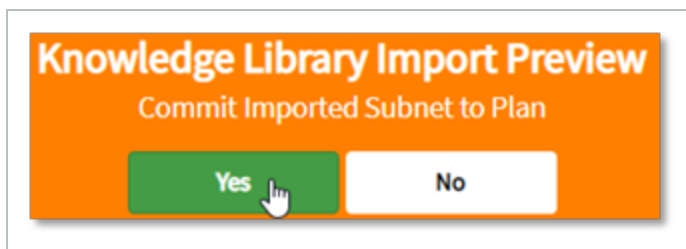


- Native Import: it will bring in the selected subnet with the original durations from the Knowledge Base

- Size to Fit: it will proportionally adjust 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.

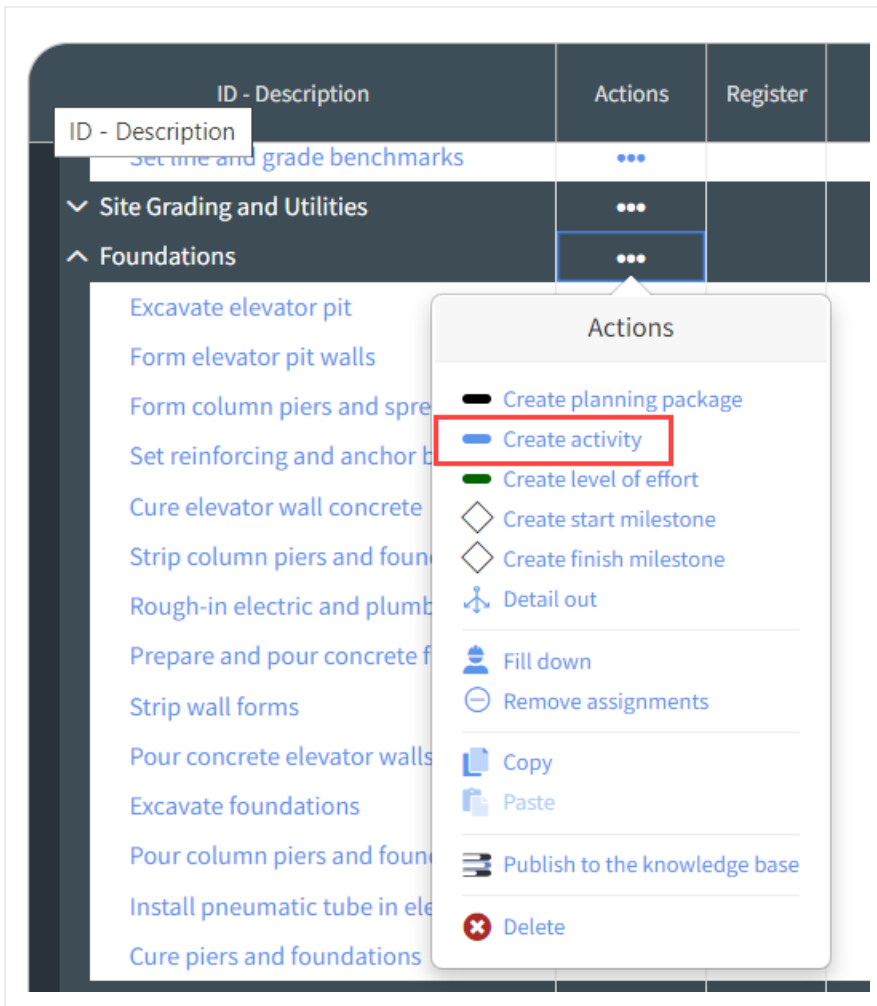


## ACTIVITIES FROM SCRATCH

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.

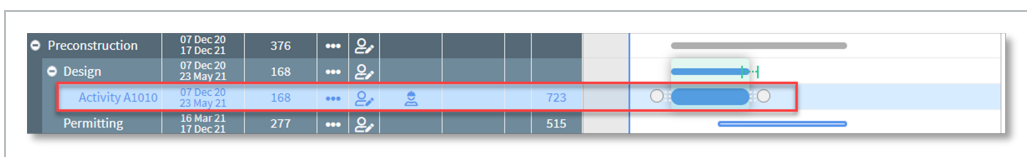
## BUILD ACTIVITIES FROM SCRATCH

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

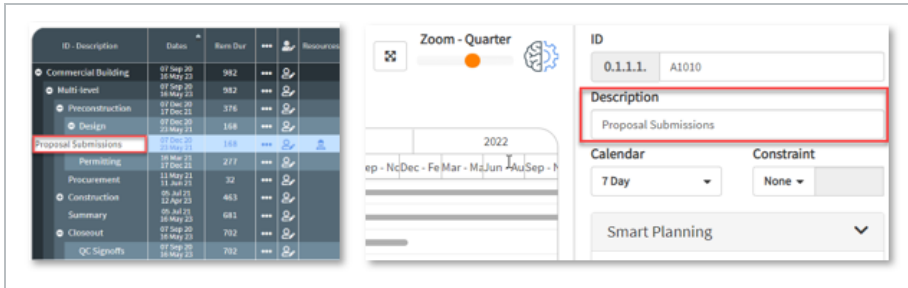


2. Select **Create Activity**.

- A new activity will appear as a subordinate



- 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.



Select an Annotation

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		0	14 Sep 2020	18 Oct 2021
Lean Concrete and		0	7 Dec 2020	23 Mar 2021
Roof Beam		0	21 Jun 2021	30 Jun 2021
Ground Slab		0	4 May 2021	7 May 2021
Site Set Out		0	12 Oct 2020	13 Oct 2020
Ground Beam		0	14 Apr 2021	21 Apr 2021
Column		0	24 May 2021	28 May 2021
Clean site availabl		0	14 Sep 2020	14 Sep 2020
Excavation		0	11 Nov 2020	17 Nov 2020
Roof Cover		0	26 Jul 2021	18 Oct 2021
Masonry Works		0	5 Jun 2021	27 Aug 2021
Activity A1010		0	5 Jun 2021	27 Aug 2021
External Wall clad		0	5 Jul 2021	17 Jul 2021
External wall and		0	5 Jun 2021	5 Jul 2021
Door and window		0	23 Aug 2021	27 Aug 2021
1st Fix of MEP	...	\$0	21 Jun 2021	14 Nov 2021

Actions

Create WBS

Create planning package

Create activity

Create level of effort

Create start milestone

Create finish milestone

Create WBS summary activity

Detail out

Fill down

Remove assignments

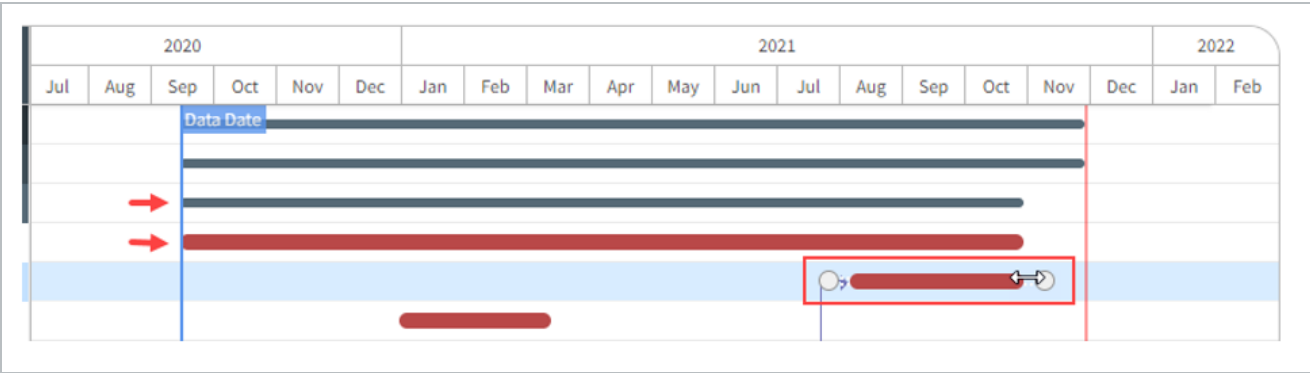
Copy

Paste

Publish to the knowledge base

Delete

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.



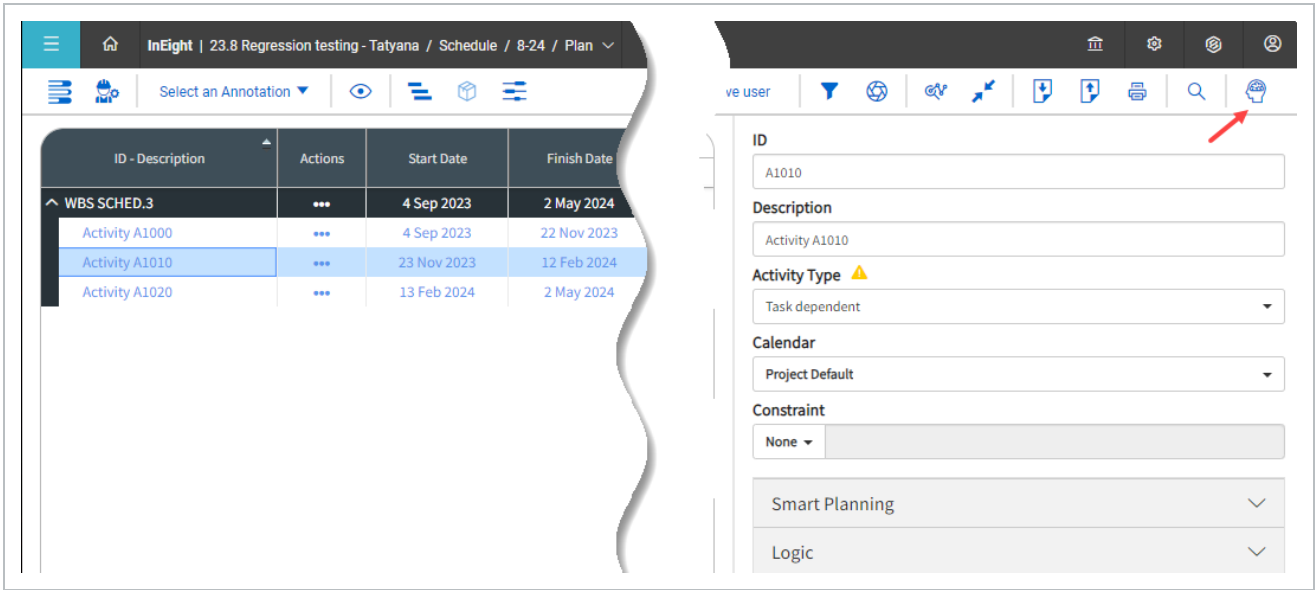
You can load resources into WBS summary activities to help linearly spread units over a specific time frame. Different calendars can be assigned to the WBS summary activity for tracking.

### 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**.



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


user

ID

A1010

Description

Activity A1010

Activity Type 

Task dependent

Select one...

Start milestone

Finish milestone

Task dependent

Level of effort

WBS summary

Logic

Knowledge Tags

Project Register

Delegation

Resource Assignments

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**.

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

Duration

Automatic Manual

Quantity

4

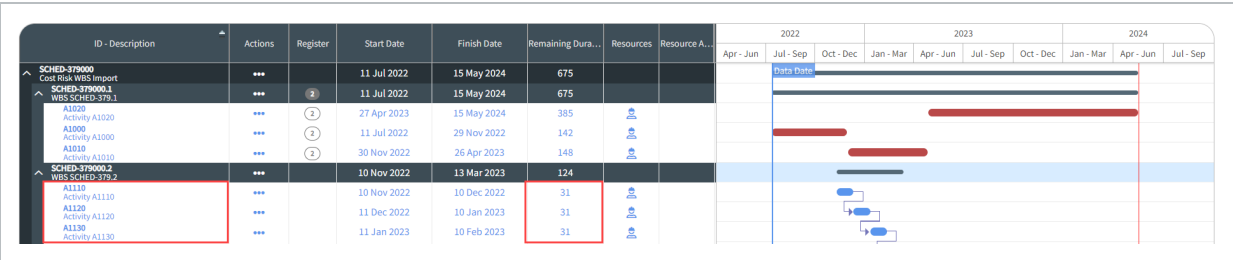
Lag Duration

0

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.



# 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.

**NOTE** 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.

The screenshot displays a project schedule interface with a table of tasks and a Knowledge Tags panel on the right. The table includes columns for ID, Description, Actions, Register, Start Date, Finish Date, Remaining Duration, Resources, and Resource Allocation. The Knowledge Tags panel is titled 'Logic' and contains a 'Knowledge Tags' section with a red box highlighting the 'Codes' tab and a list of tags including 'As-Built Performance', 'AWP Structure', 'Brian Activity Code Test', 'CALENDAR', 'Kansas Animals', and 'Kansas Towns and Villages'.

ID	Description	Actions	Register	Start Date	Finish Date	Remaining Duration	Resources	Resource Allocation
	External wall and internal wall work	***		10 Jul 2021	10 Oct 2021	80		
	1st Fix of MEP	***		1 Mar 2021	16 Oct 2021	197		
	1st fix of electrical conduit to wall,...	***		15 Jul 2021	16 Oct 2021	80		
	1st fix of plumbing work under slab	***		1 Mar 2021	15 Apr 2021	40		
	Doors & Windows Fixing	***		29 Aug 2021	13 Oct 2021	40		
	Door and Window fixing	***		29 Aug 2021	13 Oct 2021	40		
	Ceiling Works and MEP Work above c...	***		14 Sep 2020	9 Mar 2021	152		
	Ceiling installation and paint finis...	***		31 Oct 2020	9 Mar 2021	112		
	QA/QC before ceiling close out	***		12 Oct 2020	29 Oct 2020	16		
	Setting out ceiling level and MEP	***		14 Sep 2020	11 Oct 2020	24		
	Wall Finished	***		10 Mar 2021	10 Jun 2021	80		
	Finishing to wall	***		10 Mar 2021	10 Jun 2021	80		
	Tiling Work, Deck and Ladder	***		24 May 2021	17 Jan 2022	205		
	Bedroom area tile	***		12 Jun 2021	15 Aug 2021	56		
	Pool tile /w waterproof	***		17 Oct 2021	17 Jan 2022	80		
	Timber deck and Ladder	***		24 May 2021	30 Sep 2021	112		
	Toilet tile /w waterproof	***		12 Jun 2021	15 Aug 2021	56		
	2nd fix of MEP, Sanitary ware, AC Gril...	***		14 Sep 2020	21 Feb 2022	451		
	Complete of MEP Room	***		14 Oct 2021	21 Feb 2022	112		
	Installation of Sanitary ware, AC G...	***		14 Sep 2020	17 Nov 2020	56		
	ID&FFE work	***		14 Sep 2020	13 May 2021	208		
	FFE	***		29 Mar 2021	13 May 2021	40		

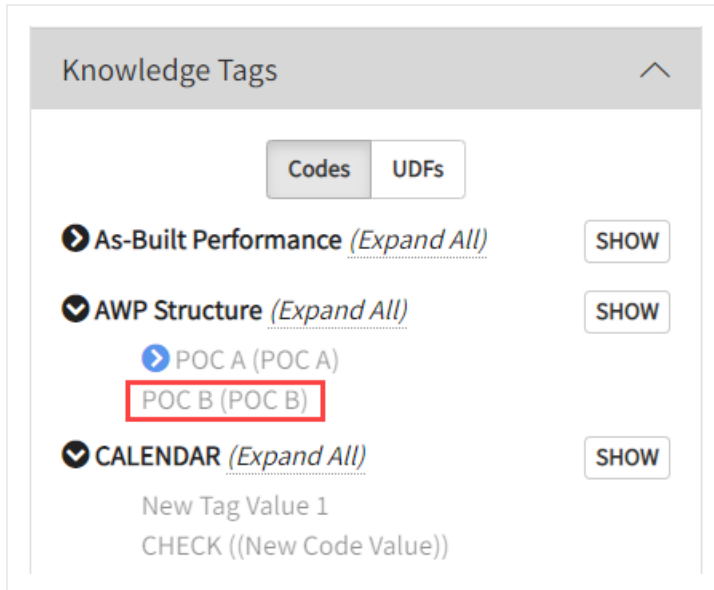
2. Click on the **arrow** to expand the Knowledge Tags available within each group.

The close-up shows the 'Knowledge Tags' panel with the 'Codes' tab selected. A red arrow points to the expandable icon (a right-pointing arrow) next to the 'As-Built Performance' tag. Below it, the 'AWP Structure' tag is expanded, showing a sub-list with 'POC A (POC A)' and 'POC B (POC B)' highlighted by a red box. Other tags like 'Brian Activity Code Test', 'CALENDAR', and 'Kansas Animals' are also visible with their respective expandable icons.

**NOTE**

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.



## 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

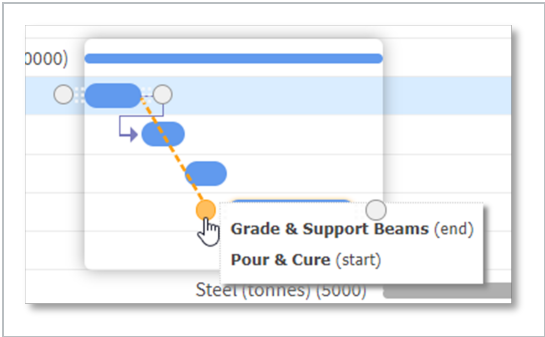
The Gantt Chart has built-in functionality allowing activity logic to be tied together directly in the visual. This is great for quickly adding or adjusting logic in the schedule.

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

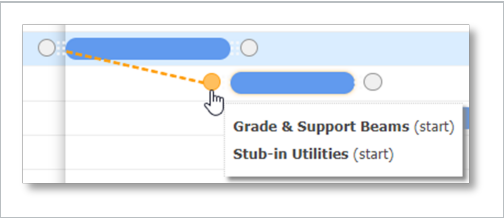
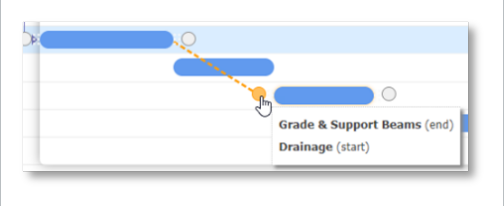
Foundations	16 Mar 22 09 Aug 22	105	...				1		Planned	ic (Yards) (10000)
Grade & Support Be...	16 Mar 22 12 Apr 22	20	...					24	Planned	
Stub-in Utilities	13 Apr 22 03 May 22	15	...					24	Planned	

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

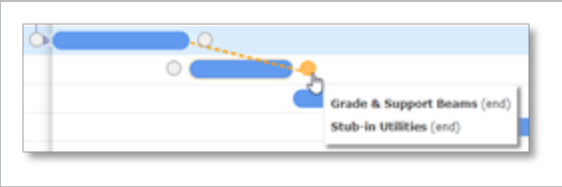
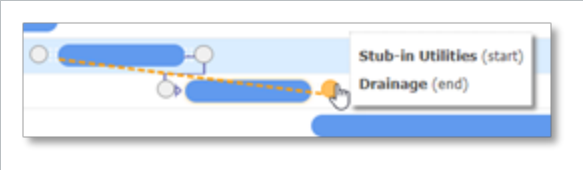
- Dot at the beginning of an activity: the start logic of the activity
- Dot at the end of an activity: the end logic of the activity



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



Function (Connect the Dots)	Logic (How to Connect)	
	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

**NOTE** 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.

RELEVANT LINKS

[Course - Schedule Detailed Planning](#)  
[Add Schedule Detail](#)

PLANNING MODE

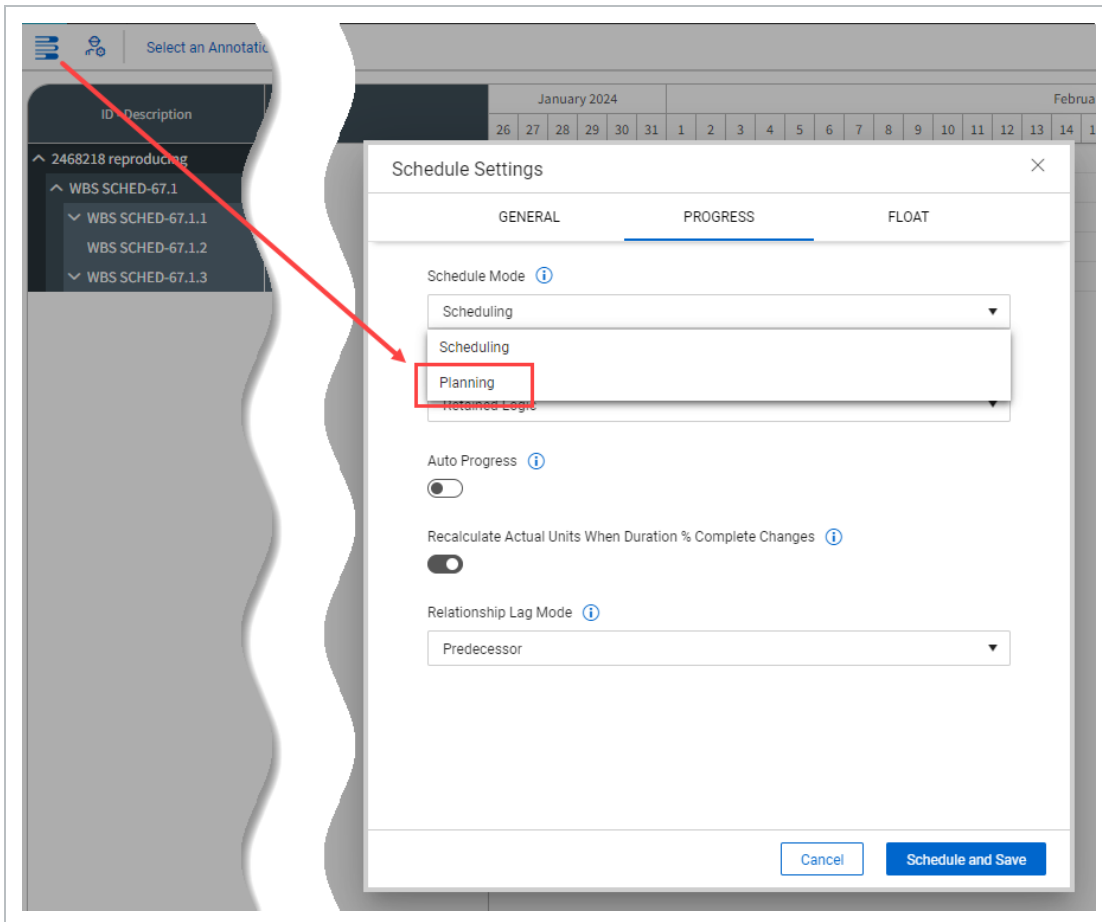
At the start of the project or phase, non-schedulers identify the key items to be planned for and create a rough timeline of the plan. InEight Schedule gives you the ability to do this in a way that easily carries forward into a full schedule.

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

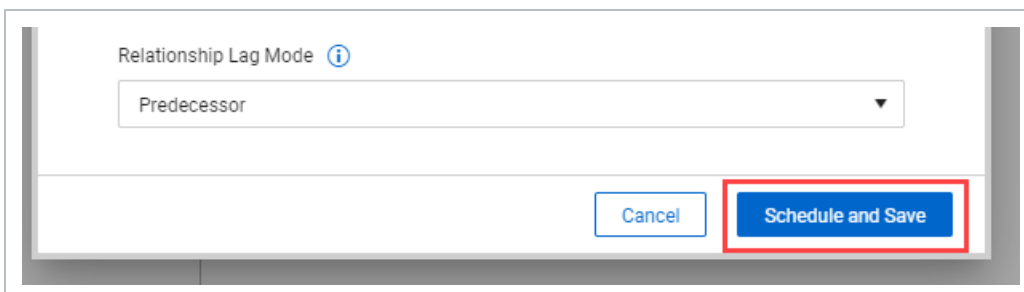
CREATE A NEW PLANNING PACKAGE

**NOTE** 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.



**NOTE**

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

**TIP**

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.

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	07 Sep 20 16 May 23	702	...			0
QC Signoffs	07 Sep 20 16 May 23	702	...			0

**NOTE**

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.

NOTE

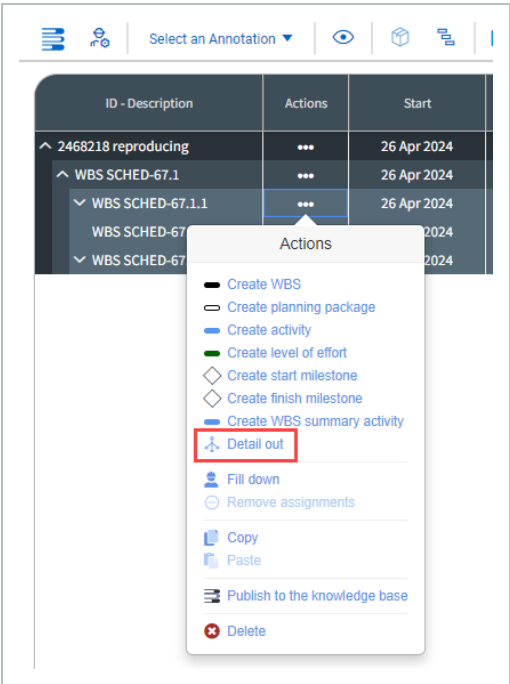
You can adjust a planning package’s duration in the Rem Dur column. This will adjust its duration while holding the current start date.



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

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

Quantity

3

Duration

Automatic Manual

Lag Duration

0

Schedule will create 3 Activities In Succession each with a duration of 2 days under WBS SCHED-67.1.1.

Cancel Build

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.

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

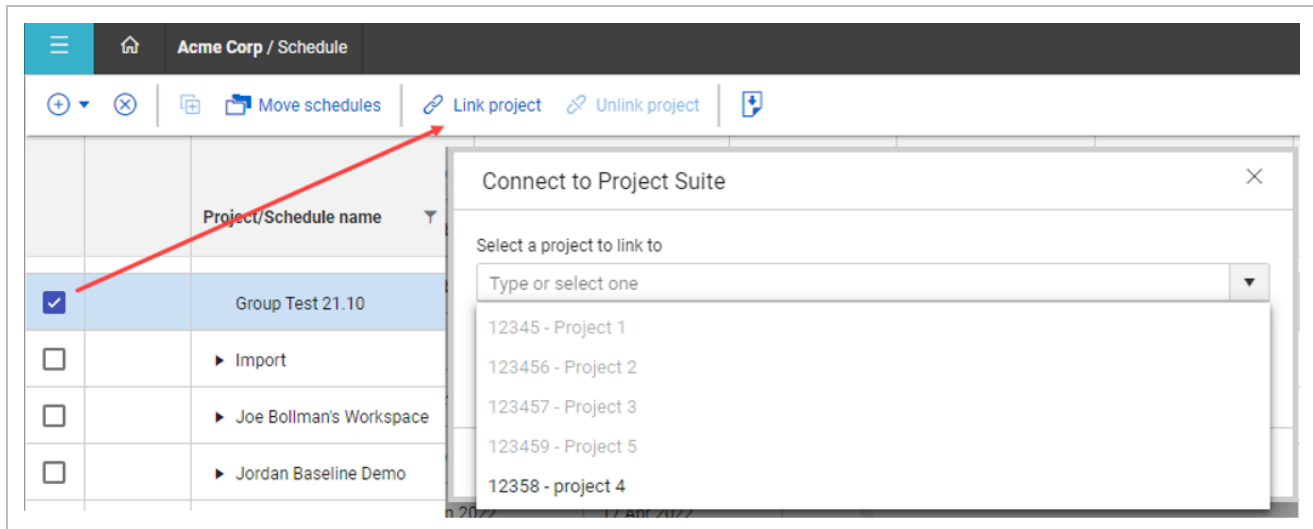
3. Set the **quantity**.
4. Click **Build**.

**NOTE** 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

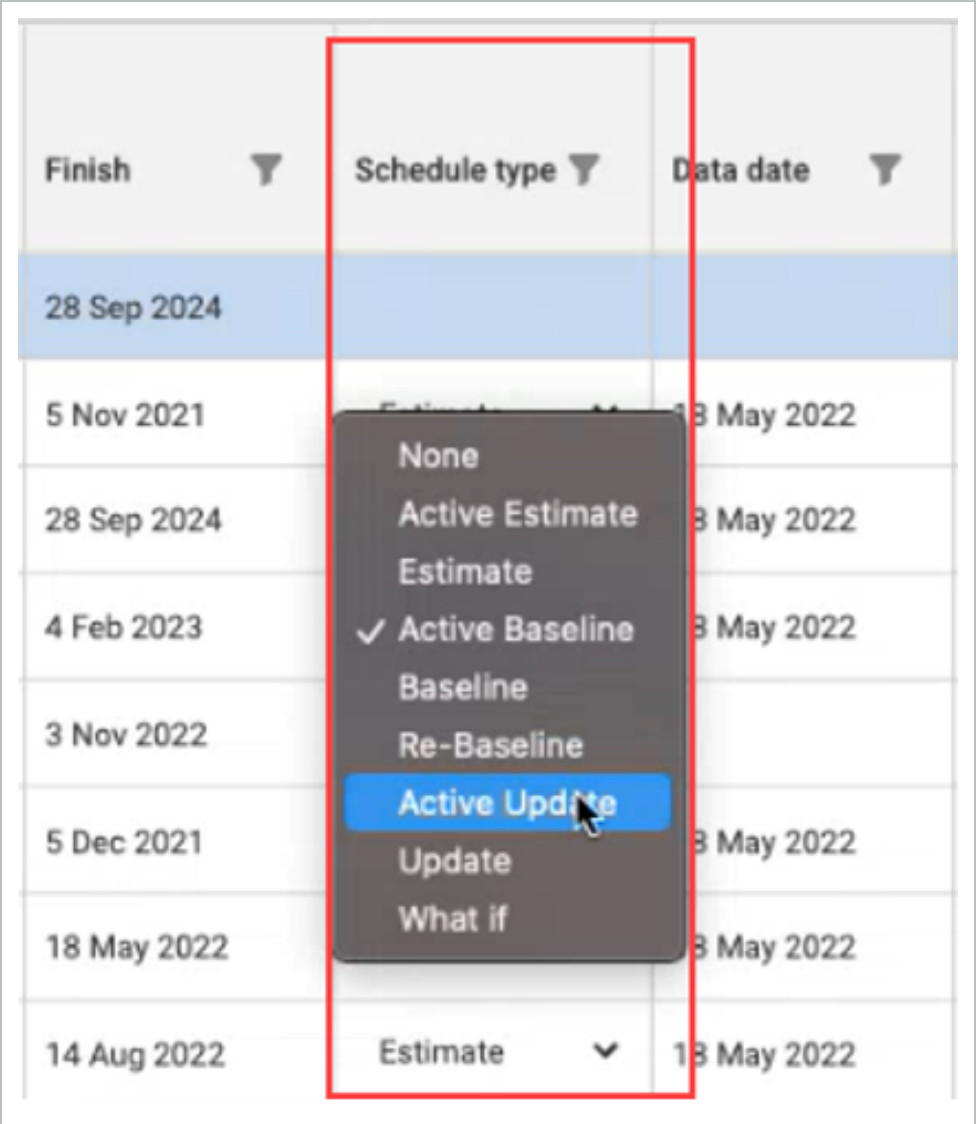
The integration with Project Suite is built primarily for the Project Suite migration. For new users or non-connected workspaces, you can navigate to the Project List page, select a workspace and link a project. You can then select a project in Project Suite to connect and link a project schedule in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



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

NOTE

**Global Options.** The toggle must be set to *ON* for projects that want to use the AWP feature in Schedule.



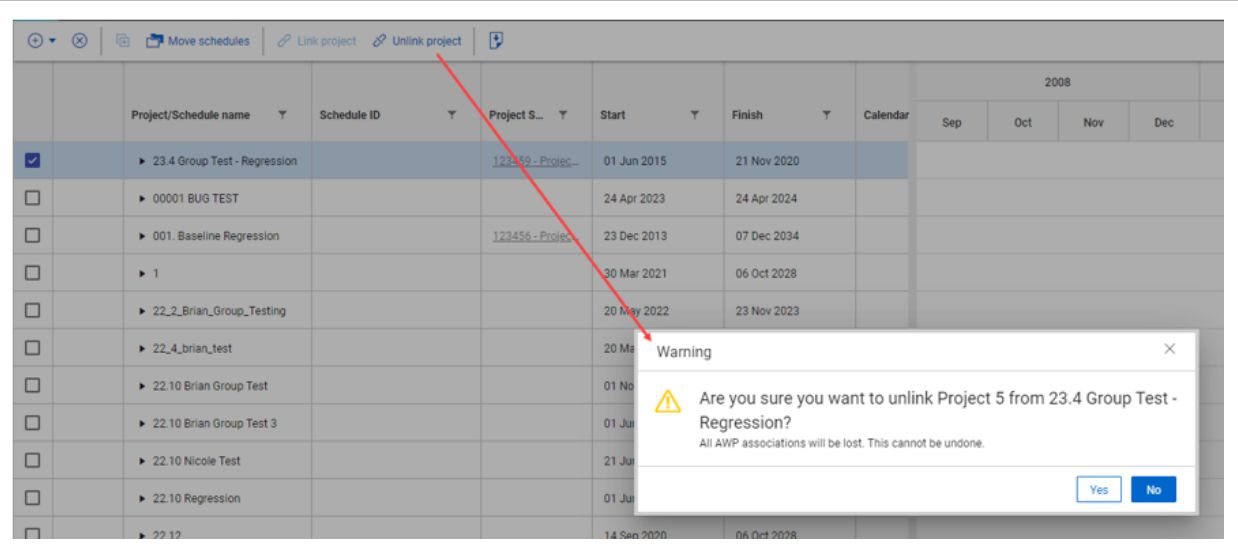
An InEight icon shows next to the project schedule name to signify that the schedule is now linked with a project in Project Suite.

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



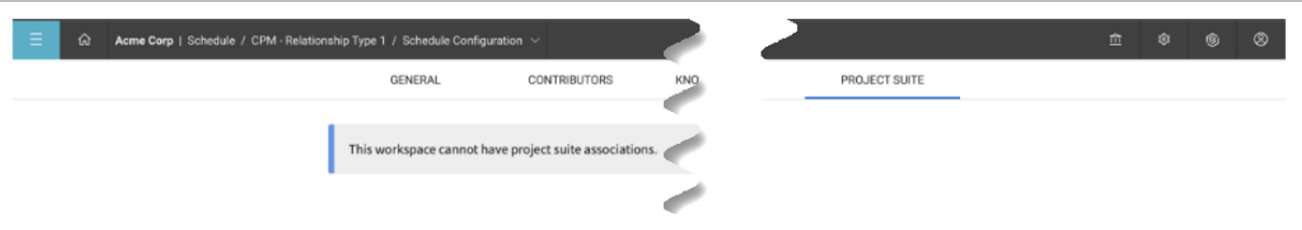
### 5.0.0.3 UNLINK A PROJECT SUITE PROJECT

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.



### 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.



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

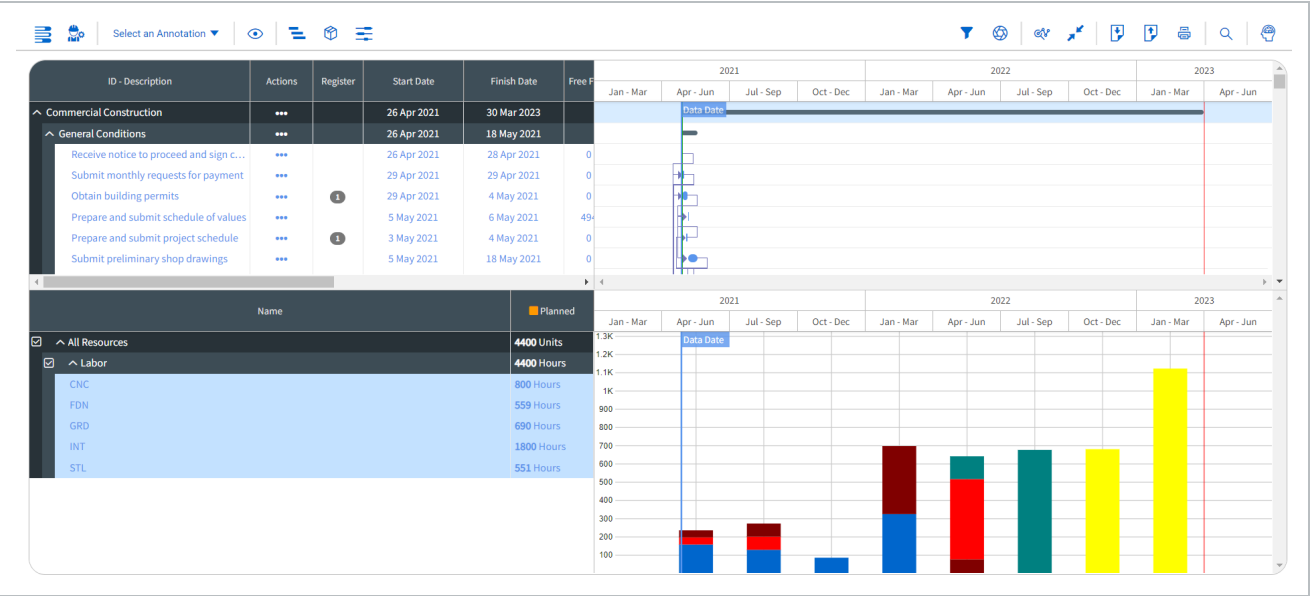


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# LESSON 6 – RESOURCE MANAGEMENT

## 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.

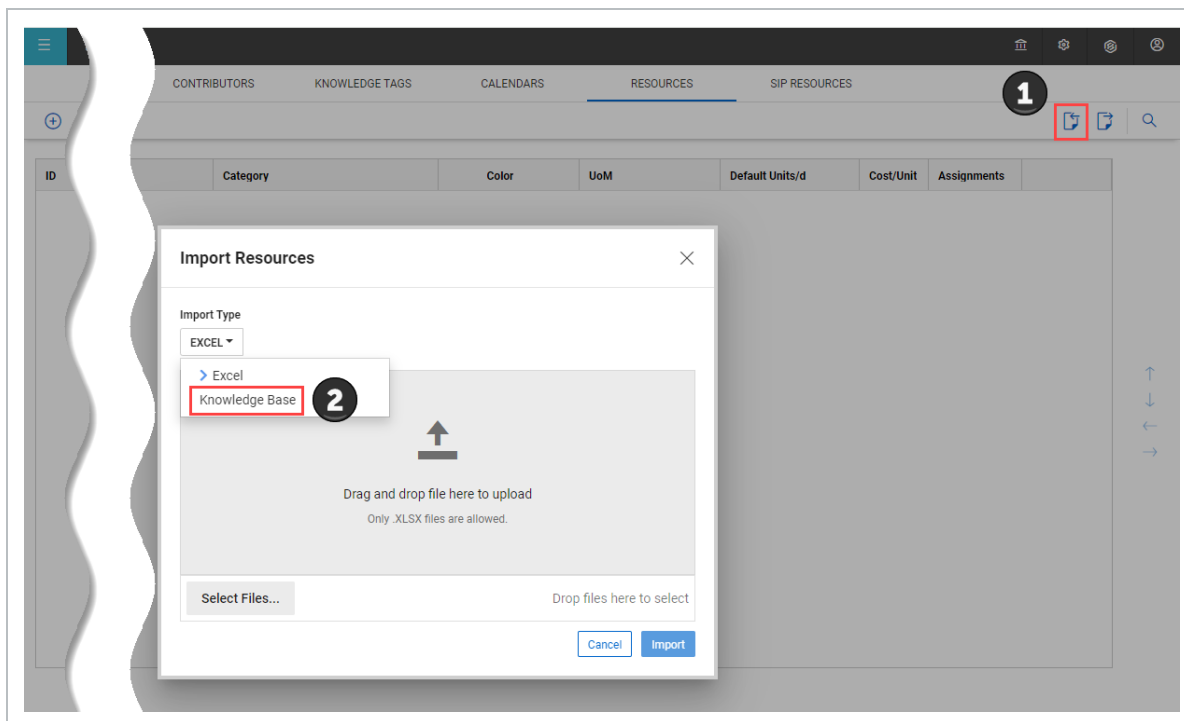


From a shared organization resource pool, schedulers can assign the required resources to activities. With the resource utilization data, InEight Schedule can assess cost and time impacts in a time-phased manner.

CPM SCHEDULES   ACTIVITY PRODUCTIVITY RATES   KNOWLEDGE TAGS   CALENDARS   REGISTER   RESOURCES   MACHINE LEARNING							
Resources Categories							
ID	Name	Category	Color	UoM	Default Units/d	Cost/Unit	
Kim	Kim Test	Labor		Hours	8.00	1.00	
Robin	Tester	Material		Each	1.00	200.00	
Project resource	project resource	Nonlabor		Each	1.00	75.00	
009	Resource 9	Nonlabor		Each	1.00	0	
Global	Global	New Category		Each	1.00	0	
Import ID	Srini Import Desc	Unique		Each	1.00	0	
Tatyana	Ressurs 009	Supply		Hver	25.00	5080.00	
Indent	Indent	Labor		Hours	8.00	0	
SB2		Labor		Hours	8.00	0	
SP	Ski Patroller	Labor		Hours	8.00	25.00	
No UOM	UOM No	Labor			1.00	0	
Jonny B	Bonny J	Labor		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**.

Import Resources

Import Type

KNOWLEDGE BASE

Indicates resource already exists and will be duplicated.

Knowledge Base Resources	Include
13149-CC008 CC008 - Const of Interior Walls at 2700S, Riter, SR201	<div>1</div> <div></div>
13149-RAL 13149-Revenue Aesthetics and Landscape	<div></div> <div></div>
13149-CC003 CC003 - Opticom for WVC	<div></div> <div></div>
13149-CC004 CC004 - Polymer Overlay - Utah/Salt Lake Canal	<div></div> <div></div>
13149-RCO 13149-Revenue Compensable Overhead	<div></div> <div></div>
13149-CC007 CC007 - HMA Fill for WVC at 2700 South	<div></div> <div>2</div>

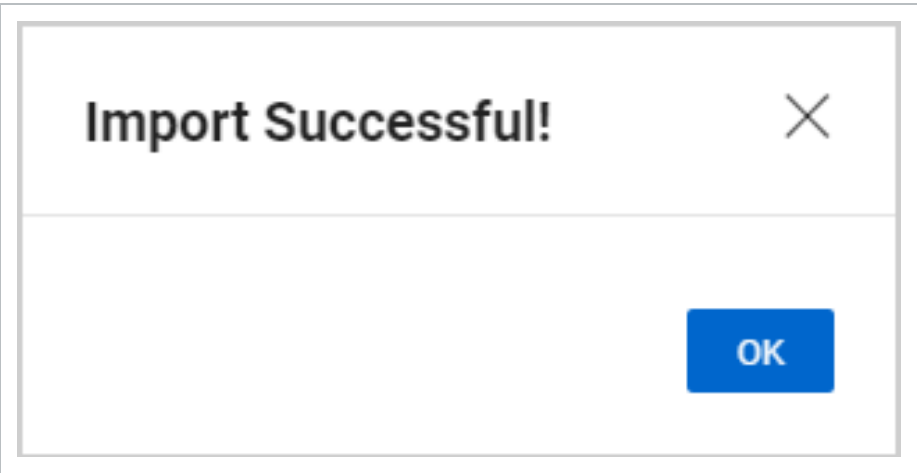
Cancel

Import

NOTE

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									
⊕									
📄 📄 🔍									
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	⊗	
13149-RAL	13149-Revenue Aesthetics and Landscape	Material ▶	●	Dollars	1.00	1.00	0	⊗	
13149-CC003	CC003 - Opticom for WVC	Nonlabor ▶	●	Each	1.00	1.00	0	⊗	

## RESOURCE ASSIGNMENTS

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

### ASSIGN RESOURCES AT THE ACTIVITY LEVEL

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

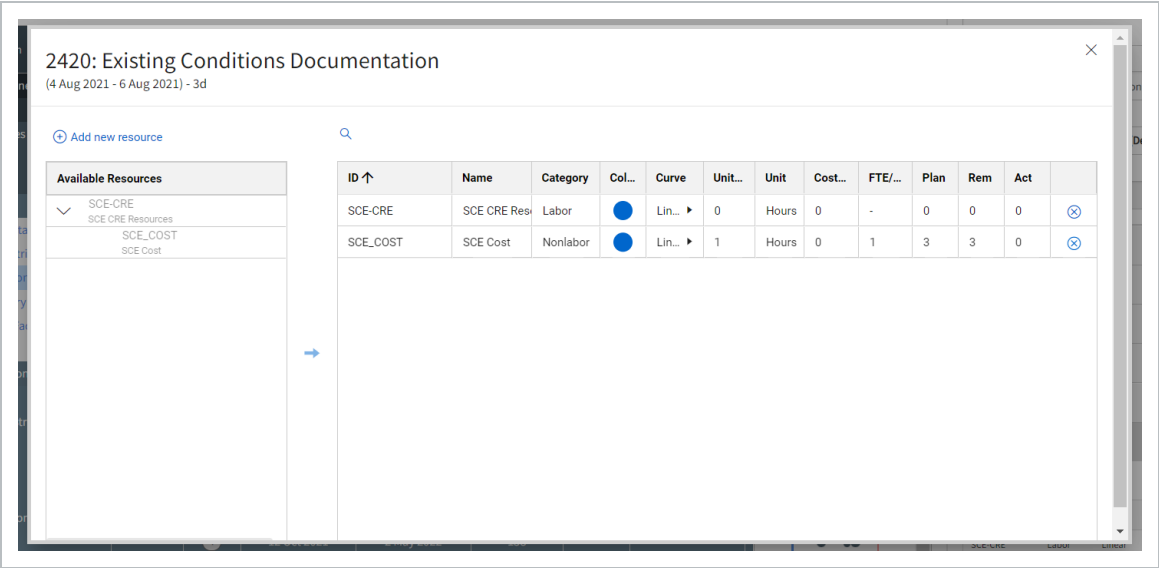
- You can open an Activity’s details in the Iris, expanding the Resource Assignments section, and selecting **Modify**.

Modify

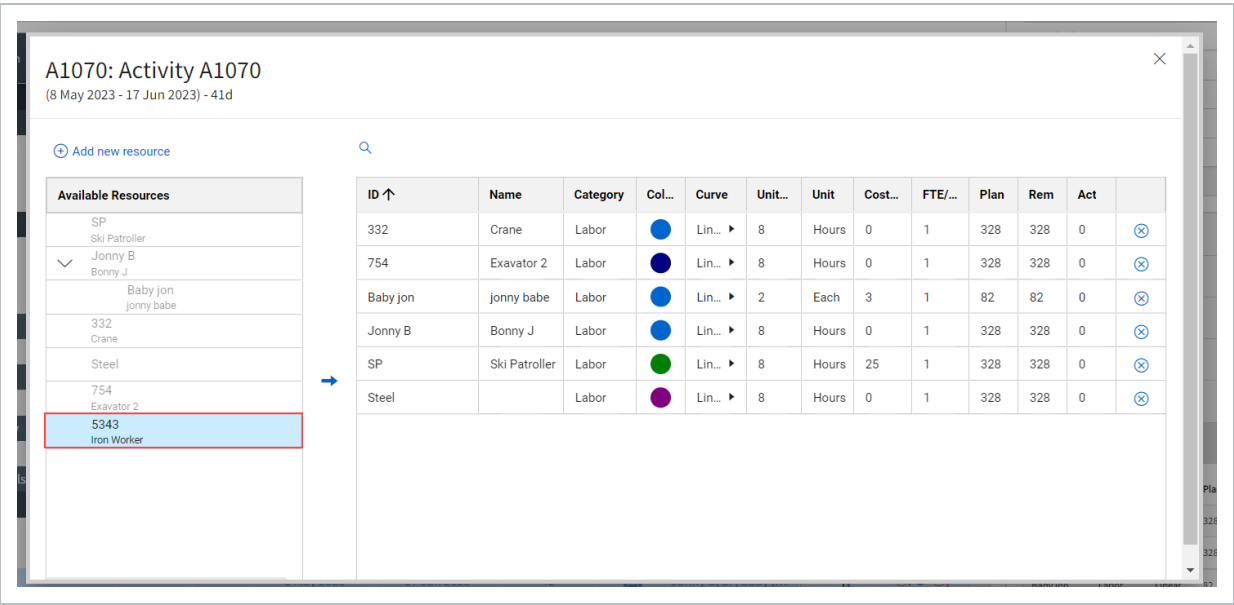
- You can customize the Gantt Chart view to include the Resources Column and selecting the **Resources** icon directly in the Gantt Chart.

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 Barricades	...	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

- When either of these options have been selected, the resource assignment window appears:



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

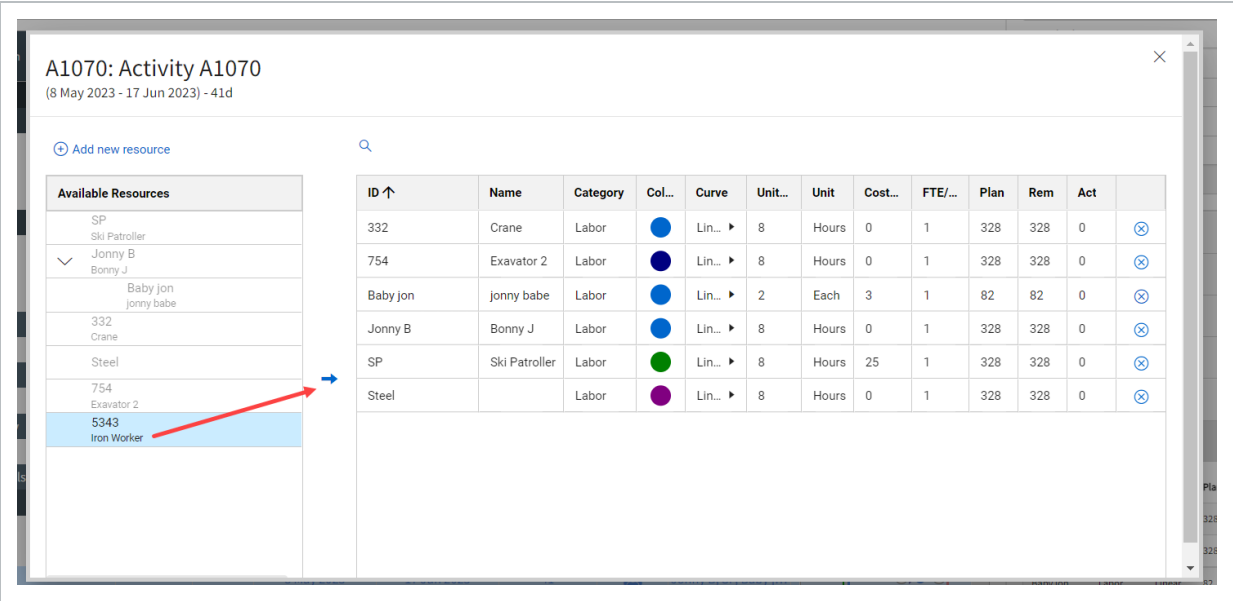




NOTE

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 “Creating Project Resources via Resource Assignment” on for more information.

3. Once selected, click the **right arrow** to add the resource to the activity’s Resource register.



TIP

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

4. Once 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.

🔍

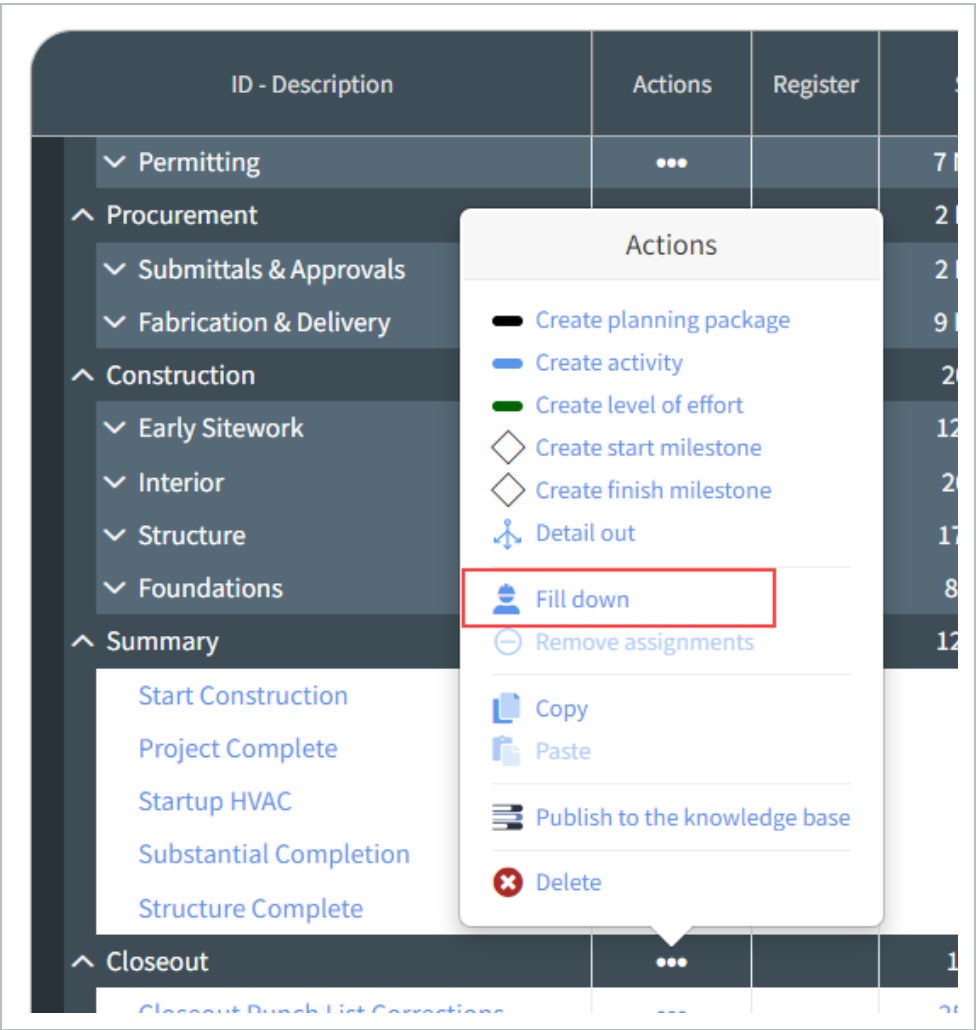
ID ↑	Name	Category	Col...	Curve	Unit...	Unit	Cost...	FTE/...	Plan	Rem	Act	
332	Crane	Labor	●	Lin... ▶	8	Hours	0	1	328	328	0	⊗
5343	Iron Worker	Labor	●	Lin... ▶	8	Hours	0	1	328	328	0	⊗
754	Exavator 2	Labor	●	Lin... ▶	8	Hours	0	1	328	328	0	⊗
Baby jon	jonny babe	Labor	●	Lin... ▶	2	Each	3	1	82	82	0	⊗
Jonny 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	⊗

**NOTE**

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.

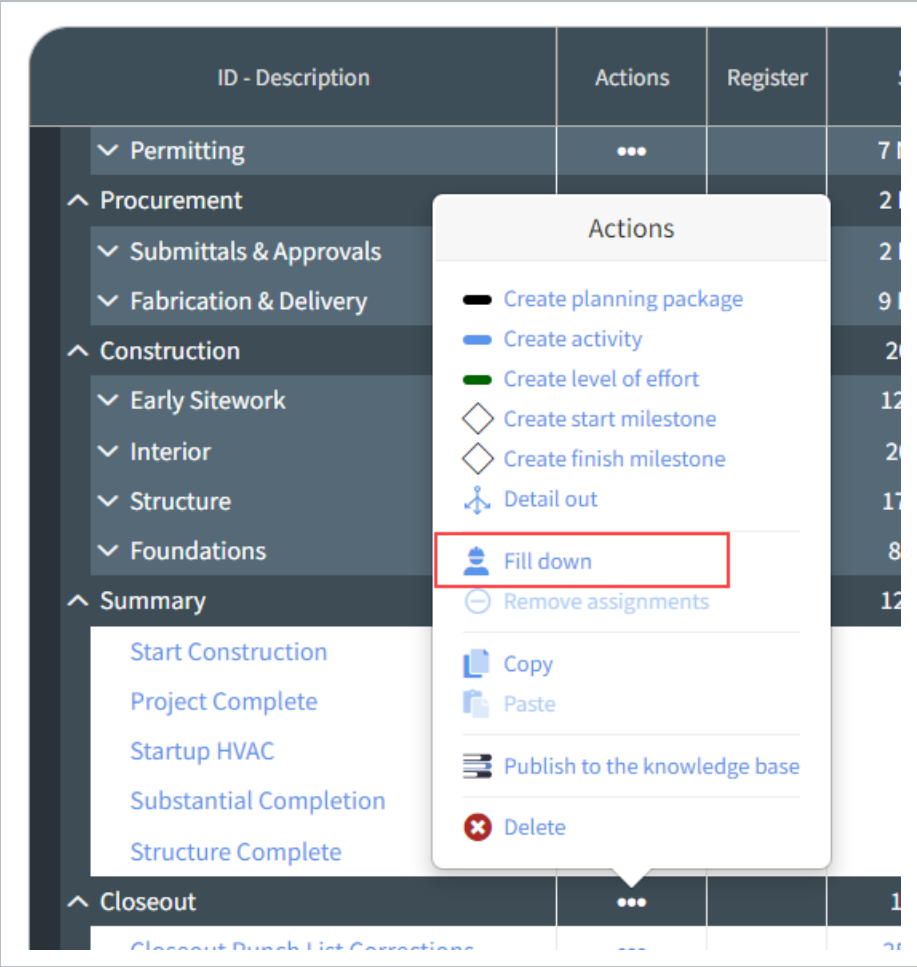


FILL DOWN FROM THE SUMMARY LEVEL

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

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**.



- The Fill down window appears

Fill down

Milestones

SCHED-514.LEV-HOST-002.0

CALENDAR

CODES

RESOURCES

Current calendar

724 Su-Sa 12:00A-1...

Available calendars

Search...

☐

KOS G 5d x 10hr w Holidays

☐

Turtle Season (2015-18)

☐

24x7 w/ Turtle Season

☐

0.Standard 5 Day w/ Hol

☐

Turtle Season (2015-18)

☐

24x7 w/ Turtle Season

☐

510 M-F No Holidays

☐

KOS G 7d x 10hr No Holidays

☐

KOS G 5d x 10hr w Holidays

Selected calendar

Selected codes

Clear all

Selected resources

Clear all

3. Under Calendar, choose a calendar from available calendars

Fill down

Milestones  
SCHED-514.LEV-HOST-002.0

CALENDAR	CODES	RESOURCES
<b>Current calendar</b> 724 Su-Sa 12:00A-1...	<b>Available calendars</b> Search... <ul style="list-style-type: none"><li><input type="radio"/> 510 M-F No Holidays</li><li><input checked="" type="radio"/> KOS G 7d x 10hr No Holidays</li><li><input type="radio"/> KOS G 5d x 10hr w Holidays</li><li><input type="radio"/> TIC - 5x10 (w/holidays)</li><li><input type="radio"/> WMB.GLB.GD - 7 x 10 hour</li><li><input type="radio"/> 24 hours / 7 days</li><li><input type="radio"/> 7d-24h (no holidays continuous)</li><li><input type="radio"/> 510 Su-Th 7:00A-5:00P No Hol</li><li><input type="radio"/> 724 Su-Sa 12:00A-12:00A No Hol</li><li><input type="radio"/> *508 M-F 8:00A-5:00P US Hol</li></ul>	<b>Selected calendar</b> KOS G 7d x 10hr No Holidays x
		<b>Selected codes</b> <a href="#">Clear all</a>
		<b>Selected resources</b> <a href="#">Clear all</a>

[Cancel](#) [Fill down](#)

- Click on the Codes and select any Activity Code.

Fill down

Milestones  
SCHED-514.LEV-HOST-002.0

CALENDAR

CODES

RESOURCES

Activity codes

Search...

\*LEV Monthly R...

\*LEV Schedule ...

\*MP Ad Hoc Sel...

3 - Sub-Phase

LEV - Area

LEV - Cost Brea...

LEV - Discipline

LEV - Equipment...

LEV - Long Leads

LEV - RFP Numb...

LEV - Schedule I...

LEV - Tech. Req...

LEV - Cost Breakdown Structure values

Search...

☒ 540

Selected calendar

KOS G 7d x 10hr No Holidays

Selected codes

Clear all

LEV - Co...Structure: 540

Selected resources

Clear all

Cancel

Fill down


5. Click on Resources and select any Resource value.

Fill down

Milestones  
SCHED-514.LEV-HOST-002.0

CALENDAR      CODES      **RESOURCES**

**Resource category**

Search... 

All resources

Installed Equipment

Installed Material

Labor

Material

New Category

Nonlabor


Ny kategori 1

Supply

Supply Non

Unique

**All resources values**

Search... 

☐ \*EXPT  
Export Vessel

☐ \*FLAY  
Flowline Vessel

☐ \*SURV  
Survey Vessel

☐ Nbl Ops & Eng Serv  
Noble Operations and Engineering Services

☒ SPL-1  
Subsea Package Lead - Doiron

☐ SPL-2  
Subsea Package Lead - Pylon

☐ SPL-3  
Subsea Package Lead - Timte

☐ SPL-4  
Subsea Package Lead - Gaston


☐ SPL-5  
Subsea Package Lead - Blockhus

☐ SPL-6  
Subsea Package Lead - Anderson


☐ SPL-8  
Subsea Package Lead - Tavassoli

☐ SPL-9


**Selected calendar**

KOS G 7d x 10hr No Holidays 

**Selected codes** [Clear all](#)

LEV - Co...Structure: 540 

**Selected resources** [Clear all](#)

Labor: Subsea Package Lead - Doiron 

[Cancel](#) [Fill down](#)

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

**NOTE**

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.

**NOTE**

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.

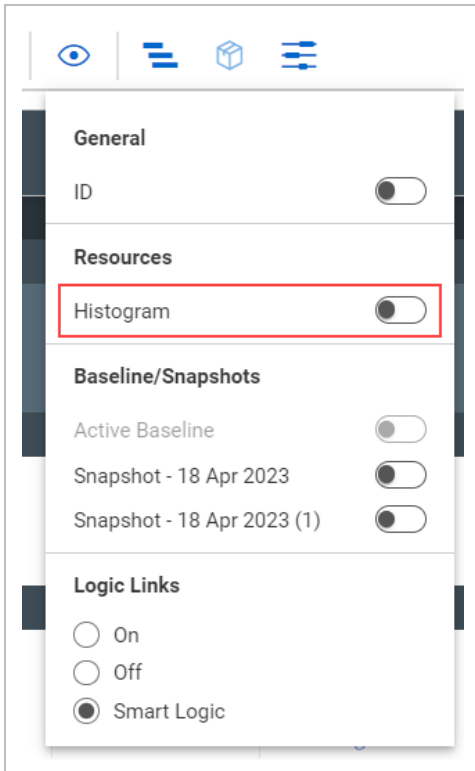
## RESOURCE HISTOGRAM

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



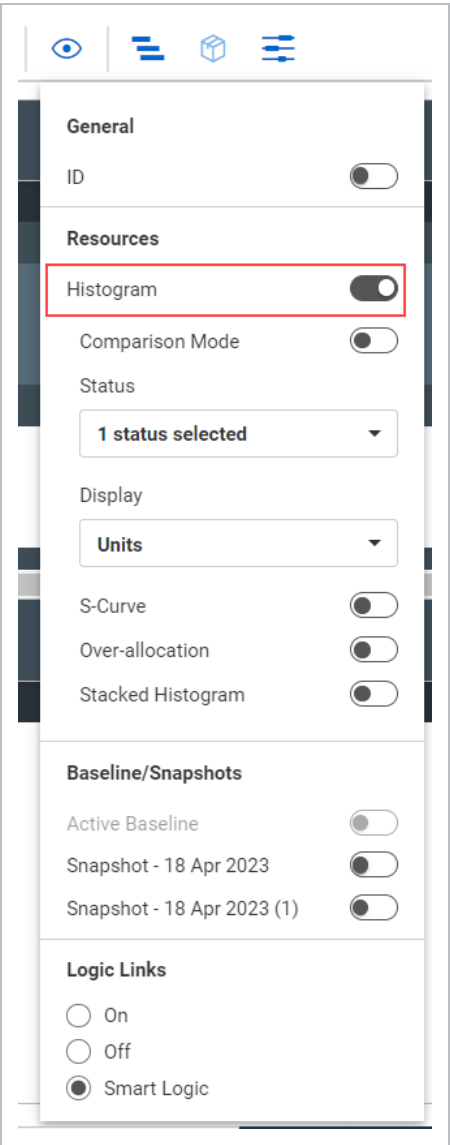
## GENERATE A RESOURCE HISTOGRAM

1. In the Schedule's Planning View, select **View Options**.
  - A drop-down menu appears where you can switch the Resource Histogram on or off.
2. Switch the histogram from off to *ON*.



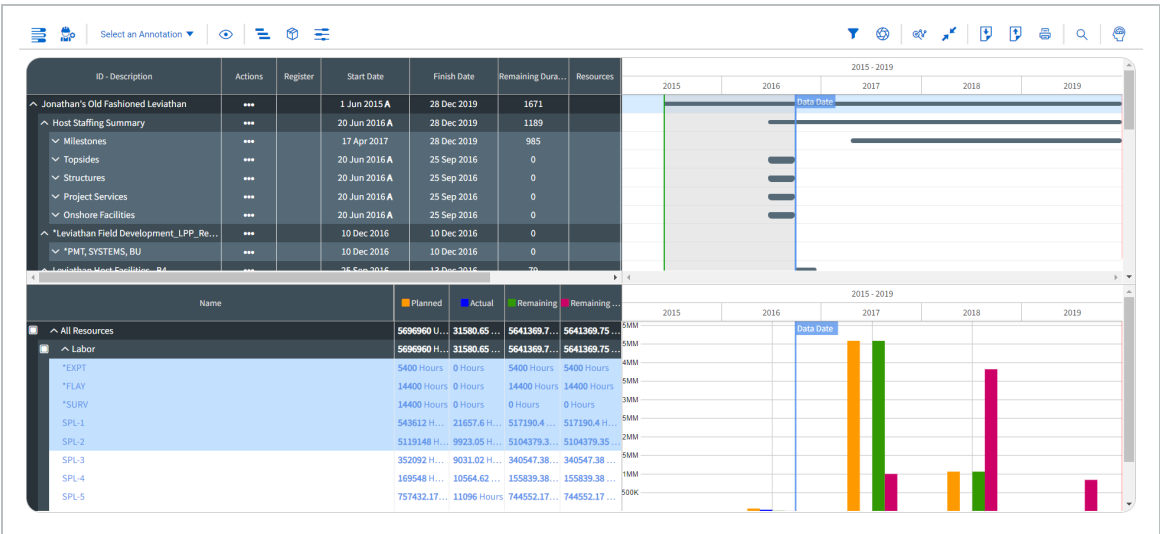
A histogram shows below the Gantt Chart. The resource histogram plots resource utilization over time depending on the following:

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

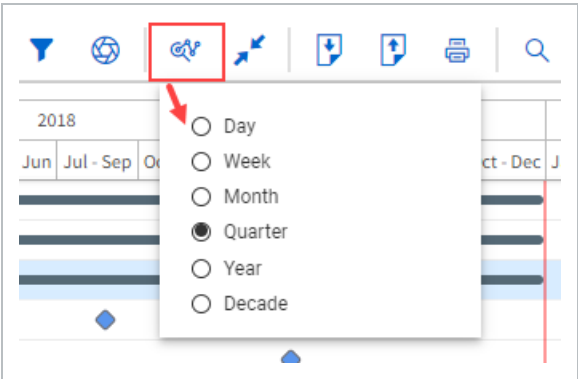


Setting	Function
Resource Histogram	You can switch the Resource Histogram view on or off.
Comparison Mode	Compares Current, Active Baseline, and Snapshots in the Resource Histogram.
Status	Filters histogram to show Planned, Actual

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.

Resource Histogram

Status

2 statuses selected

☒ Planned

☐ Actual

☒ Remaining

☐ Remaining Late

Over-allocation

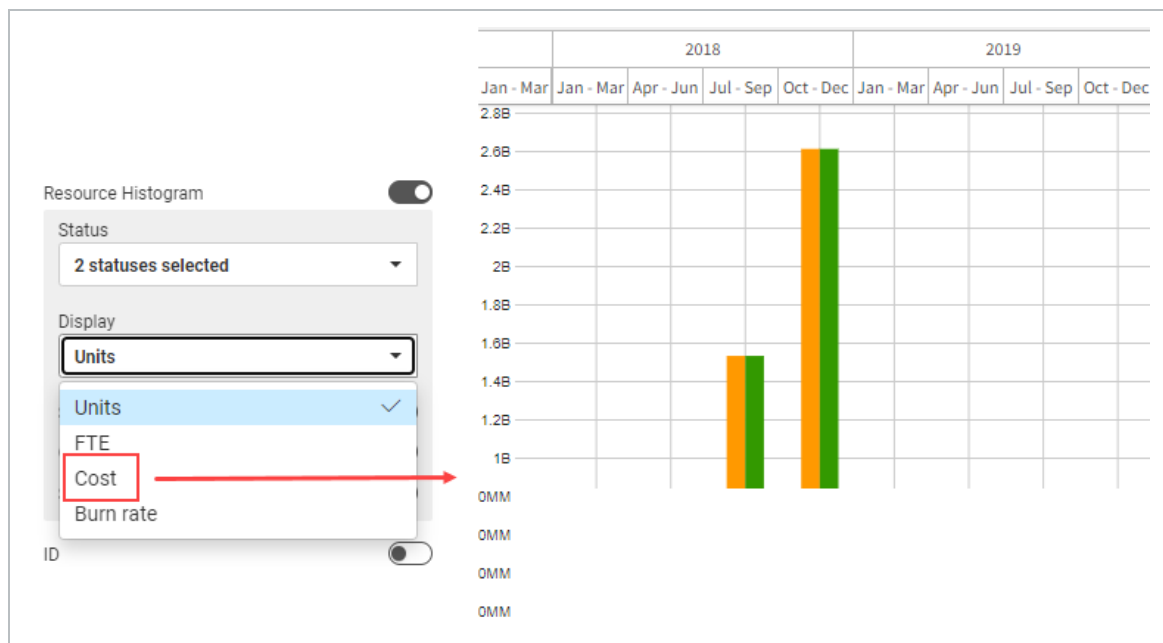
Stacked Histogram

Name	Planned	Remaining
^ All Resources	5696960 Units	5641369.75 U...
^ Labor	5696960 Hours	5641369.75 H...
*EXPT	5400 Hours	5400 Hours
*FLAY	14400 Hours	14400 Hours
*SURV	14400 Hours	0 Hours
SPL-1	543612 Hours	517190.4 Hours
SPL-2	5119148 Hours	5104379.35 H...
SPL-3	352092 Hours	340547.38 H...
SPL-4	169548 Hours	155839.38 H...

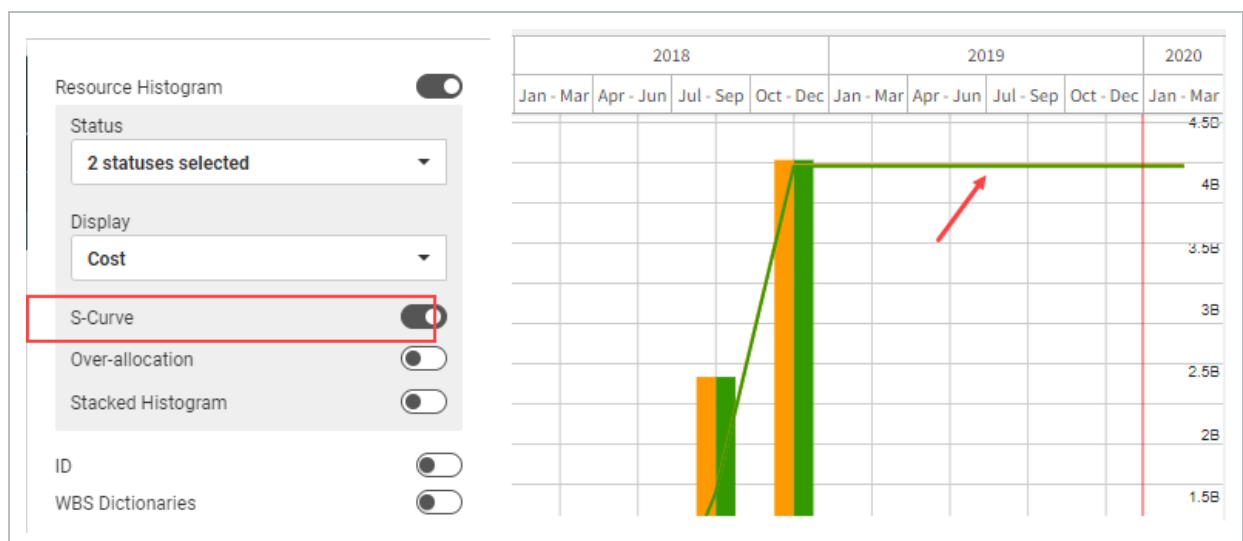
4. Change the Resource Setting Configuration Display from Units to **Cost**.

- 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.

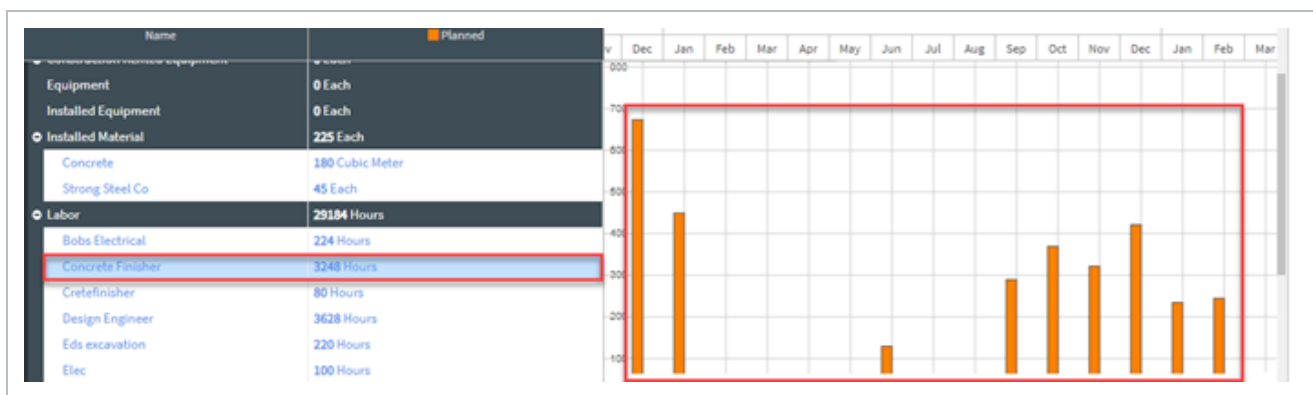


**NOTE** S-Curves reflect cumulative data. As the values increase over time, this reflects the accumulation of resource units/FTE/cost, depending on settings, over time.

## 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.

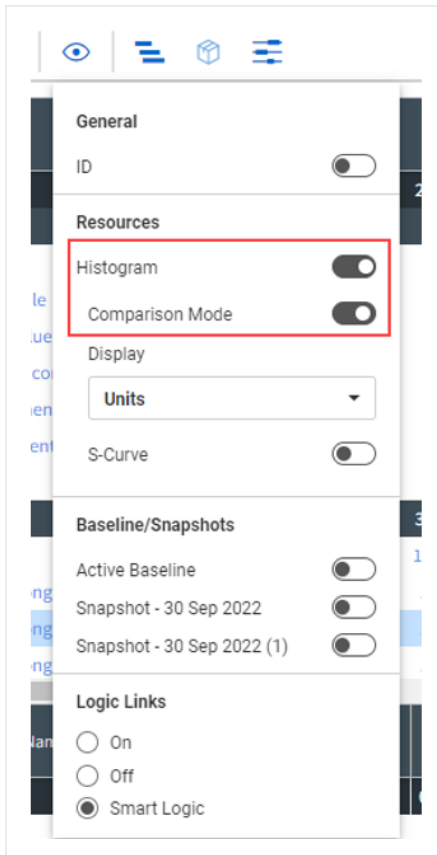
In the image below, the Resource Histogram is filtering based on the selected resource: *Concrete Finisher*.



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

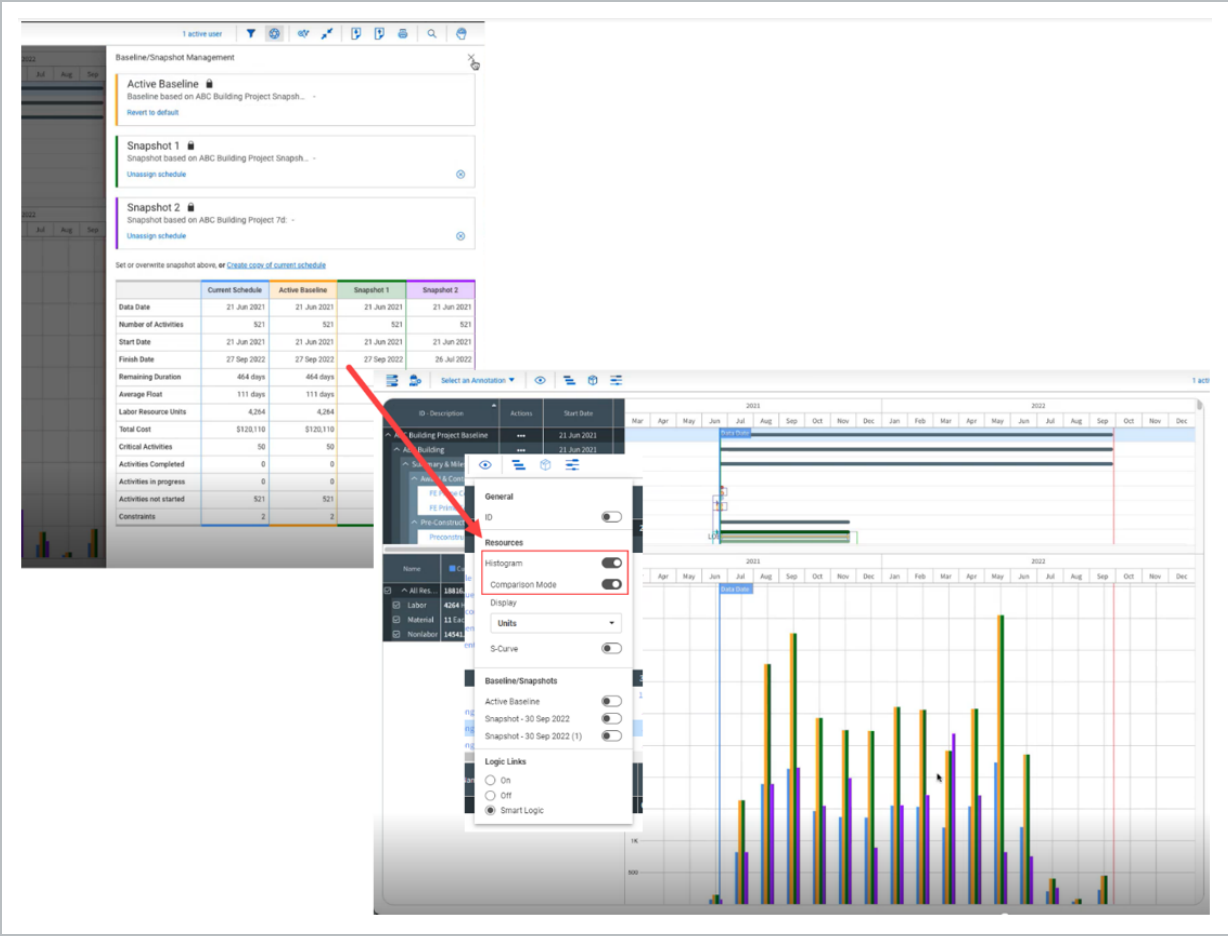
## HISTOGRAM COMPARISON MODE

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



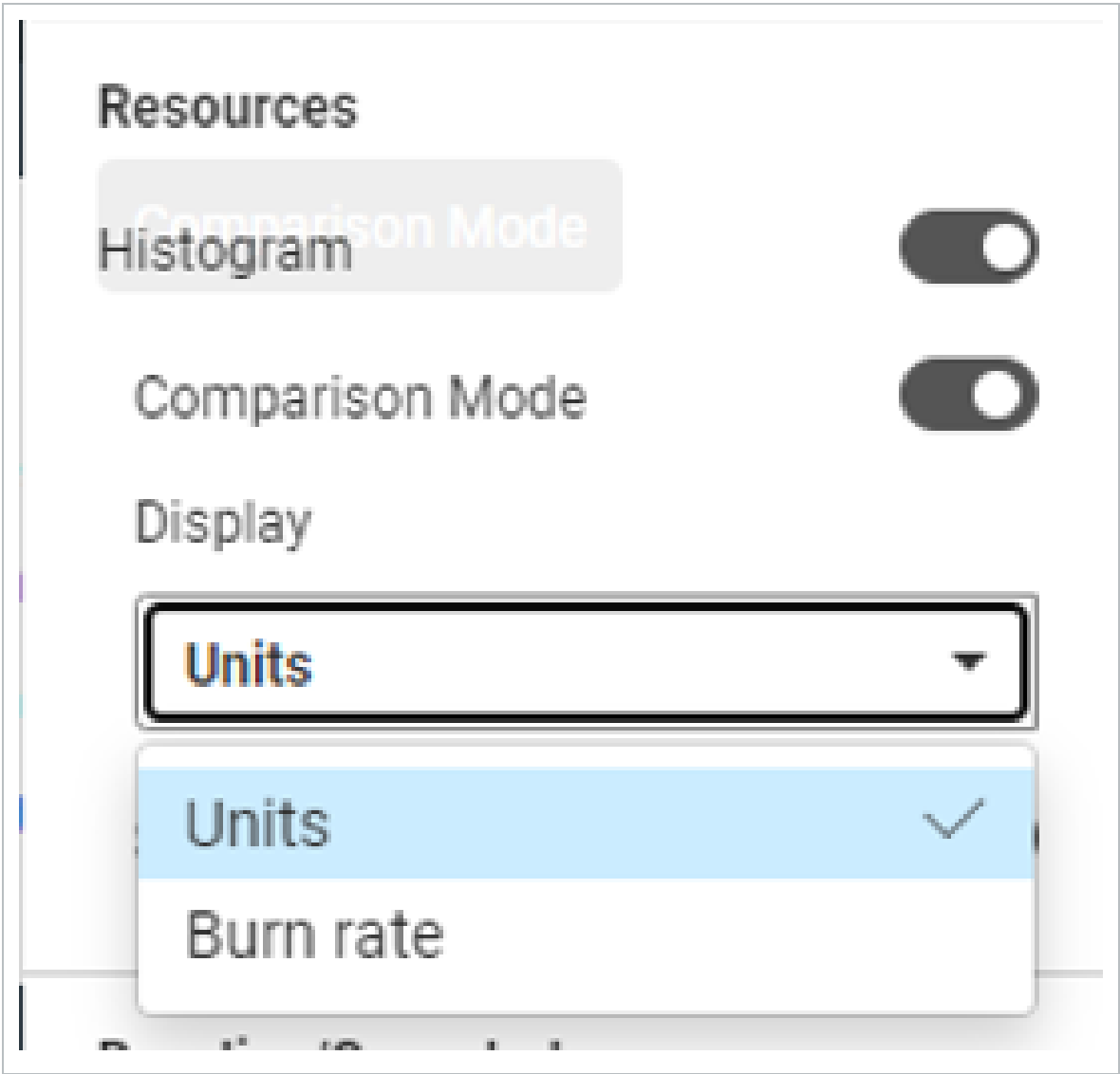
When the Comparison mode toggle is set to On, the baselines and snapshots that exist in the Baseline/Snapshot Management show as a graph with the current baseline. The histogram compares resources rolled up to the category type and shows you resources as they trend.

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

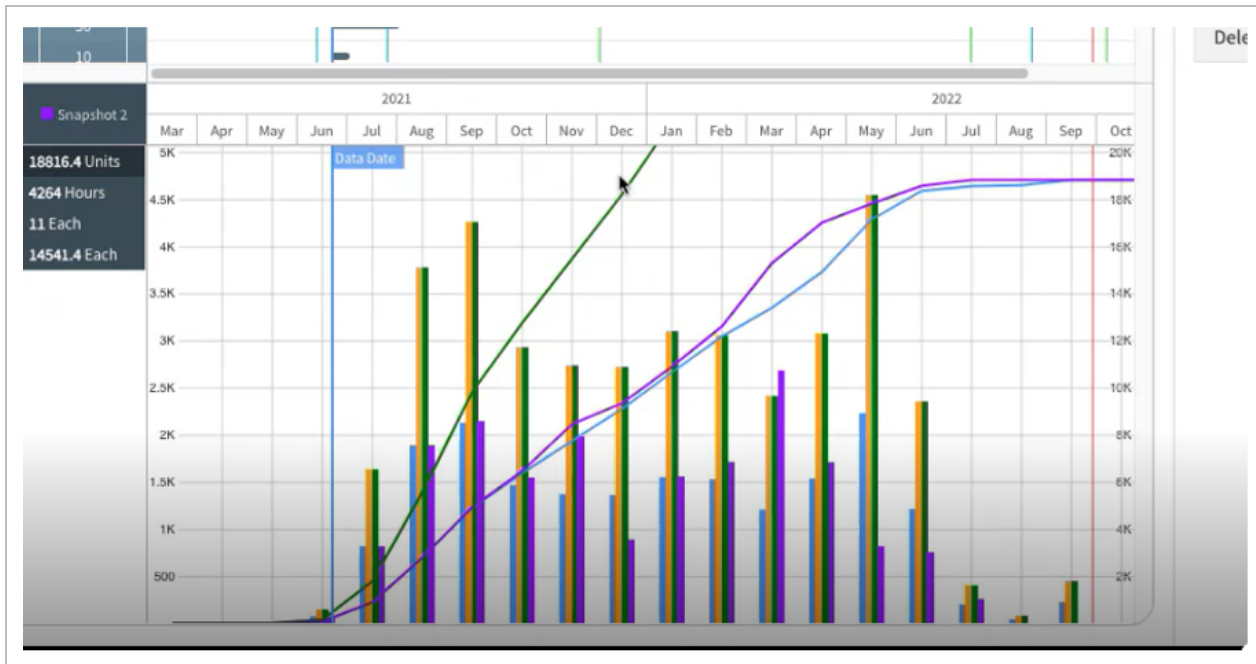


The histogram graph can now also be shown in units and burn rate.



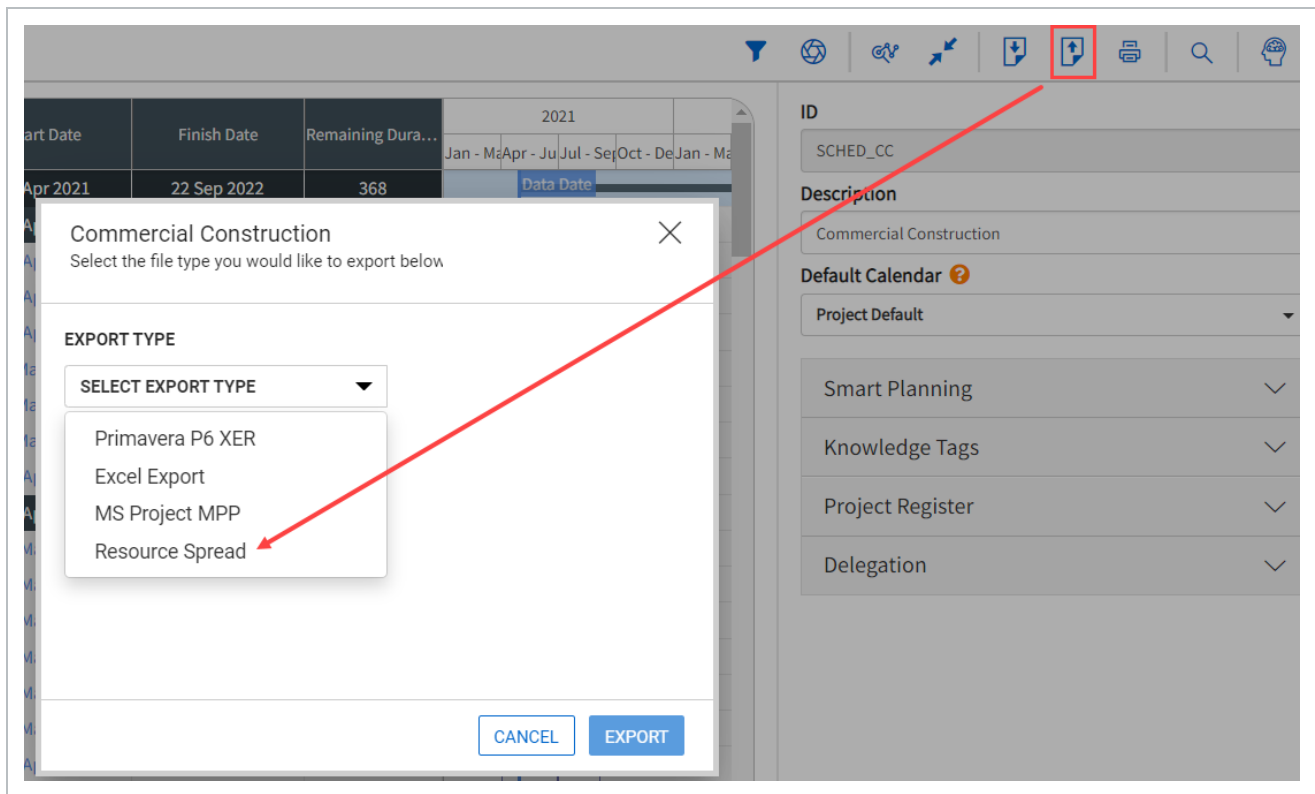


You can also view the histogram with an S-Curve that shows you a cumulative trend line for each baseline, snapshot and current.



## EXPORT ASSIGNMENTS

Schedule export functionality includes the ability to export resource assignments. Select the **Export** icon, then select the **Resource Spread** export type from the drop-down menu.



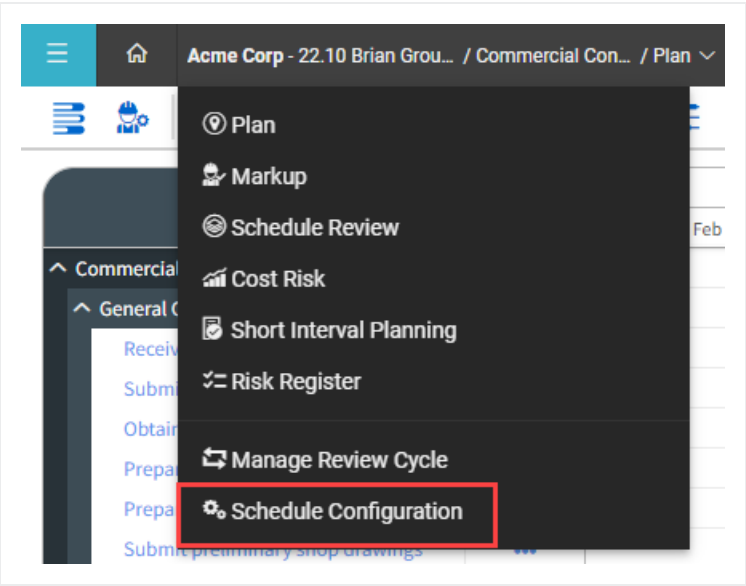
## PROJECT SPECIFIC RESOURCES: PROJECT CONFIGURATION SETUP

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.

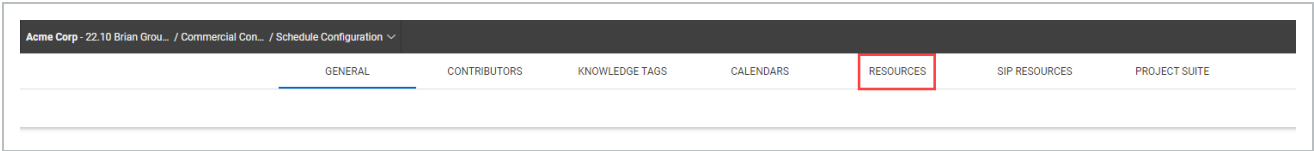
To establish project specific resources:

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

A screenshot of the project-level resource register table. The table has columns for ID, Name, Category, Color, UoM, Default Units/d, Cost/Unit, Assignments, and a final column with circular icons. The 'RESOURCES' tab is selected in the top navigation bar. In the top left corner of the table area, there is a red box around a circular icon with a plus sign. In the top right corner, there is a red box around two square icons (one with a download arrow, one with an upload arrow) and a search icon.

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

TIP

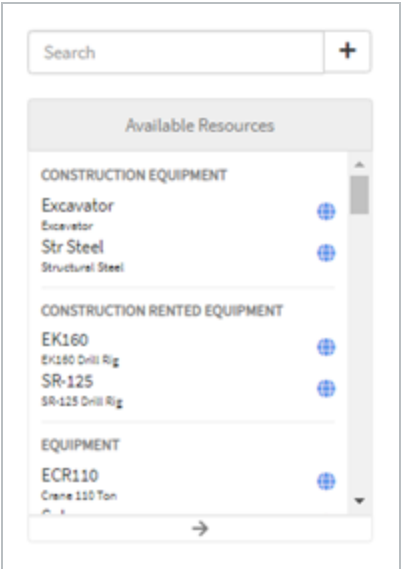
Project specific resources can also be added from the resource assignment window in the planning view. See the Resource Assignment for more information.

6.0.0.1 CREATE A PROJECT-SPECIFIC RESOURCE VIA THE RESOURCE ASSIGNMENT WINDOW

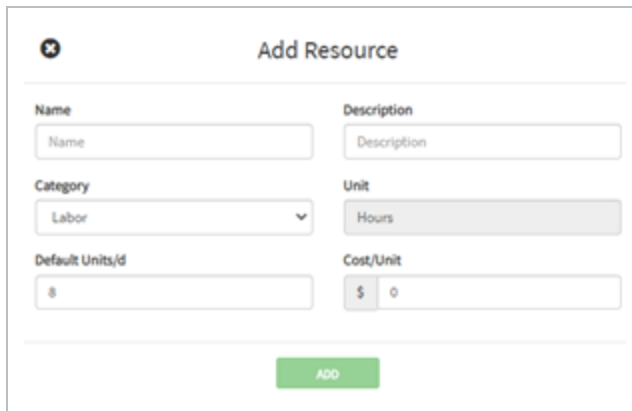
Project Specific Resources can also be created from the Resource Assignment window in the Planning view.

CREATE A PROJECT SPECIFIC RESOURCE VIA THE RESOURCE ASSIGNMENT WINDOW

- 1. Without having any resources selected, click the plus **+** icon.



- The Add Resource opens to add a project specific resource



The screenshot shows a web form titled "Add Resource" with a close button (X) in the top left corner. The form is divided into two columns. The left column contains three fields: "Name" (text input), "Category" (dropdown menu with "Labor" selected), and "Default Units/d" (text input with "8"). The right column contains three fields: "Description" (text input), "Unit" (dropdown menu with "Hours" selected), and "Cost/Unit" (text input with "\$ 0"). At the bottom center of the form is a green "ADD" button.

2. Fill out the project resource information and then click **Add**.

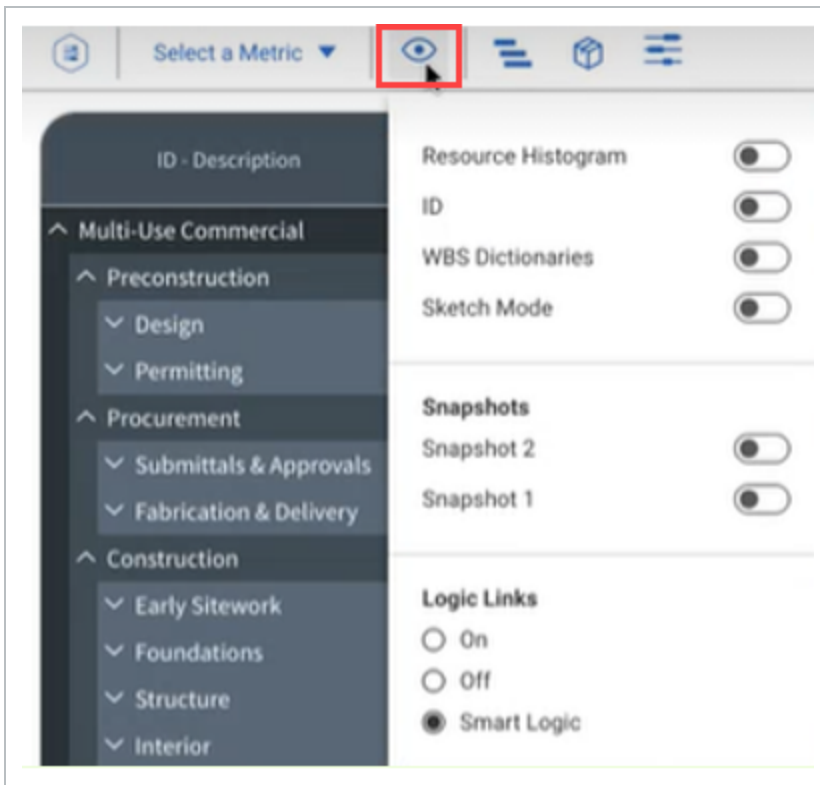
## RESOURCE HISTOGRAM VIEW

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.

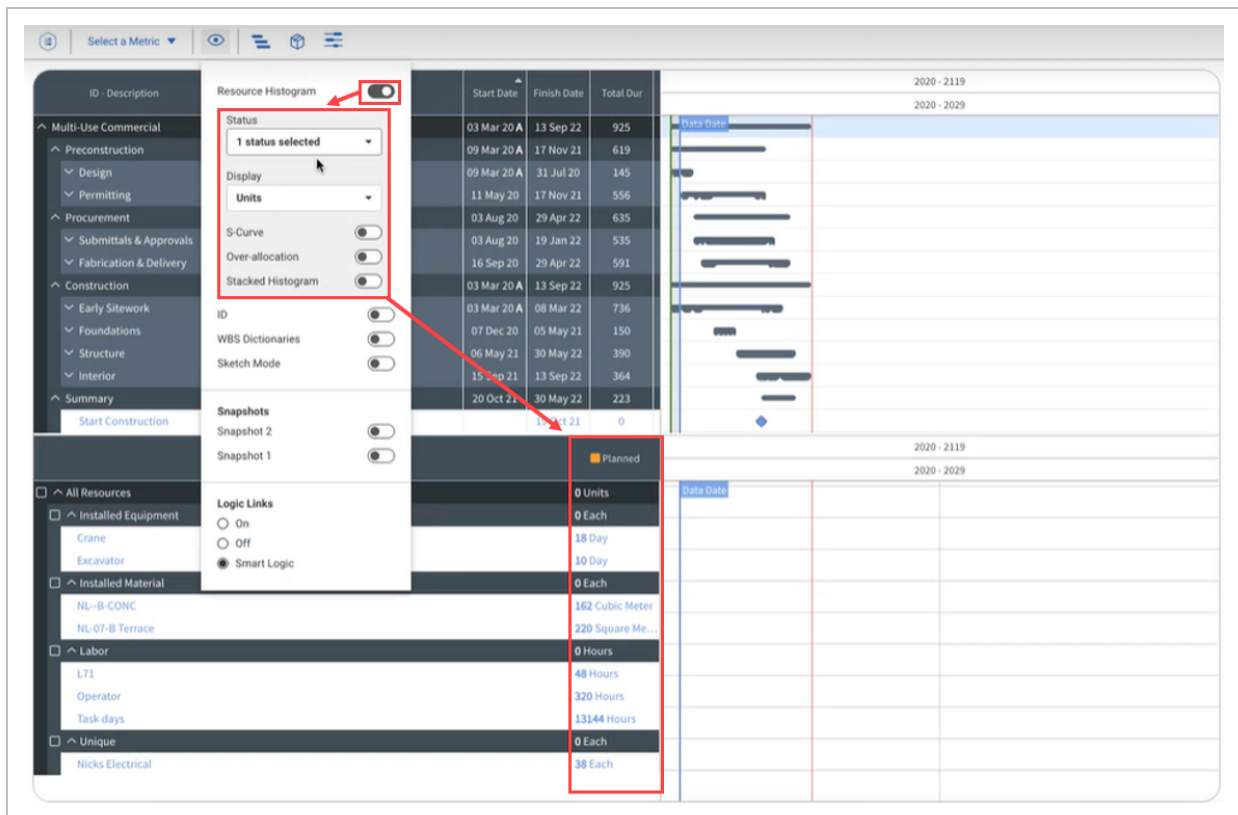
## ENABLE THE RESOURCE HISTOGRAM VIEW

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

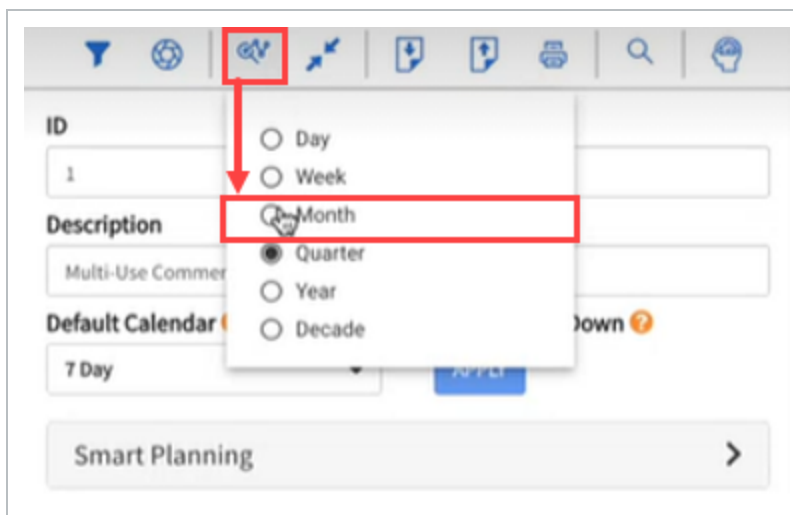


2. Switch the Resource Histogram toggle to enable the Resource histogram.

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.



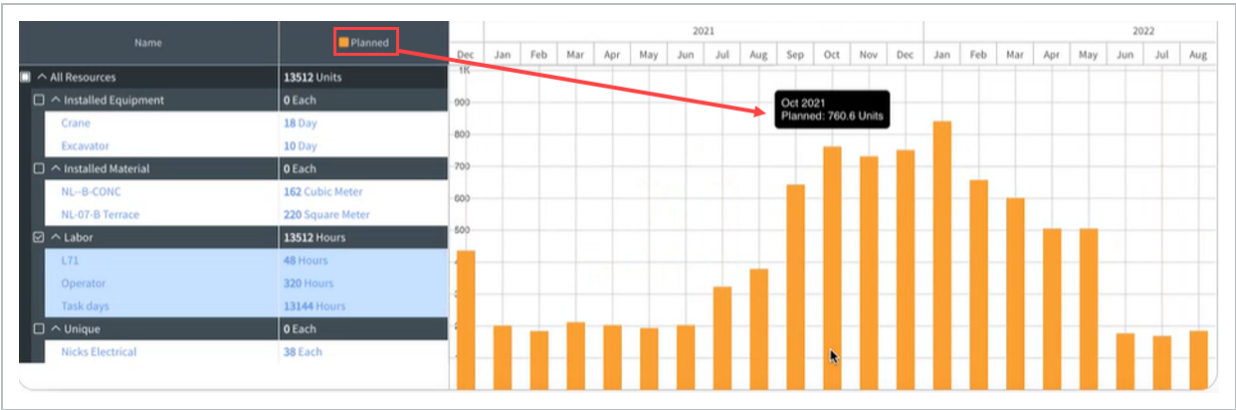
- To view a specific date range for resources, on the right side of the screen, select the **Zoom level** icon.



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



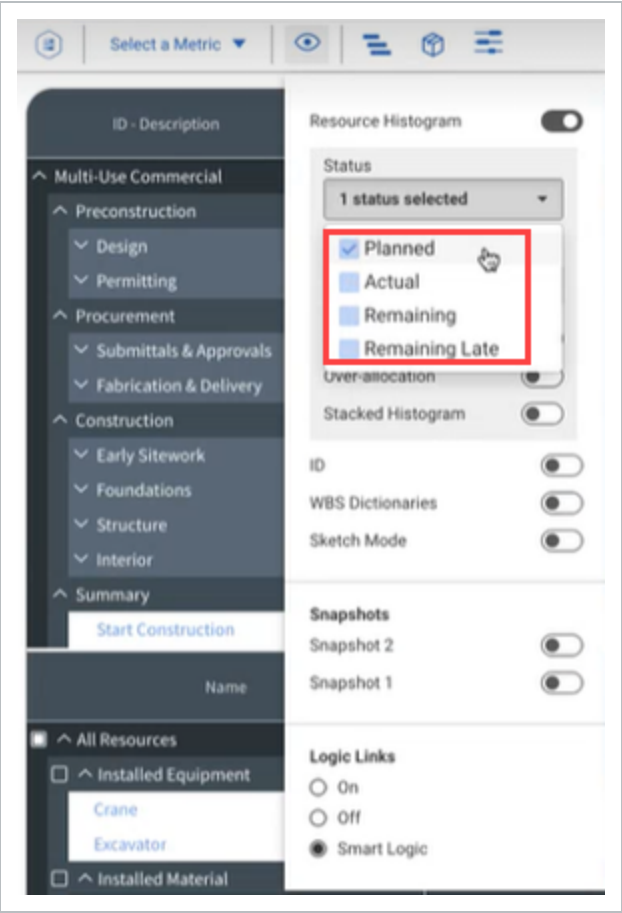
The histogram now shows resources allocated based on the month. By default, only the Planned status is selected.



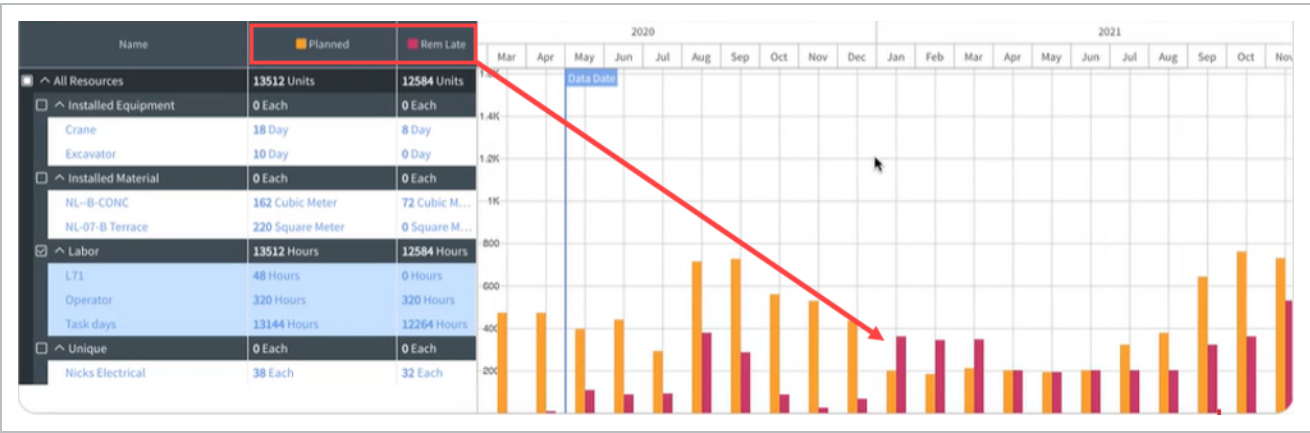
Use the following instructions to add statuses to the histogram.

## 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.

**NOTE**

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.

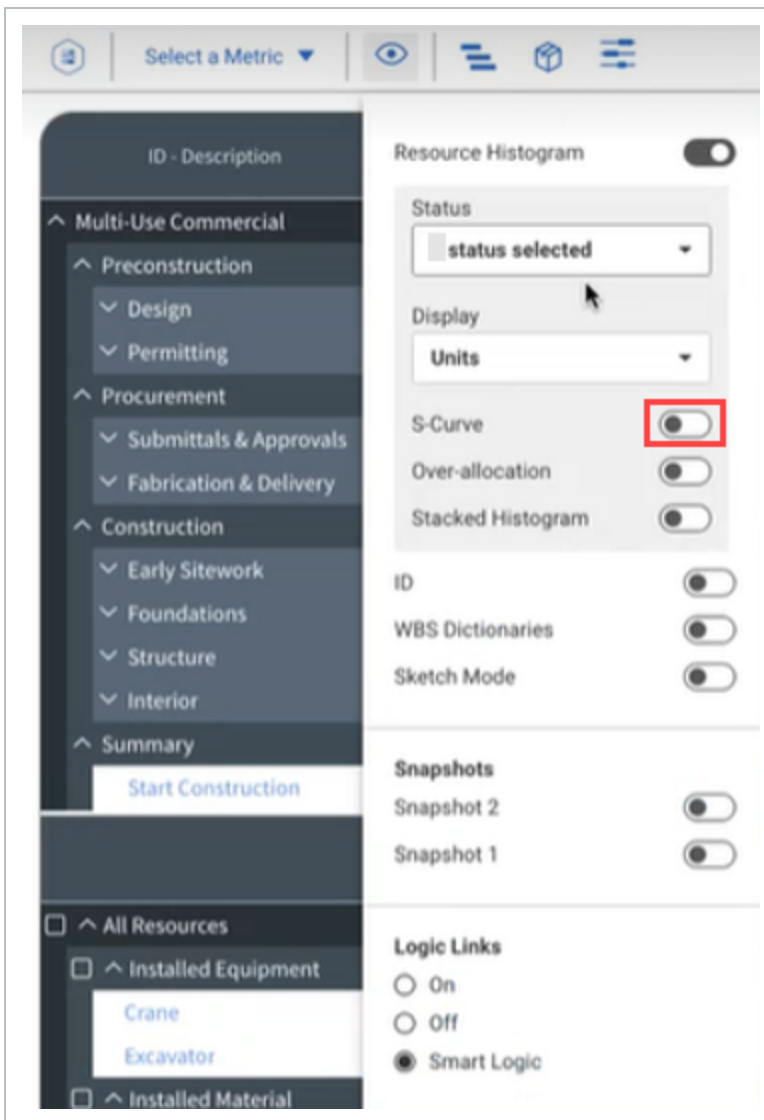
## S-CURVE

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.

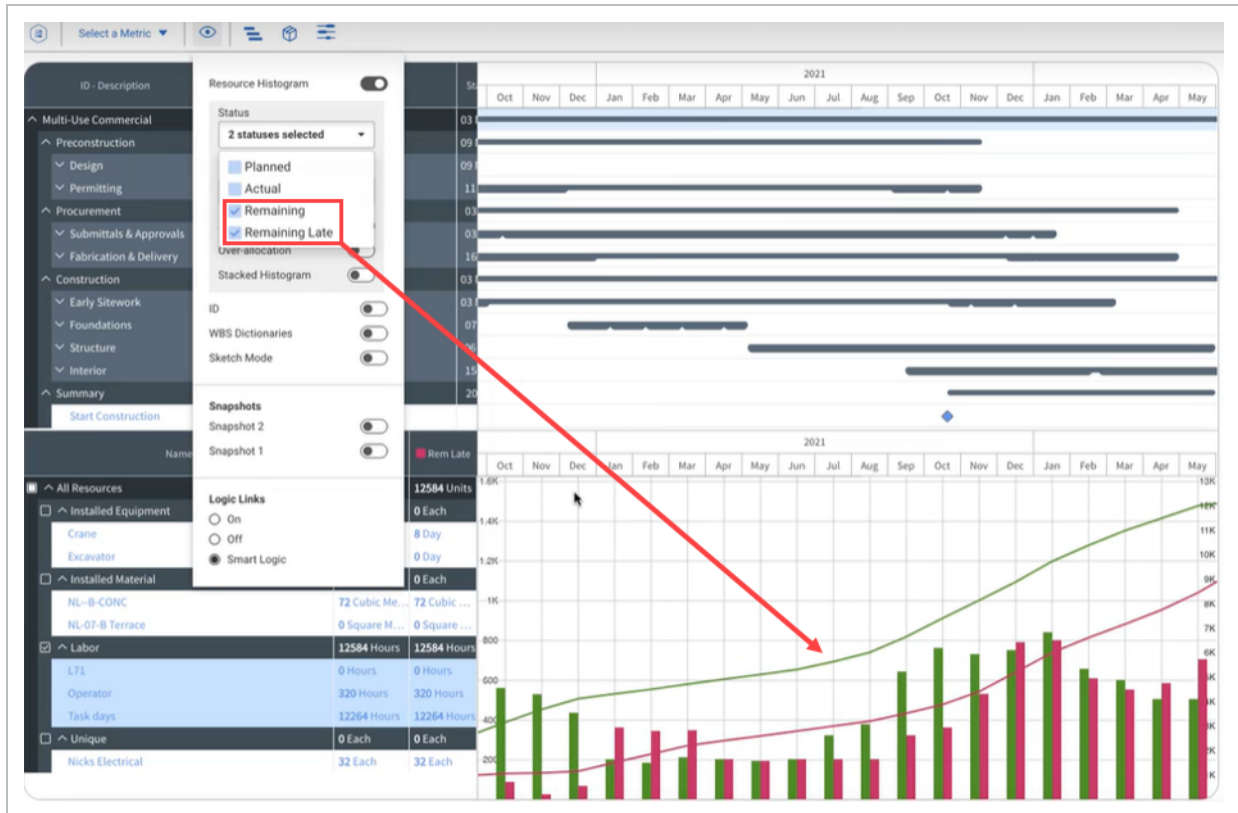
Use the following step by step to enable the S-curve in the Resource histogram.

### 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.

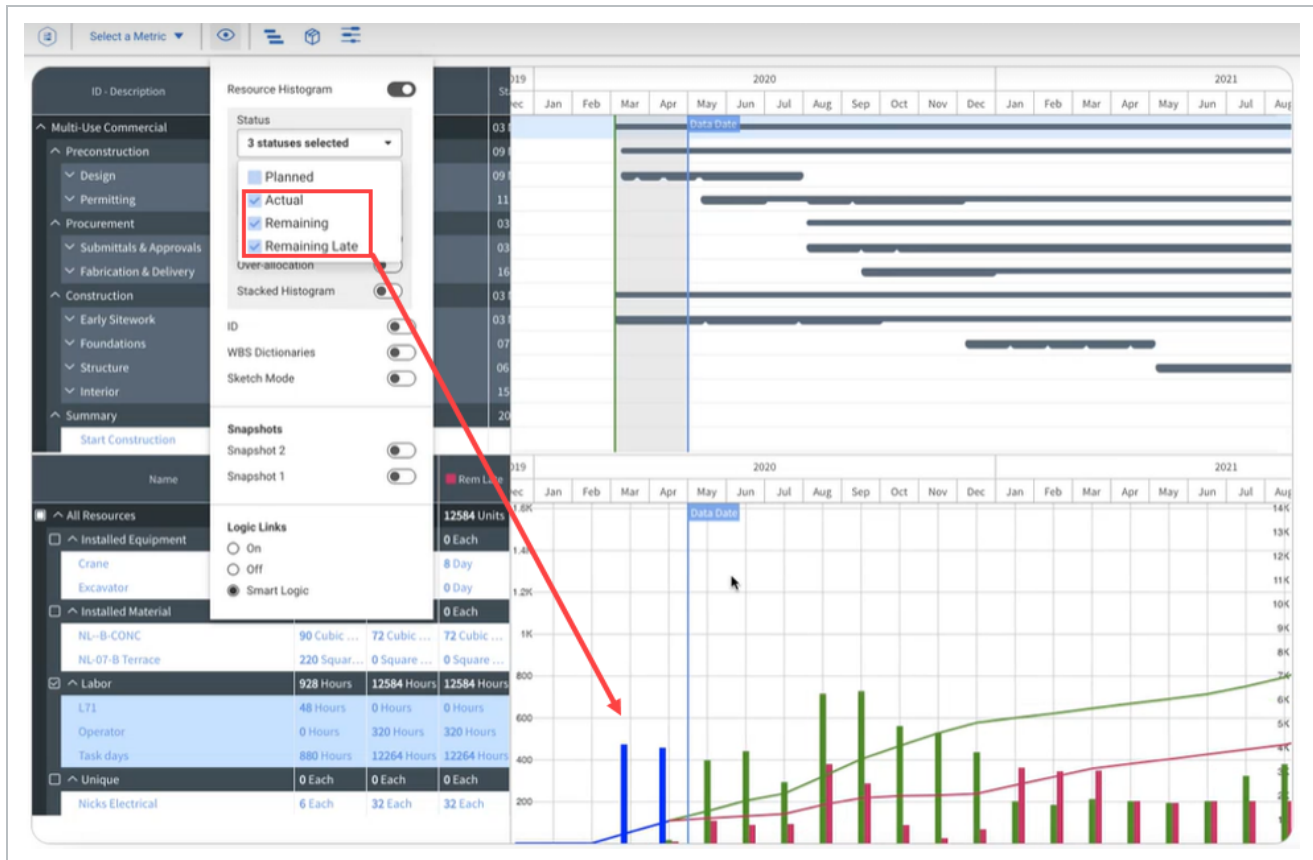


Two S-curves show on the histogram. At the conceptual phase of a project, you are shown these early and late dates. The space between those curves is the float on the project.



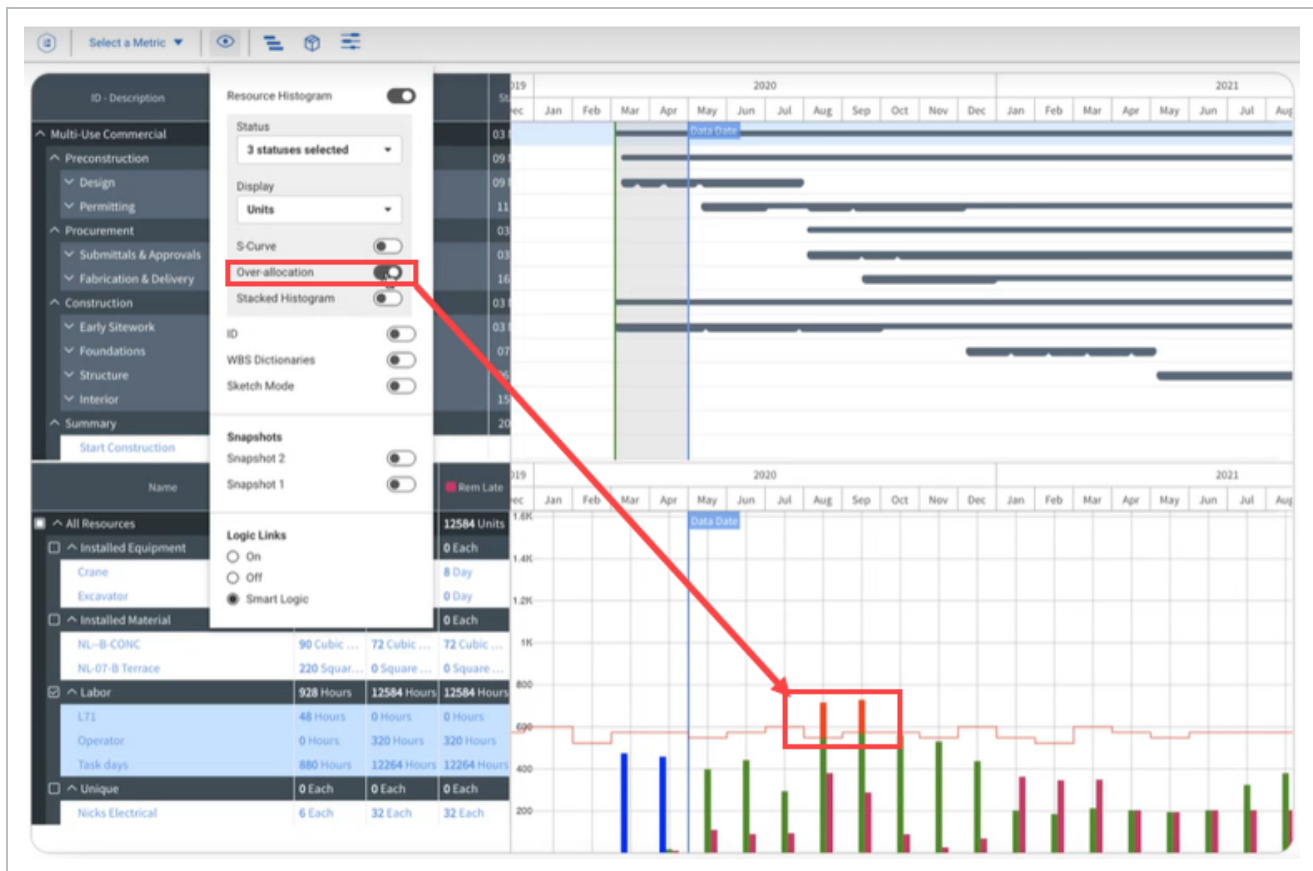
## ACTUAL STATUS ENABLED WITH S-CURVE

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.

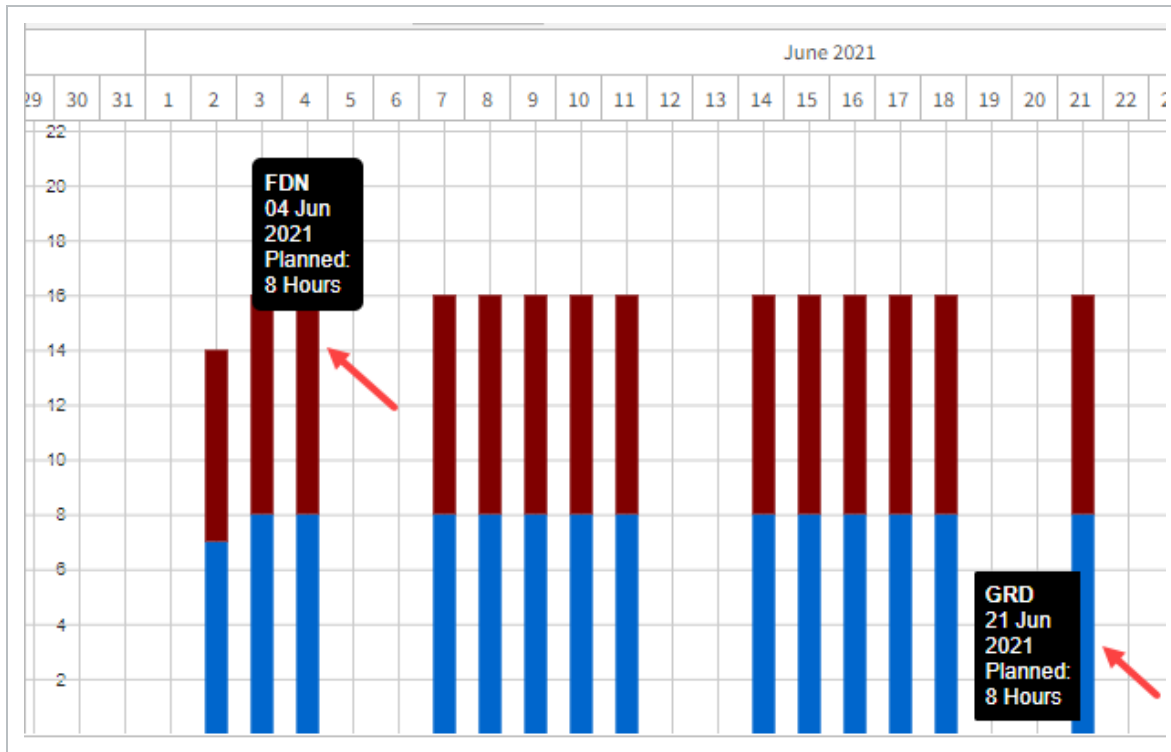
## ENABLE THE OVER-ALLOCATION

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.

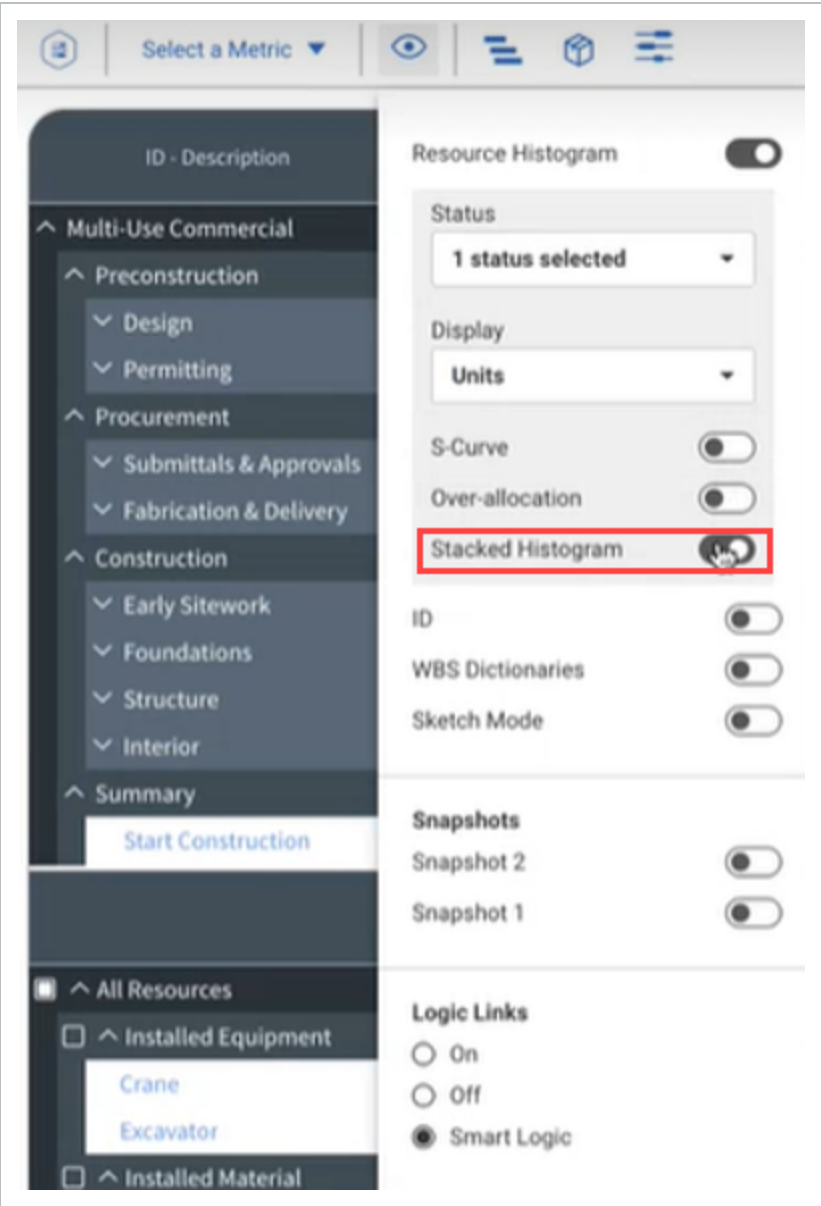


Use the following step by step to enable the Stacked Histogram.

## ENABLE THE STACKED HISTOGRAM

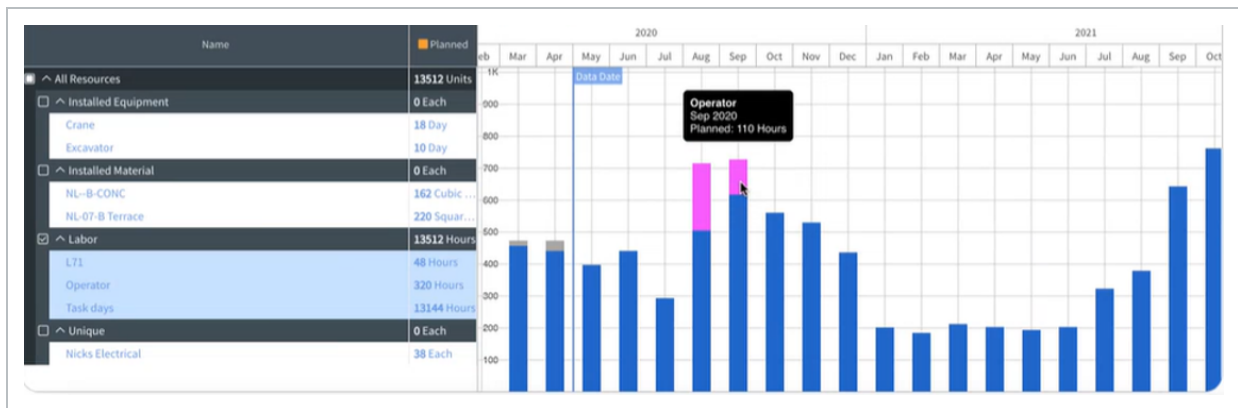
1. In the toolbar, click the **View options** icon.
2. With Resource Histogram enabled, switch the **Stacked Histogram** toggle on.





Stacked Histograms are shown on the histogram.

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



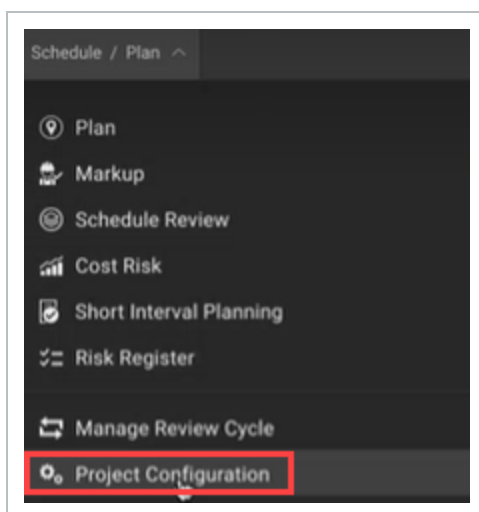
## CHANGING THE STACKED HISTOGRAM COLORS

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.

GeneralContributorsKnowledge TagsCalendarsResourcesSIP ResourcesProject Suite

Add new resource

ID	Name	Category	Color	Unit	Default Units/d	Cost/Unit	Assignments	
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 ~ Concre	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 Equipm...		Day	1	100	1	
Crane	Crane	Installed Equipm...		Day	1	100	2	
L71	Mechanical (Labor)	Labor		Hours	8	100	1	

BURN RATE

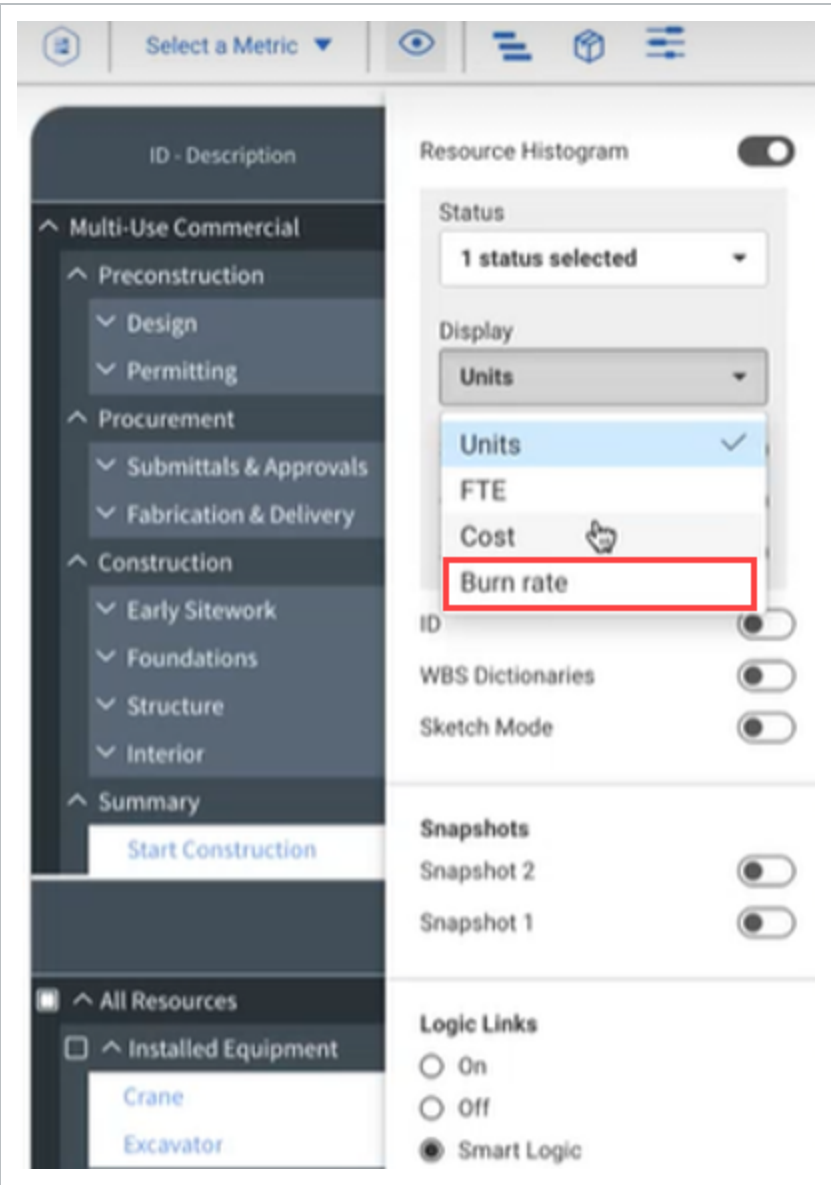
When Burn Rate is enabled, it shows as a percentage on the x-axis. The Burn rate is the percent of total man-hours in a period. The equation is the following:

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

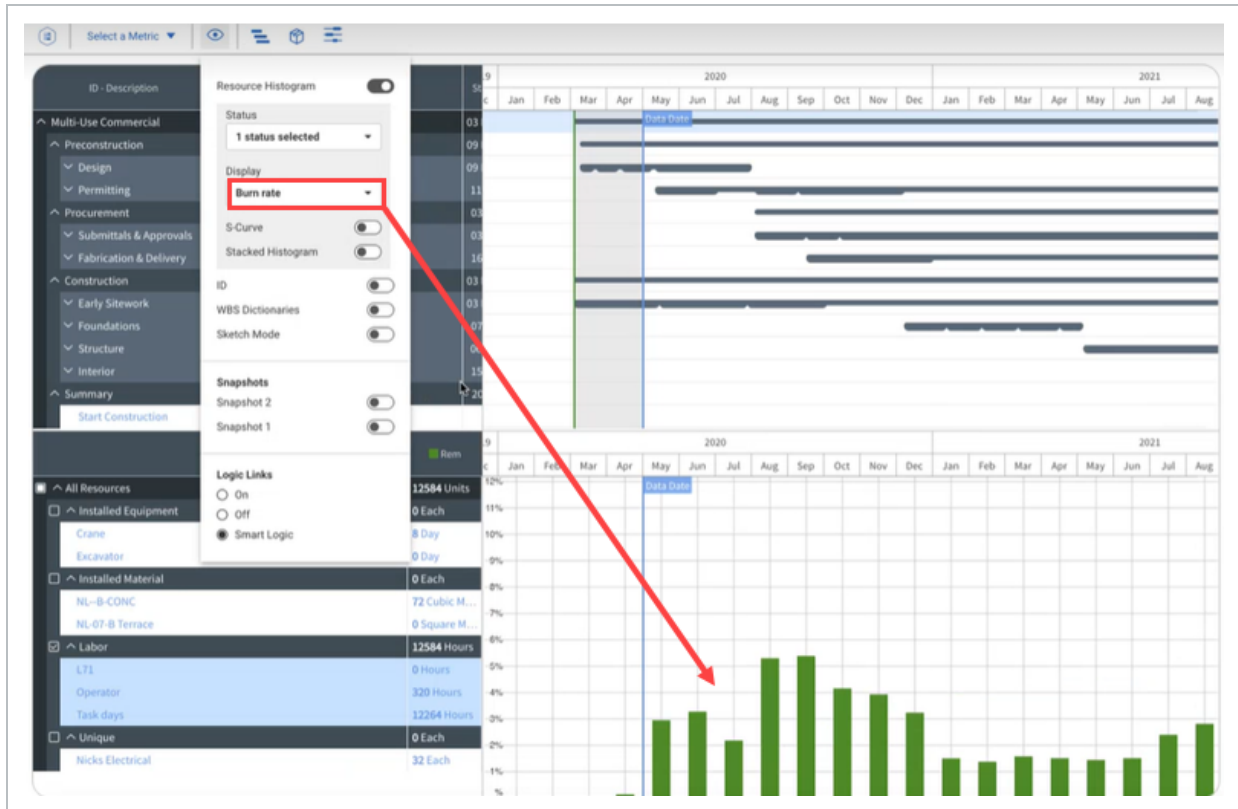
Use the following step by step to enable the Burn rate on the Resource Histogram.

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.

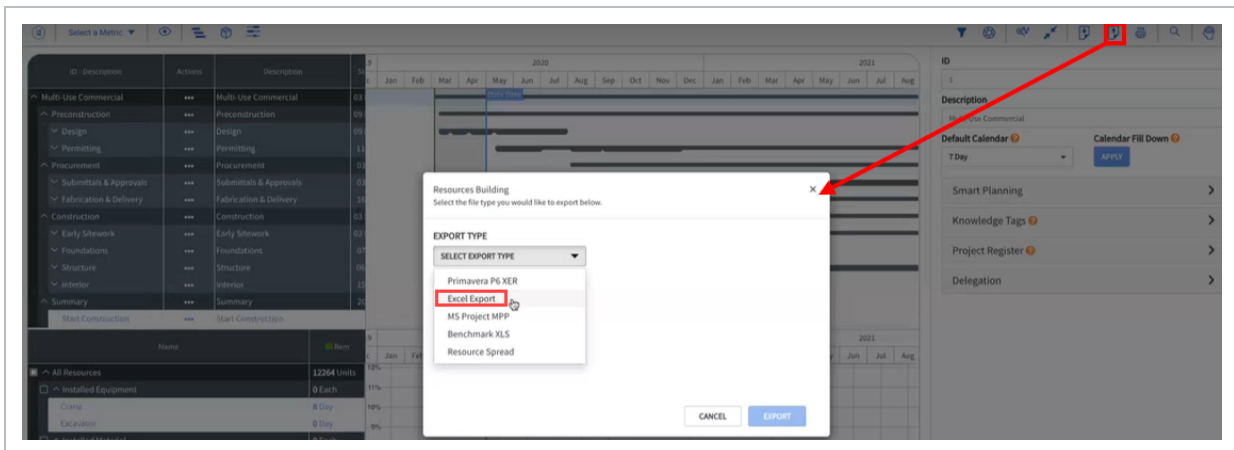
**NOTE**

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

A9						
	A	B	C	D	E	F
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:						
5	1. WBS ID must be unique					
6	2. When a WBS is deleted, all child WBS's will be deleted and activities will be placed in the root of the project					
7	WBS ID	WBS Description	Cost	Deliverable	Deliverable Quantity	Delete Record
8	Test	Test	Numeric	Text	Numeric > 0	Text: "Yes"
9	256	256		128		
10	1	Use Commercial	\$200			
11	1.1	Construction				
12	1.1.1	Design				
13	1.1.2	Permitting				
14	1.2	Procurement				
15	1.2.1	Submittals & Approvals				
16	1.2.2	Fabrication & Delivery				
17	1.3	Construction	\$200			
18	1.3.1	Early Sitework	\$200			
19	1.3.1.1	Parking Structure	\$200			
20	1.3.1.2	Utilities Structure				
21	1.3.1.3	Entry & Access Roads				
22	1.3.2	Foundations				
23	1.3.3	Structure				
24	1.3.3.1	Floor 1				
25	1.3.3.2	Floor 2				
26	1.3.3.3	Floor 3				
27	1.3.5	Interior				
28	1.3.5.2	Floor 2				
29	1.3.5.1	Floor 1				
30	1.5	Summary				
31	1.4	Closeout				
32						
33						
34						

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**.

### NOTE

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.

*This page intentionally left blank.*



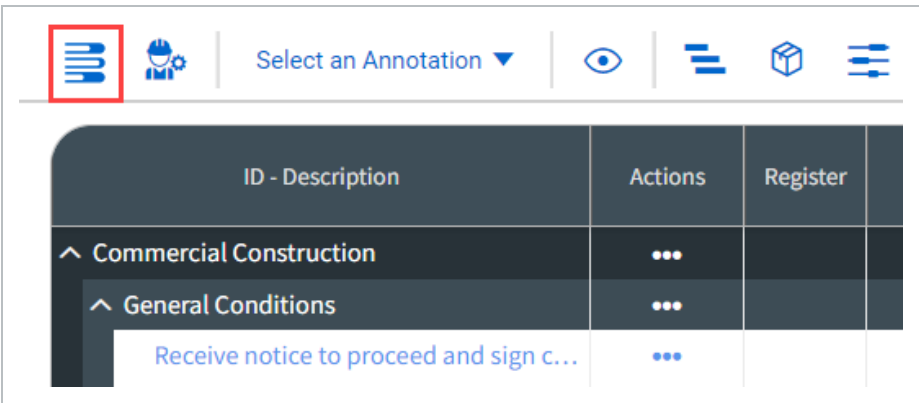
# LESSON 7 – SCHEDULING

## 7.0.1 SCHEDULING OVERVIEW

### SCHEDULING

#### SETTING SCHEDULE PROGRESS ATTRIBUTES

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



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.

The screenshot shows a 'Schedule Settings' dialog box with three tabs: GENERAL, PROGRESS, and FLOAT. The GENERAL tab is selected. It contains three date pickers: 'Project Start' (13 Sep 2021), 'Data Date' (13 Dec 2021 7:00 AM), and 'Project Finish' (10 Feb 2026). Below these is a toggle for 'Auto CPM' which is currently turned off. At the bottom right are 'Cancel' and 'Schedule and Save' buttons.

GENERAL	PROGRESS	FLOAT
<p>Project Start</p> <p>13 Sep 2021</p> <p>Data Date</p> <p>13 Dec 2021 7:00 AM</p> <p>Project Finish</p> <p>10 Feb 2026</p> <p>Auto CPM </p> <p><input type="checkbox"/></p>		

Cancel Schedule and Save

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.

The screenshot shows the 'Schedule Settings' dialog box with the 'PROGRESS' tab selected. The dialog has three tabs: 'GENERAL', 'PROGRESS', and 'FLOAT'. The 'PROGRESS' tab contains the following settings:

- Schedule Mode**: A dropdown menu with 'Scheduling' selected.
- Out of Sequence Progress**: A dropdown menu with 'Retained Logic' selected.
- Auto Progress**: A toggle switch that is currently turned off.
- Recalculate Actual Units When Duration % Complete Changes**: A toggle switch that is currently turned off.
- Relationship Lag Mode**: A dropdown menu with 'Predecessor' selected.

At the bottom right of the dialog are two buttons: 'Cancel' and 'Schedule and Save'.

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.

Schedule Settings

GENERAL

PROGRESS

FLOAT

Identity Critical Activities by

Total Float

Total Float

≤ Old

Hours

Float Paths

Manually Configure Settings

On

Define Critical Activities Using

Total Float

Select Activity to Stop Displaying Multiple Float Paths at

Number of Paths to Calculate

9

Cancel

Schedule and Save

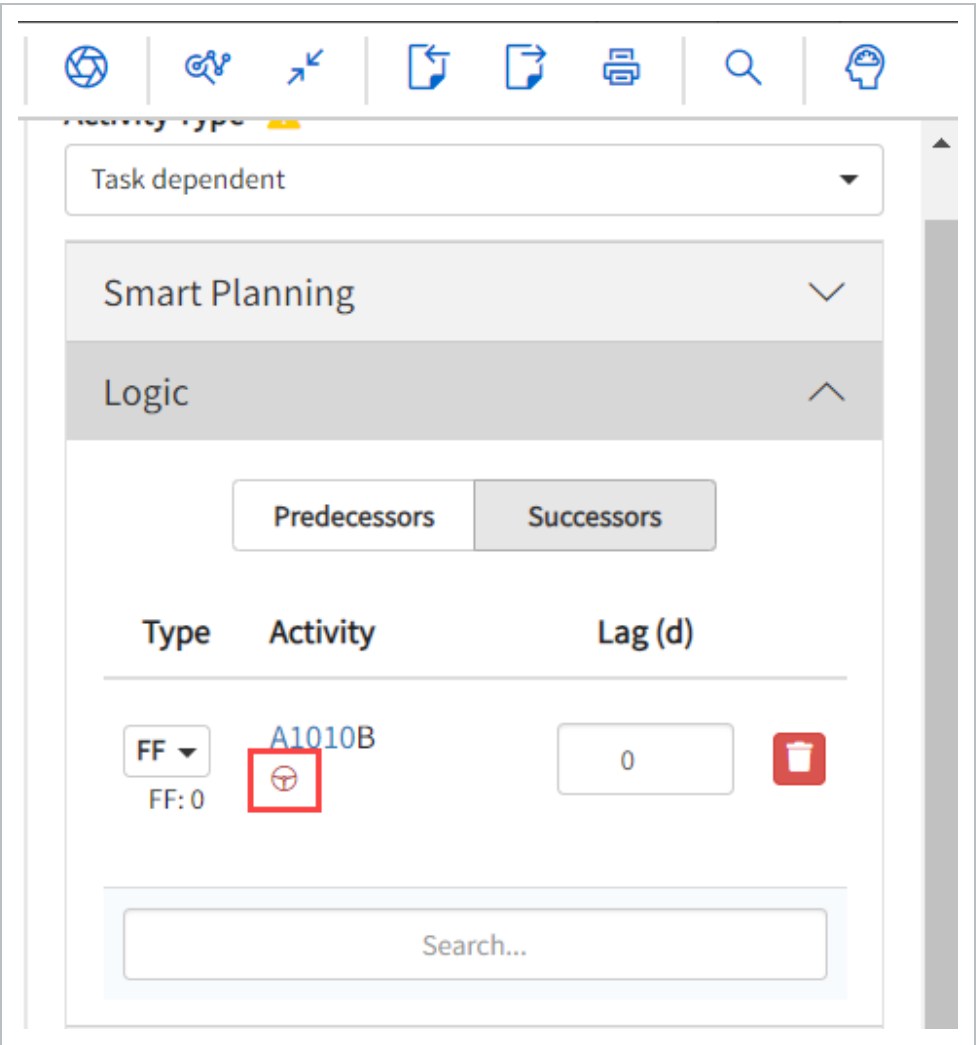
To see the float paths in Plan view, you can group by float path in the Group By Builder to see which activities are critical and sub-critical, and the float path where they reside.

ID - Description	Actions	Start	Finish	At Complet...	Total Fl...	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	103
▼ 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

R

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

Remaining (d)

0

R

Actual (d)

167

At Complete (d)

167

Cost (\$)

0

Start

09 Oct 2017

Finish

24 Mar 2018

Percent Complete

Phys

100

# PERCENT COMPLETE

Percent complete can be calculated in three different ways:

- Duration
- Units
- Physical

**Smart Planning**

**Planned (d)**  
120

**Cost (\$)**  
0

**Remaining (d)**  
0 R

**Start**  
09 Oct 2017

**Actual (d)**  
167

**Finish**  
24 Mar 2018

**At Complete (d)**  
167

**Percent Complete**  
Phys 100

**Early Start**  
None

**Early Finish**  
None

**Total Float**  
0

**Late Finish**  
None

**Free Float**  
-

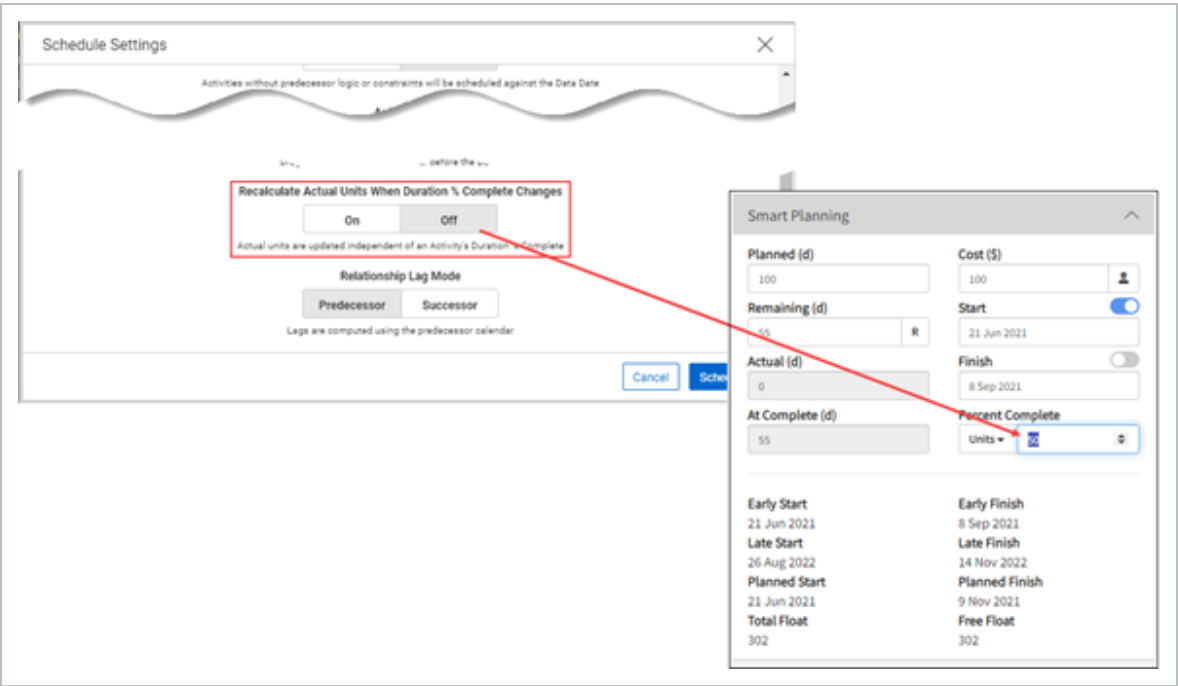
**Planned Start**  
09 Oct 2017

**Planned Finish**  
05 Feb 2018

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.

Smart Planning

Planned (d)

100

Cost (\$)

100

Remaining (d)

55

R

Start

21 Jun 2021

Actual (d)

0

Finish

8 Sep 2021

At Complete (d)

55

Percent Complete

Dur ▾

44.88

Resource Assignments

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

Modify

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

**Smart Planning**

**Planned (d)**  
100

**Cost (\$)**  
100

**Remaining (d)**  
55 R

**Start**  
21 Jun 2021

**Actual (d)**  
0

**Finish**  
8 Sep 2021

**At Complete (d)**  
55

**Percent Complete**  
Units ▾ 37.5

**A1000: Activity A1000**  
(21 Jun 2021 - 8 Sep 2021) - 55.125d

+ Add new resource

**Available Resources**

- > SCE-CRE  
SCE CRE Resources
- Srini
- Chris

FTE/Qty	Plan	Rem	Act	
0.09	40	30	10	⊗
0.09	40	20	20	⊗

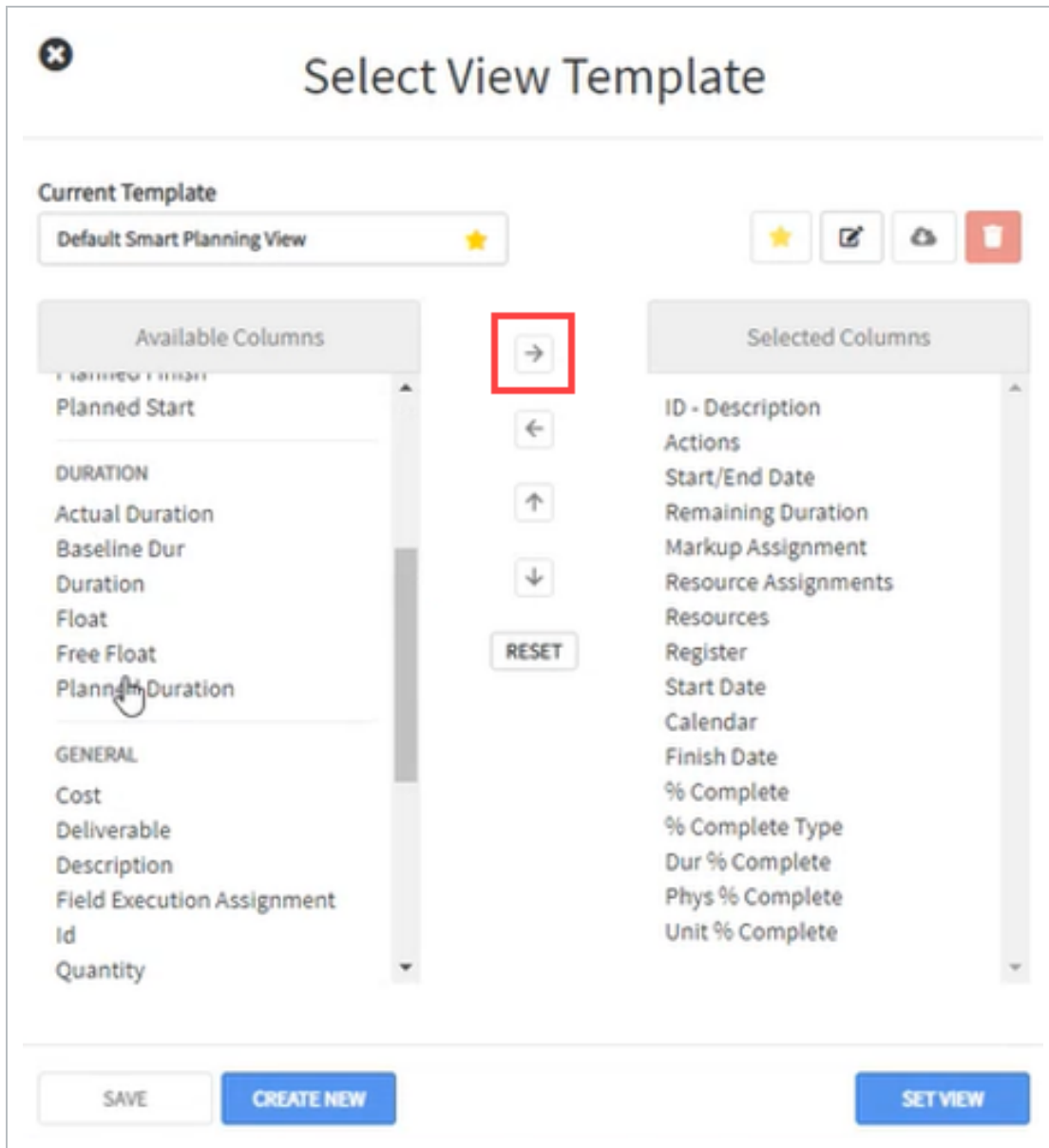
Physical percent complete uses the Phys % Complete column as a text field to type in the percent complete. This only applies to an activity that has started and is not completed. Physical percent complete interacts with earned value management. For example, if you have 20% physical complete and 5% duration 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.

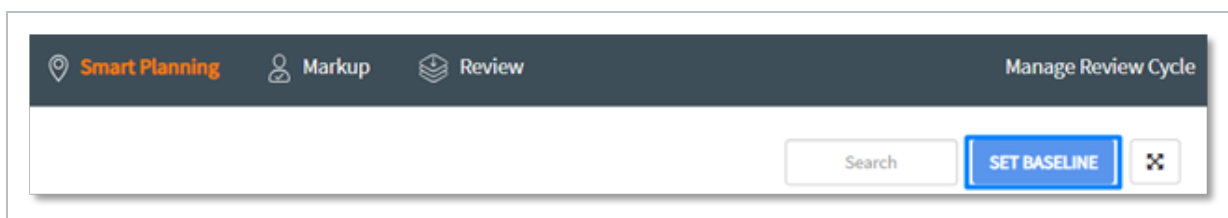
**NOTE**

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			
Sitework 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	
Sitework 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	

**NOTE**

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.



**NOTE**

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**.



Select an Annotation ▼



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

Schedule Settings

Project Start

26 Apr 2021

Data Date

26 Apr 2021 12:00 AM

Project Finish

21 Sep 2022

Schedule Mode

Planning

Scheduling

Activities without predecessor logic or constraints will be scheduled against the Data Date

Auto CPM

On

Off

Automatically perform CPM on any changes to the schedule

Critical Activities Contain Total Float Less Than or Equal To...

0

hours

Out of Sequence Progress

Retained Logic

Progress Override

Actual Dates

Relationships are maintained between the predecessor and successor for unworked portions of activities and continued after the predecessor has finished (recommended)

Auto Progress

On

Off

Drag activities forward that occur before the Data Date

Recalculate Actual Units When Duration % Complete Changes

On

Off

Actual units are updated independent of an Activity's Duration % Complete

Relationship Lag Mode

Predecessor

Successor

Lags are computed using the predecessor calendar

Cancel

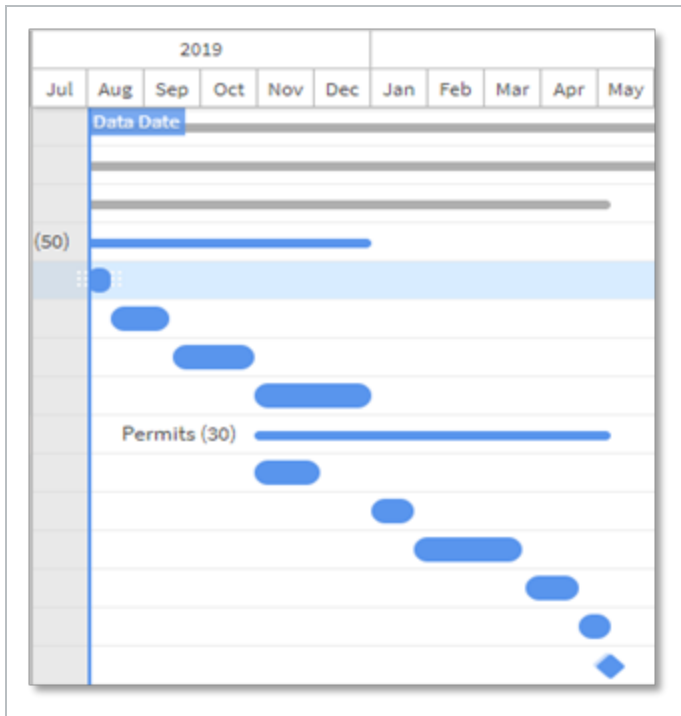
Schedule

7.0.2.3 DATA DATE

Data Date

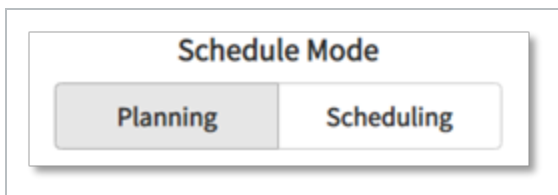
20 Nov 2020

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)

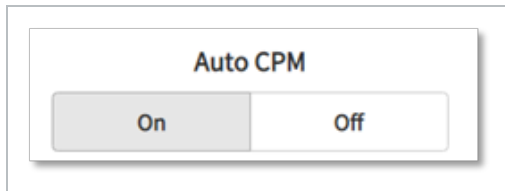
The Schedule Mode determines how activities without predecessor logic or constraints will respond to the updates being made to the schedule.



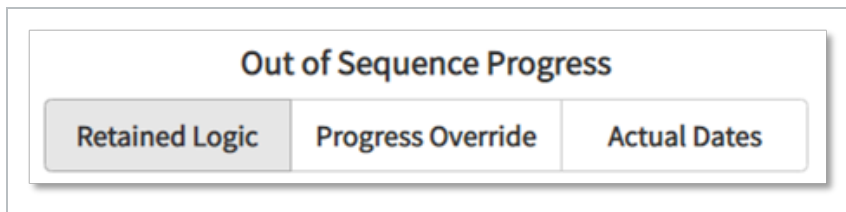
- In **Planning Mode**: Activities without predecessor logic or constraints do not snap back to the Data Date. This allows activities without predecessors to be scheduled throughout the project's timeline.
- In **Scheduling Mode**: Activities without predecessor logic or constraints are scheduled against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

**NOTE**

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

**Active Baseline**

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

[Assign schedule](#)

**Snapshot 1**

Snapshot - 18 Apr 2023: Paul - 18 Apr 2023

[Overwrite snapshot](#) [Promote to project list](#)

**Snapshot 2**

Snapshot - 18 Apr 2023 (1): Paul - 18 Apr 2023

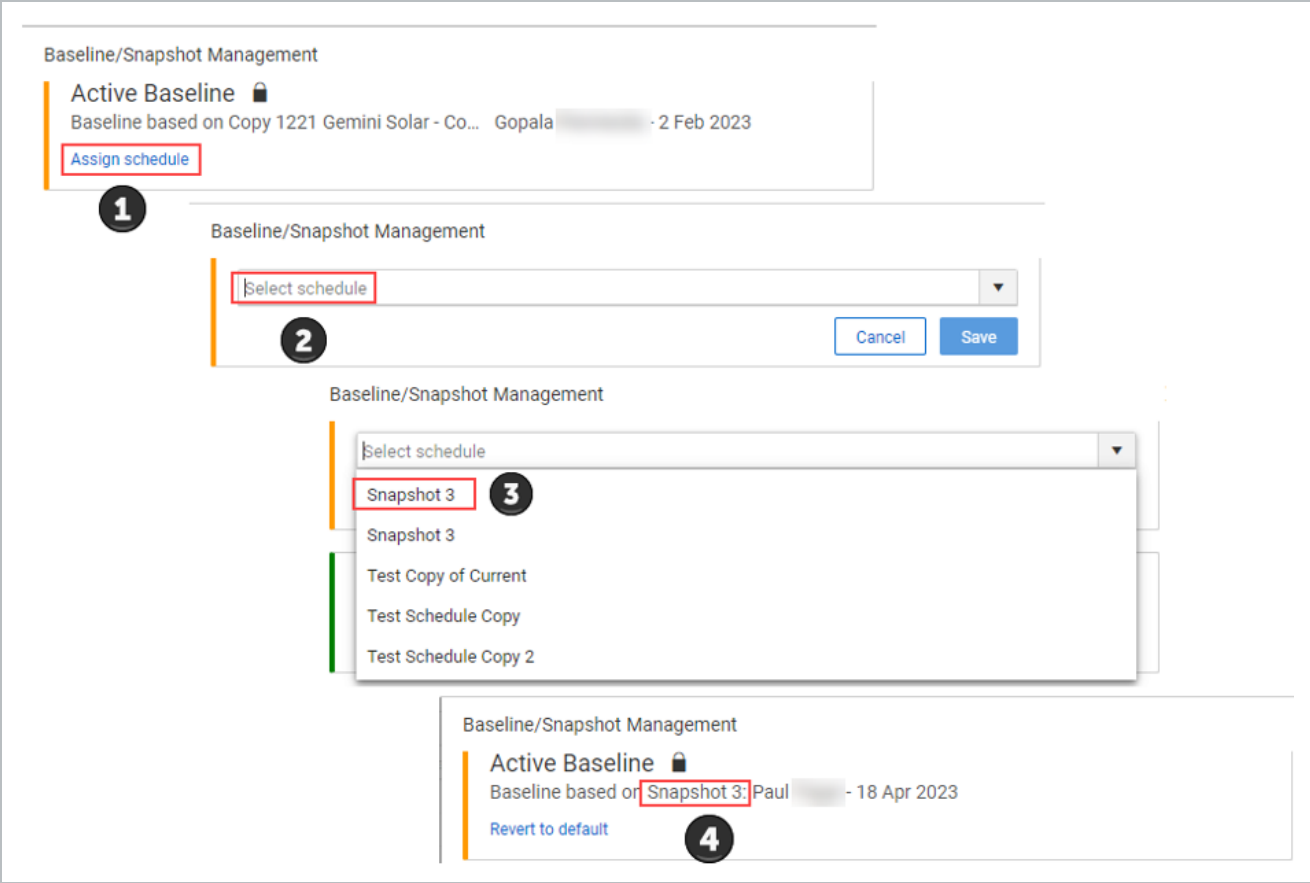
[Overwrite snapshot](#) [Promote to project list](#)

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

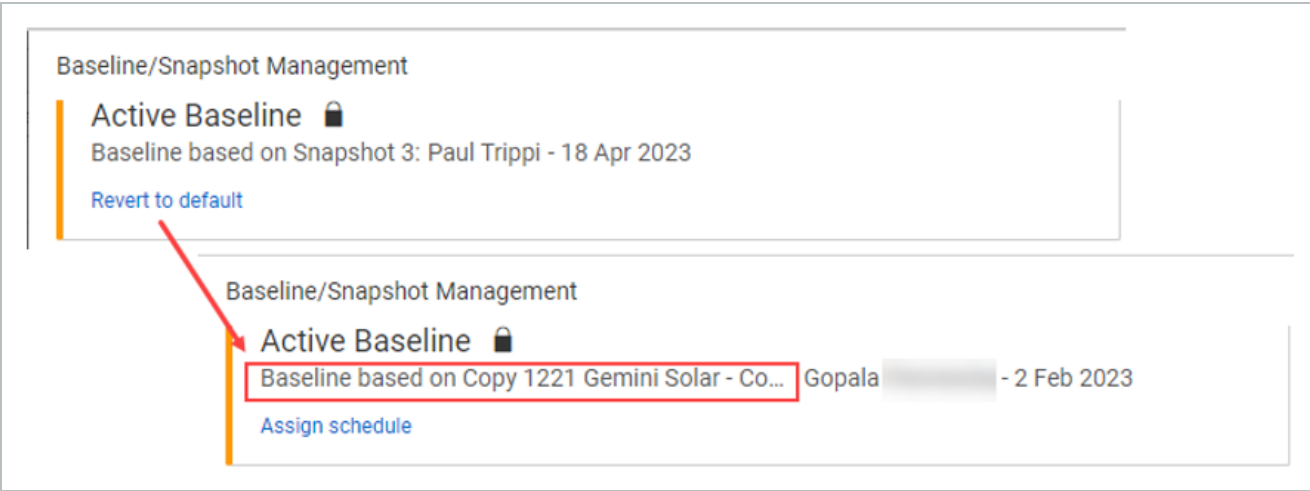
**Snapshot 3 has been saved to your schedule list** [View in schedule list](#)

	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.



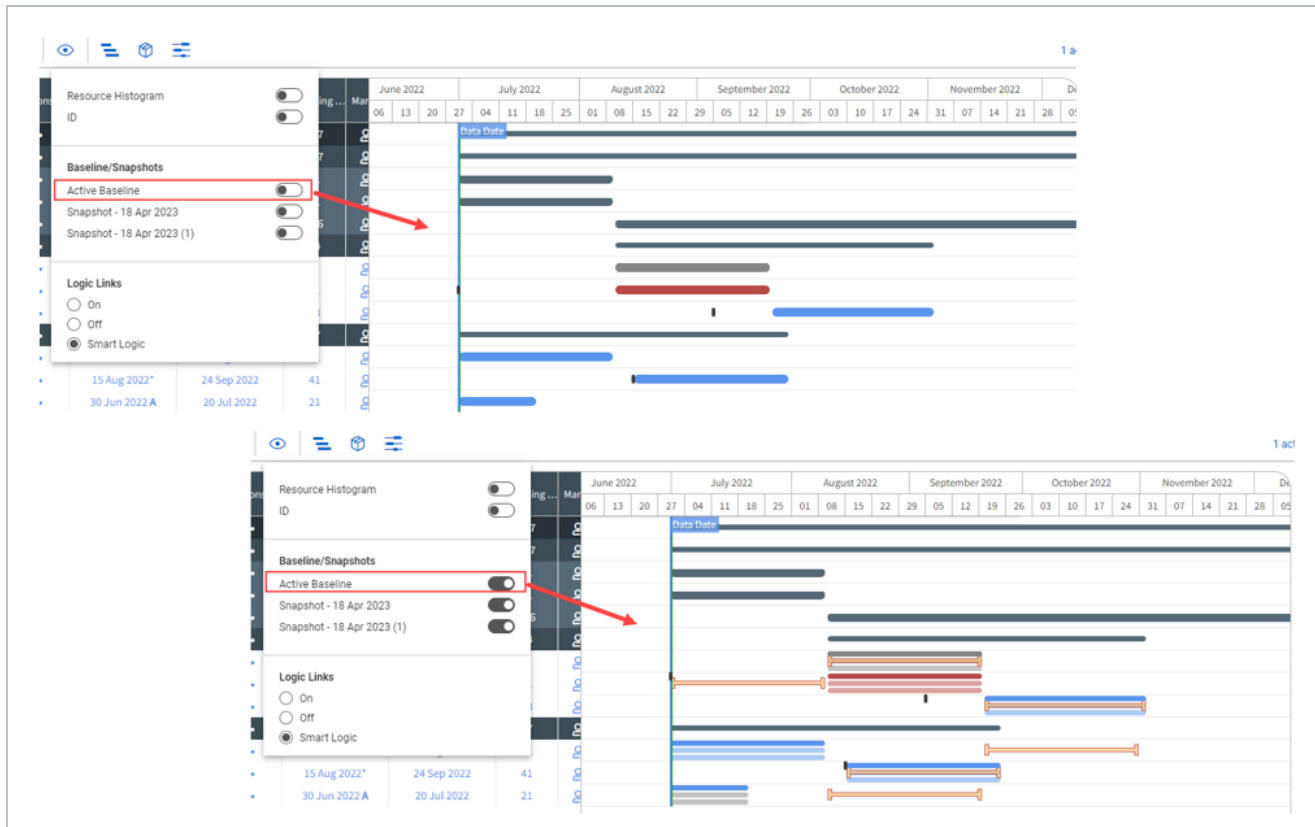
Select *Revert to default* to return to the previously assigned defaulted schedule.





## 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

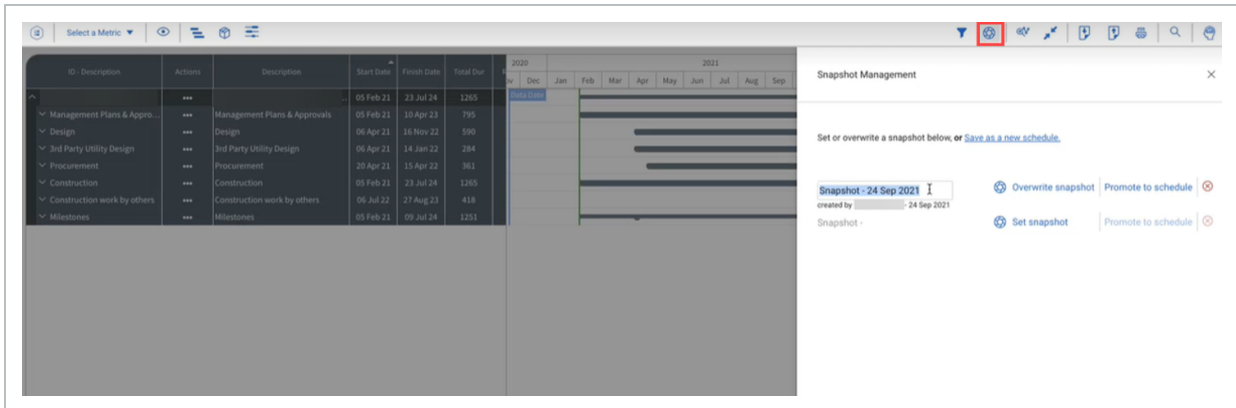
The following step-by-step walks you through how to create a snapshot.

#### NOTE

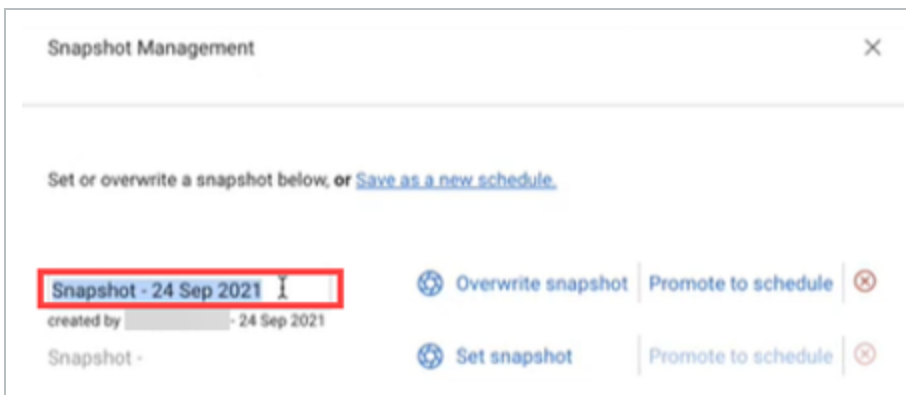
You can only create snapshots from the Plan view.

## 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. You can now rename the snapshot to a name of your preference.



### 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.

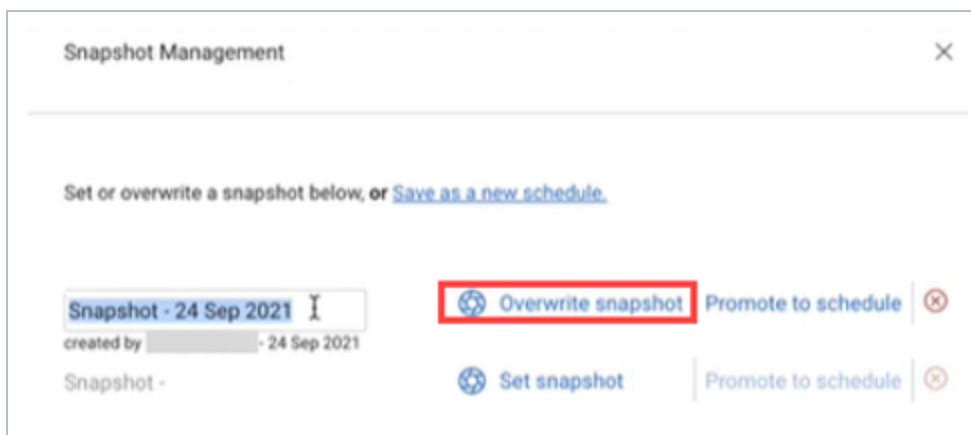
**NOTE**

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.

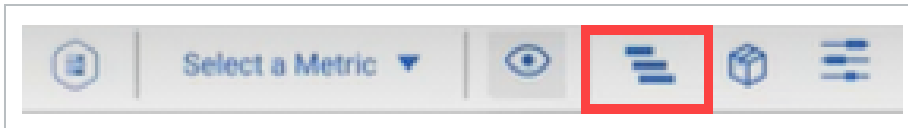
## ANALYSIS VIEW TEMPLATE

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.

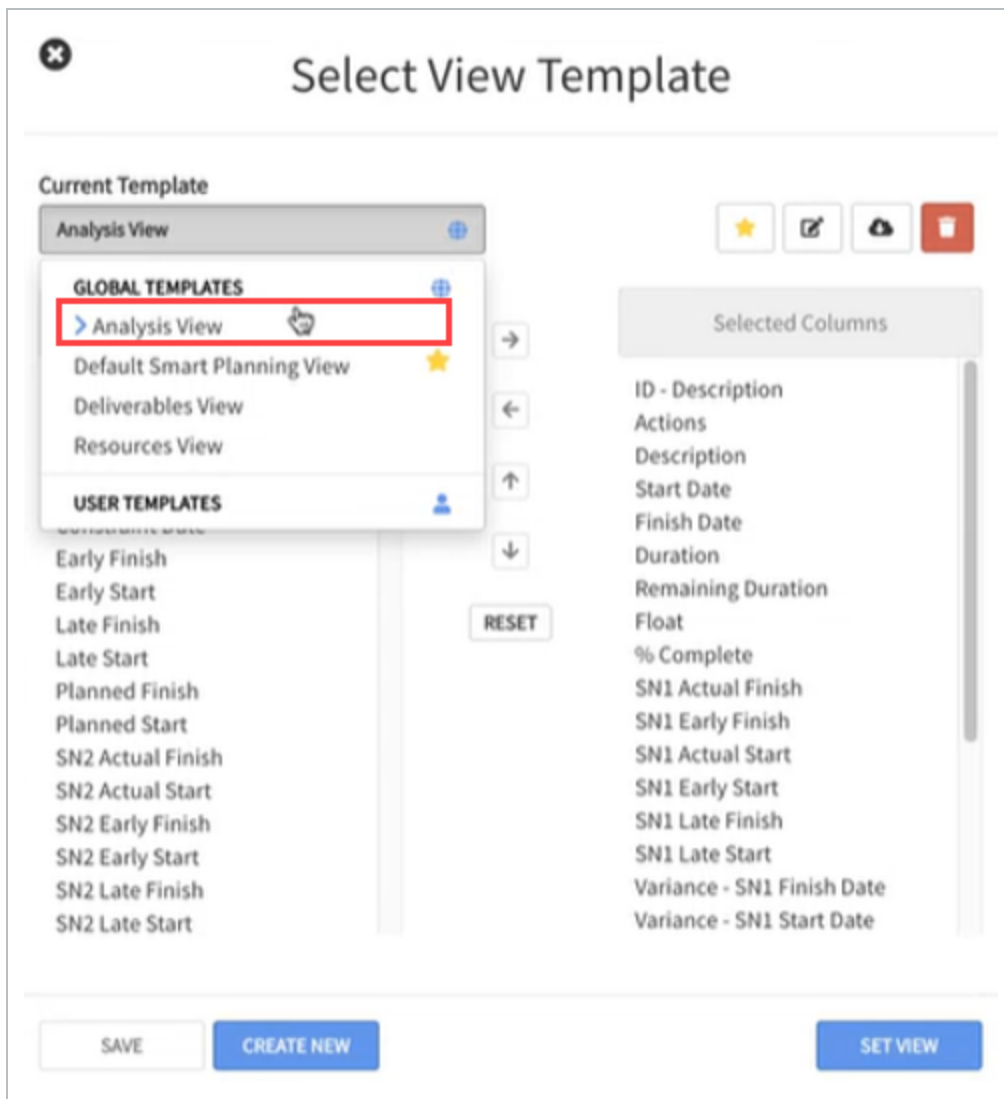
The following step-by-step walks you through how to select the Analysis View template.

## 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.

**Select View Template**

Current Template: Analysis View

Available Columns:

- Late Finish
- Late Start
- Planned Finish
- Planned Start
- SN2 Actual Finish
- SN2 Actual Start
- SN2 Early Finish
- SN2 Early Start
- SN2 Late Finish
- SN2 Late Start
- Start/End Date

Selected Columns:

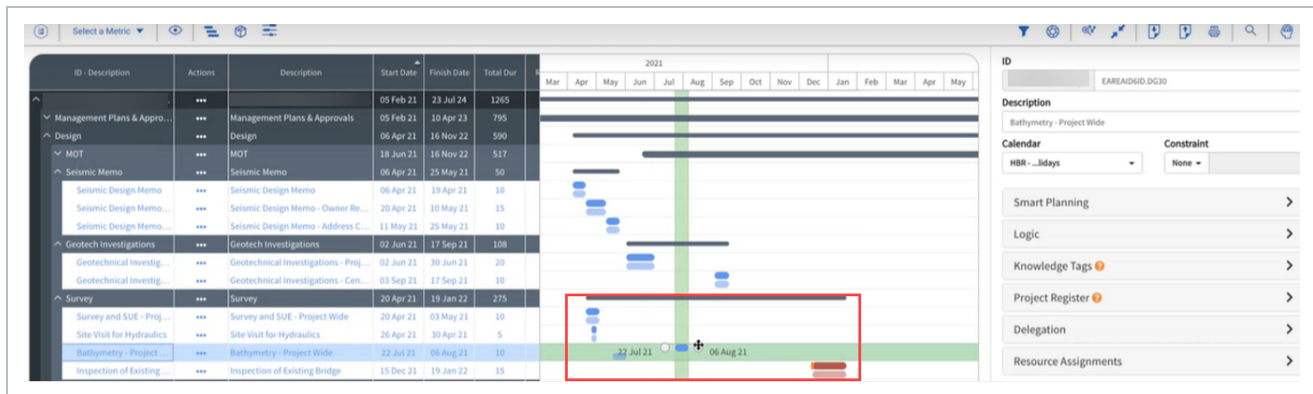
- % Complete
- SN1 Actual Finish
- SN1 Early Finish
- SN1 Actual Start
- SN1 Early Start
- SN1 Late Finish
- SN1 Late Start
- Variance - SN1 Finish Date
- Variance - SN1 Start Date
- Variance - SN2 Finish Date
- Variance - SN2 Start Date
- Variance - SN1 Duration
- Variance - SN2 Duration
- SN1 Total Float
- SN2 Total Float
- SN1 Free Float
- SN2 Free Float

Buttons: SAVE, CREATE NEW, SET VIEW

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

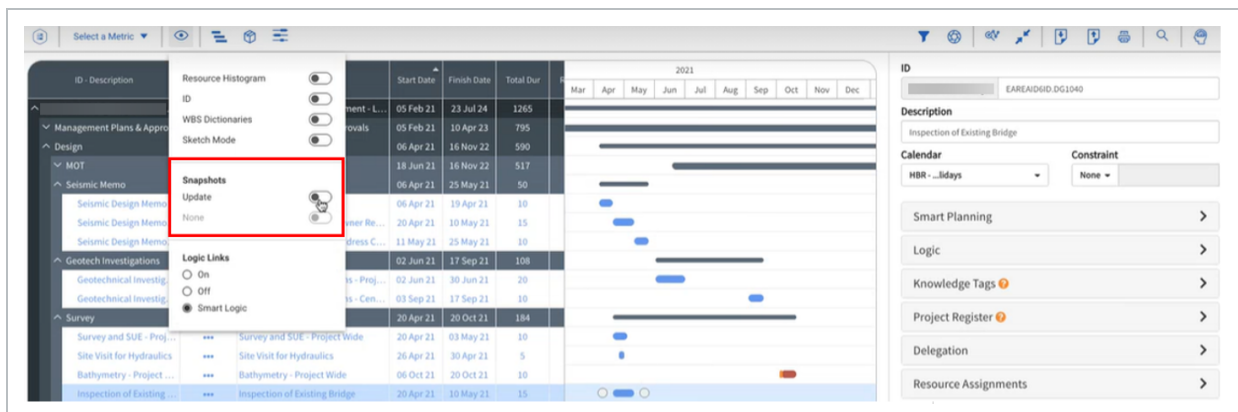
After the snapshot has been created, your Gantt chart is updated with bars for the information that relates to the current schedule status and the snapshot status. The darker bars can be moved to change the schedule on the Gantt Chart. The lighter bars represent the snapshot. The bars are blue when the 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.

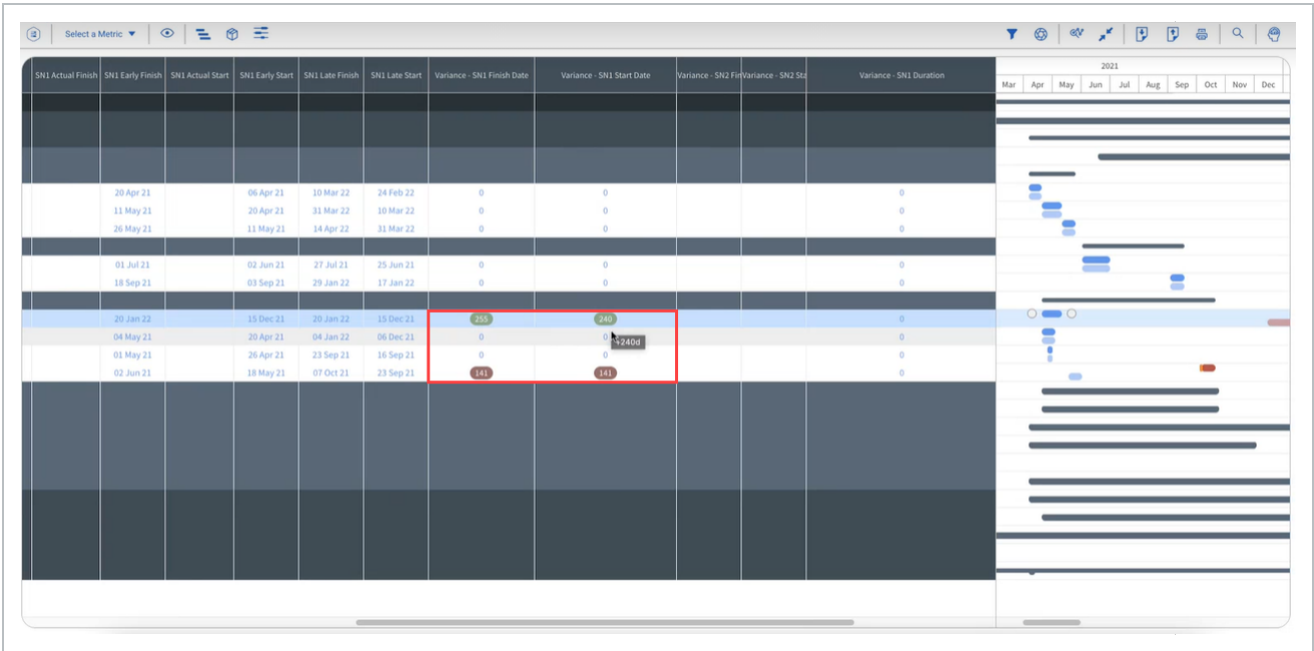


Two bars now show for items in the Gantt chart. You can move around the darker blue or darker red bars. The lighter bars represent the information saved in the snapshot and cannot be moved.

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

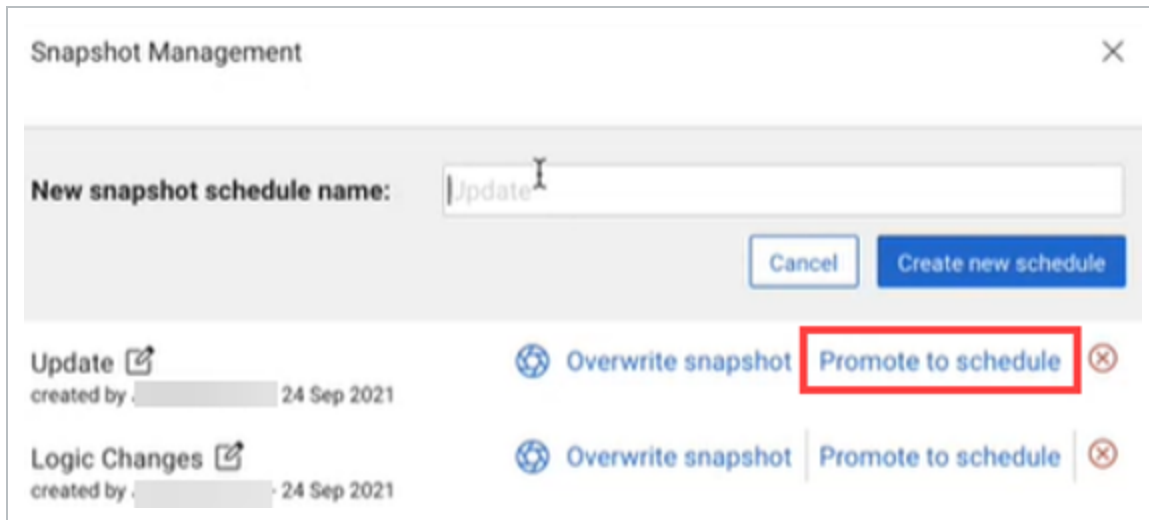
When you choose to promote a snapshot to schedule or to save a snapshot as a new schedule, the snapshot selected is then saved to the project list.

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.

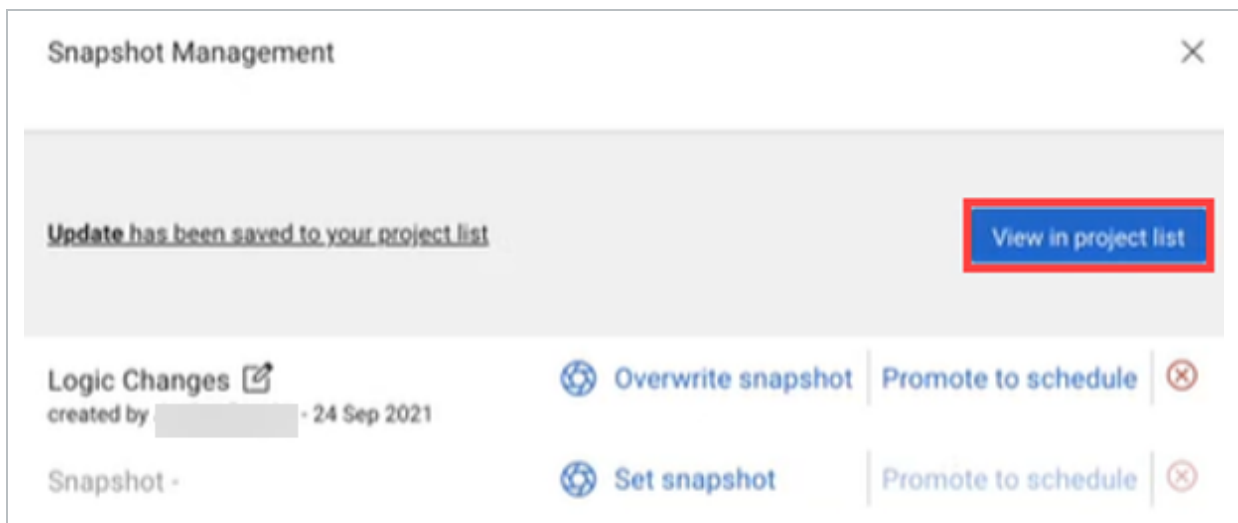
The following step-by-step walks you through how to save a snapshot to the project list.

## 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.



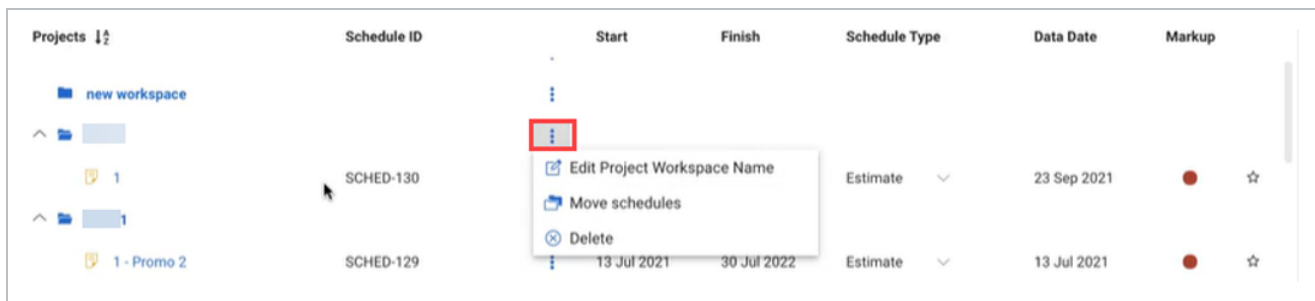


## 7.0.4.11 PROJECT LIST VIEW

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

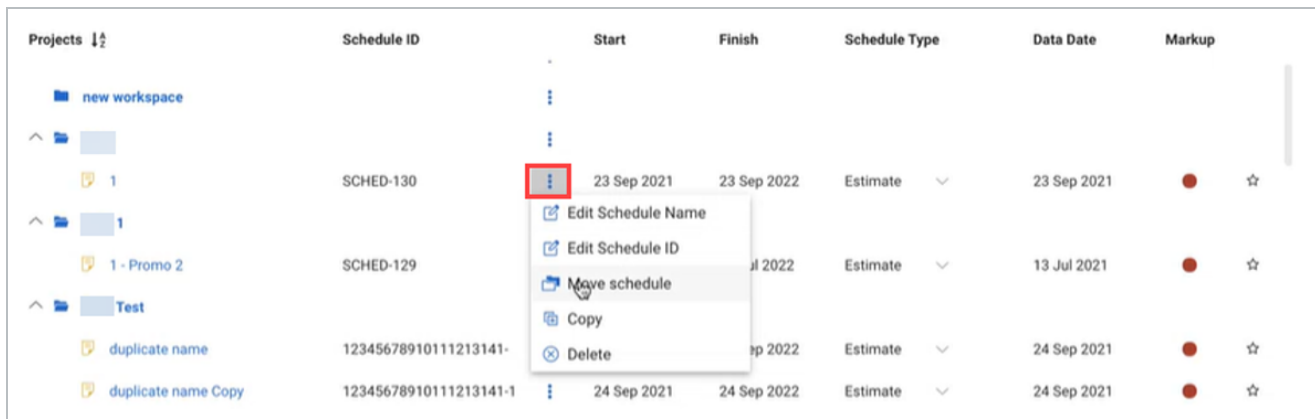


The screenshot shows the Project List View interface. On the left, a sidebar displays a project hierarchy with folders like 'new workspace' and '1 - Promo 2'. The main table lists schedules with columns: Projects, Schedule ID, Start, Finish, Schedule Type, Data Date, and Markup. A context menu is open over the '1 - Promo 2' folder, showing options: 'Edit Project Workspace Name', 'Move schedules', and 'Delete'.

Projects	Schedule ID	Start	Finish	Schedule Type	Data Date	Markup
new workspace						
1	SCHED-130			Estimate	23 Sep 2021	● ☆
1 - Promo 2	SCHED-129	13 Jul 2021	30 Jul 2022	Estimate	13 Jul 2021	● ☆

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

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



The screenshot shows the Project List View interface with a context menu open over the 'SCHED-130' schedule row. The menu options are: 'Edit Schedule Name', 'Edit Schedule ID', 'Move schedule', 'Copy', and '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 - Promo 2	SCHED-129		Jul 2022	Estimate	13 Jul 2021	● ☆
Test	12345678910111213141-		ep 2022	Estimate	24 Sep 2021	● ☆
duplicate name	12345678910111213141-1	24 Sep 2021	24 Sep 2022	Estimate	24 Sep 2021	● ☆

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

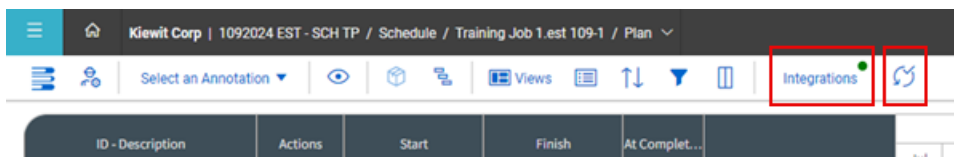
**NOTE**

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.

**NOTE**

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

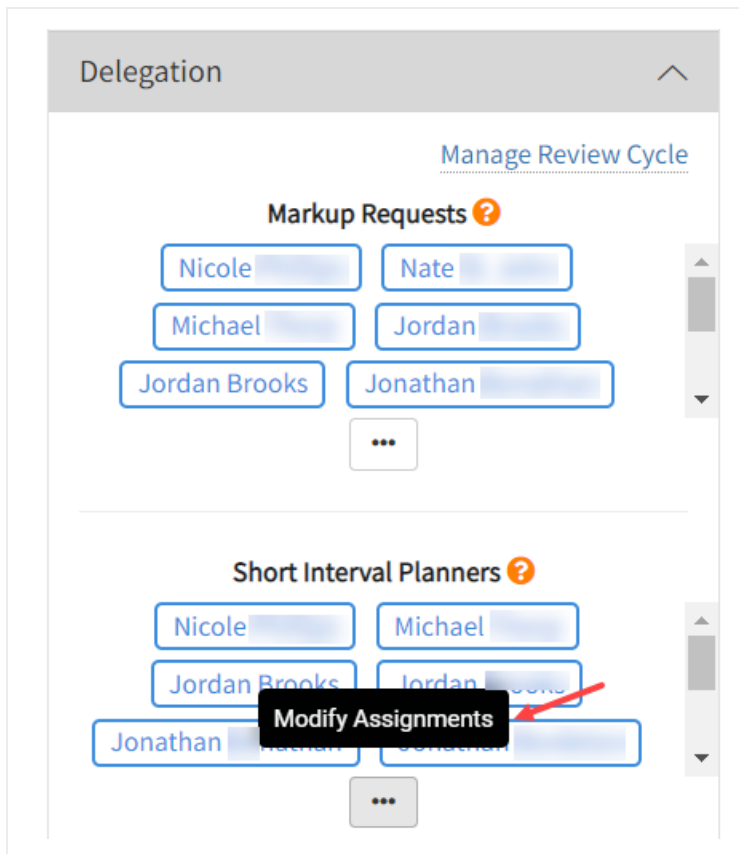
To integrate Estimate job data with Schedule workspaces, see Integrated Solutions [InEight Integration Estimate-Schedule](#) for more information.

# LESSON 8 – SCHEDULE MARKUP PROCESS

## MARKUP PROCESS OVERVIEW

### ASSIGNING MARKUP

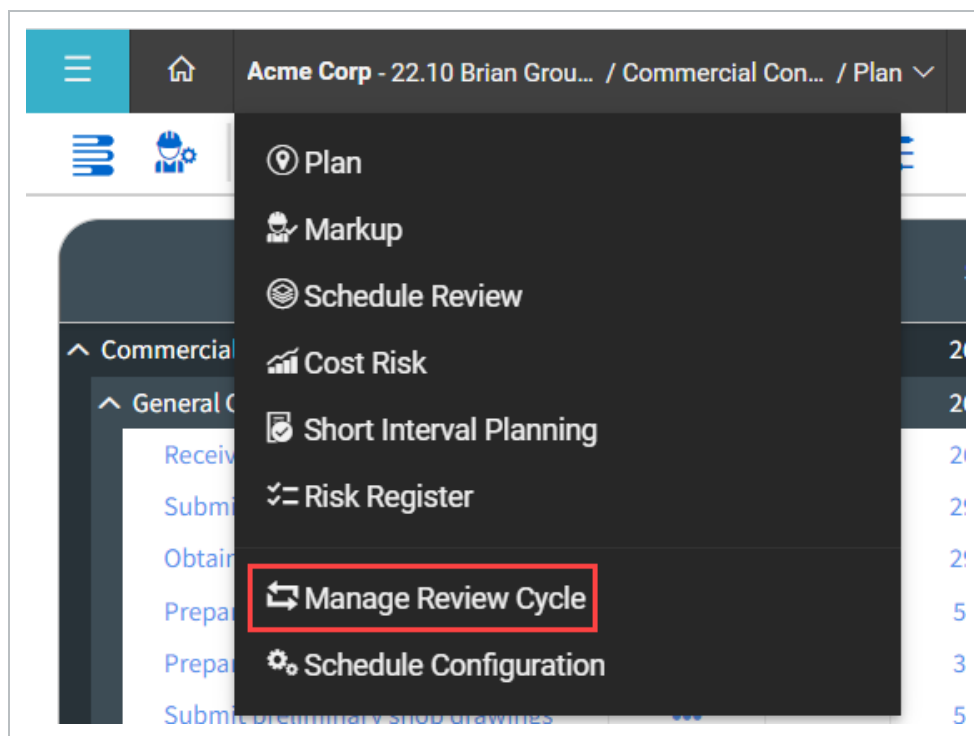
Markup is assigned in the plan project view from the first level drop-down menu in a project. Select a project WBS summary level, then expand the delegation panel and click the **Modify Assignments** icon, where users can be assigned at various levels within the schedule to provide markup.



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.

Start Review Cycle

Start Review Cycle to solicit expert feedback from project team members

START REVIEW CYCLE

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

+/- 50%

Team Member Markup

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

EXPORT USER MARKUP

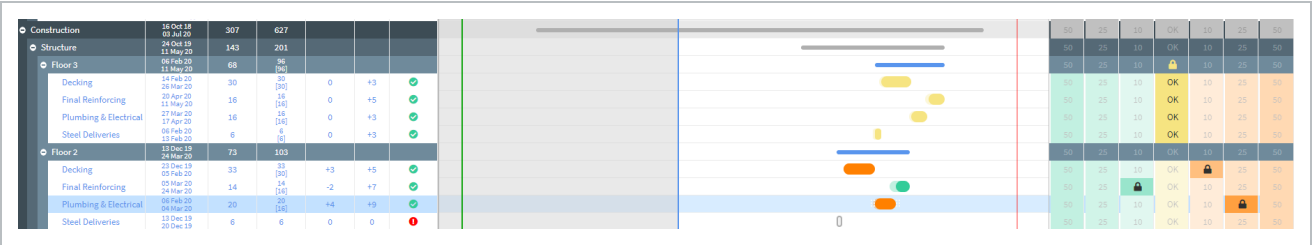
Uncertainty

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

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 displays the 'Review' interface for the 'Vasey Building (Exp. Confidence Scenario)'. The main area is a Gantt chart showing project tasks and their durations. A red box highlights the 'Review' tab in the top navigation bar. On the right, a 'Duration Uncertainty' panel is open, showing 'Uncertainty Type' (Markup/Manual), 'Layer' (Deterministic), 'Rem Dur' (13), and 'Constraint' (13). It also includes a 'Distribution' section with a histogram and a 'COMMIT' button.

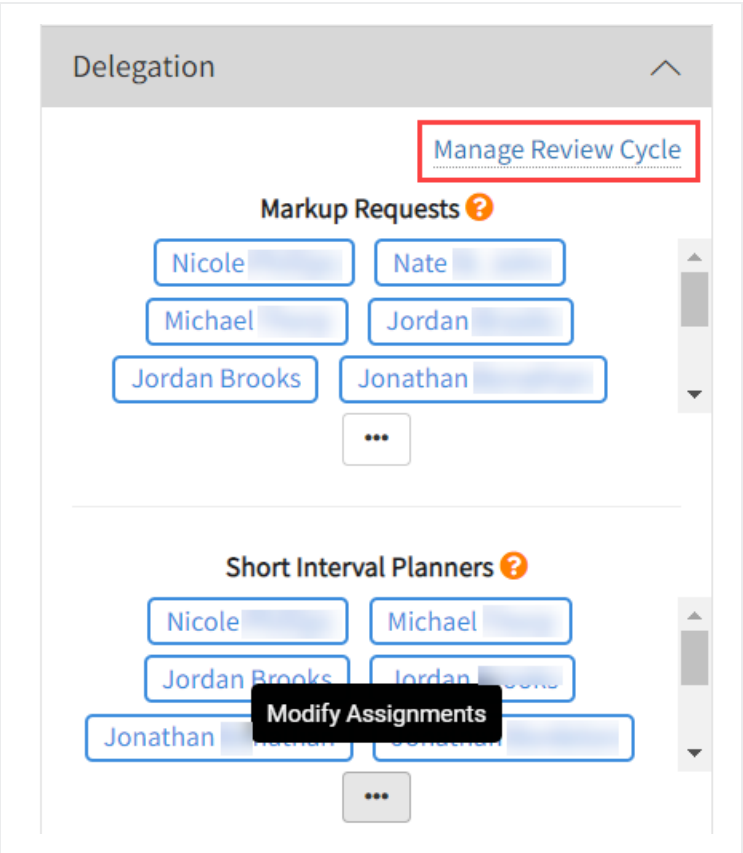
After a review is complete, the cycle can be ended by returning to the Manage Review Cycle page, and clicking **End Review Cycle**.

## 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**.



**TIP** 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

START REVIEW CYCLE

**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

None

**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"/>	
Nicole Phillips	51% (66) 16% (21) 27% (35)	10/12/22		<input type="checkbox"/>	<input type="checkbox"/>	
Jonathan Bordelon	29% (38) 50% (64) 16% (20)	10/12/22		<input type="checkbox"/>	<input type="checkbox"/>	
Brian Basis Planning Mikinski	36% (47) 11% 39% (50)	10/27/22		<input type="checkbox"/>	<input type="checkbox"/>	
Nate St. John	15% (19)	10/19/22		<input type="checkbox"/>	<input type="checkbox"/>	
Jonathan Bonathan	Not started			<input type="checkbox"/>	<input type="checkbox"/>	
Jonathan Bordelon	Not started			<input type="checkbox"/>	<input type="checkbox"/>	
Jordan Brooks	Not started	11/9/22		<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

START REVIEW CYCLE

**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

None

None
+/- 10%
+/- 25%
+/- 50%

**Team Member Markup**

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



## TEAM MEMBER MARKUP

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

### NOTE

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
Brian	<div> <div>66% (85)</div> <div>17% (22)</div> <div>12%</div> </div>			9/30/22	<input type="checkbox"/>	<input type="checkbox"/>	
Nicole	<div> <div>51% (66)</div> <div>16% (21)</div> <div>27% (35)</div> </div>			10/12/22	<input type="checkbox"/>	<input type="checkbox"/>	
Jonathan	<div> <div>29% (38)</div> <div>50% (64)</div> <div>16% (20)</div> </div>			10/12/22	<input type="checkbox"/>	<input type="checkbox"/>	
Brian	<div> <div>36% (47)</div> <div>11%</div> <div>39% (50)</div> </div>			10/27/22	<input checked="" 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.


**NOTE**

Markups can only be exported per cycle. Once a new cycle is initiated, the previous cycle is over written. 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

START REVIEW CYCLE

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
Brian Mikinski	66% (85)	17% (22)	12%	9/30/22		<input type="checkbox"/>	<input type="checkbox"/>
Nicole Phillips	51% (66)	16% (21)	27% (35)	10/12/22		<input type="checkbox"/>	<input type="checkbox"/>
Jonathan Bordelon	29% (38)	50% (64)	16% (20)	10/12/22		<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"/>

- 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...	Clear Markup
Brian Mikinski	<div><div></div>66% (85)<div></div>17% (22)<div></div>12%</div>			9/30/22		<input checked="" type="checkbox"/>	
Nicole Phillips	<div><div></div>51% (66)<div></div>16% (21)<div></div>27% (35)</div>			10/12/22		<input type="checkbox"/>	
Jonathan Bordonon	<div><div></div>29% (38)<div></div>50% (64)<div></div>16% (20)</div>			10/12/22		<input checked="" type="checkbox"/>	
Brian Basis Planning Mikinski	<div><div></div>36% (47)<div></div>11%<div></div>39% (50)</div>			10/27/22		<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						
Assignee	Team Contribution	Last Accessed	Ready For Review?	Show Whole Project	Show Cost	Clear Markup
Allen Paddock	<div><div>25%</div><div>15%</div><div>58% (28)</div></div>	2 years ago		<input type="checkbox"/>	<input type="checkbox"/>	
Ben Heights	<div><div>17%</div><div>29% (14)</div><div>52% (25)</div></div>	2 years ago		<input type="checkbox"/>	<input type="checkbox"/>	
Christy Tuppance	<div><div>31% (15)</div><div>10%</div><div>40% (19)</div></div>	2 years ago		<input type="checkbox"/>	<input type="checkbox"/>	
Bridgette Quintero	<div><div>10%</div><div>10%</div><div>24%</div></div>	5 months ago		<input type="checkbox"/>	<input type="checkbox"/>	
Susan Cappelloni	<div><div>20%</div><div></div><div></div></div>	2 years ago		<input type="checkbox"/>	<input type="checkbox"/>	
Overall	<div><div>22%</div><div>16%</div><div>46% (78)</div></div>					

REMOVE ALL

EXPORT USER MARKUP

**NOTE**

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

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

End Review Cycle

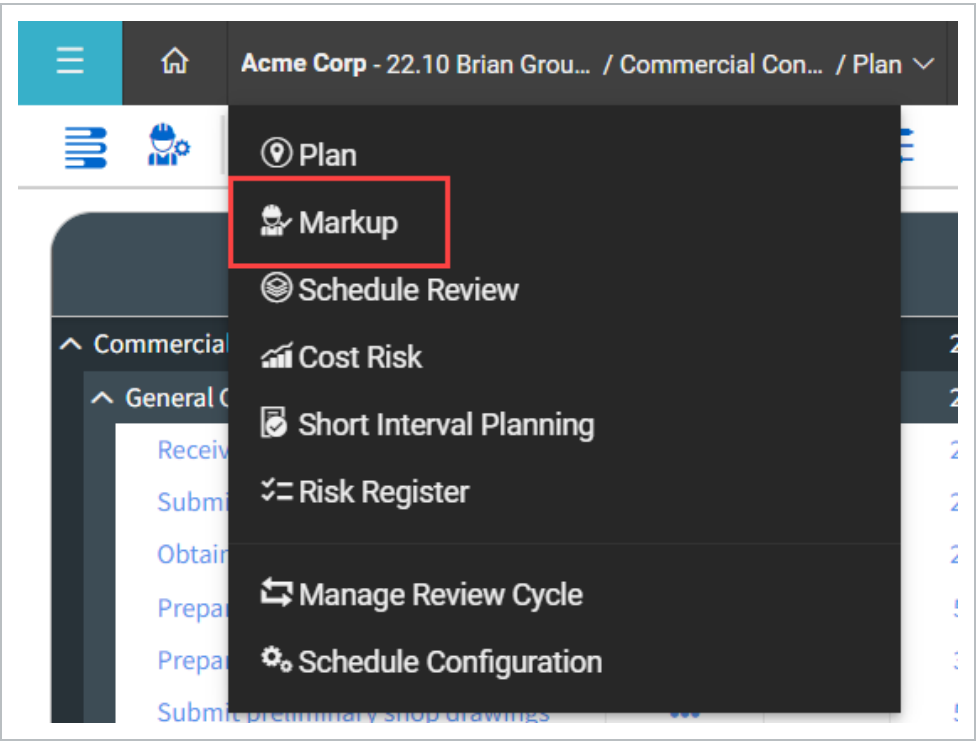
End Review Cycle to review Markup from team members

END REVIEW CYCLE

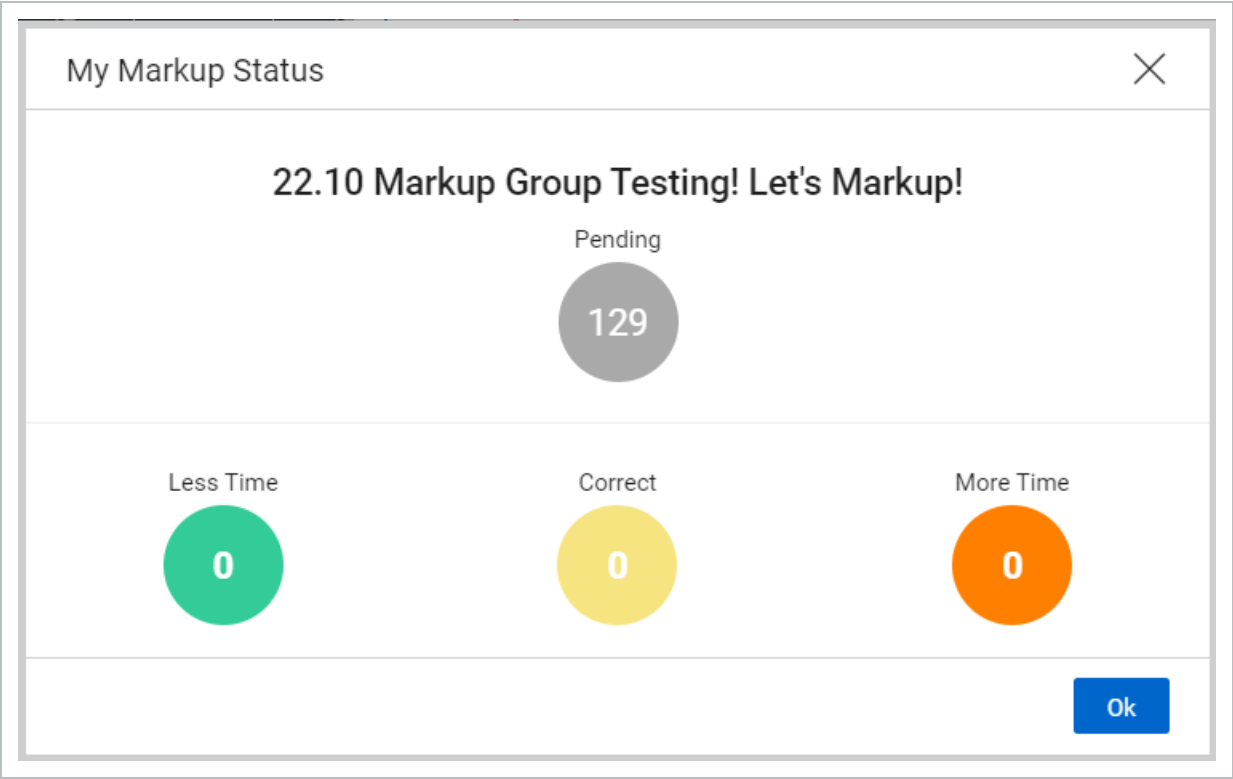
## MARKING UP THE SCHEDULE

### 8.0.0.2 UNCERTAINTY

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

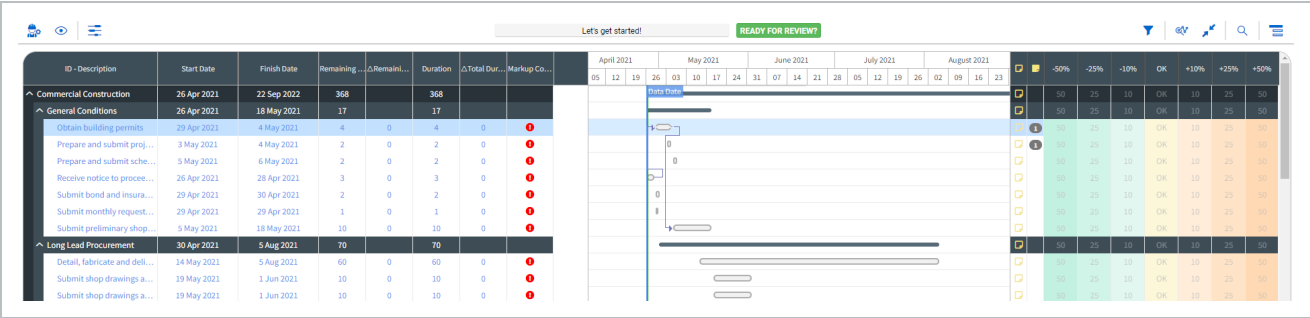


The My Markup Status confirmation box opens to show markup status information.



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.

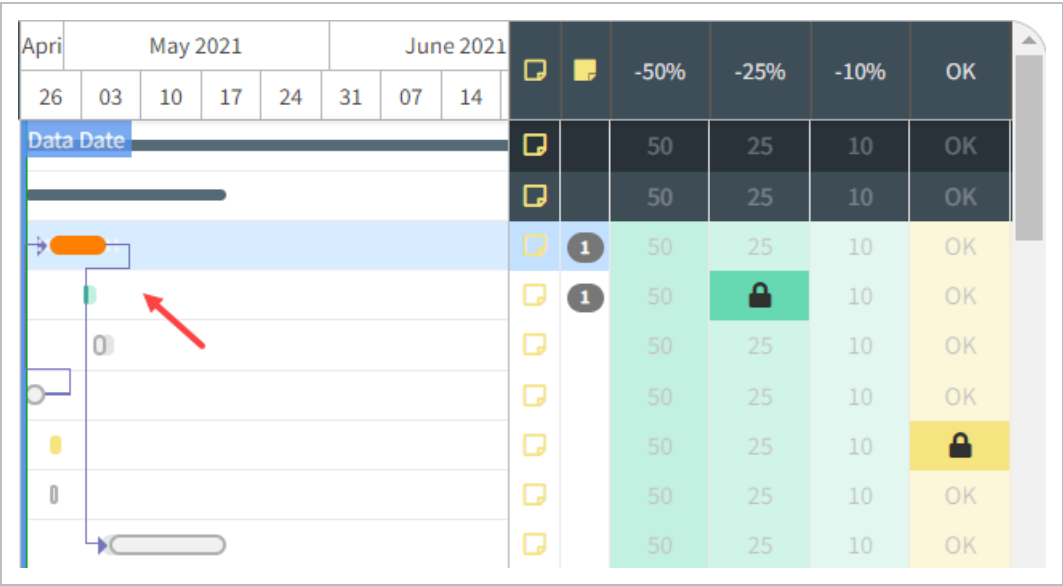


SCORECARD VALUES

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.

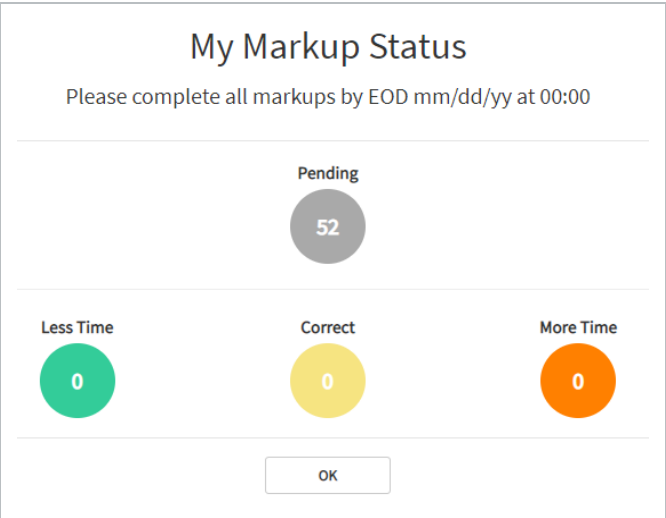
		-50%	-25%	-10%	OK	+10%	+25%	+50%
		50	25	10	OK	10	25	50
		50	25	10	OK	10	25	50
	1	50	25	10	OK	10	25	50
	1	50	25	10	OK	10	25	50
		50	25	10	OK	10	25	50
		50	25	10	OK	10	25	50
		50	25	10	OK	10	25	50
		50	25	10	OK	10	25	50

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.

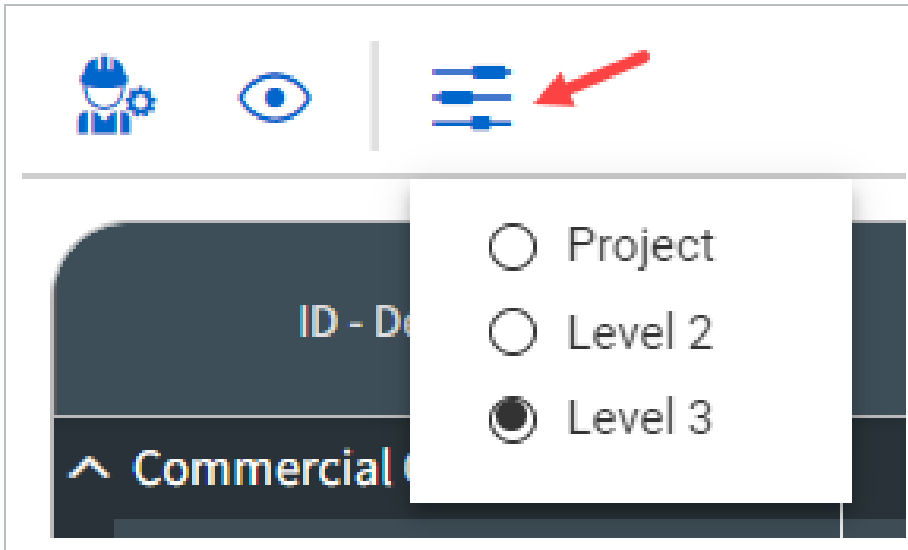


## MARKING UP THE SCHEDULE VIA THE SCORECARD

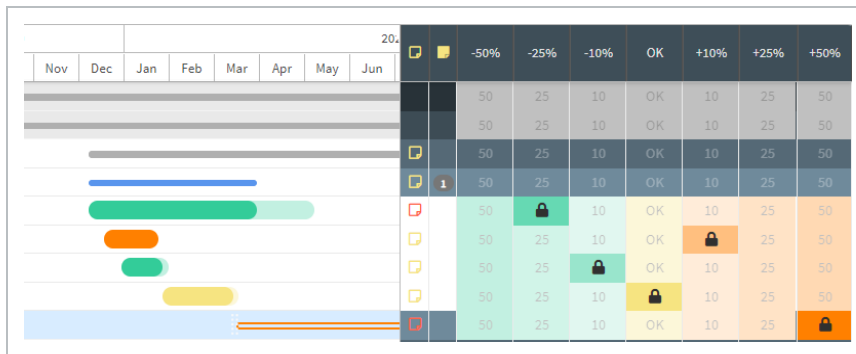
1. Open the Markup view. The markups made by the individual user are summarized
2. Under My Markup Status, look for Review Cycle Notes.
3. Click **OK** to close.



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

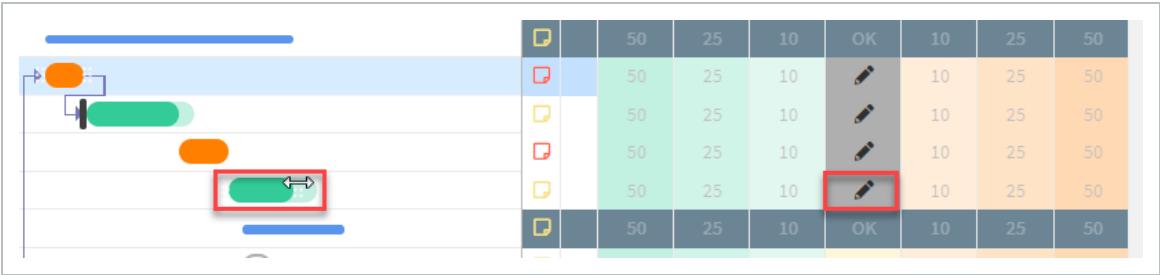


5. Go to the scorecard and adjust activities by selecting a markup score. Activities should show a Lock icon once selected, confirming the markup made.



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.





**NOTE** 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.

Red icon	50	Red icon	10	OK	10	25	50
Yellow icon	50	25	10	OK	Red icon	25	50
Yellow icon	50	25	Red icon	OK	10	25	50
Yellow icon	50	25	10	Red icon	10	25	50
Red icon	50	25	10	OK	10	25	Red icon

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# LESSON 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.

### NOTE

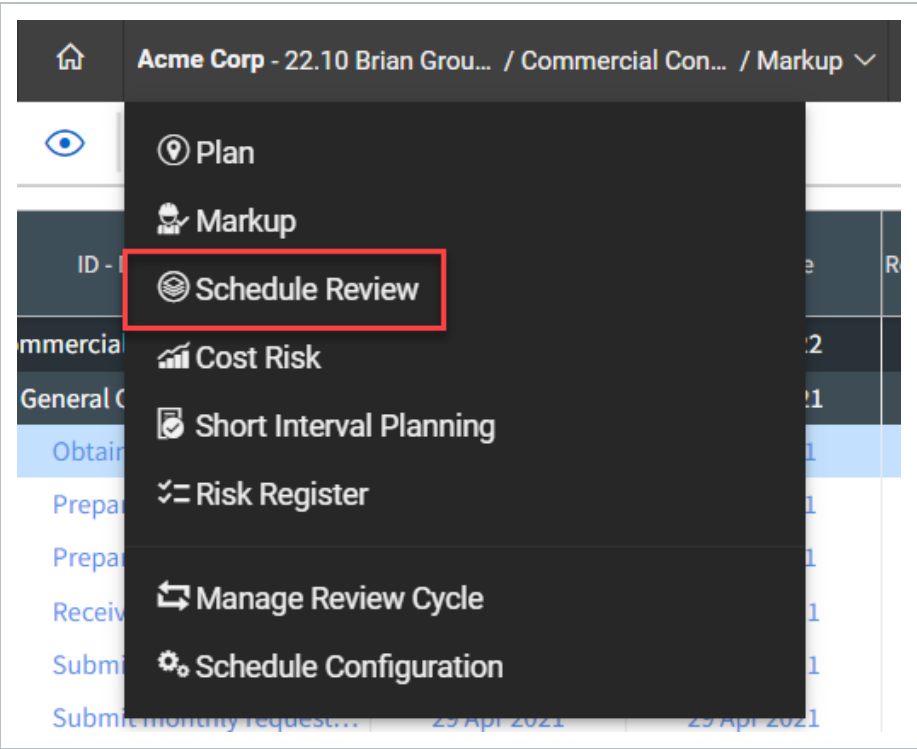
Projects often tend to mix uncertainty and risks events together resulting in less accurate mapping of risk characteristics to projects. It is important to evaluate risk items and place each in their appropriate categories, Uncertainty or Risk Event.

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

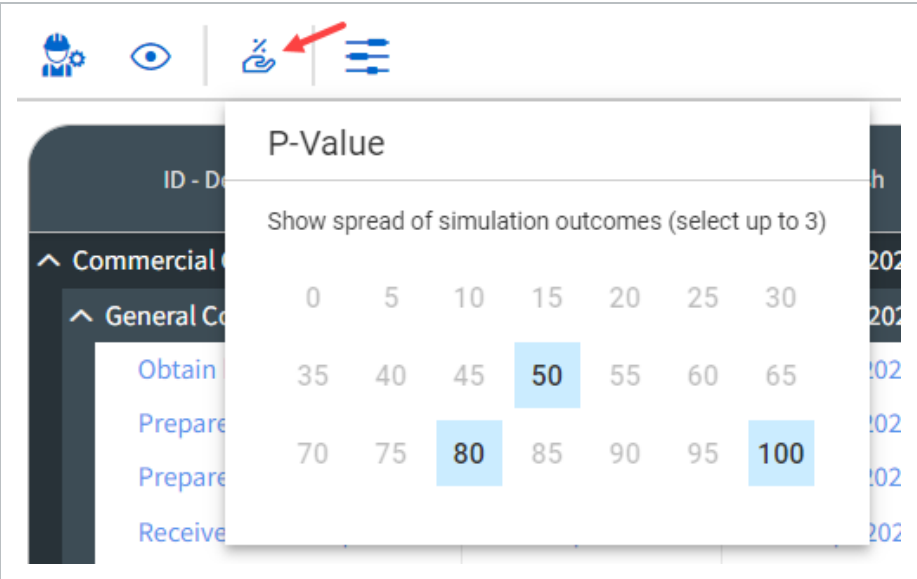
This feedback can come from the Markup process outlined in other topics. From here, the following review process steps can help you conduct a risk assessment utilizing a confidence level, called a **P-value**.

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

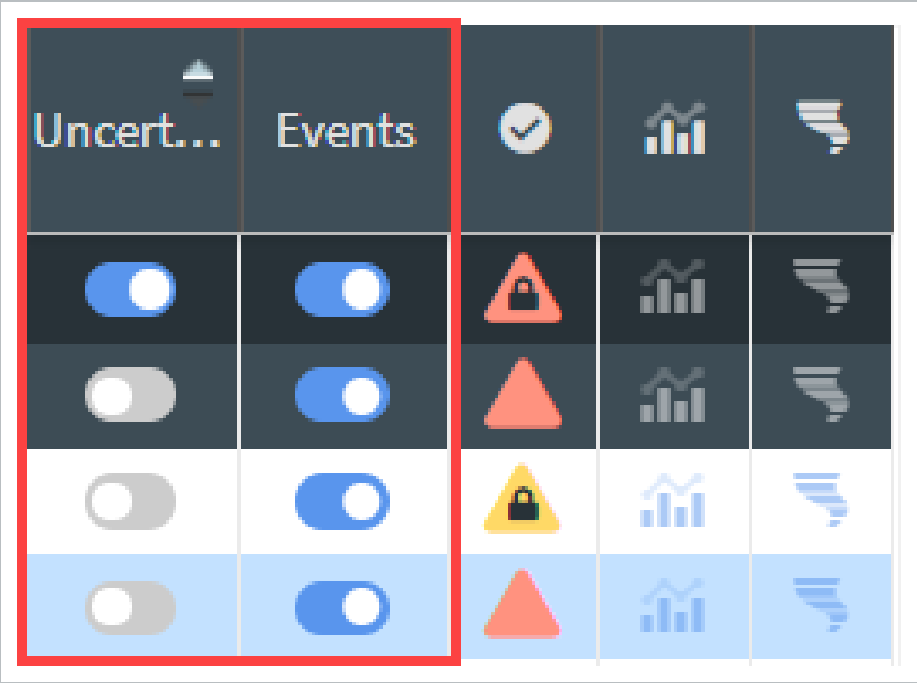
1. From the Project View drop-down, select **Review**.



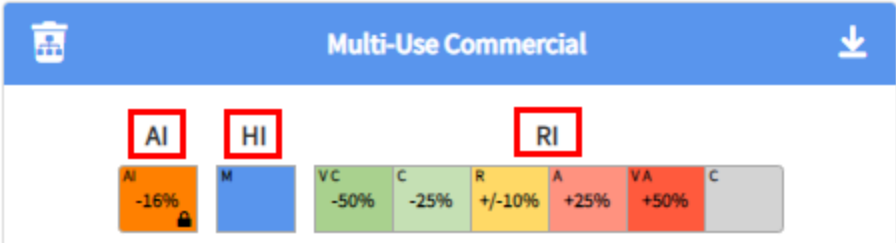
2. Select a P-value for instant insight during the review process by first selecting the **P-value** icon .



- 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)

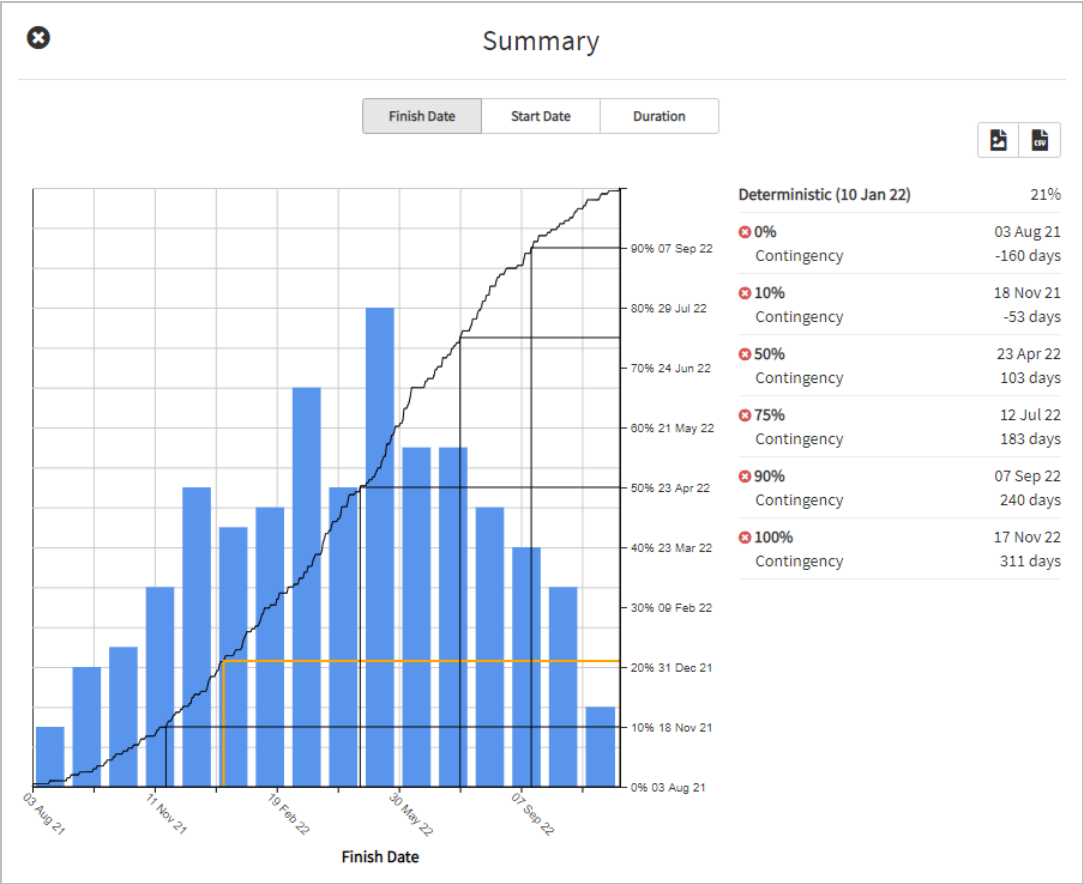



5. As needed, assign **Register Events** to project items.
  - Any item in a project may be assigned a Register Event
  - The default categories are shown below:

The screenshot shows a dialog box titled "Add new register event". It contains a dropdown menu currently set to "Threat". The dropdown menu is open, showing a list of categories: "Threat" (red dot), "Opportunity" (green dot), "Issue" (orange dot), "Idea" (blue dot), and "Schedule Change Request" (orange dot). To the right of the dropdown is a text input field labeled "\* Title (required)" with the placeholder text "Title". Below the dropdown and text field are two buttons: "Clear" and "Add".

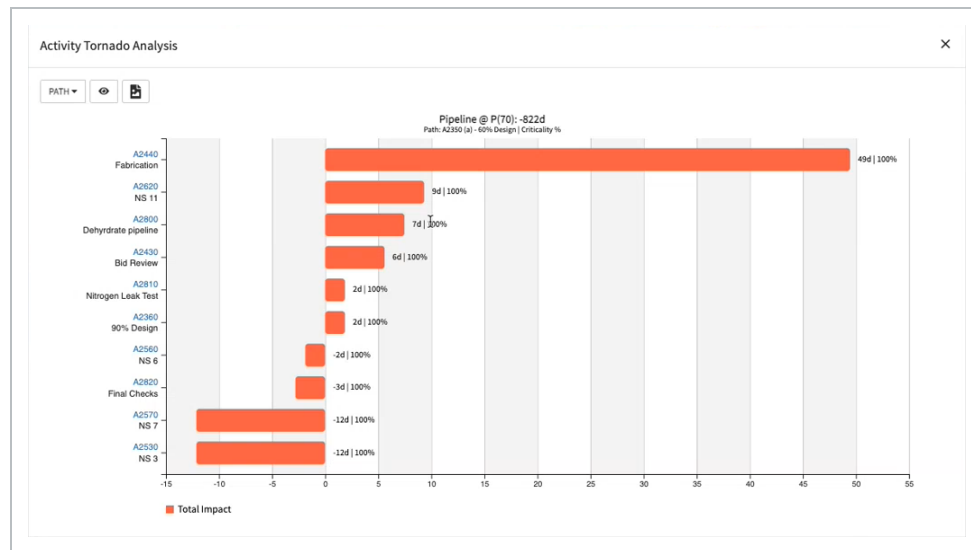
- After all uncertainty and events have been agreed to, you can access two main reports that provide insight into the project's risk:

- Risk histogram 

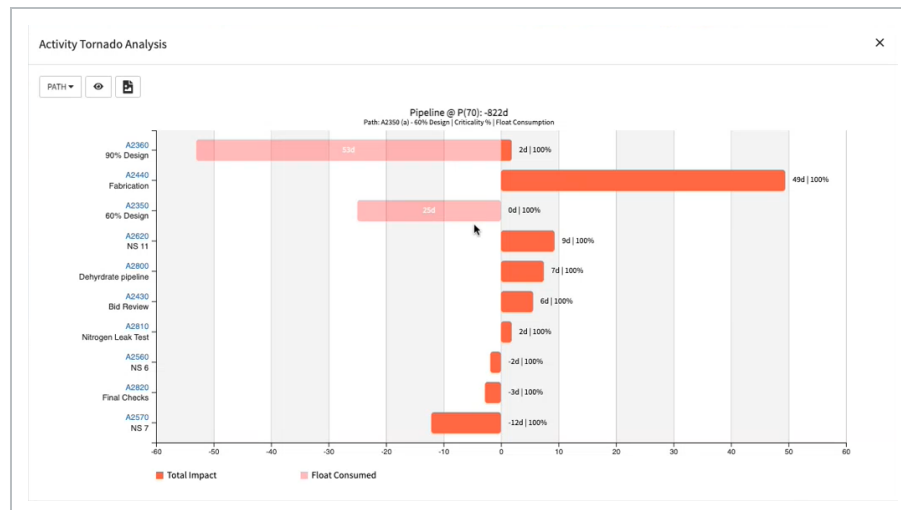


- Tornado analysis 

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.

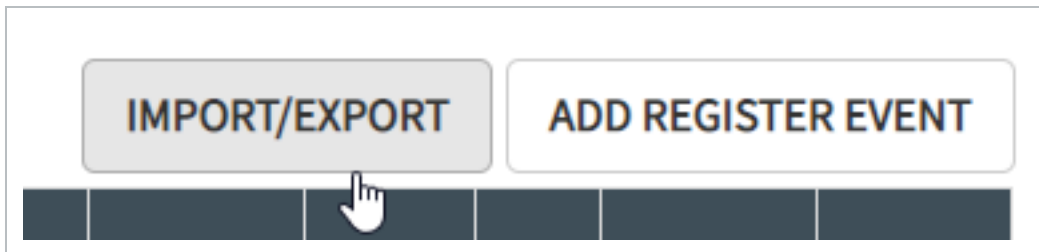


- Adopt any part of the risk model by selecting **Adopt Markup** or **Apply Uncertainty adjustments to deterministic schedule**. Both options will run a Critical Path Method schedule calculation and generate a new risk adjusted project schedule.



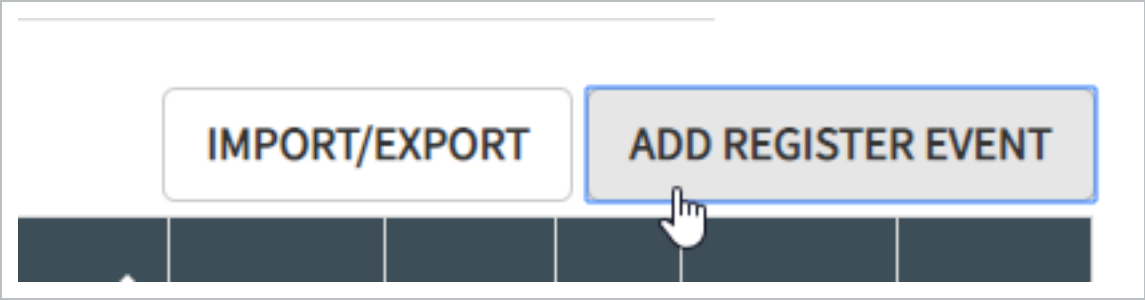
## IMPORT/EXPORT

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 the 'Import/Export' dialog box. The dialog has a close button (X) in the top left corner and a document icon with an arrow in the top center. Below the icon, there is a section titled 'Action' with two buttons: 'Import' and 'Export'. Underneath, a text label reads 'Import new or updated register events and their associations to activities within this project'. The next section is titled 'File Format' and contains two buttons: 'Oracle PRA - Pertmaster' and 'Deltek Acumen'. Below that, the section is titled 'File (.xlsx)' and includes a 'Choose File' button and the text 'No file chosen'. At the bottom of the dialog is a large green button labeled 'IMPORT'.

## 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.

IMPORT/EXPORTADD REGISTER EVENT

Active	Id	Type	Description	Mitigation	Probability	Schedule Impact	Cost Impact	Score	Markup	Basis	Publish	Delete
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

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.

Events RegisterRegister TypesMatrix Definition

ATTRIBUTES

EDIT

Description	Probability	Schedule Impact	Cost Impact	Color
Very Low	5%	7 days	\$100	<div></div>
Low	25%	30 days	\$1,000	<div></div>
Medium	50%	60 days	\$10,000	<div></div>
High	75%	90 days	\$100,000	<div></div>
Very High	95%	180 days	\$1,000,000	<div></div>


RELEVANT LINKS

- Manage Markup Review Cycle Quick Guide
- Markup Process Quick Guide
- Video - Manage Review Cycle
- Course - Schedule Feedback and Updates

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.

P-Value

Expected Value

0

5

10

15

20

25

30

35

40

45

50

55

60

65

70

75

80

85

90

95

100

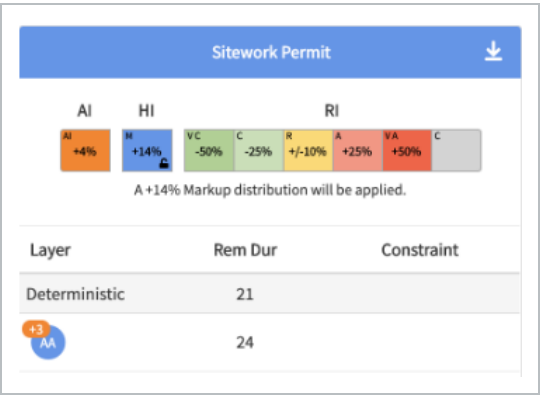
A P-value of 75 can be interpreted as “we are 75% confident in hitting or beating a target goal”.

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 18 Feb 19 A	07 Jan 22 17 Jan 23	1055 1430		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Preconstruction	18 Feb 19 A 18 Feb 19 A	21 Feb 20 11 Dec 20	369 663		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Design	18 Feb 19 A 18 Feb 19 A	17 Sep 19 26 Jun 20	212 495		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Create Early Stage Construction Docs	21 Jun 19 21 Feb 20	17 Sep 19 26 Jun 20	63 91	0 0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

## 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.

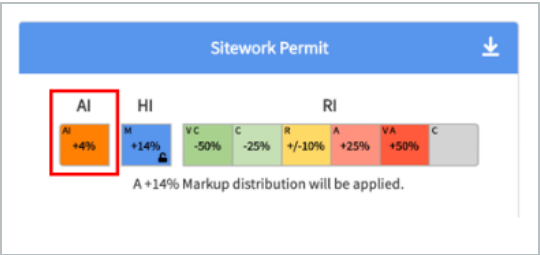


The reviewer has three options for providing markup feedback:

- **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).

Sitework Permit

AI

HI

RI

AI

HI

RI

A +14% Markup distribution will be applied.

Layer	Rem Dur	Constraint
Deterministic	21	
	24	

RISK INTELLIGENCE (RI)

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

Multi-Use Commercial

AI

HI

RI

AI

HI

RI

Inference Engine suggests a distribution of 84% to 100%

Distribution

Triangular

Uniform

Min %

84

Max %

100

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

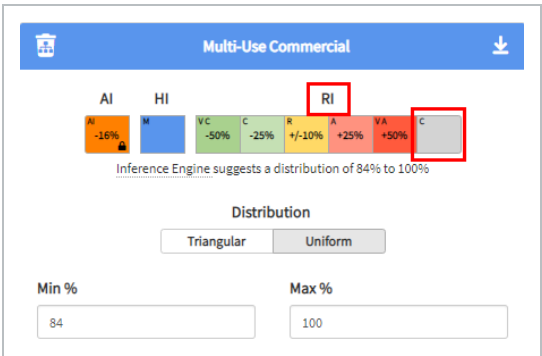
Classification	Range	Guidance
Very Conservative	50% - 100%	Could take as little as 50% less
Conservative	75% - 105%	Most likely less
Realistic	90% - 110%	Within +/- 10%
Aggressive	95% - 125%	Most likely more
Very Aggressive	100% - 150%	Could take up to 50% more

NOTE

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

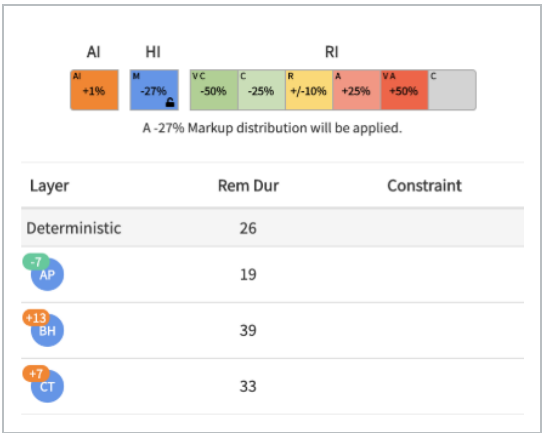
Using the Custom Intelligence lets you use a user defined level of risk.



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.



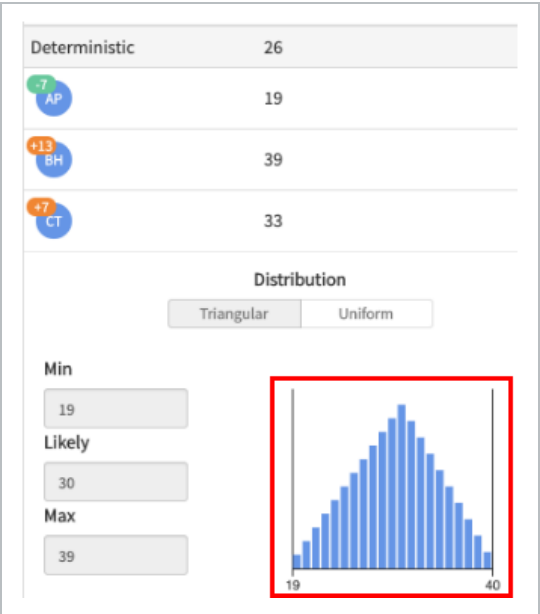
Notice here where three members contributed their feedback:

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

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

Layer	Rem Dur	Constraint
Deterministic	26	
 AP	19	
 BH	39	
 CT	33	

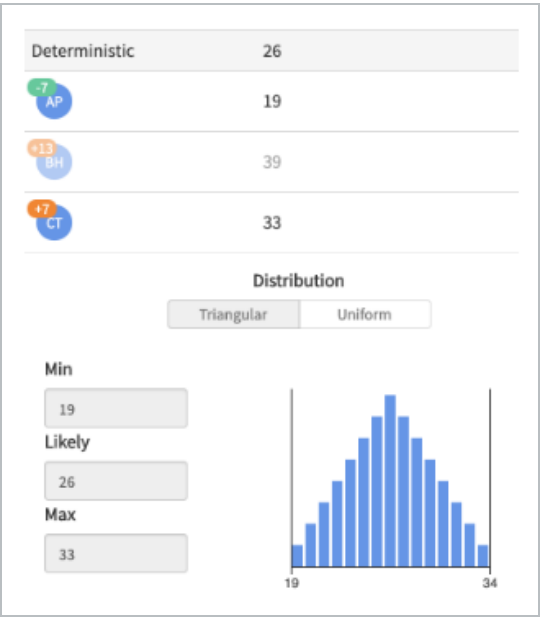
If you decide to consider all the HI feedback, then a distribution triangle is automatically applied for the risk simulation distribution.



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.

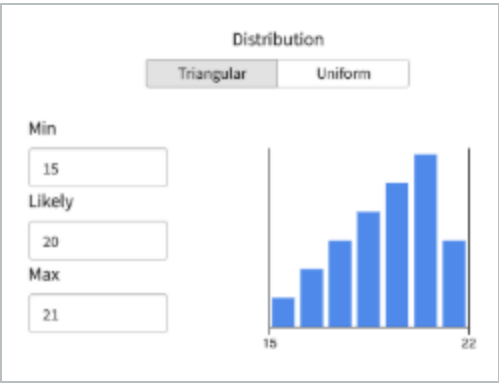
If you want to discount or ignore a particular feedback, click on the contributor to remove them from the feedback. The distribution triangle adjusts automatically.





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)
	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

NOTE

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.

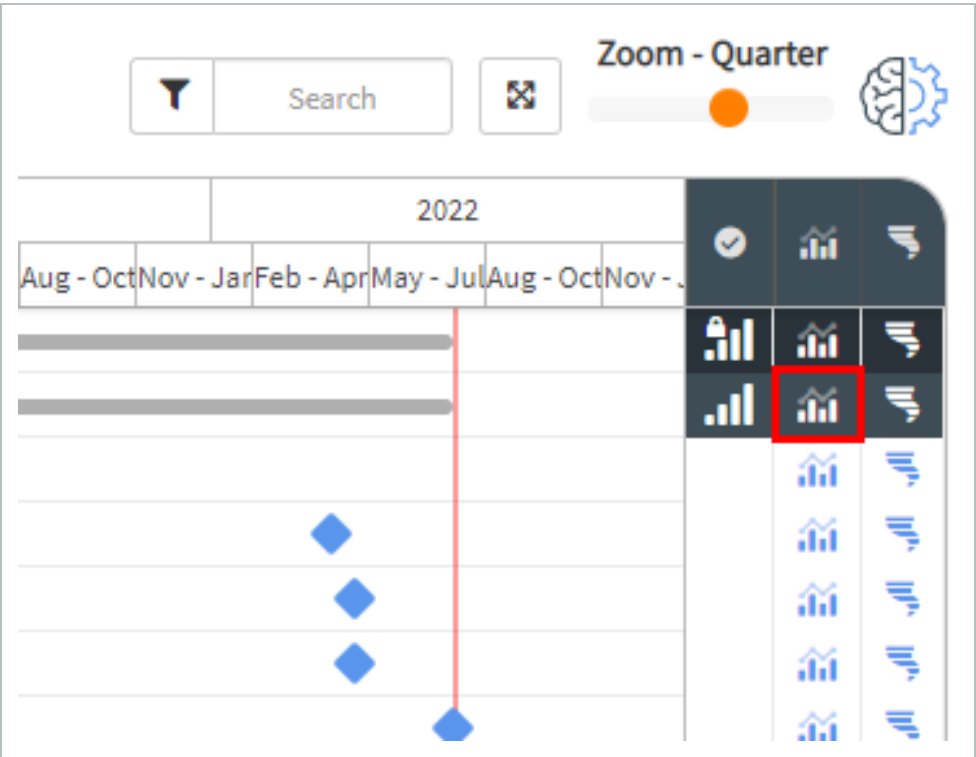
TIP

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.

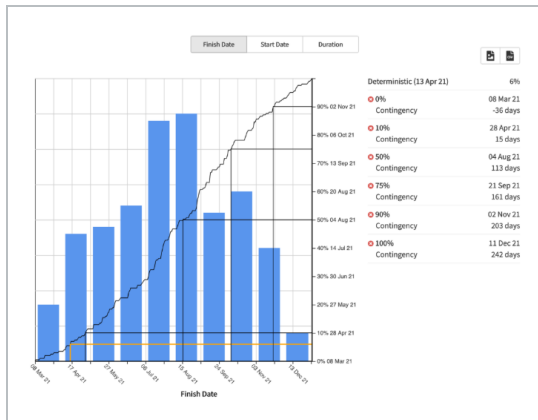
Once feedback on uncertainty and events are reviewed, you are ready to generate outcomes via Risk Histograms and Tornado Analysis.

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.

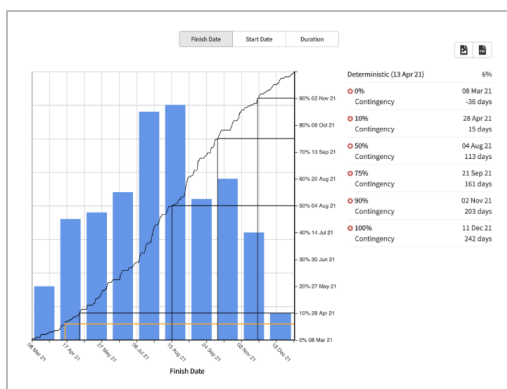


By clicking on the Risk histogram icon at the top level, you can report on the total project, as shown below.



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.



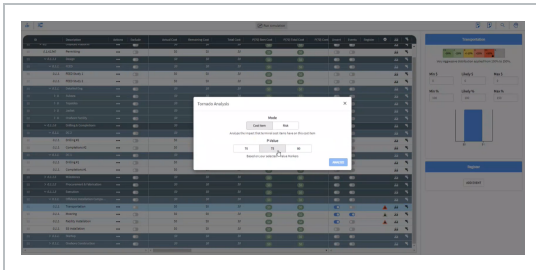
## TORNADO ANALYSIS

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.



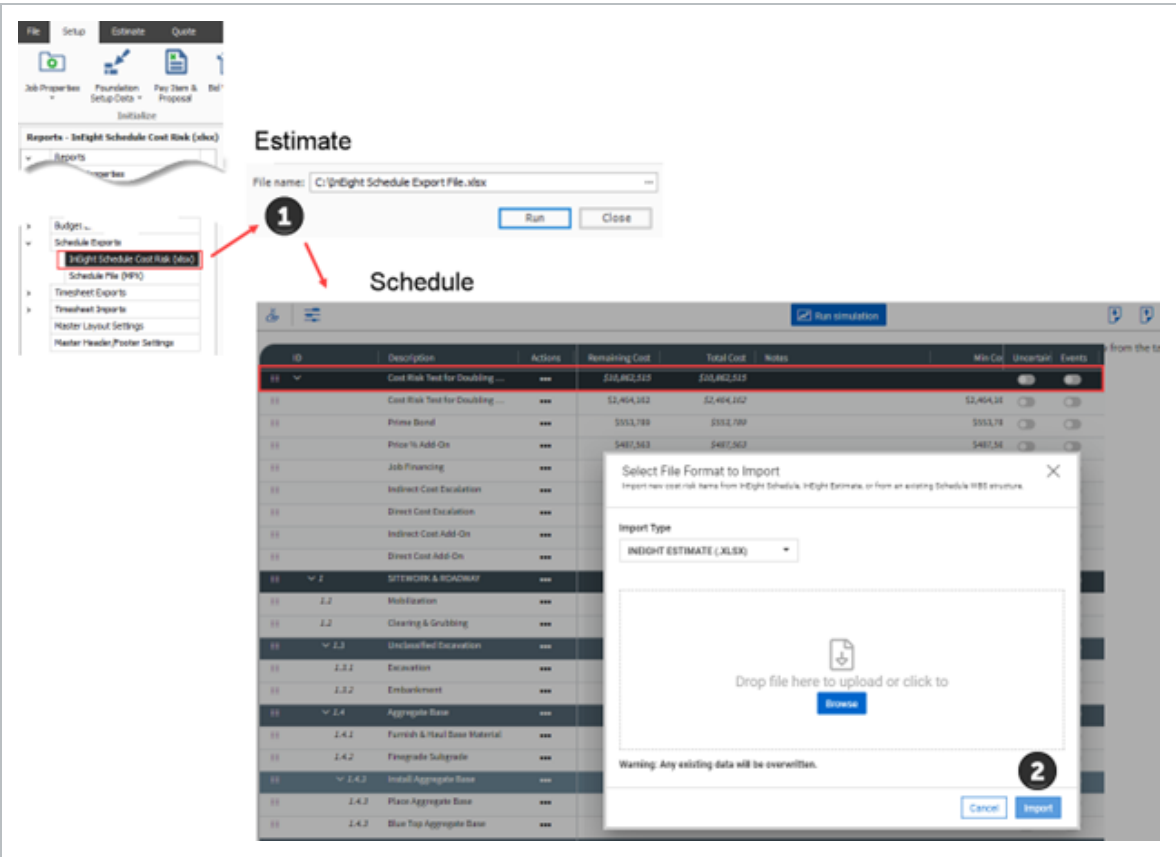
In this example, the P-Value is set to 75 based on the selected P-Values Markers. Selecting **Analyze** shows the Uncertainties and Risk Events for the Cost Item Tornado Analysis.



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

- View
- Level
- Display Number

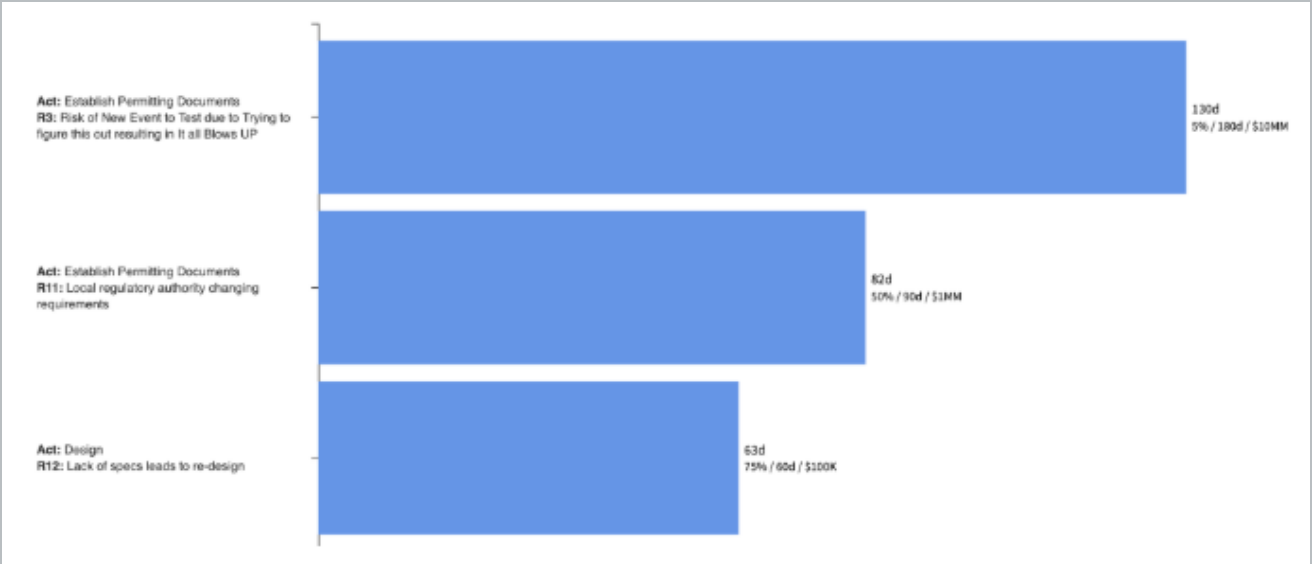




## RISK MODE

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.



# LESSON 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.





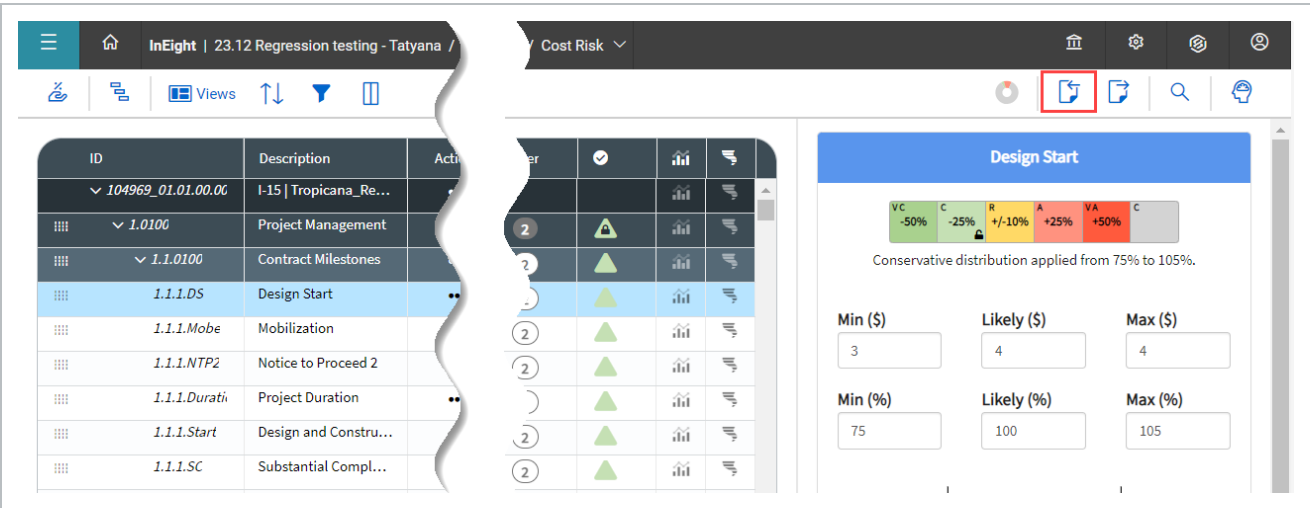
File name: C:\Users\Paul.\Documents\InEight Schedule Export File.xlsx

	A	B	C	D
	CBS Position Code	Description	Total Cost (Forecast)	Suspend
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

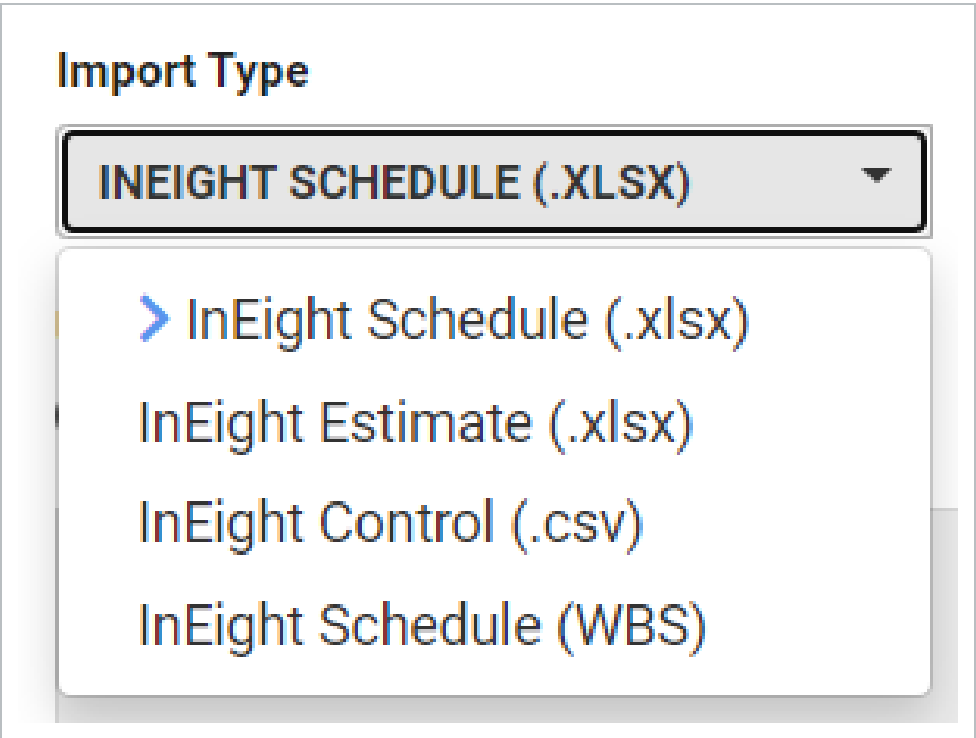
Run Close

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



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.

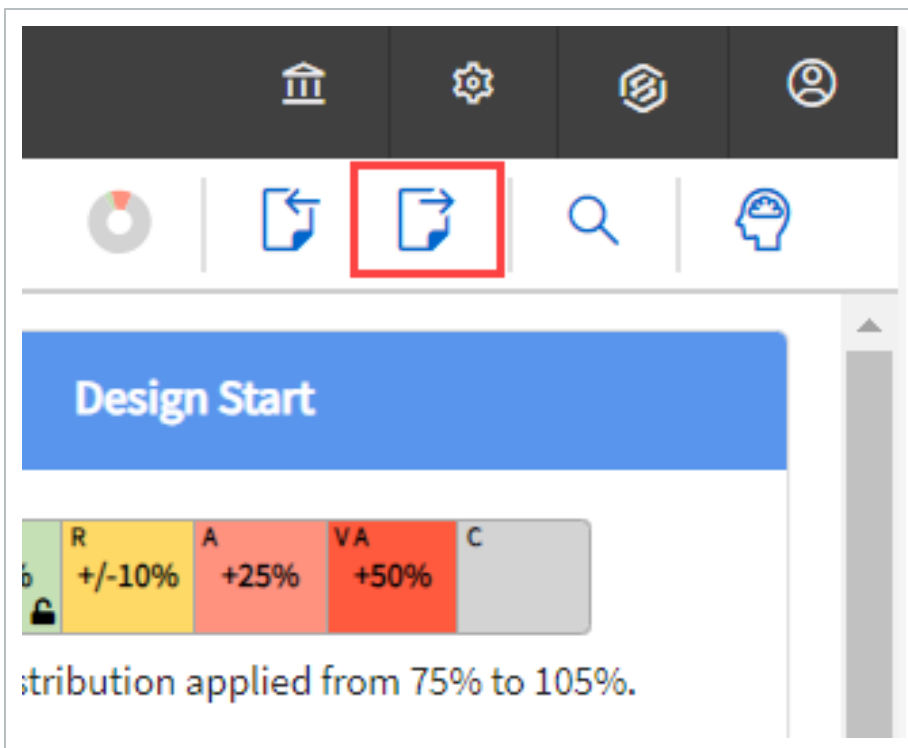
Only the InEight Schedule export type can be imported back in, and not the export.

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.

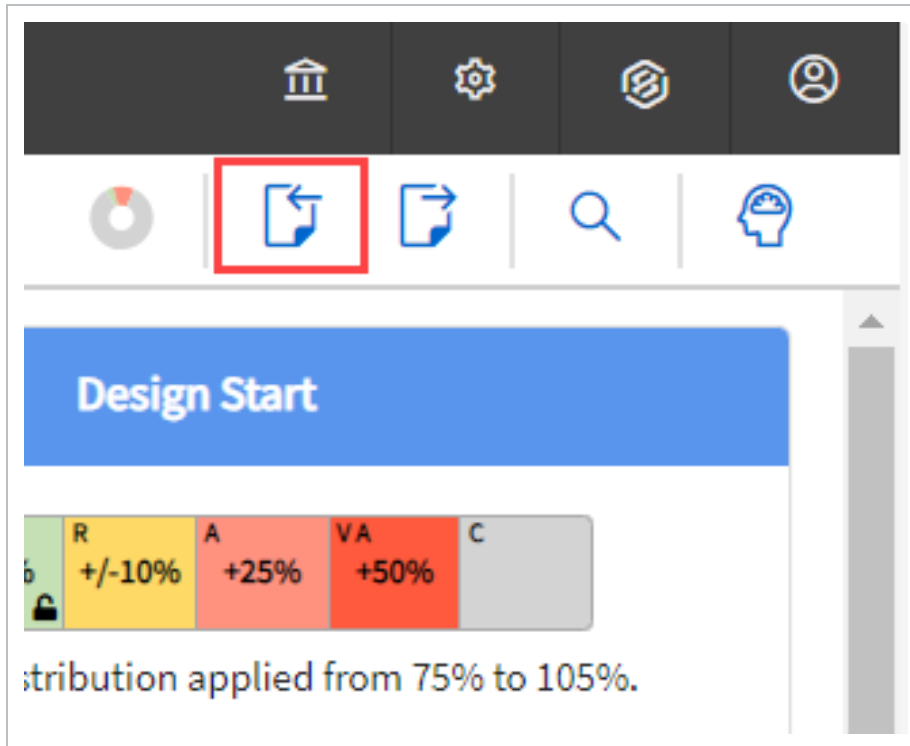
The Schedule WBS import pulls the Actual Cost and Remaining Cost values, based on the assigned resources from the schedule.

## STEP BY STEP – IMPORT COST RISK ITEMS

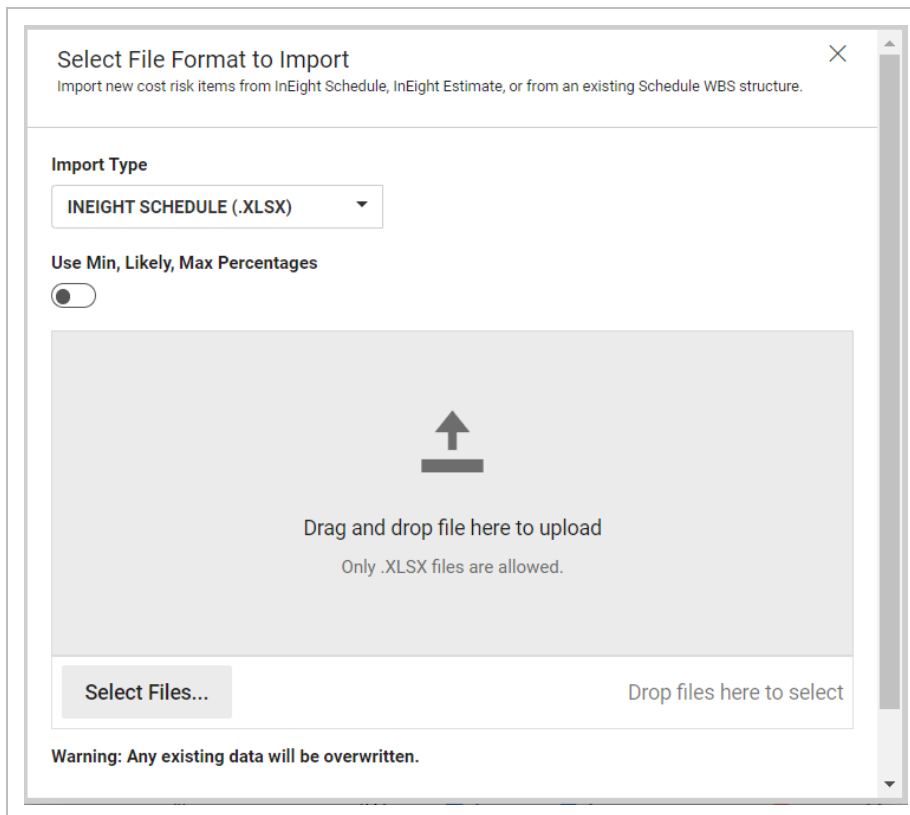
1. From the Schedule > **Cost Risk**, click the **Export** icon.



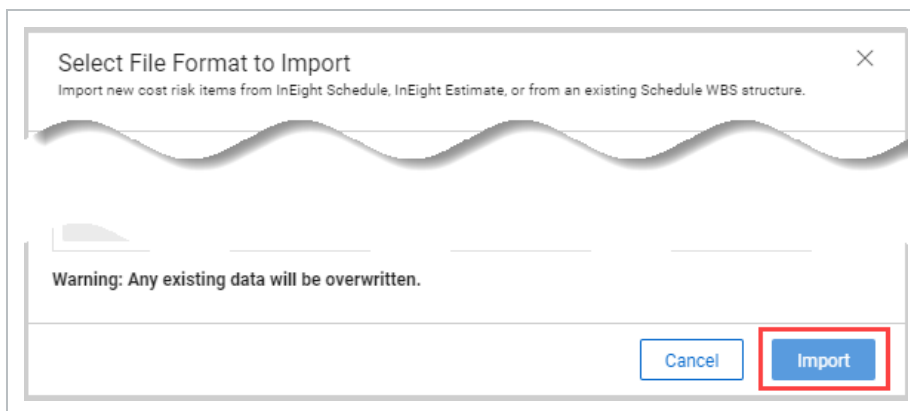
2. From the Export Type drop-down, select either **Data Import** or **InEight Schedule**. Open either file to change the contents of the file for step 4 below.
3. Click the **Import** icon.



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

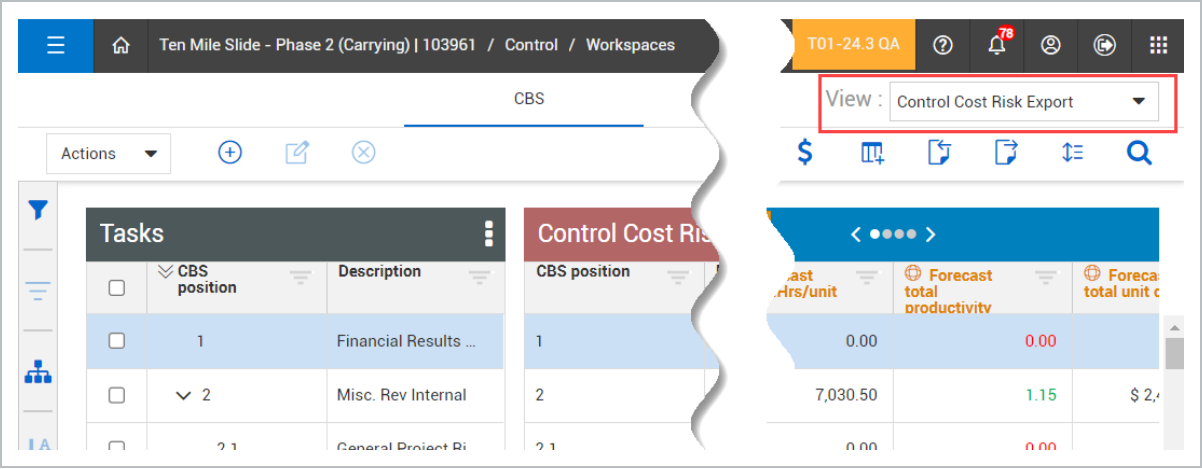
File name: C:\Users\Paul\Documents\InEight Schedule Export File.xlsx

	A	B	C	D
	CBS Position Code	Description	Total Cost (Forecast)	Suspend
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	SITWORK & 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

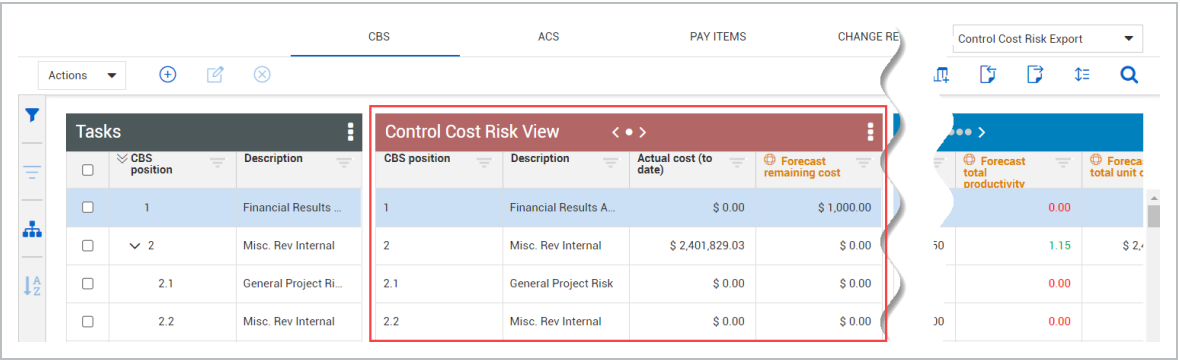
Run Close

## 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.



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.



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



Control / Workspaces

CBSACS

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)

T01-24.3 QA

View : Unsaved (Live forecast)

01/01/2024

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

Select Export: **CBS as CSV**.

\$

Export:

CBS as CSV

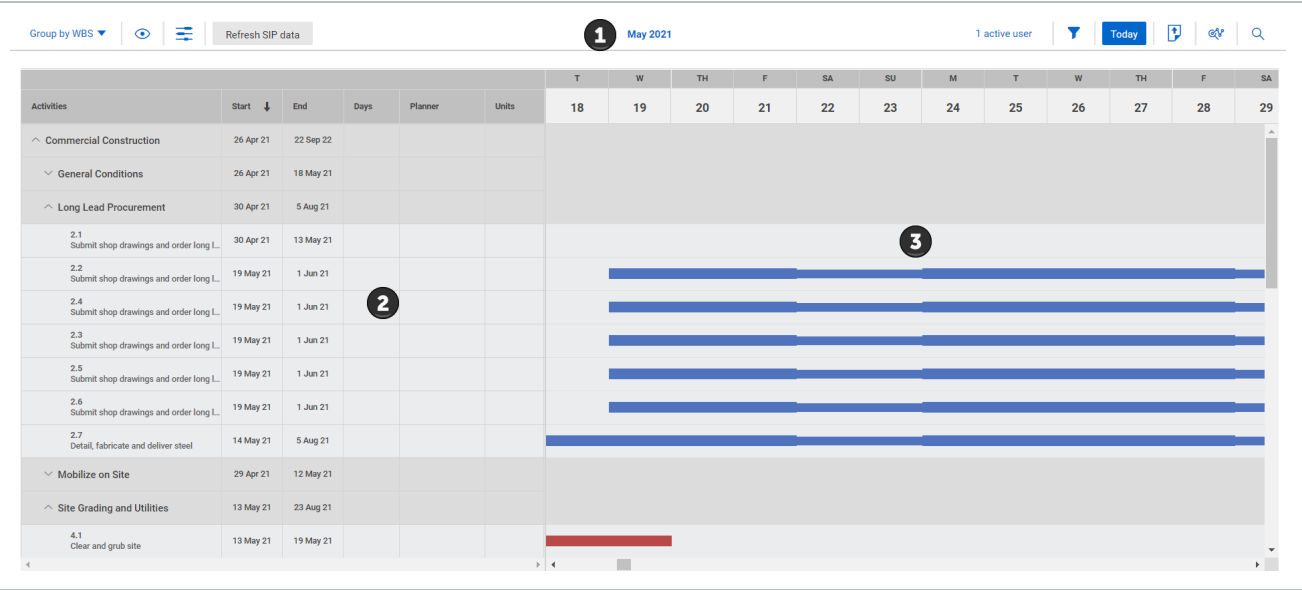
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# LESSON 10 – SHORT INTERVAL PLANNING

## 10.0.1 SIP OVERVIEW

### 10.0.1.1 PROCESS 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 conducted.



### 10.0.1.2 PLANNING STEPS/TASKS

Steps are created by selecting the Add icon on the row of the activity being planned out. After steps are added, you can then select the step to fill in information (description, dates, duration, and planner) for the task to be completed.

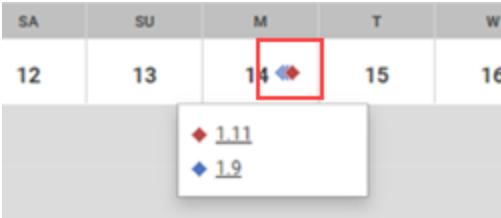


The screenshot shows a project schedule table. At the top, there is a header row with a project name 'A2350 60% Design', a red box around a blue circular button with a plus sign, and several date columns: '11 Nov 21', '16 Feb 22', and a total value '9,000'. Below the header, there is a table with three rows of activities. The first row is 'Step 35' with a date of '11 Nov 21'. The second row is 'Pressure Calculaitons' with dates '15 Nov 21' and '19 Nov 21'. The third row is 'Slope Feed Calculations' with dates '10 Nov 21' and '16 Nov 21'. A tooltip 'Add a step' is visible over the red box.

A2350 60% Design		11 Nov 21	16 Feb 22			9,000
Step 35		11 Nov 21	17 Nov 21	5	None	
Pressure Calculaitons		15 Nov 21	19 Nov 21	5	None	6,000
Slope Feed Calculations		10 Nov 21	16 Nov 21	5	Jordan Broo...	3,000

10.0.1.3 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.



10.0.1.4 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.

## 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

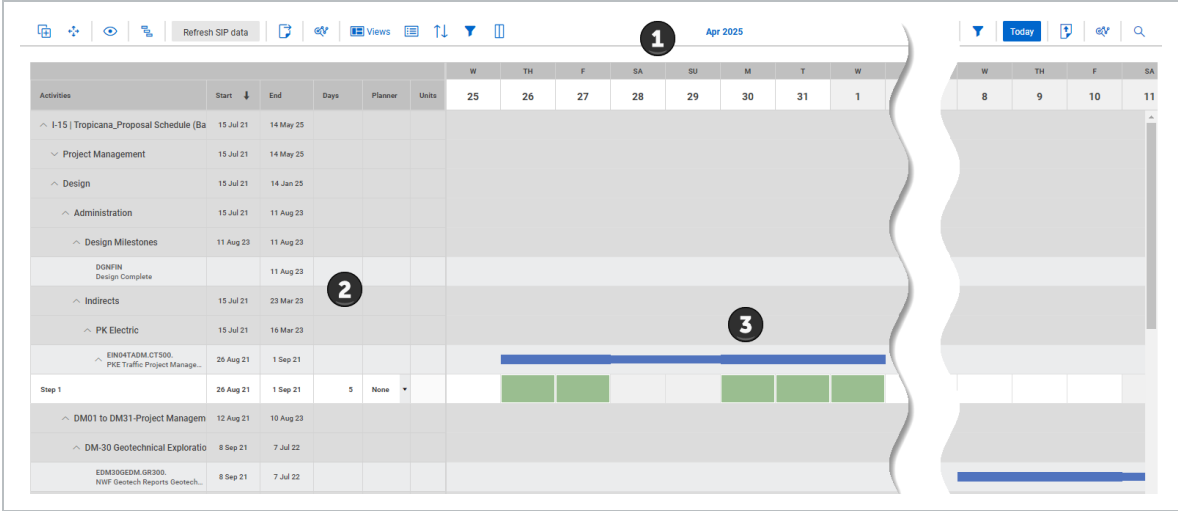
Save

## 10.0.2 SIP GENERAL NAVIGATION

### 10.0.2.5 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, in the project navigation menu click **Short Interval Planning**.



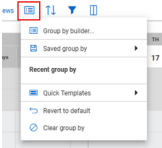
In the SIP view there are three primary sections:

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.

TOOLBAR - ICONS, FUNCTIONS, SETTINGS

GROUP BY

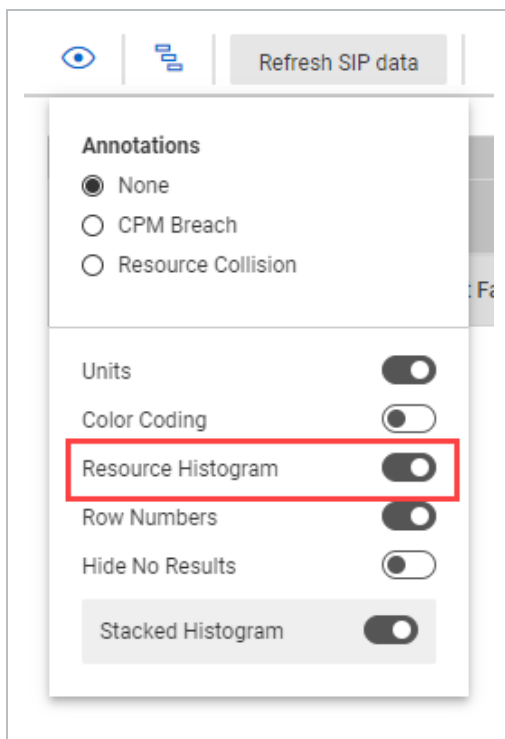
The Group by builder menu lets you see activities grouped together based on the option selected. This functionality provides flexibility to schedulers and execution planners in how they want to organize and assess tasks, resource utilization, and activity progress. You can also group activities and task by codes when knowledge tags are used on the project.



## SIP FUNCTIONS

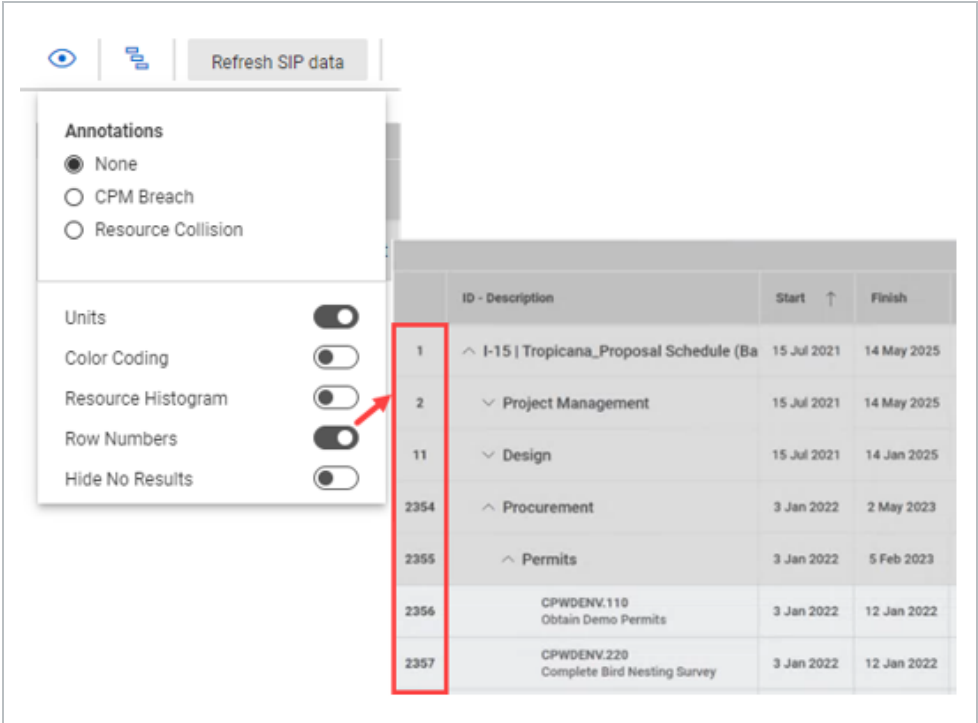
Description	Function
View options	Select metrics, view row numbers, annotations, color coding for the view, and resource histogram.
Detail level	Select the level of detail shown in the Activities section.
Filter	Opens the filter function to set parameters for the activities and tasks that show in the view.
Export	Export the current view to an Excel spreadsheet.
Zoom level	Sets the date range interval shown in the calendar.
Search	Search and find a specific task or step.

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 the SIP view, click the **View options** icon, and then select **Resource histogram**.



You can choose to view a single resource or select **Stacked Histogram** to show all SIP resources assigned to the specific date. You can also resize the grid and histogram areas to show more or less of the date time line.

You can add row columns to the SIP schedule by selecting the Row Numbers toggle.



## ACTIVITIES - STEPS, ICONS, FUNCTIONS

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.



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	

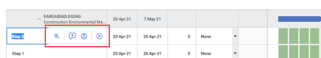
Planning packages and activities are shown in a hierarchy. Planning packages group activities the same way as in the CPM schedule. Each activity line shows a planned start date, end date, activity ID, and the activity description.

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.

To create a new step, click the **Add** icon. A step is created to input task details.



Hover over the step to show the available Action icons.

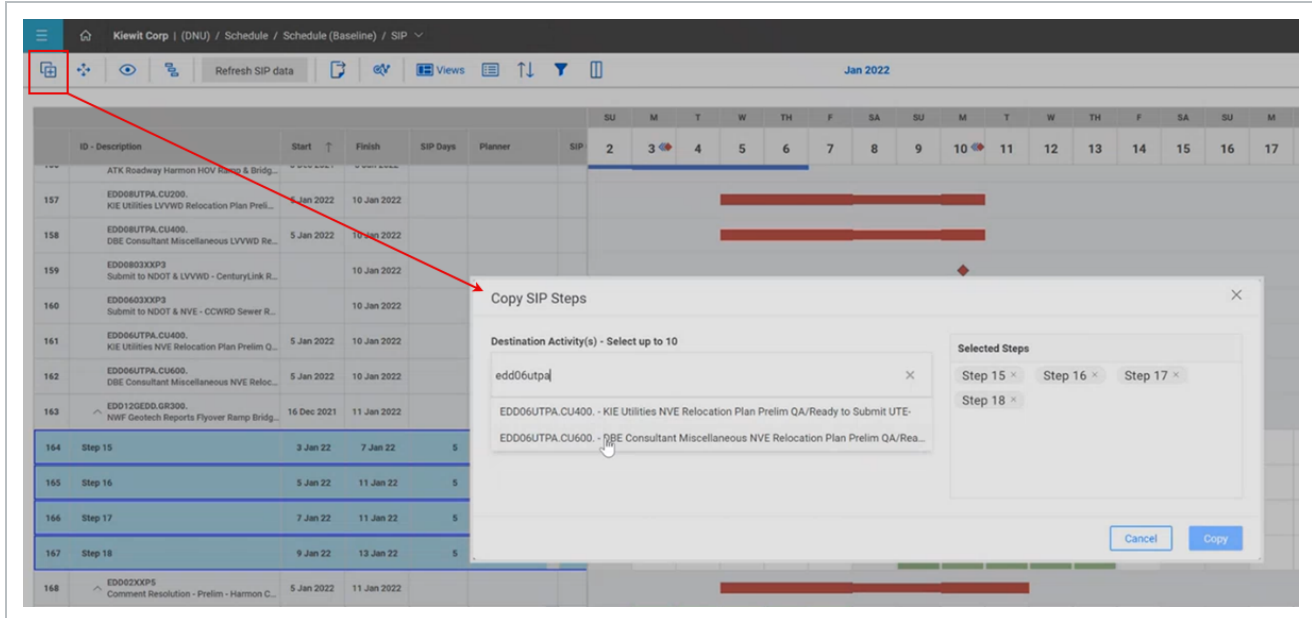


- **Zoom to start** moves the Gantt chart to one day prior to the step start date.
- **Add comment** opens a text box where you can type text and save a comment.
- **Add SIP resource** opens a SIP resource window that lets a planner assign an existing SIP resource or create a new SIP resource that can have units assigned to it.
- **Remove step** that when selected, deletes the step.

## 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

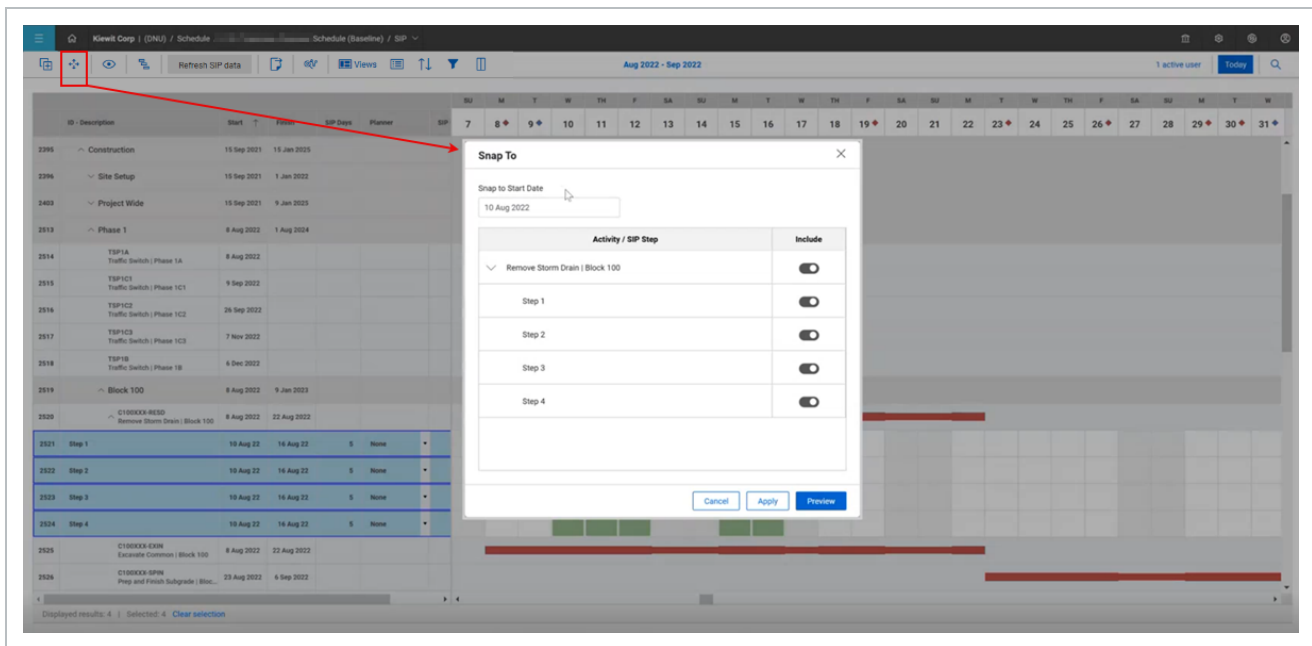
remove steps that are selected from the list to be copied.



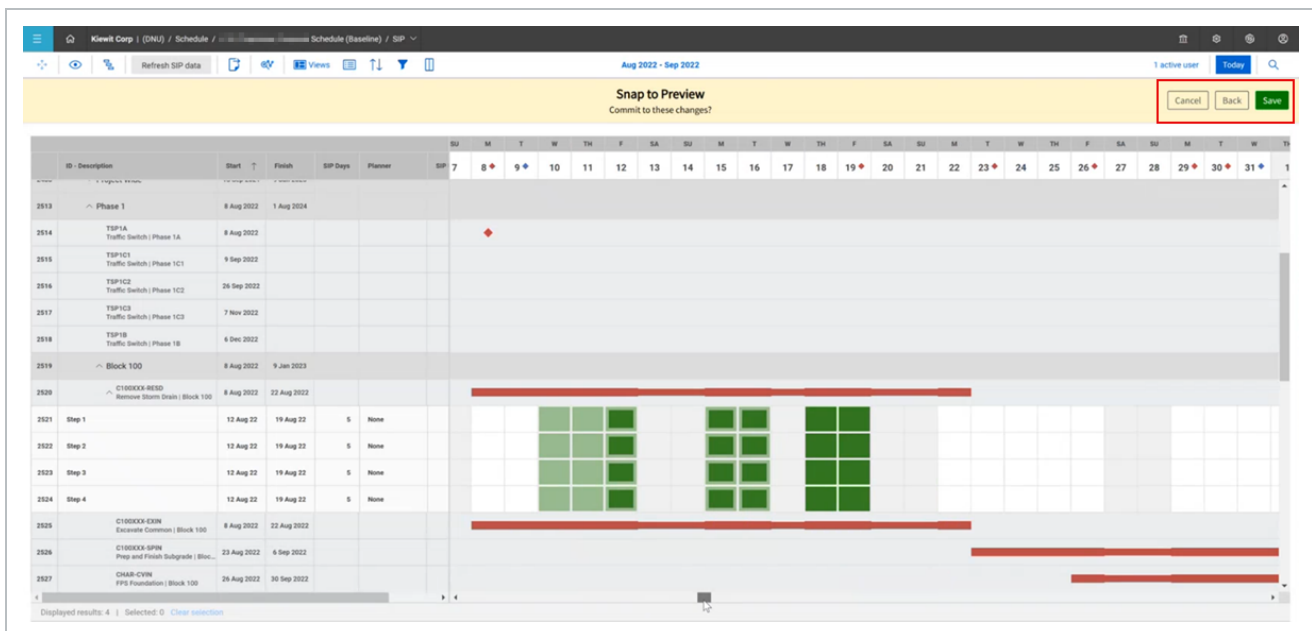
## SNAP TO

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.



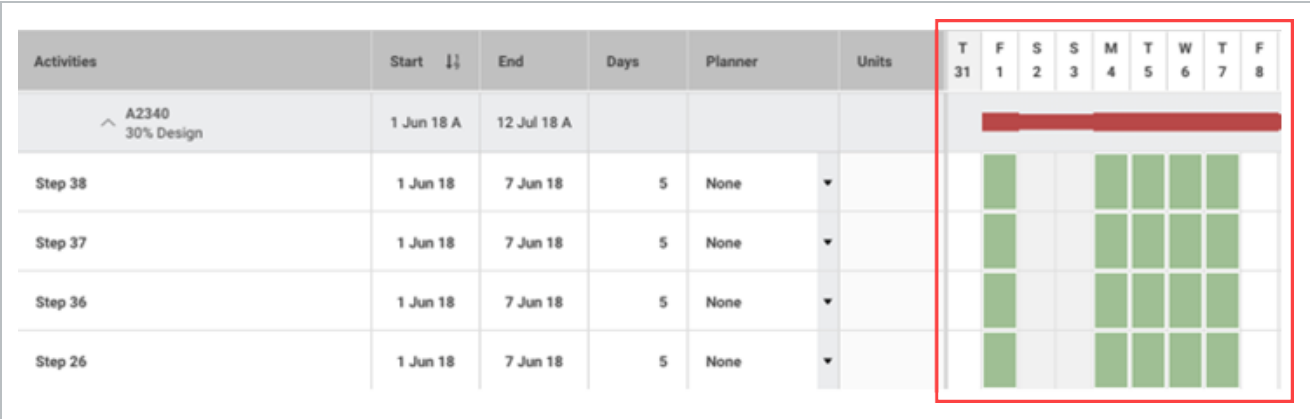
After selecting the new start date, click **Preview** to show an overlay of the steps with the new start date. You can save the changes in the preview or click **Back** to close the preview and open the dialog box again to make additional changes as needed.



## CALENDAR - VIEWS, ICONS, FUNCTIONS

The Calendar date range is adjusted in the header of the SIP view by selecting the Zoom level icon. 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 step bars are the days that step is being worked. As a Planner you have the ability to 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

InEight 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.



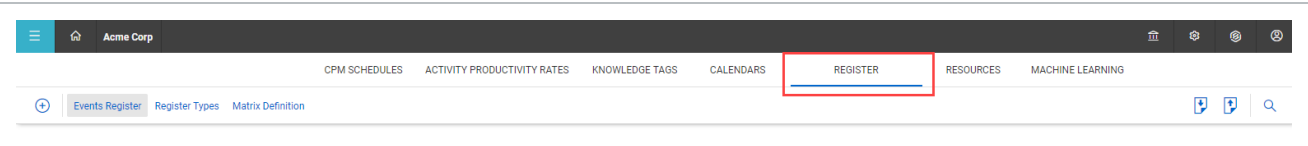
You can click the weather icon to open the selected day’s weather forecast. This data is powered by Open Weather.

# LESSON 11 – REGISTER ITEMS

## ORGANIZATIONAL REGISTER ITEMS

### EVENTS REGISTER

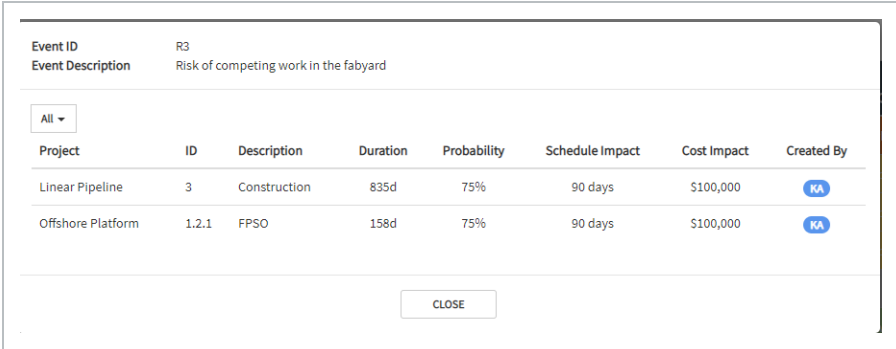
Knowledge Library Register Items can be viewed by accessing the Knowledge Library, and clicking on the **Register** tab



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	Activities	KA	Delete
	R3	Risk	▼ Risk of competing work in the fabyard	Identify overflow yards	High	High	High	16	2	KA	
	R2	Risk	▼ Risk of change in permitting authority	Schedule review with permitting office	Medium	High	Medium	12	5	KA	
	R7	Risk	▼ Risk of unknown soil conditions		Medium	High	Medium	12	2	KA	
	R4	Risk	▼ Risk of final route may not be known until 30 days before site access		Low	High	Medium	8	4	KA	
	O2	Opportunity	▼ Opportunity of identify third party engineering firm to support design		Medium	Low		6	5	KA	
	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	14	KA	
	R6	Risk	▼ Risk of weld issues causing rework		Low	Medium	Low	6	1	KA	
	R5	Risk	▼ Risk of local regulatory changing requirements		Very Low	Medium	Low	3	5	KA	
	O1	Opportunity	▼ Opportunity of use alternate pre-fab modules to accelerate delivery		Medium					KA	
	R10	Risk	▼ Risk of Hurricane due to weather resulting in destruction						1	RAI	

Name	Description
Verified	Items can be either created directly in the Knowledge 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,

Name	Description
	and Action Item.
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	<p>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>  <p>The screenshot shows a modal window titled 'Event ID R3 Risk of competing work in the fabyard'. It contains a table with columns: Project, ID, Description, Duration, Probability, Schedule Impact, Cost Impact, and Created By. The table has two rows: 'Linear Pipeline' with ID 3 and 'Offshore Platform' with ID 1.2.1. Both rows show a duration of 835d and 158d respectively, a probability of 75%, a schedule impact of 90 days, and a cost impact of \$100,000. The 'Created By' column shows 'KA' for both. A 'CLOSE' button is at the bottom right.</p>
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.

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 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"/>		

Click **Add Register Item** to create a new register item with a custom defined caption and code prefix.

CPM SCHEDULES

ACTIVITY PRODUCTIVITY RATES

KNOWLEDGE TAGS

CALENDARS

REGISTER

RESOURCES

Events Register

Register Types

Matrix Definition

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

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"/>		

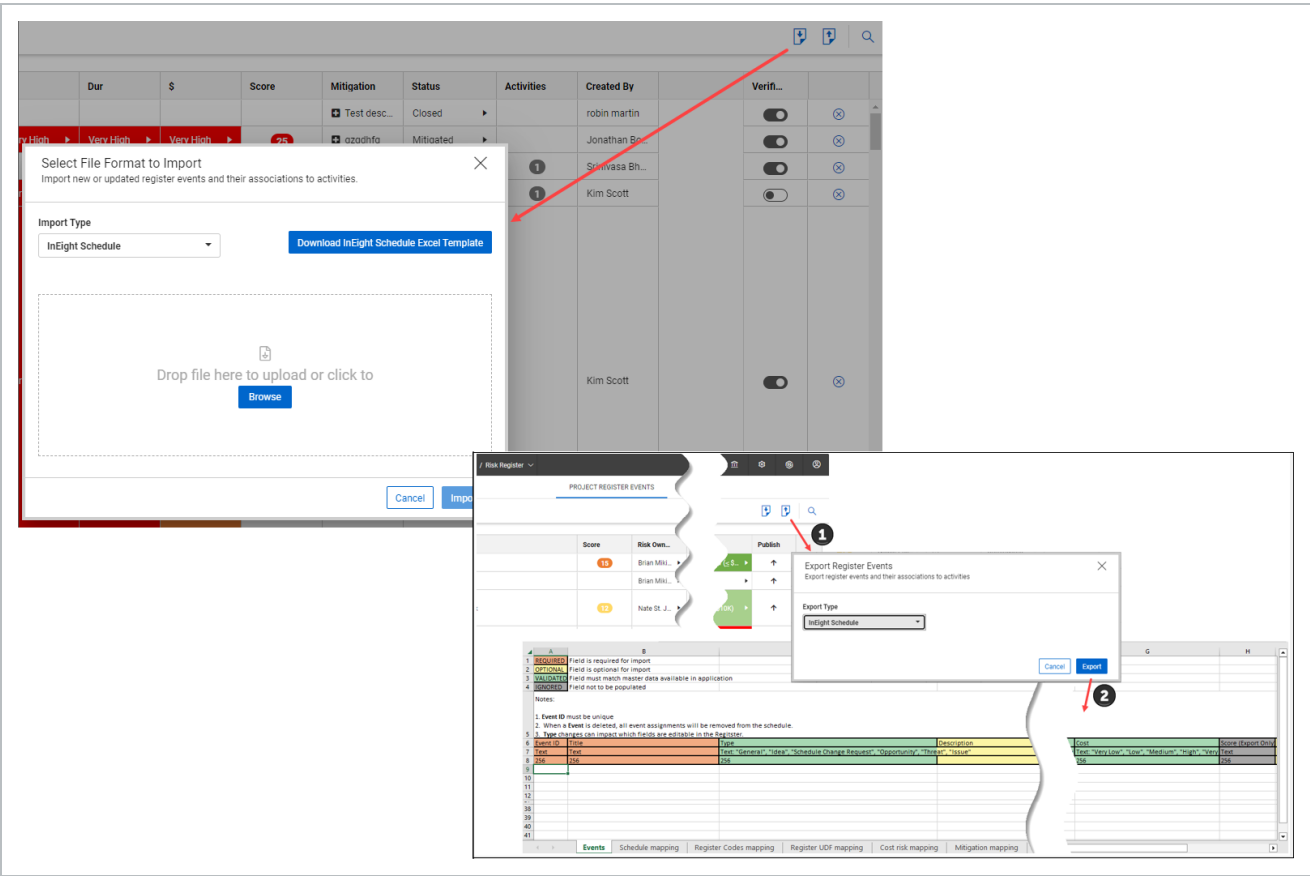
## IMPORT AND EXPORT

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.

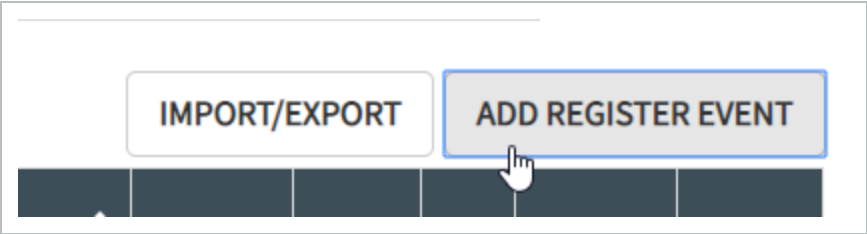
The export file closely reflects what is exported from the Schedule Plan view. A color-coded key has been added in the upper left corner in the export file that shows you the required, optional, validated, and ignored records. Additional mapping tabs are also included at the bottom of the Microsoft Excel 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.

IMPORT/EXPORTADD REGISTER EVENT

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

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	<div></div>
Low	25%	≤ 30 days	≤ \$10,000	<div></div>
Medium	50%	≤ 60 days	≤ \$100,000	<div></div>
High	75%	≤ 90 days	≤ \$1,000,000	<div></div>
Very High	95%	≤ 180 days	≤ \$10,000,000	<div></div>

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.

Events Register

Regi

Event Id	Title	%	Dur	\$	Score	Mitigation	Status	Activi
G1	Threat k est 4-29	Ultra High ▶	Ultra High ▶	Ultra High ▶	81	+ ttytrtrurt...	Unmitigated ▶	
G2	General Plan range	ra High ▶	Medium ▶	Low ▶	45	+ Lorem ips...	Closed ▶	
G3	Threat Pl range	Low						
G5	General Pl range							
G6	General Opportu High							
GENERAL3	General Risk register							
GENERAL4	10/19					+ M1	Unmitigated ▶	
I1	think ah					+ M1	Closed ▶	
	Idea Plan							

Add register event

Threat

\* Title (required)

Title

optional) 2000

Description

CancelAdd

General

Idea

Issue

Opportunity

Schedule Change Request

Threat

Custom Type 1

TP Type

## 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	%	🕒	💰	

- **Probability:** Likelihood 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.

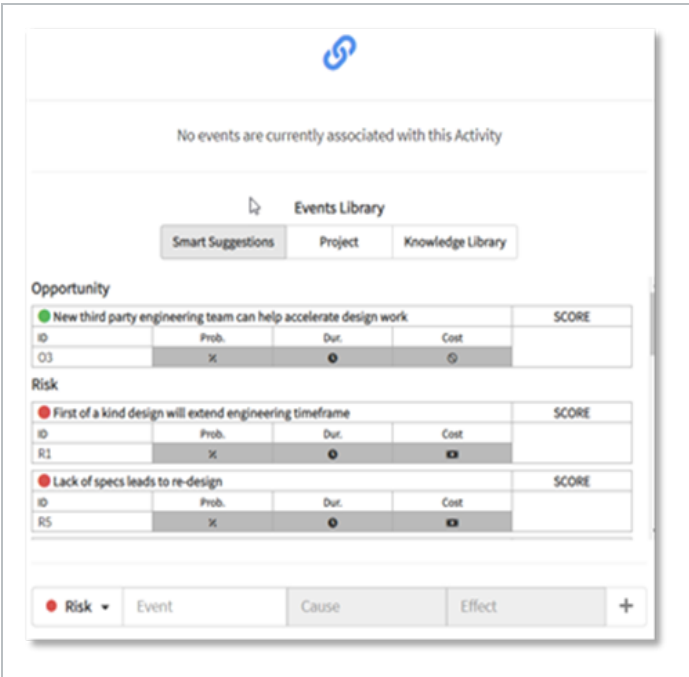
# CREATE AN EVENT

- 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.

NOTE

This icon might be red or yellow depending on the markup provided.

- 2. A new window opens with the Events Library.



- 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

Threat

Threat

Opportunity

Issue

Idea

Schedule Change Request

Test

Test

\* Title (required)

Title

5. Fill out the Event, Cause, and Effect fields. As these fields are populated, a summary of the event is shown below.

Risk

Additional Cure days

Cold Temperatures

Schedule Delay

+

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).

Risk

✖

Risk of Additional Cure days due to Cold Temperatures resulting in Schedule Delay

SCORE

ID	Prob.	Dur.	Cost
R2	%	h	\$

Risk				
⚠ Risk of Additional Cure days due to Cold Temperatures resulting in Schedule Delay				SCORE
ID	Prob.	Dur. ①	Cost	6
R2	50%	30d	\$10K	

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

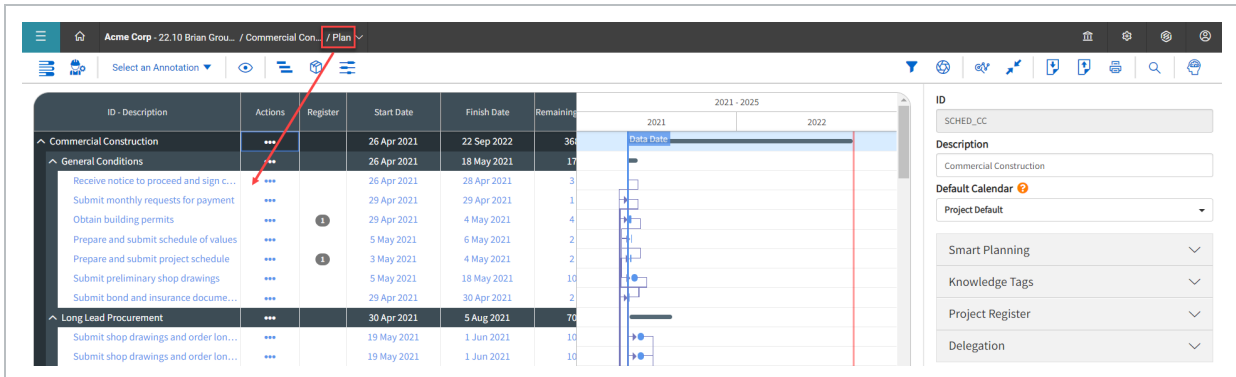
Range	Score
Ultra Low	1
Extremely Low	2
Very Low	3
Low	4
Medium	5
High	6
Very High	7
Extremely High	8
Ultra High	9

## ASSIGN REGISTER ITEMS

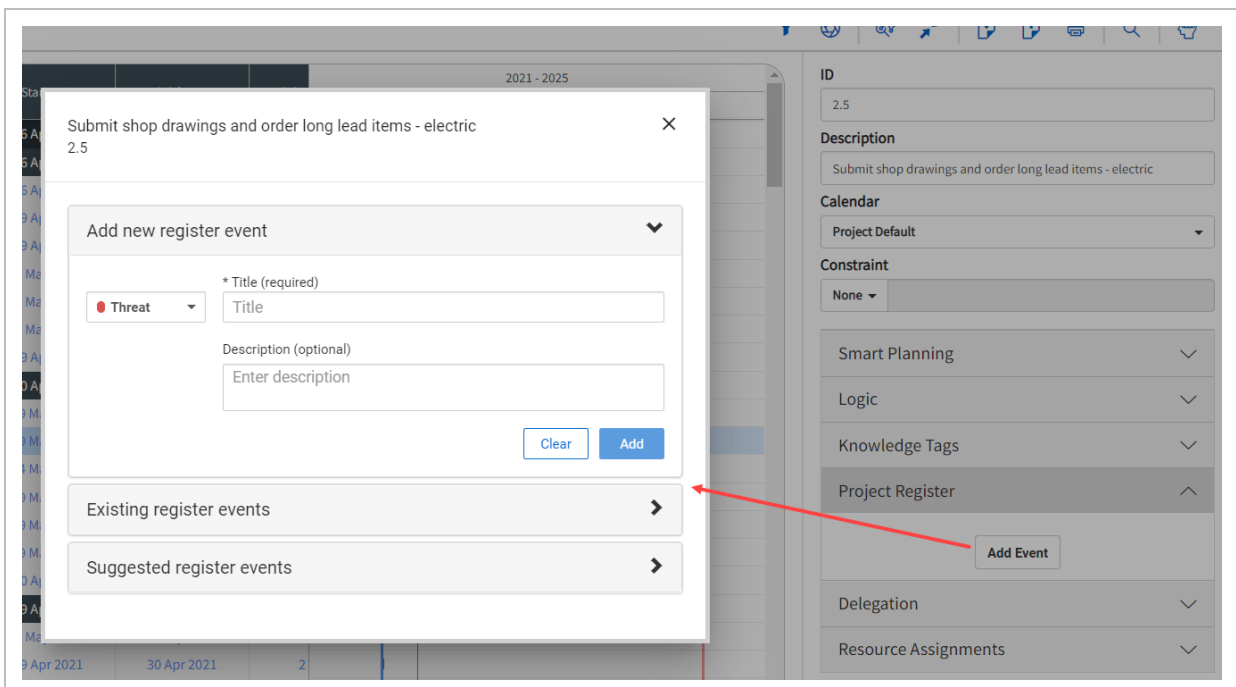
Register items consist of risks, opportunities, change orders, and any other qualifiers that your organization has defined.

## 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.




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.



Risk

Site access delays

ID

Prob.

Dur.

Cost

SCORE

R2

50%

30d

\$100K

9

Events Library

Smart Suggestions

Project

Knowledge Library

Risk

Site access delays

ID

Prob.

Dur.

Cost

SCORE

R1

%

!

Risk

Event

Cause

Effect

+

CLOSE

- An item has now been added to this WBS element.

NOTE

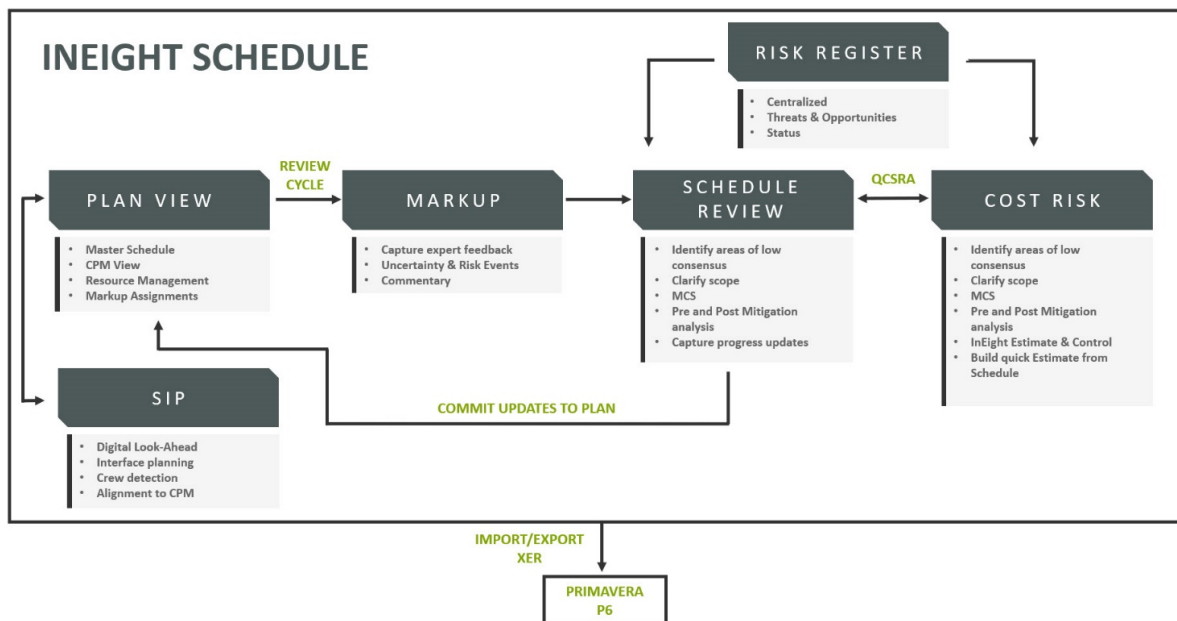
When the Register column is in the gantt view there is an indicator on the line, telling other users that the WBS element has register items associated with it.

Interior	25 Mar 21 26 Aug 21	155	111	0%		...	03 Dec 21	
Floor 1	25 Mar 21 26 Aug 21	155	111	0%		...	03 Dec 21	
Floor 2	25 Mar 21 31 May 21	68	48	0%		...	07 Sep 21	
Floor 3	14 May 21 20 Jul 21	68	48	0%		...	27 Oct 21	
Electrical Rough-in	14 May 21 27 May 21	10	10	0%	0	...	03 Sep 21	?
Finishes - Drywall	11 Jun 21 03 Jul 21	16	16	0%	0	...	09 Oct 21	!
Finishes - Final Paint	13 Jul 21 20 Jul 21	6	6	0%	0	...	27 Oct 21	
Finishes - Lighting Inst.	05 Jul 21 12 Jul 21	6	6	0%	0	...	19 Oct 21	
Plumbing Rough-in	28 May 21 10 Jun 21	10	10	0%	0	...	17 Sep 21	
Structure	15 Dec 20 28 Jun 21	196	140	0%		...	05 Oct 21	

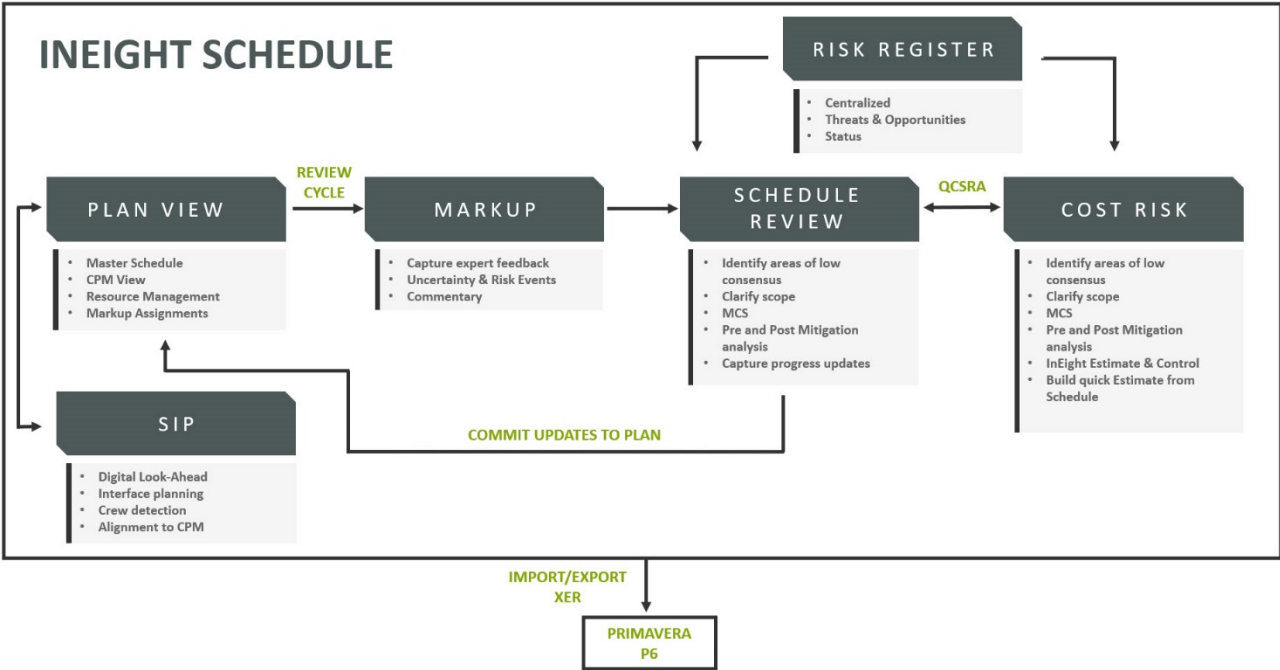
# 11.1 INEIGHT SCHEDULE WORKFLOWS

## 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.

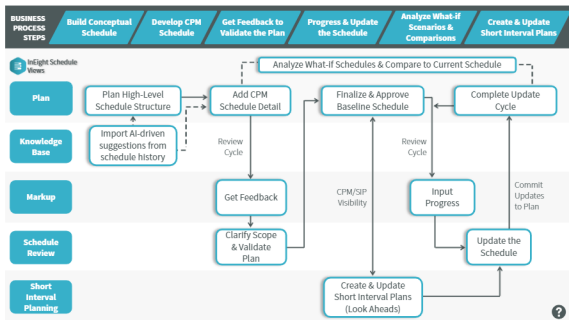


## INEIGHT CONTROL GENERAL WORKFLOW



### 11.1.2 SCHEDULING & SHORT INTERVAL PLANNING WORKFLOW

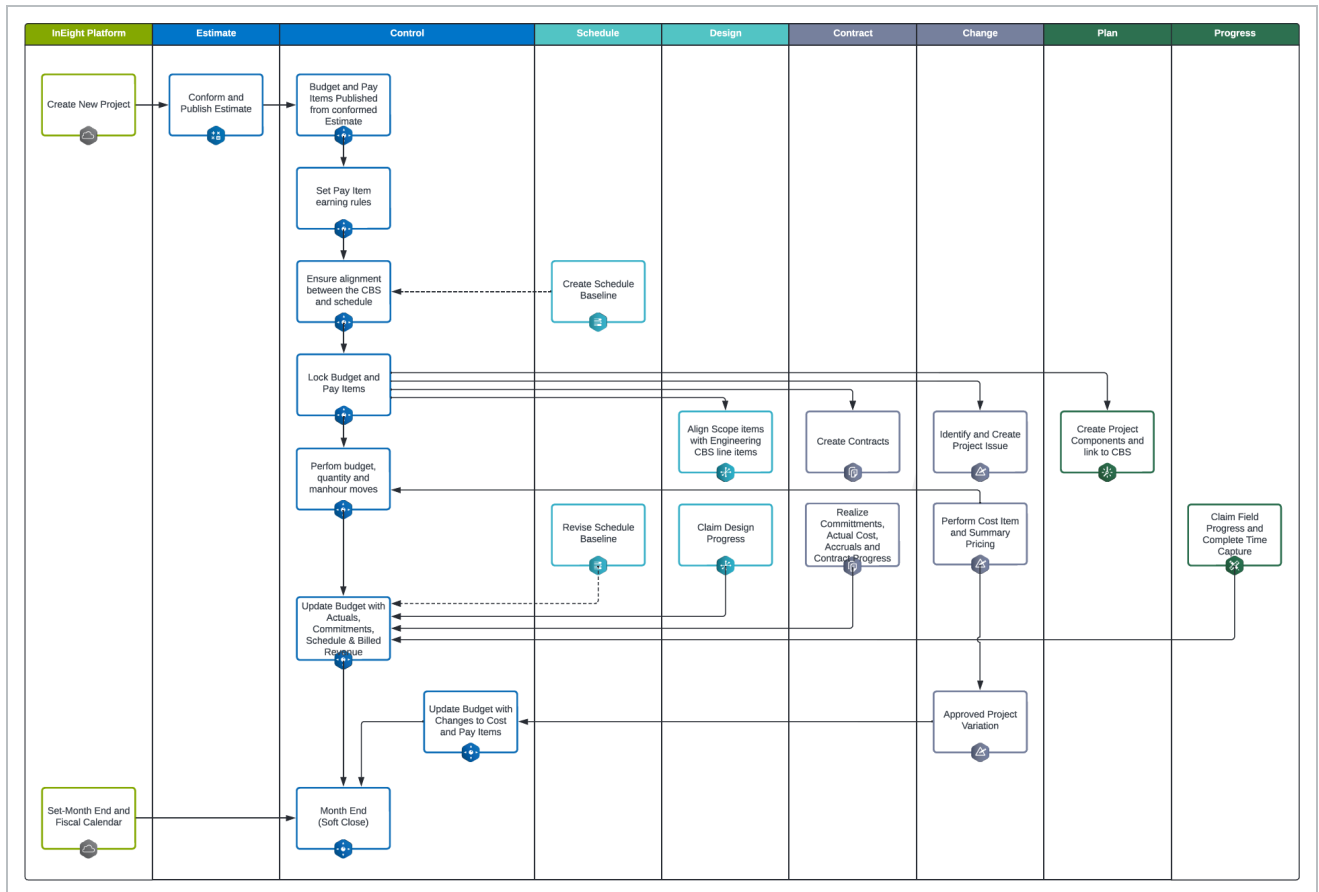
This interactive workflow looks at the key functions of InEight Schedule through the lens of a typical scheduling business process. As you click on each business process step, the workflow highlights the key functions involved, along with the InEight Schedule view you would use for that step.



### 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 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.

The screenshot shows the 'Logic' tab in the InEight Schedule interface. It displays a table with columns: Predecessor Activity ID, Predecessor Activity Description, Successor Activity ID, Successor Activity Description, Lag, and Type. The table lists various activities and their dependencies, such as 'Install Spool 3' (A1430) preceding 'Complete Line A' (A1540). Below the table, there are tabs for WBS, Activity, Logic (selected), Codes, WBS UDFs, Activity UDFs, and Resource Assignments.

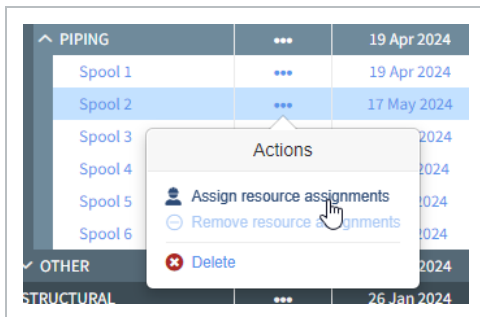
Predecessor Activity ID	Predecessor Activity Description	Successor Activity ID	Successor Activity Description	Lag	Type
A1430	Install Spool 3	A1540	Complete Line A	0	FS
A1530	Start Line A	A1410	Install Spool 1	0	SS
A1510	Spool 5	A1520	Spool 6	0	FS
A1500	Spool 4	A1510	Spool 5	0	FS
A1490	Spool 3	A1500	Spool 4	0	FS
A1290	Mechanical O	A1270	Mechanical B	0	FS
A1200	Electrical "L"	A1190	Electrical "B"	0	FS
A1280	Mechanical L	A1290	Mechanical O	0	FS
A1260	Mechanical S	A1230	Electrical "K"	0	FS
A1200	Electrical "L"	A1210	Electrical "O"	0	FS
A1230	Electrical "K"	A1240	Electrical "S"	0	FS
A1310	Mechanical K	A1280	Mechanical S	0	FS
A1270	Mechanical B	A1190	Electrical "B"	50	FF
A1290	Mechanical O	A1210	Electrical "O"	50	FF
A1280	Mechanical L	A1200	Electrical "L"	50	FF
A1260	Mechanical S	A1240	Electrical "S"	50	FF
A1310	Mechanical K	A1230	Electrical "K"	50	FF

For export, you have several options, including:

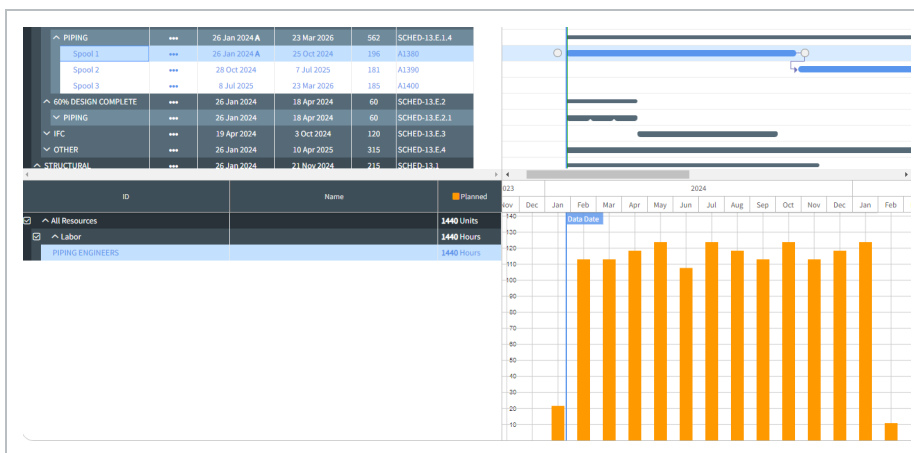
- Primavera P6 XER
- Excel Export
- MS Project MPP

### 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.

PIPING	...	26 Jan 2024 A	23 Mar 2026	562	SCHED-13.E.1.4
Spool 1	...	26 Jan 2024 A	25 Oct 2024	196	A1380
Spool 2	...	28 Oct 2024	7 Jul 2025	181	A1390



See Also:

[Baseline/Snapshot](#)

How can I store past schedules to be used as templates?

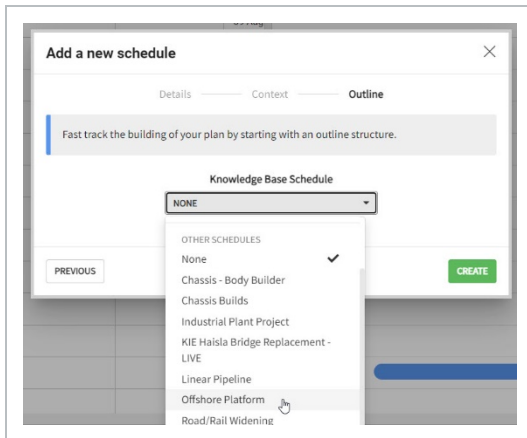
You can save your entire schedule, or portions of it, to the Knowledge Base for future use. To save the entire schedule, click the Actions ellipses on the highest level (first row) of the schedule and select **Publish to the knowledge base**.

Nate Co. / Schedule						
CPM SCHEDULES    ACTIVITY PRODUCTIVITY RATES    KNOWLEDGE TAGS    CALENDARS    REGISTER    RESOURCES    MACHINE LEARNING						
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_REVC_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	●

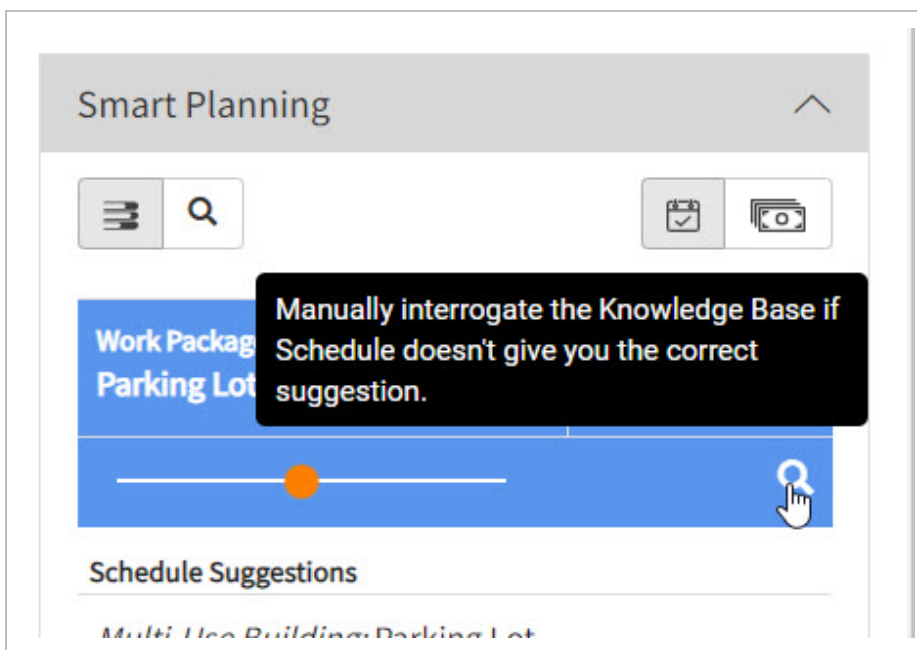
You can perform this same function at any WBS level.

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.

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## 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.

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## 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](#)

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## 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***

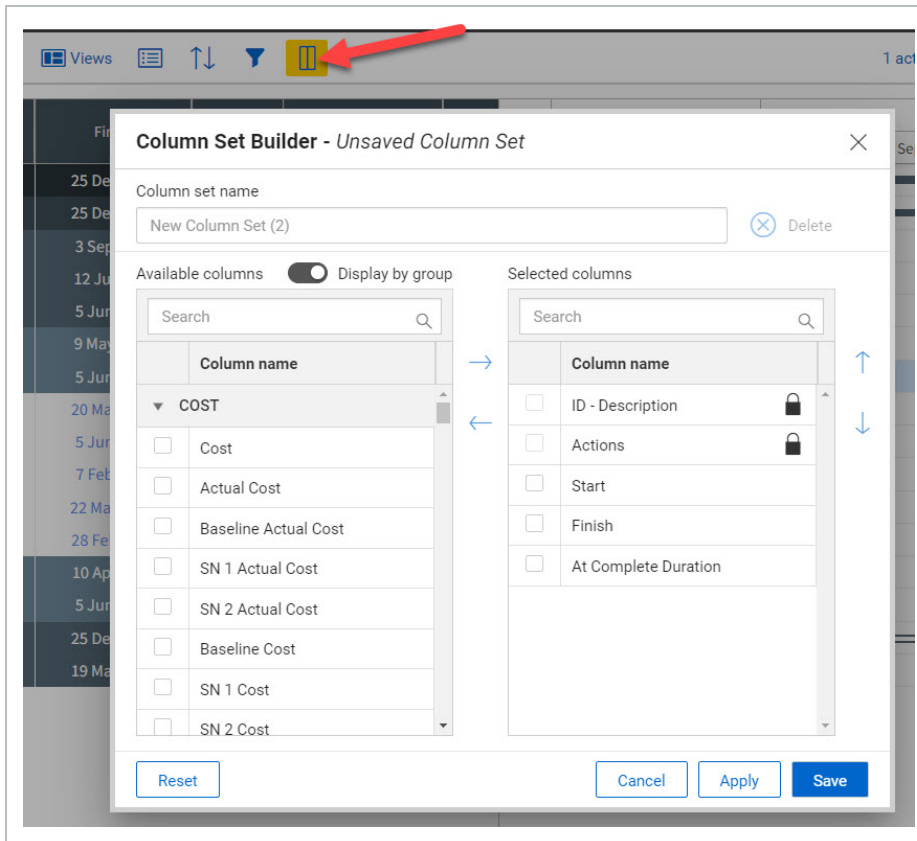
*Select multiple schedules in Primavera and export them as a single structure in an XER file. Then import the .XER file into InEight Schedule, where it becomes a single “master” schedule structure containing the individual schedules exported from Primavera.*

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## 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](#)

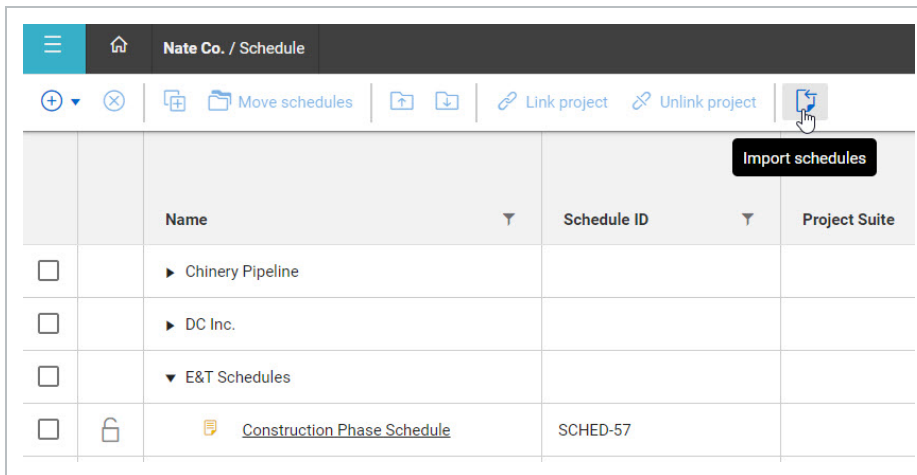
Are my resources the same resources as are in InEight Control/Cloud Platform?

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

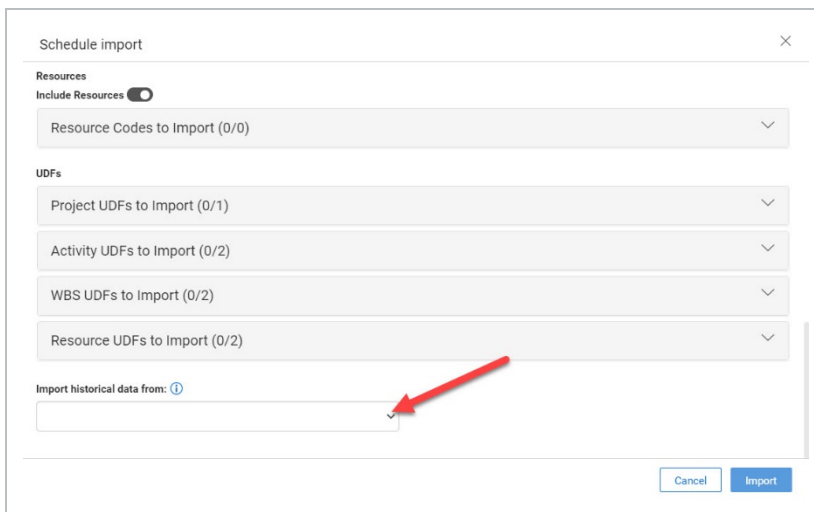
each application.

## 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.



Note that when importing you can import historical data from another schedule to bring in additional information including planners, assignments, and short interval plans.



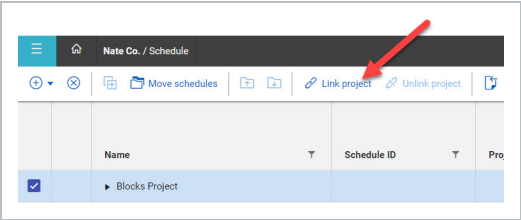
## How do I get access to a schedule from within the InEight Cloud Platform?

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](#)