

ANNING, SCHEDULING & RISK



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1.1 FEATURED CONTENT

Scheduling & SIP Business Process Risk Workshop Quick Guide

1.2 POPULAR TOPICS

Project List View

Plan View

Markup View

Schedule Review View

Cost Risk View

View All Topics

1.3 QUICK LINKS

Quick Guides User Guides Supplemental Documents Integrated Solutions Workflows

E-Learning Courses

1.4 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.

| 4 | IGNORED | B Field not to be populated | C | D | E | F |
|----|-----------------------------|---------------------------------------|---------------------------|-----------------------------------|---------|------------------------------|
| | Notes: | Field flot to be populated | | | | |
| | Notes: | | | | | |
| | 1. To update a logic link i | Type, you must delete the existing lo | rais link and create a co | parate row for the new logic link | tuno | |
| | 2. Lags can be both posit | | gic link and create a se | parate row for the new logic link | type | |
| | | Predecessor Activity Description | Successor Activity ID | Successor Activity Description | Lag | Туре |
| | Text | Text | Text | Text | Numeric | Text: "FS", "FF", "SF", "SS" |
| 8 | 256 | 256 | 256 | 256 | | 2 |
| 9 | A1430 | Install Spool 3 | A1540 | Complete Line A | 0 | FS |
| 10 | A1530 | Start Line A | A1410 | Install Spool 1 | 0 | SS |
| 11 | A1510 | Spool 5 | A1520 | Spool 6 | 0 | FS |
| | A1500 | Spool 4 | A1510 | Spool 5 | 0 | FS |
| 13 | 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 | A1260 | Mechanical S | 0 | FS |
| | A1270 | Mechanical B | A1190 | Electrical "B" | 40 | FF |
| | A1290 | Mechanical O | A1210 | Electrical "O" | 40 | FF |
| | A1280 | Mechanical L | A1200 | Electrical "L" | 40 | FF |
| | A1260 | Mechanical S | A1240 | Electrical "S" | 40 | FF |
| 25 | A1310 | Mechanical K | A1230 | Electrical "K" | 40 | 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 Options** menu.

| | | | | | | .4 | | | | | | | | | | | | | | | - |
|-----------------------|-------|---------------|-------------|-----|------------|-----------|------|--------|---------|-----|-----|-----|------|-----|-----|-------|-----|----------|-----|-------|----|
| Spool 1 | | 26 Jan 2024 A | 25 Oct 2024 | 196 | A1380 | | | | | | | | | | | | - | P | | | |
| Spool 2 | | 28 Oct 2024 | 7 Jul 2025 | 181 | A1390 | | | | | | | | | | | | 4 | | | | |
| Spool 3 | | 8 Jul 2025 | 23 Mar 2026 | 185 | A1400 | | | | | | | | | | | | | | | | |
| ∧ 60% DESIGN COMPLETE | | | 18 Apr 2024 | | | 2 | | | | | _ | | | | | | | | | | |
| | | | | | | 51 | | | - | | | | | | | | | | | | |
| | | | | | | : | | | | | - | | | - | | | | | | | |
| | | | | | | • | | | | | | | | - | | | - | | | | - |
| STRUCTURAL | | 26 Jan 2024 | 21 Nov 2024 | 215 | SCHED-13.1 | | | | | _ | _ | _ | | - | _ | _ | - | _ | | | |
| | | | | | | | 023 | | | | | | 2024 | | | | | | | | |
| | | | | | | Planned | lov | Dec Ja | n Feb | Mar | Apr | May | Jun | Jul | Aug | Seo 1 | Det | Nov | Dec | Jan I | Fe |
| ∧ All Resources | | | | | 1 | 440 Units | 140 | | Data Da | te | 1 | | | 1 | | 1 | - | | | - | |
| ∧ Labor | | | | | 1 | 440 Hours | 100 | | | | | | | | | | | | | | |
| PIPING ENGINEERS | | | | | 1 | 440 Hours | 120 | | | | | | | | | | | | | | |
| | | | | | | | 110 | | | | | | | | | | | | | | |
| | | | | | | | 100 | | | | | | | | | | | | | | |
| | | | | | | | -90 | | | | | | | | | | | | | | |
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| | | | | | | | 20 | | | | | | | | | | | | | | |
| | | | | | | | 10 | | | | | | | | | | | | | | ×. |

I've set up groupings, filters, and column sets in my Plan view. How can I save them?

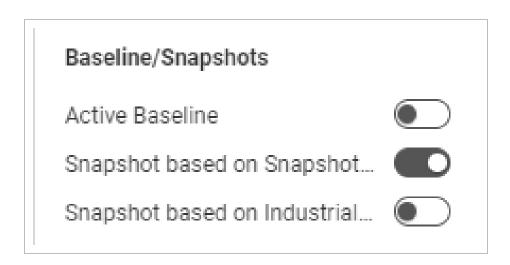
If you've customized your Plan view by applying groupings, filters or columns sets, you can save the view by selecting **Views** from the left toolbar and selecting **Save current view**.

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.

| Baseline/Snapshot Ma | anagement | | | |
|--|---|---|--|---|
| Active Baseline Baseline based on Revert to default | e 🔒 Industrial Plant - Bas | eline: Laura Koonce | e - 4 Apr 2024 | |
| Snapshot 1 Snapshot based or | n Snapshot 05APR24 | : Laura Koonce - 10 | Apr 2024 | 8 |
| Snapshot 2 🔒 | | | | |
| | n Industrial Plant - Wh | | oonce - 10 Apr 202 | 4 ⊗ |
| Snapshot based or Unassign schedule | n Industrial Plant - Wh | | oonce - 10 Apr 202 Snapshot 1 | |
| Snapshot based or Unassign schedule | n Industrial Plant - Wh t above, or <u>Create copy o</u> | f current schedule | | ⊗ |
| Snapshot based or Unassign schedule | n Industrial Plant - Wh t above, or <u>Create copy o</u> Current Schedule | f current schedule Active Baseline | Snapshot 1 | Snapshot 2 |
| Snapshot based or Unassign schedule Set or overwrite snapshot Data Date | n Industrial Plant - Wh t above, or <u>Create copy o</u> Current Schedule 26 Jan 2024 | f current schedule Active Baseline 26 Jan 2024 | Snapshot 1 15 Feb 2024 | Snapshot 2 9 Feb 2024 |
| Snapshot based or Unassign schedule Set or overwrite snapshot Data Date Number of Activities | n Industrial Plant - Wh t above, or <u>Create copy o</u> Current Schedule 26 Jan 2024 75 | f current schedule Active Baseline 26 Jan 2024 66 | Snapshot 1 15 Feb 2024 75 | Snapshot 2 9 Feb 2024 74 |
| Snapshot based or Unassign schedule Set or overwrite snapshot Data Date Number of Activities Start Date | a Industrial Plant - Wh t above, or <u>Create copy o</u> Current Schedule 26 Jan 2024 75 26 Jan 2024 | Active Baseline 26 Jan 2024 66 26 Jan 2024 66 | Snapshot 1 15 Feb 2024 75 26 Jan 2024 | Snapshot 2 9 Feb 2024 74 26 Jan 2024 |

Once designated, you can select which snapshots to include in your view by selecting them in the View Options menu.



You can then compare the activities of each schedule next to each other in the Gantt chart.

| > PIPING | 26 Jan 2024 A | | | 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 |
| 0 | 0.1.10005 | 2214-2020 | 2.05 | 43.400 |

See Also:



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**.

| | CPM SCHEDULES | ACTIVITY PRODUCTIV | VITY RATES | KNOWLEDGE TAGS | CALENDARS | REGISTER | RESOURCES | MACHINE LEARNING | 3 |
|---|--------------------------|--------------------|--------------------|----------------|-------------|-------------|-------------|------------------|---|
|) | | | | | | | | C | Ţ |
| | Schedules \downarrow | | Schedule ID | | Start | Finish | Data Date | Verified | |
| | 30% Design Complete | - MST | SCHED | 1 | 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_RE | VC_23 Feb 24 - Cos | DP.001.93343.4.50 | 1-3 | 31 Oct 2022 | 15 Feb 2029 | 23 Feb 2024 | • | |
| | Chassis - Body Builder | | SCHED-1 | 1 | 26 May 2021 | 8 Sep 2021 | 26 May 2021 | • | |
| | Chassis Builds | | SCHED-2 | 1 | 26 May 2021 | 26 May 2021 | 26 May 2021 | • | |
| | Combined Cycle Estim | ate Schedule | CC Power Plant Bio | : | 2 Oct 2023 | 20 Oct 2026 | 2 Oct 2023 | • | |
| | Commercial Building | | SCHED-3 | : | 12 Jun 2018 | 17 Feb 2021 | 12 Jun 2018 | • | |
| | FC - MST | | SCHED-9 | : | 19 Apr 2024 | 19 Aug 2024 | 26 Jan 2024 | • | |
| | Industrial Plant Project | t | SCHED-10 | : | 26 Jan 2024 | 28 Aug 2026 | 9 Feb 2024 | • | |
| | 🖲 KIE Haisla Bridge Repl | acement - 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.

| nedule | 2 |
|--|--|
| Details Context Outline | |
| ilding of your plan by starting with an outline structure. | |
| Knowledge Base Schedule | |
| NONE | |
| OTHER SCHEDULES | |
| | CREATE |
| | _ |
| | |
| KIE Haisla Bridge Replacement - LIVE | |
| Linear Pipeline | |
| Offshore Platform | |
| | Details Context Outline iliding of your plan by starting with an outline structure. Knowledge Base Schedule OTHER SCHEDULES None Chassis - Body Builder Chassis - Body Builder Chassis Builds Industrial Piant Project KICH usida Bridge Replacement - LIVE Linear Pipeline |

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.

| Smart Plan | ning | / |
|----------------------------|-------------------------------------|----------------------|
| ⊒ Q | | |
| | Manually interrogate | e the Knowledge Base |
| Work Packag Parking Lot | Schedule doesn't giv suggestion. | ve you the correct |
| Work Packag Parking Lot | Schedule doesn't giv suggestion. | ve you the correct |

See Also:

Knowledge Base

Can InEight Schedule integrate with other InEight applications?

InEight Schedule currently includes import/export functionality to share schedule data between applications via Microsoft Excel and .XER files. Development is underway to more tightly integrate InEight Schedule with other applications including InEight Estimate and InEight Plan.

What is the difference between Short Interval Planning (SIP) resources and resources?

Resources used for scheduling in the Plan view are for considering durations, productivity and costs for the entire CPM schedule for the project and are assigned at the higher activity level.

SIP resources represent the labor, equipment and materials tracked on look-ahead schedules managed by the field team. These look-ahead or short interval plans break schedule activities down into the day-to-day steps to execute the work in the field and track the SIP resources at the step or task level.

Is there a standardized fill-down option in InEight Schedule?

Yes, there is a fill-down feature for calendars, codes and resources, where you can specify a value at a summary level and have it apply to the child elements below it. You access the Fill down feature by clicking on the Actions ellipses of your summary level item.

See Also:

Project Resources

How do we manage multiple schedules with external relationships?

InEight Schedule does not support a program level of schedule management, where distinct schedules for different projects are managed under a single program and have external relationships between them. You can still manage multiple schedules with relationships between them, however, by importing the individual schedules into one "master" schedule and then establishing logic links between them as needed.

Use Case 1: InEight Schedule only

Publish each schedule to the Knowledge Base, then add WBS items representing each schedule and import the corresponding schedule from the Knowledge Base for each WBS item using the Smart Planning feature.

Use Case 2: InEight Schedule and Primavera

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

Can we copy/paste data from the InEight Schedule Plan view to Excel?

You can send data from the InEight Schedule Plan view to Excel using the **Column Set Builder** and the Export feature. From the Column Set Builder Menu, select the Column Set Builder to specify what columns you would like to include for exporting to Excel.

| | | 10.1 | | | |
|-----|--------------------------|-----------|---------|----------------------|----------|
| Co | lumn Set Builder - Unsav | ed Column | Set | | |
| | umn set name | | | | |
| e N | ew Column Set (2) | | | | 🚫 Delete |
| | ilable columns 🛛 Display | by group | Selecte | ed columns | |
| | Search | Q | Sea | arch | Q |
| | Column name | | > | Column name | |
| | COST | Î (| | ID - Description | |
| | Cost | | | Actions | |
| | Actual Cost | | | Start | |
| | Baseline Actual Cost | | | Finish | |
| | SN 1 Actual Cost | | | At Complete Duration | |
| | SN 2 Actual Cost | | | | |
| | Baseline Cost | | | | |
| | SN 1 Cost | | | | |
| | SN 2 Cost | - | | | - |

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.

| ∃ ଜ | Nate Co. / Schedule | | |
|-------|-----------------------------|-------------------------------|---------------|
| ⊕ • ⊗ | H T Move schedules | nk project 🔗 Unlink project 🛛 | |
| | | Impo | rt schedules |
| | Name T | Schedule ID T | Project Suite |
| | Chinery Pipeline | | |
| | DC Inc. | | |
| | ▼ E&T Schedules | | |
| 6 | Construction Phase Schedule | SCHED-57 | |

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

| Resources | |
|--------------------------------|--------------|
| nclude Resources 🜑 | |
| Resource Codes to Import (0/0) | \sim |
| JDFs | |
| Project UDFs to Import (0/1) | \checkmark |
| Activity UDFs to Import (0/2) | ~ |
| WBS UDFs to Import (0/2) | \checkmark |
| Resource UDFs to Import (0/2) | ~ |
| mport historical data from: ① | |
| | |
| | |

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.

| ≡ ໖ | Nate Co. / Schedule | | | | |
|-----|------------------------|------|---------------------|-----------|-----|
| ⊕•⊗ | 🕀 🗂 Move schedules 🗈 🗈 | 8 Li | ink project 🔗 Unlin | k project | C7 |
| | Name | Ŧ | Schedule ID | Ŧ | Pro |

In the future, the schedule workspace will be created automatically when an InEight Platform project is created.

See Also:

Advanced Work Packaging



LESSON 1 – SCHEDULE OVERVIEW

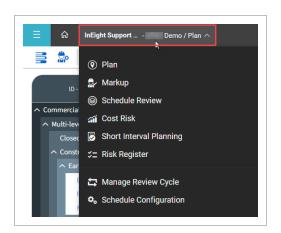
OVERVIEW OF THE SCHEDULE AND RISK PROCESS

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.

| Select an Annotatio | n • |) 🕆 🔁 | 🔛 Views 🔢 | 41 Y | 1 active user 🛛 🕲 🔍 💉 🗜 | 🗗 🖶 🔍 |
|--|---------|---------------|-------------|-------------|---|--|
| | | | | | ① This schedule is locked and is in a view only state. | |
| ID - Description | Actions | Start | Finish | At Complet | 2021 2022 2023 2024 2025 D | |
| | | | | | pr - Juljul - SejÖct - DejJan - Mijápr - Juljul - SejÖct - DejJan - | |
| L5 Tropicana_Revised Proje | ••• | 13 Sep 2021 A | 11 Sep 2026 | 1249 | Data Date Description | |
| Project Management | ••• | 13 Sep 2021 A | 1 Apr 2026 | 1132 | I-15 Tropicana_Revised Project Baseline Schedule | _NTP2 Schedule (to be submit |
| Contract Milestones | | 13 Sep 2021 A | | 1132 | Default Calendar 😧 | |
| Interim Milestones | | 13 Sep 2021 | 13 Sep 2021 | 0 | Project Default | |
| Design | ••• | 13 Sep 2021 A | 11 Sep 2026 | 1249 | | |
| ✓ Integration Milestone | | 29 Apr 2022 | 21 Jun 2023 | 288 | Smart Planning | ~ |
| DM01 to DM29 - Project | | 13 Sep 2021 A | 11 Sep 2026 | 1249 | SharePaining | |
| ∨ Design | ••• | 13 Sep 2021 A | 30 Jun 2023 | 443 | 2 3 | |
| Procurement | ••• | 1 Dec 2021 | 2 Jul 2023 | 381 | 0 | |
| ✓ Submttals | | 28 Feb 2022 | | 208 | wes | 1249 |
| ✓ Materials | | | | 307 | | 0% |
| Environmental Permits | | | | 299 | | |
| Right-of-Way | | 13 Nov 2022 | 23 May 2024 | 558 | | |
| Property Acquisition | | | 23 May 2024 | 558 | Schedule Suggestions | |
| Construction | | 14 Dec 2021 | 15 Nov 2025 | 971 | Project B: Project B | |
| ✓ Project Wide | | 14 Dec 2021 | 23 Oct 2025 | 955 | | 364d |
| ✓ Phase 1 | | 21 Dec 2022 | 12 Jun 2025 | 610 | | 0% |
| ✓ Phase 2 | | 19 Jan 2024 | 1 May 2025 | 318 | Construction: Project Milestones | |
| ∨ Phase 3 | | 9 Sep 2024 | 1 Aug 2025 | 225 | | 981d |
| ✓ Phase 4 | | 26 May 2025 | | 120 | | 55% |
| ✓ Preservation | | | | 543 | Construction: NTP Site Construction | |
| ✓ Project Wide Activities | | | | 971 | | 1.890d |
| ✓ Activities to be Added | | | | 691 | | 12% |
| Testing and Commissioning | ••• | 8 Jun 2022 | 15 Sep 2025 | 809 | Construction: GMP02B-BP04-003 Ames Re | wisad |
| Sub System Test ATM G | | 8 Jun 2022 | 21 Jun 2022 | 10 | | |
| System Acceptance Test | | 18 Jul 2025 | 15 Sep 2025 | 60 | - | 20% |
| Sub System Test CCTV's | | 1 Jul 2025 | 14 Jul 2025 | 10 | Construction: BP01-009 Early NTP Large B | in a start from the start of th |
| Sub System Test Radar | | 1 Jul 2025 | 14 Jul 2025 | 10 | Construction: BPUI-DUB Early NTP Large B | |

- 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 <u>import</u> or <u>export</u> a schedule in Plan view.

Gantt chart legend

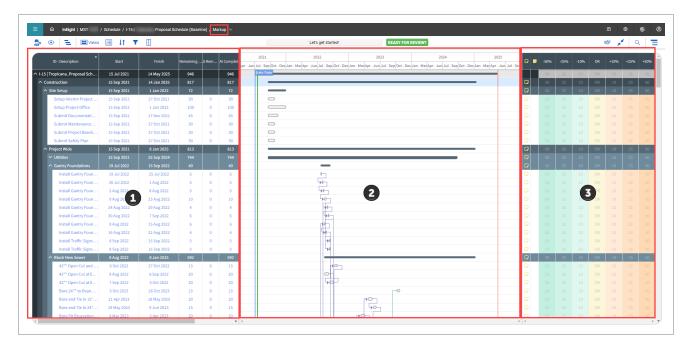
| Vertical Bar Type | Description |
|-------------------|---|
| Project start | The planned or actual project start dates |
| Data date | The point in time when the status of the schedule is recorded |
| Project finish | The planned or actual project finish dates |

| 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.

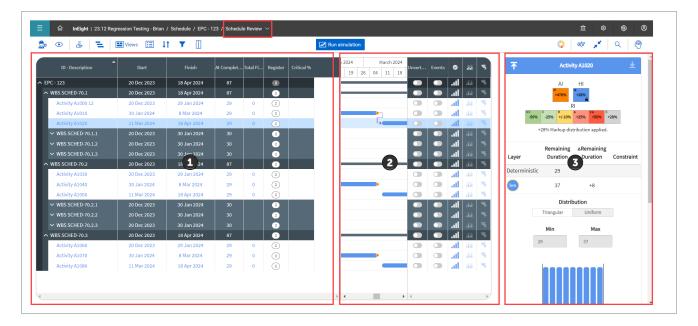


- 1 Gantt chart columns contain activity metadata: ID-description, dates, remaining duration, total duration, delta [change in] remaining duration, delta [change in] end date, and completed [markup status].
- 2 This Gantt chart provides a visual layout of how the schedule would be affected by the markups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

| 12 | E Viev | vs 👫 🍸 🗓 | | | | | Run : | simulation | | | | | | | 3 | 🗗 Q 4 |
|----|--------|------------------------|---------|---------|-----------|----------|------------|-------------|--------|----------|---|------|----|------------|-----------------------------|--------------|
| ID | | Description | Actions | Exclude | ly Cost % | Max Cost | Max Cost % | Uncertainty | Events | Register | 0 | âŭ | 5 | | WBS Sum Act | |
| | 1 | Start Milestone A1700 | | | 100% | \$0 | 100% | | | | | âŭ | Ξ. | vc -50% | C R A -25% +/-10% +25% | VA C +50% |
| | 1 | Activity A1670 | ••• | | 100% | \$0 | 100% | | | | | ilil | Ψ, | | | |
| | 1 | Activity A1730 | | | 100% | \$0 | 100% | | | | | âí | Ψ, | N | lo uncertainty distribution | n applied. |
| | 1 | Start Milestone A1700 | | | 100% | \$0 | 100% | | | | | âí | Ψ, | Min (\$) | Likely (\$) | Max (\$) |
| | 1 | Finish Milestone A1720 | ••• | | 100% | \$0 | 100% | | | | | âí | 5 | 0 | 0 | 0 |
| | 1 | Activity A1670 | ••• | | 100% | \$0 | 100% | | | | | âí | Ξ, | | | |
| | 1 | Activity A1750 | | | 100% | \$0 | 100% | | | | | ilil | Ψ, | Min (%) | Likely (%) | Max (%) |
| | 1 | Start Milestone A1700 | | | 100% | \$0 | 100% | | | | | ilií | 5 | 100 | 100 | 100 |
| | 1 | Activity A1670 | 6 | | 100% | \$0 | 100% | | | 2 | | âí | Ψ, | | | |
| | 1 | Activity A1740 | | | 100% | \$0 | 100% | | | • | | âí | Ψ, | | <u> </u> | |
| | 1 | Activity A1730 | | | 100% | \$0 | 100% | | | | | ilil | 5 | | | |
| | 1 | Activity A1740 | ••• | | 100% | \$0 | 100% | | | | | âí | μ, | | | |
| | 1 | Finish Milestone A1720 | | | 100% | \$0 | 100% | | | | | âí | Ψ, | | | |
| | 1 | Activity A1680 | | | 100% | \$0 | 100% | | | | | âí | Ψ, | | \$0 \$1 | |
| | 1 | Activity A1680 | | | 100% | \$0 | 100% | | | | | ílí | Ψ, | | | |
| | 1 | Activity A1680 | | | 100% | \$0 | 100% | | | | | âí | Ξ, | | | |
| | 1 | Activity A1690 | | | 100% | \$0 | 100% | | | | | άŭ | Ψ, | | Register | |
| | 1 | Activity A1690 | ••• | | 100% | \$0 | 100% | | | | | ílí | 5 | | | |
| | 1 | Activity A1690 | ••• | | 100% | \$0 | 100% | | | | | áú | 5 | | ADD EVENT | |

- 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 | Conduct short interval planning, detailing daily work for crews and short |
| Planning | term plan to get the CPM Activities done |

In the Short Inverval 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.

| roup by WBS 🔻 💿 📃 | Refresh SIP | data | | | | | | | | | Ma | r 2023 - | Apr 2023 | 3 | | | | | | | | | | 1 a | ctive user | · * | r | Today | 3 | QV | 0 |
|---|-------------|-----------|------|---------|-------|-----|---|---|-----|---|----|----------|----------|------|----|----|------|----|----|----|----|----|----|-----|------------|-------|----|-------|----|----|---|
| | | | | | | м | т | w | TH | 4 | F | SA | SU | м | т | w | TH | F | SA | SU | м | т | w | тн | F | SA | SU | м | т | w | |
| ctivities | Start 👃 | End | Days | Planner | Units | 6 🔹 | 7 | 8 | 9 4 | • | 10 | 11 | 12 | 13 🔷 | 14 | 15 | 16 👒 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | |
| Tropicana Bridge over Dean Martin | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| DD-12 Flyover Ramp Bridge - IFC Complet | | 29 Dec 22 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| DD-19 MOT Phase 2 & 3 - IFC Complete (1 | | 3 Jan 23 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| DD-14 Frank Sinatra Bridge - IFC Complet | | 24 Jan 23 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| DD-15 NB I-15 Ramp Bridge over Sinatra | | 3 Feb 23 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| DD-23 ITS - IFC Complete (4/11/23) | | 2 Mar 23 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| DD-24 Signals - IFC Complete (3/7/23) | | 9 Mar 23 | | | | | | | • | • | | | | | | | | | | | | | | | | | | | | | |
| DD-20 MOT Phase 4 - IFC Complete (4/18 | | 13 Mar 23 | A | | | | | | | | | | | ٠ | | | | 2 | | | | | | | | | | | | | |
| DD-26 Lighting - IFC Complete (5/23/23) | | 16 Mar 23 | • | | | | | | | | | | | | | | • | | | | | | | | | | | | | | |
| DD-25 Signing & Marking - IFC Complete (| | 23 Mar 23 | | | | | | | | | | | | | | | | | | | | | | ٠ | | | | | | | |
| DD-16 SB I-15 Ramp, Bridge over Dean M | | 23 Mar 23 | | | | | | | | | | | | | | | | | | | | | | • | | | | | | | |
| DD-22 Landscape & Irrigation - IFC Compl | | 24 Mar 23 | | | | | | | | | | | | | | | | | | | | | | | • | | | | | | |
| DM01 to DM31-Project Managem | 12 Aug 21 | 24 Mar 23 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| ∧ DM-30 Exploratio | 8 Sep 21 | 7 Jul 22 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| EDM30GEDM.GR300. Reports Geotech | 8 Sep 21 | 7 Jul 22 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| ∧ Design | 12 Aug 21 | 24 Mar 23 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| DD01-ITS VB I-15 | 13 Oct 21 | 29 Apr 22 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| STAGE 2 - 60% to 90% Desig | 13 Oct 21 | 21 Jan 22 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

- 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.

| ≡ | ଜ | _ | / Risk Regis | ter \sim | |
|---|---|---|-------------------------|-------------------------|---------------------|
| | | | PROJECT REGISTER EVENTS | PROJECT REGISTER MATRIX | PROJECT UNCERTAINTY |

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

| | | | | | PROJECT REGISTER EVE | NTS PROJECT | FREGISTER MATRIX | PROJECT U | NCERTAINTY | | | | | | | |
|------------|----------|----------------------------------|---------------|------------------|----------------------|--------------------|--------------------|-----------|------------|----------------|-------------|--------|----------|------|---------|---|
| (+) | | | | | | | | | | | | | | | C C | ; |
| Active | Event Id | Title | Туре | Description | 5 | Dur | s | Score | Risk Own | Mitigation | Status | Markup | Schedule | Cost | Publish | |
| | R1 | Rapid river water | Threat + | crane on a barge | Extremely Low (| Very Low (≤ 40d) | Very Low (≤ \$50K) | 6 | Gari 🕨 | Bring the crar | Mitigated | • | 0 | | x | (|
| | 01 | Rent equipment for 50% off | Opportunity + | overbought! | Ultra Low (5%) 🔸 | Uitra Low (≤ 7d) ► | Uitra Low (≤ \$ → | 1 | Gari 🕨 | Ŧ | Unmitigated | • | | | Ŷ | |

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

| | | - | PROJECT REGISTER E | VENTS PROJEC | T REGISTER MATRIX | PROJECT U | NCERTAINTY | | | | |
|------|-----------|--|------------------------------|--------------|---|-----------------------|---------------|----------|------|----------|---|
|) | | | | | | | | | | C7 | |
| tive | Event Ic. | | 5 | Dur | s | Score | Risk Own | Schedule | Cost | Publish | |
| D | RI | faced delays due to lan- a six-month setback. | Select File Format | | associations to activiti | es within this projec | ct. | 0 | 0 | Ť | 8 |
| 0 | R10 | mination, leading to bu | Import Type InEight Schedule | · | Download I | nEight Schedule Ex | cei Template | 0 | 0 | ^ | 6 |
| 5 | | | | - | p file here to upload X files are allowed. | I | | | | | |
| D | R11 | e faced bureaucratic h. | Select Files | | | Drop files he | ere to select | 0 | 0 | Ť | 8 |

• 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.

| scription ra Low | Probability 5 | Schedule Impact | Cost Impact | Threat Color | |
|------------------|-------------------|---|---|---|---|
| | | Schedule Impact | Cost Impact | Threat Color | 0 |
| ra Low | 5 | | | The car bolion | Opportunity Color |
| | | 7 | 1000 | | |
| tremely Low | 15 | 20 | 25000 | | |
| ry Low | 25 | 40 | 50000 | | |
| w | 35 | 50 | 75000 | | |
| edium | 50 | 60 | 100000 | | |
| gh | 65 | 100 | 1000000 | | |
| ry High | 75 | 120 | 5000000 | | |
| tremely High | 85 | 160 | 7500000 | | |
| w ec | lium 1 High | Image: Constraint of the second se | Image: Second | Image: Second | Image: Second |

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 EVE | NTS PROJECT | REGISTER MATRIX | PROJECT UN | | |
|--------|----------|--------------------|---------------|-------------|----------------------|------------------|-----------------|------------|----------|---|
| • | | | | | | | | | ••• | 0 |
| Active | Event Id | Title | Туре | Description | s | Dur | \$ | Score | Publish | |
| | R1 | MST Threat | Threat > | | Very Low (25%) 🕨 | Very High (≤ 1 ► | Medium (≤ \$1 ► | 21 | ^ | 8 |
| | 01 | MST Opportunity | Opportunity 🕨 | | High (65%) 🕨 | Very Low (≤ 4 ► | Medium (≤ \$1 ► | 30 | ^ | 8 |

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.

| Des | cription | * | D | ur \$ | | Sci | ore | Risk Own | Mitigation |
|-------------------------------------|----------------------------|----|---------------|-------|---|---------------------------|-------|----------|------------|
| 01 - MS | T Opportunity | | | | | | | | |
| | Probability: High (65%) | | Duration Impa | | | Cost Impa Aedium (≤ \$ | | | Unmitigate |
| ⊕ Add | new value | -0 | | | | | | | |
| Add ID | | 5 | Dur | s | S | Cost | Owner | Start | End |

• 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.

| GISTER EVENTS PROJ | ECT REGISTER MATRIX PROJECT UNCERT | AINTY | |
|--------------------|---|--|---|
| Min | Most Likely | Мах | Color |
| 50% | 100% | 100% | |
| 75% | 100% | 105% | |
| 90% | 100% | 110% | |
| 95% | 100% | 125% | |
| 100% | 100% | 150% | |
| | Min 50% 75% 90% 95% | Min Most Likely 50% 100% 75% 100% 90% 100% | Min Most Likely Max 50% 100% 100% 75% 100% 105% 90% 100% 110% 95% 100% 125% |

LESSON 2 – USER ACCESS

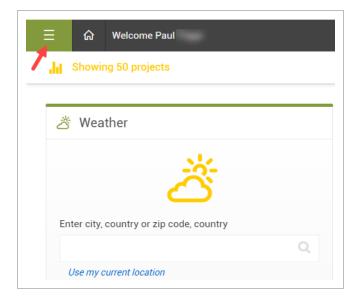
SCHEDULE NAVIGATION

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 <u>here</u>.

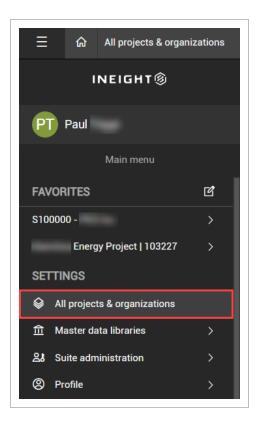
Schedule can be accessed from All projects & organizations in the Main menu, which opens to the Schedule Project List page. If a schedule is linked to a project, from the project home page the Main menu click **Schedule** to open to the project workspace.

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.

| | | | PROJECTS | | | ORGANIZATIONS | | | | | |
|---|--|--------------------------------|-------------------|-----------------|----------------|------------------------|----------|-----------|-------------------------------|---------------|-------------------------|
| Ŧ | | | | | | | | | | | |
| | Organization | | | | Ŧ | Description | | | | | |
| | <u> \$100000 - F</u> | PKS Inc : S | A1000 - Kie | rporation : SB3 | <u>000 - I</u> | Central | | | | | |
| | S100000 - PKS Inc : SA1000 - Kie poration : SB3000 - I | | | Western | | | | | | | |
| | S100000 - PKS Inc : SA1000 - Kie poration : SB3000 - I | | | Canada | | | | | | | |
| S100000 - PKS Inc : SA1000 - Kie [poration : SB3000 -] | | | | Building | | | | | | | |
| | | ☐ All projects & organizations | | | | | | | | | |
| | ⊕ | | | | | | PROJECTS | ORG | ANIZATIONS | | |
| | | | | | | | | | | | |
| | | | ID <mark>†</mark> | | Name | | Stat | Pha | Organization | | Created by |
| | | | 101979 | | East Rail | Maintenance Facility | Active | Execution | 1 - : SE3001 - Ea | stern Canada | InEight Service Account |
| | | | 101984 | | Pointe St | t. Charles Maintenance | Active | Execution | +- : SE3001 - Ea | stern Canada | InEight Service Account |
| | | | 102004 | | 1225 Ligh | nt Rail Corridor | Active | Execution | r: SD3005 - Ben Bentley : SE3 | 008 - Central | InEight Service Accoun |
| | | | 102007 | | Madekter | t - H2 VMC | Closed | Execution | I - Hank Adams : SE3001 - Ea | | Scott Schemahorn |

4. Select Schedule

| Ξ | 命 Project 100808 / Project home |
|----|---|
| | |
| | Add project image Minimum of 540px x 360px |
| | River Project 100808 |
| | |
| () | Model |
| | Document |
| | Schedule |
| * | Design |
| | Quantity forecasting |
| | Engineering |

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 / 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

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

KNOWLEDGE LIBRARY ADMINISTRATOR

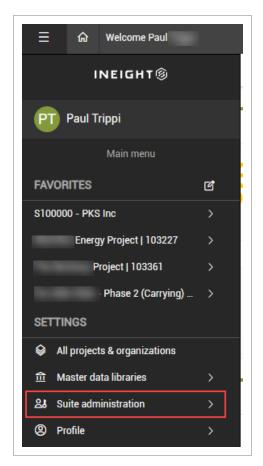
The Knowledge Library Administrator role is primarily responsible for creating and updating Knowledge Library tags, schedules, deliverable rates, and Register Items.

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.

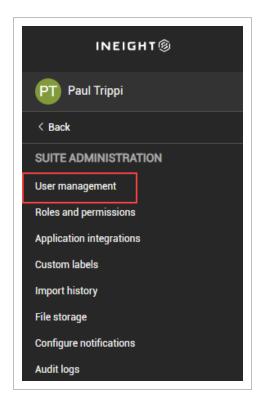
USER CREATION

CREATE A NEW USER

1. Click Suite Administration.



2. Select User Management.



3. Click the Add Users.

| ≡ | ଜ | Suite admin | istration / | / User management |
|-------|----------|-------------|-------------|-------------------|
| (+) A | dd usei | rs 🗹 | \otimes | |
| F | irst nan | ne ↑ | | |
| | | | | T |

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

| | | 1 DETAILS 2 ROLE | ES |
|--------------------------|---|------------------------------|----|
| * First name | | * Last name | |
| Brian | | Smith | |
| * Email address | | * Start date | |
| bsmith@concreteinc.com | | 02/02/2024 | |
| * End date | | Vendor | |
| 06/28/2025 | | AA1 - Lewis Concrete | |
| | | Hint: type vendor name or ID | |
| Contact | | | |
| Office number | | Mobile number | |
| 480-555-6644 | | 480-662-6654 | |
| Country / Region | | Address 1 | |
| United States Of America | • | 568 East Poinsettia Drive | |
| Address 2 | | City | |
| | | Scottsdale | |
| | | | |
| State | | Postal / Zip code | |
| Arizona | • | 85259 | |

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

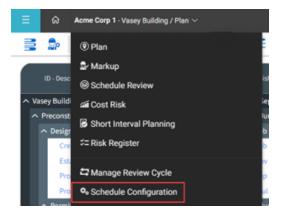
| | | 1 DETAILS 2 | ROLES |
|---------------|---|-------------------------------|-------------|
| Roles (1) | | | (+) Add rol |
| * Role | | * Organization/Project | |
| Administrator | • | Desalination 102035-DNU × • | Θ 0 |

6. Select Save.

SCHEDULE CONTRIBUTOR SETUP

SCHEDULE CONTRIBUTORS

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



CONTRIBUTOR ROLE TYPES

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

MARKUP

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

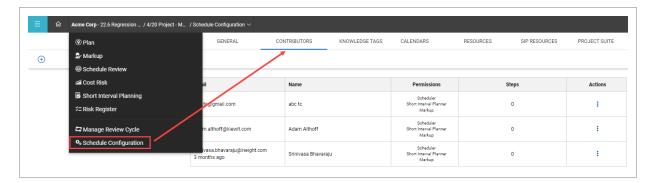
SHORT INTERVAL PLANNER

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

SCHEDULER

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

SELECTING PROJECT CONTRIBUTORS



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

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

| CENERAL | CONTRIBUTORS | KNOWLEDGE TAGS | CALENDARS | RESOURCES | SIP RESOURCES | PROJECT SUITE |
|---|---------------|----------------|---|-----------|---------------|---------------|
| | | | | | | |
| Email | Name | | Permissions | 51 | leps | Actions |
| Michael Thorp@ineight.com Today, 1.42 PM | Michael Thorp | | Scheduler Short Interval Planner Markup | | • | 1 |

- 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.

| | Add User | |
|---------------|-----------------------|-------------------|
| | Schedule Non-Schedule | |
| | Search Users | |
| User | | Organization Role |
| Allen Paddock | | ^ |
| Art Sherwood | | |
| Babji Talluri | | |

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*.

| First Name | Last Name |
|--------------------------------|---|
| Ahmed | Gouda |
| Administrator Knowledge Base A | Roles dministrator Schedule Creator Project Member |
| | |

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

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.

| = 6 | InEight / Schedule | Link project | & Unlink project | Ð | | | | | | | | | | | | | | Monti | Quarter Y | ear C |
|-----|--|---------------|-------------------------|-------------|-------------|-----------------|----------|----|------|------|-------------|------|------|------|------|-------------|------|-------|-----------|-------|
| | | | | - | | | | | | | 2017 - 2021 | | | | | 2022 - 2026 | | | | |
| | Project/Schedul T | Schedule ID T | Project Suite T | Start T | Finish T | Calendar days 🔻 | Schedule | 16 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 |
| | ▶ 12.20 TP Workspac | | | 03 Dec 2018 | 24 Dec 2024 | | | | | | | 1 | 1 | | | | | | | |
| | 23.12 Regression T | | | 20 Dec 2023 | 18 Apr 2024 | | | | | | | | | | | • | | | | |
| | 23.12 Regression T | | | 01 Jul 2021 | 18 May 2026 | | | | | | | | | | | | | | | |
| | 23.12 Regression T | | | 11 Oct 2018 | 11 Dec 2024 | | | | | | | | | | | | | | | |
| | ► 23.12 Regression te | | | 04 Jan 2016 | 09 Dec 2058 | | | | | | | | | | | | | | | |
| | Biran 23.12 Testing | | | 19 Dec 2023 | 16 Feb 2024 | | | | | | | | | | | • | | | | |
| | Dave Workspace | | | 21 Jun 2021 | 14 Jul 2022 | | | | | | | | | | | | | | | |
| | Dominic Testing | | | 08 Dec 2023 | 28 Dec 2026 | | | i | | | | | | | | | | | | |
| | ▶ Juli Testing | | | 11 Dec 2023 | 01 Jan 2025 | | | | | | | | | | | | | | | |
| | ▶ KMP2-01 | | KMP2-2312 - CH3 | 03 Dec 2018 | 28 Jul 2025 | | | | | | | | | | | | | | | |
| | MST TEST | | | 01 Jul 2021 | 14 May 2025 | | | | | | | | | | | | | | | |
| | Schedule Review | | | 01 Jan 2024 | 04 Mar 2024 | | | | | | | | | | | • | | | | |
| | ► srini | | | 22 Dec 2023 | 26 Dec 2023 | | | | | | | | | | | | | | | |
| | Srini - 23.12 Regres | | | 23 Dec 2013 | 05 Jan 2032 | | | | | | | | | | | | | | | |
| | TEST | | | 01 Nov 2023 | 01 Dec 2023 | | | | | | | | | | 1 | | | | | |
| | Test Workspace | | <u>120420231 - 1204</u> | 02 Oct 2017 | 15 Sep 2023 | | | | | | | | | | | | | | | |
| | None | | | 29 Feb 2016 | 01 Sep 2027 | | | | | | | | | | | | | | | |

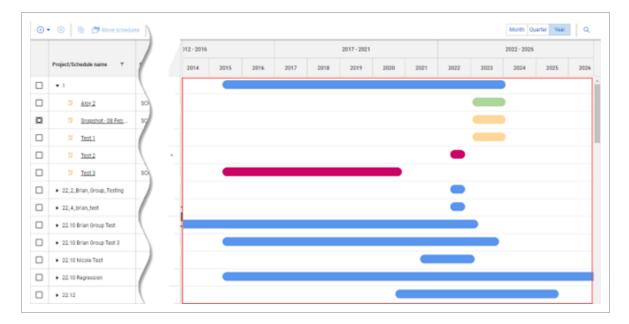
You can select multiple projects and schedules on the Schedule home workspaces page. With this functionality, you can select more than one project or schedule and then select one of the available options on the upper left toolbar, such as delete or move.

| ⊕ ▼ | | 🗄 📑 Move sch | edules | 🖉 Link pro | ject | 🔗 Unlink project | t 🖪 | 2 |
|-----|--------|------------------|--------|-------------|------|------------------|-------|--------|
| | 2 P | roject/Schedul | Ŧ | Schedule ID | Ŧ | Project Suite | Ŧ | Start |
| | • | 12.20 TP Worksp | ac | | | | | 03 Der |
| | • | 23.12 Regression | Т | | | | | 20 Dec |
| | | 23.12 Regression | T | | | | | 01 Jul |
| | • | 23.12 Regression | T | | | | | 11 Oct |
| | | 23.12 Regression | te | | | | | 04 Jar |

You can edit the Project/Schedule name and Schedule ID fields directly and double-click the Project/Schedule name or Schedule ID fields to make direct edits.

| Project/Schedule name | Schedule ID |
|---------------------------------------|----------------------|
| ▶ 1 | |
| 22_2_Brian_Group | |
| ► 22_4_brian | |
| ▼ 22.10 Brian Group | |
| Commercia <mark>l Construction</mark> | SCHED_CC |
| Commercial Construction | 504689-1444444444444 |
| Commercial Construction | SCHED-393 |
| ontract Program - (Status 15th Se | Sept2019-2 |

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.



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.

| ↔ ▲ ⊗ Image: The second seco | ≟ <i>∂</i> Lir |
|--|--|
| Add new schedule Add new folder | т |
| ✓ Water Treatment Workspace | Add new folder $	imes$ |
| | Folder Name Water Treatment Facility Folder |
| | Cancel Add |

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 T | Project Suite 🛛 🔻 | Start ⊤ | Finish 🔻 |
|---|-------------------------------------|---------------|-------------------|-------------|-------------|
| | ▼ Water Treatment Workspace | | | 01 May 2024 | 30 Apr 2025 |
| | ▼ ■ Water Treatment Facility Folder | | | 01 May 2024 | 30 Apr 2025 |
| | ▼ 🗀 West Coast Sub Folder | | | 01 May 2024 | 30 Apr 2025 |
| 6 | Central Coast Water Treatment | SCHED-96 | | 01 May 2024 | 30 Apr 2025 |

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

| | | | | | | | | | 20 | 009 |
|---|-----------------------|---------|-----------------|---------------|--------------------------------|----------------|----------------|-------------|----------------|-----------|
| T Project Suite | Y Start | ٣ | Finish | τ 0 | Mar | Apr | May | Jun | Jul | Au |
| Schedule import | | | | | | | | | | × |
| Select a Primavera XER or M | IS Project file to be | importe | d as either a N | lew Sched | ule or as Knowk | edge to be sto | red in the Kno | wiedge Base | | |
| | | | | | • | | | | | |
| | | | | | | | | | | |
| | | | Drag a | ind drop | file here to up | load | | | | |
| | | | | | | | | | | |
| | | Or | nly .XER, .MPF | files are a | allowed. (Max fil | e size: 60mb) | | | | |
| Select Files | | O | nly .XER, .MPF | ° files are a | allowed. (Max fi | e size: 60mb) | | Dro | p files here t | to select |
| Select Files Schedule ID | | 01 | nly .XER, .MPF | ° files are a | allowed. (Max fi Schedule N | | | Dro | p files here t | to select |
| | | o | nly .XER, .MPf | files are a | | | | Dro | p files here t | to select |
| Schedule ID | | 0 | nly .XER, .MPF | files are a | | | | Dro | p files here t | to select |
| Schedule ID SCHED | Dace | 0 | nly XER, MPF | P files are a | Schedule N | | | Dro | p files here t | to select |
| Schedule ID SCHED Project Workspace | Dace | 0 | niy XER, MPF | | Schedule N | | | Dro | p files here t | to select |
| Schedule ID SCHED Project Workspace | Dace | 0 | nly XER, MPF | | Schedule N | iame | | Dro | p files here t | to select |
| Schedule ID SCHED Project Workspace | 01 May 202 | | 30 Apr 2025 | | Schedule N | iame | | | p files here 1 | to select |

You can move schedules into specified folders.

| Move schedules | sk project | C7 | | | | | | | | | |
|---|------------|----------------------------|---------------------|-------------|-----------|-------|----------------|----------------|-----|------|------|
| | | | | | | | | | | 20 | 009 |
| •• | ٣ | Project Suite 🔻 | Start 🔻 | Finish | ٣ | c | Mar | Apr | Jun | Jul | Aug |
| ojectStructure_Excel_Export | | ProjectStructure_E | | | | | | | | | |
| 319350 | Move | Schedules | | | | | | | | | × |
| aline County | | foving a schedule will rem | oua narmiesions ini | arited from | a foldar | | | | | | |
| nreya_Test_WorkSpace | | ioning a schedule will rem | ove permissions in | lented norm | a totuet. | | | | _ | | |
| ini | Project | t Workspace Name | | | Select | ed Sc | hedules | | | | |
| ST_000000000000000000000000000000000000 | | ter Treatment Workspa | ace | | Centr | al Co | ast Water Trea | tment Facility | | | |
| est | Folder | | | _ | | | | | | | |
| rst 4-25 | Wes | at Coast Sub Folder | × | • | | | | | | | |
| sting04112024 | | | | | | | | | | | |
| PVT auto assignment | I | | | | | | | | | | |
| erify 2466563 | | | | | | | | | Ca | ncel | Move |

SCHEDULE TYPE

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

| Schedule type | T |
|-------------------|---|
| 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 readonly 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.

| \otimes | 🐵 💣 Move schedules 🖉 Link project 🖉 | 🖉 Unlink proj | ect 🗗 | | | | | |
|----------------------|---|--|---|--|---|----------------------------------|-----------|--|
| | | | | | | | | |
| | Project/Schedule name | Schedule | ID T | Project Suite T | Start T | Finish T | c | c . |
| | ► 12.20 TP Workspace 12 | | | , | 03 Dec 2018 | 24 Dec 2024 | | |
| | 12.20 FP Workspace 12 | | | | 03 Dec 2018 | 24 Dec 2024 | | |
| 6 | Bring the Risk Register Events from PI | SCHED-55 | | | 09 Oct 2023 | 03 Feb 2025 | 41 | 4 |
| nlock, ge and una | o to snapshot × <u>rcial Building</u> assign. Currently | SCHED-21 | | | 18 Feb 2019 | 18 Feb 2019 | 1 | 1 |
| ed to fol | Ilowing: 01.00.00 - B1 20icana_Revised Project Basel | 104969_0 | 1.01.00.00 - B1 | | 13 Sep 2021 | 10 Feb 2026 | - 10 | h |
| | I-15 Tropicana_Revised Project Basel | SCHED-18 | | | 13 Sep 2021 | 11 Sep 2026 | 11 | n de la constante de |
| | | | - | | | | | |
| | E 🖓 IntEight 23.12 Regre | | | Views | | | edule (tr | (t) be submitted 13/22) copy / Plan ∨ 1 active user S ≪ V ✓ I I I active user 1 active user S ≪ V ✓ I I I I I I I I I I I I I I I I I I |
| | | | | ₩ Views 📰 ↓ | t 🍸 📋 | 2021 | * | 1 active user 😵 🕸 💉 🗜 🕽 🖨 Q. ([*] ① This schedule is locked and is in a view only state. 2023 2024 2025 🔐 10 |
| | Belect an Annotation | n • 🛛 💿 | Start | Finish A | t Complet | 2021 | MaApr | 1 active user 😵 🕸 💉 13 🗗 🖨 🔍 1 |
| | 📑 🏇 Select an Annotation | n 🔻 💿 | 01 | ₩ Views 📰 ↓ | t 🍸 📋 | 2021 Ju Jul - Se Oct - De Jan | MaApr | 1 active user S & & ✓ I I I active user S & W ✓ I I I I active user S & W ✓ I I I I I I I I I I I I I I I I I I |
| | Select an Annotation Or Description A 131 [Tepicana_Revised Proje] | n V 💿 | Start 13 Sep 2021 A | Finish A | t T Apr 1249 | 2021 Ju Jul - Se Oct - De Jan | MaApr | 1 active user 😵 🕸 💉 👔 🗗 🖶 Q. This schedule is locked and is in a view only state. 2022 2023 2024 2025 for Julia Saptat bulan Hulper Juliat Saptat |
| | Select an Annotation O - Description A Soft Trapicana_Revised Project. A Project Management | Actions | Start 13 Sep 2021 A 13 Sep 2021 A | Finish A 11 Sep 2026 1 Apr 2026 | t Complet Apr- 1249 1132 | 2021 Ju Jul - Se Oct - De Jan | MaApr | 1 active user 😵 🕸 💉 🗜 🕑 🖶 Q. 1 This schedule is located and is in a view only state. 2022 2023 2024 2025 [50/07.54] Solid teljoin: Huljer: Juljuit teljoin: Buljen: Buljuit teljoin: Buljen: Buljuit teljoin: Buljuit |
| | Beect an Annotation Decorption A 113 [Troplana, Briefder Proje Project Management Contact Management Contact Management | Actions | Start Start 13 Sep 2021 A 13 Sep 2021 A 13 Sep 2021 A | Finish A 11.5ep 2026 1 Apr 2026 1 Apr 2026 | t Complet Apr 1249 1132 1132 | 2021 Ju Jul - Se Oct - De Jan | MaApr | 1 active user 😵 🕸 💉 👔 🗗 🖶 Q. This schedule is locked and is in a view only state. 2022 2023 2024 2025 for Julia Saptat bulan Hulper Juliat Saptat |
| | Benet an Annotation Secretary A 1131 Tropicana, Benetar Annotation A 1131 Tropicana, Benetar Angle Project Reagament Contract Milliostores Interim Milliostores Interim Milliostores | Actions | ⑦ ► Start Start 13 Sep 2021 A | Finish A 11 Sep 2026 1 Apr 2026 1 3 Sep 2021 | t Complet Apr 1249 1132 1132 0 | 2021 Ju Jul - Se Oct - De Jan | MaApr | 1 active user 😵 🕸 💉 👔 <table-cell> <table-cell> 🔍</table-cell></table-cell> |
| | Beect an Annotation B - Decription A LL3 [https://www.international.phi/organ.unternati | Actions Actions | The second sec | Finish A 11 Sep 2026 1 Apr 2026 1 Apr 2026 13 Sep 2021 11 Sep 2026 | t Complet Apr 1249 1132 0 1249 | 2021 Ju Jul - Se Oct - De Jan | MaApr | 1 active user 😵 🕸 💉 🗜 🕑 🖶 Q. 1 This schedule is located and is in a view only state. 2022 2023 2024 2025 [50/07.54] Solid teljoin: Huljer: Juljuit teljoin: Buljen: Buljuit teljoin: Buljen: Buljuit teljoin: Buljuit |
| | Beerst at Annotation Project Management, Comman Millestones beerst Venestation Millestones Venestation Millestones | Actions | The second sec | Views Image: Control of the second seco | t Complet Apr 1249 1132 1132 0 1249 288 | 2021 Ju Jul - Se Oct - De Jan | MaApr | 1 active user 😵 🕸 💉 👔 <table-cell> <table-cell> 🔍</table-cell></table-cell> |
| | Beer an Annotation Beer an Annotation Bourners Bourners Bourners Contrast Milliotones Contrast Milliotones Contrast Milliotones Contrast Milliotones Contrast Milliotone | Actions | Start Start 13 Sep 2021 A 13 Sep 2021 A 13 Sep 2021 13 Sep 2021 13 Sep 2021 13 Sep 2021 13 Sep 2021 A | Weeks Tell J Finish A 115ep 2026 A 1Apr 2026 A 135ep 2021 B 135ep 2026 B 1111 Sep 2026 135ep 2026 B 115ep 2026 B 115ep 2026 B 115ep 2026 B 115ep 2026 B | t Complet Apr. 1249 1132 1132 0 1249 288 1249 | 2021 Ju Jul - Se Oct - De Jan | MaApr | 1 active user 😵 🕸 💉 👔 <table-cell> <table-cell> 🔍</table-cell></table-cell> |
| | Decemption Constant Milliance | Actions | Start 13 Sep 2021 A | Views Image: Control of the second seco | t Complet Apr- 1249 1132 0 1249 132 132 0 1249 443 | 2021 Ju Jul - Se Oct - De Jan | MaApr | 1 active surr 😵 🕸 💉 👔 <table-cell> <table-cell> 🔍 To This schedule is locked and is in a view only state. 2022 2023 2024 2025 per Julial sejdet: bijzan Huger: Julial sejdet: bijzan Huger: Julial sejdet: bijzan Deforision 13 The schedule, White Schedule, WH2 Schedule, MH2 Schedu</table-cell></table-cell> |
| | Beerginson Beerginson Beerginson Biggenerginson Project Management Contract Management | Actions Actions | Start 13 Sep 2021 A | Views Image: Control of the second seco | t Complet Apr. 1249 1132 0 1249 288 1249 248 1249 288 1249 14 | 2021 Ju Jul - Se Oct - De Jan | MaApr | 1 active user 😵 🕸 💉 1 🕑 🖶 Q |
| | Decomposition Constraints Decomposition Decomposi | Actions | Start 13 Sep 2021 A 13 Sep 2021 A | Wees Image: Control of the second secon | t Complet Apr. 1249 1132 1132 1249 288 1249 288 1249 331 208 | 2021 Ju Jul - Se Oct - De Jan | MaApr | 1 active user 😵 🕸 💉 1 D D al Q |
| | Beerlet an Annotation Program Annotation Beerlet an Annot | Actions | Szert 13 Sep 2021 A 13 Sep 2021 A | Views Image Image Finish A 11699 2026 A 13899 2021 B 13899 2021 B 11699 2026 B 21 Jung 2025 B 21 Jung 2025 B 30 Jung 2023 B 2 Julg 2023 B 3 Jung 2023 B 2 Julg 2023 B | t Complet Apr. 1249 1132 0 1249 288 | 2021 Ju Jul - Se Oct - De Jan | MaApr | 1 active user 😵 🕸 💉 1 🕑 🖶 Q |
| | Beect an Annotation Boundary Section Section | Actions | C 2 3000 Start 135ep 2021 A 135ep 2021 A 136ep 2021 A | Views Image: Control of the second seco | Y I 1240 Apr. 1332 0 1240 288 1240 443 208 383 208 307 209 0 | 2021 Ju Jul - Se Oct - De Jan | MaApr | 1 active user 😵 🕸 💉 1 🕑 🖶 Q |

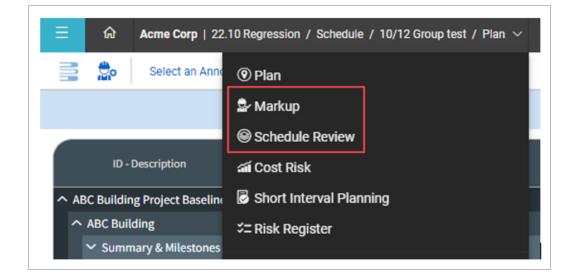
Active baselines are contractual schedule agreements between contractors and owners with infrequent changes. Some scenarios require active baselines to never change, which requires the active baseline to become locked.

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

Schedule Help Topics

| Team Member Markup Assignee Team Contribution Last Accessed Reg rst Clear Markup Tatyana Pustovit 23% (120) 10% (120) 3/8/23 1 | | | | | | | This schedule is locke | ed and is in a view only | rstate. | | | | | |
|---|----|-----------|-----------|-------------|--------------------------|---|---|---|--------------------|------------------------|------------------------|----------|---------|--------------|
| 1 Na | | | | | | PROJECT REGISTER E | VENTS PROJECT | REGISTER MATRIX | PROJECT | UNCERTAINTY | | | | |
| 1 N4 Next Treat 1 Dir 1 Dir < | | | | | | | | | | | _ | | | |
| 0 07 | ve | Event Id | Title | Туре | Description | S | Dur | \$ | Score | Risk $\uparrow \equiv$ | | | | |
| 0 07 Projection Quortunity Strin - Projections of sin (Spin Strin (Spin |) | R4 | New Event | Threat | | | | | | | | | | |
| 06 Sen Opp Opportunity Sen Opp Opportunity Sen Opp Opportunity Sen Opportunity <td>></td> <td>07</td> <td></td> <td>Opportunity</td> <td>Srini - Projectissue des</td> <td>Low (25%)</td> <td>Very High (≤ 180</td> <td>Very High (≤\$10</td> <td>•</td> <td></td> <td></td> <td></td> <td></td> <td></td> | > | 07 | | Opportunity | Srini - Projectissue des | Low (25%) | Very High (≤ 180 | Very High (≤\$10 | • | | | | | |
| Anne Corp 1 22 10 Regression / Schedule / 10/12 Group test / Manage Review Cycle This schedule is locked and is it is a view only state. End Review Cycle End Review Cycle to review Markup from team members Data in to your team members the purpose of the review cycle as well as what to focus on. This message will appear in popur Register Threshold Difference in Schedule Duration and Team Member Markup that requires a Register entry Team Member Markup Assignee Tayana Pustovit Tayana Pustovit <td>)</td> <td>629 Oppor</td> <td>629 Oppor</td> <td>Opportunity</td> <td></td> <td>Low (25%)</td> <td>Low (≤ 30d)</td> <td>Low (≤\$10K)</td> <td>0</td> <td></td> <td></td> <td></td> <td></td> <td></td> |) | 629 Oppor | 629 Oppor | Opportunity | | Low (25%) | Low (≤ 30d) | Low (≤\$10K) | 0 | | | | | |
| This schedule is locked and is in a view only state. End Review Cycle End Review Cycle End Review Cycle Explain to your team members the purpose of the review cycle as well as what to focus on. This message will appear in popus Register Threehold Difference in Schedule Duration and Team Member Markup that requires a Register entry Team Member Markup Asignee Tayona Pustovit 2061231 Scinivasia Bhavaraju 12/21/22 Overall 206 | 5 | 06 | Srini Opp | Opportunity | Srini Opp | Low (25%) | Very Low (≤ 11d) | | 0 | | | | | |
| Assignee Team Contribution Last Accessed Res st Clear M Tatyana Pustovit 23% (128) 15% (72) 3/8/23 1 1 Srin/vasa Bhavaraju 12/21/22 12/21/22 1 1 Overall 13% 7% 1 1 | | | | | | Message | | | ll as what to focu | us on. This messag | ge will appear i | in popup | D REVIE | W CICLE |
| Tatyana Pustovit 25% (22) 3/8/23 Srinivasa Bhavaraju 12/21/22 Overall 13% 7% | | | | | | Message Explain to your team men | the purpose of th | e review cycle as wel | | | ge will appear i | in popup | | |
| Srinivasa Bhavaraju 12/21/22 | | | | | | Message Explain to your team men Register Threshold Difference in Schedule Du Team Member Markup | the purpose of th | e review cycle as wel | ires a Register e | ntry | | | | None |
| Overall 13% The REMOVE | | | | | | Message Explain to your team men Register Threshold Difference in Schedule Du Team Member Markup Assignee | ibers the purpose of th ration and Team Memb | e review cycle as wel er Markup that requi Team Cor | ires a Register e | ntry | ast Accessed | | | None - |
| | | | | | | Message Explain to your team men Register Threshold Difference in Schedule Du Team Member Markup Assignee Tatyana Pustovit | ibers the purpose of th ration and Team Memb | e review cycle as wel er Markup that requi Team Cor | ires a Register e | ntry | ast Accessed 3/8/23 | | Jst | Clear Markup |
| | | | | | | Message Explain to your team men Register Threshold Difference in Schedule Du Team Member Markup Assignee Tatyana Pustovit Srinivasa Bhavaraju | nbers the purpose of th ration and Team Memb | e review cycle as wel er Markup that requi Team Cor | ires a Register e | ntry | ast Accessed 3/8/23 | | Jst | None - |

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



SHOW/HIDE LOGIC, WBS

From the plan project view from the 1st level drop-down menu within a project, click on the **ID** icon to show or hide WBS Codes.

| setch Mode 😯 | D ROW - | ID ~ E | | ₽ | | etail - Project | | | | | T | Search SET BASELI | NE S Zoom - Year | C.L.S |
|---------------------------------------|----------------------------|---------|----------|---------|----|-----------------|------|--------------|----------|-------------|------|-------------------|------------------|-------|
| ID - Description | | Rem Dur | | | | | | | | 2017 - 2021 | | | 2022 - 2026 | |
| | Dates | Rem Dur | Progress | | ~ | Baseline End | 2017 | | 2018 | 2019 | 2020 | 2021 | 2022 | |
| 1 vasey Building | 02 Jul 18 A 13 Apr 21 | 532 | 21% | | | 22 May 21 | | | | Data Date | | | | 10 |
| 1.1 Preconstruction | 02 Jul 18 A 08 Jul 19 | 71 | 76% | ••• | 2/ | 09 Jul 19 | | | | _ | | | | •• |
| • 1.1.1 Design | 02 Jul 18 A 31 Jan 19 A | | 100% | •••• | 2, | 01 Feb 19 | | Drawings (50 |) | 6 | | | | •• |
| A3050 Proposal Submissions | 02 Jul 18 A 18 Jul 18 A | 0 | 100% | | 2/ | 19 Jul 18 | | | | | | | | Q |
| A3060 Proposal Reviews & Approva | 19 Jul 18 A 03 Sep 18 A | 0 | 100% | | 2/ | 04 Sep 18 | | | 40-1 | | | | | Q |
| A3070 Establish Permitting Docume | 04 Sep 18 A 05 Nov 18 A | 0 | 100% | | 2/ | 06 Nov 18 | | | - | | | | | 0 |
| A3080 Create Early Stage Construct | 06 Nov 18 A | 0 | 100% | | 2 | 01 Feb 19 | | | - | | | | | Q |

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

| etch Mode 😯 | D ROW - | ID ~ I | | ₽ | D | etail - Project | | | | | T | Search SET BASELINE | Zoom - Year | 6 |
|---------------------------------------|----------------------------|---------|----------|-----|----|-----------------|------|---------------|-----|-------------|------|---------------------|-------------|-----|
| ID - Description | Dates | Rem Dur | 0 | | | Develop roal | | | | 2017 - 2021 | | | 2022 - 2026 | |
| ID - Description | Dates | Rem Dur | Progress | | ~ | Baseline End | 2017 | 2 | 018 | 2019 | 2020 | 2021 | 2022 | |
| 1 Vasey Building | 02 Jul 18 A 13 Apr 21 | 532 | 21% | ••• | | 22 May 21 | | | - | Data Date | | | | 10 |
| L1 Preconstruction | 02 Jul 18 A 08 Jul 19 | | 76% | | 2, | 09 Jul 19 | | | | - | | | | |
| L1.1 Design | 02 Jul 18 A 31 Jan 19 A | | 100% | | 2, | 01 Feb 19 | | Drawings (50) | | | | | | |
| A3050 Proposal Submissions | 02 Jul 18 A 18 Jul 18 A | 0 | 100% | ••• | 2/ | 19 Jul 18 | | | | | | | | Q |
| A3060 Proposal Reviews & Approva | 19 Jul 18 A 03 Sep 18 A | 0 | 100% | ••• | 2/ | 04 Sep 18 | | | • | | | | | 000 |
| A3070 Establish Permitting Docume | 04 Sep 18 A 05 Nov 18 A | 0 | 100% | | 2/ | 06 Nov 18 | | | • | | | | | Q |
| A3080 Create Early Stage Construct | 05 Nov 18 A | 0 | 100% | | 2 | 01 Feb 19 | | | | | | | | Q |

ANNOTATIONS

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

| Sketch Mode 😮 | | | ID 5 | | | Detail - Pr | oject | | | |
|------------------------------------|------------------------|-----------|---------|----------|-------|-------------|-------|--------------|---------|---|
| BENC | HMARK + SELECTE | DROW - | ID 5 | | 9 | • | | | | |
| ► ID - Description | Dates | Total Dur | Rem Dur | Progress | Float | New | : | Baseline End | | 20 Jul - Sep Oct - Dec Jan - MarApr - Jun Jul - |
| Vasey Building | 02 Jul 18 13 Apr 21 | 1017 | 532 | 20% | | 🔶 | 8 | | | Data Date |
| Preconstruction | 02 Jul 18 08 Jul 19 | 372 | 71 | 76% | | 🔶 | | | | |
| Design | 02 Jul 18 31 Jan 19 | 214 | 0 | 100% | | | | | gs (50) | in the second |

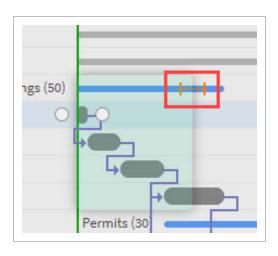
From here, Annotations can be changed by clicking the various options, which will update the information displayed on the Gantt Chart.

| ANNOTATION | | | | | | 2018 | | | 20 | 19 | | 1 | 20 | 020 | | | 2021 |
|---|--------|------|--------|------------------------|------------|-----------|-----------|-------------|-----------------------------|--------------------|--------------------------------|---------------|------------|------------------------------|-----------|--------------------------|------------------------|
| None | ogress | •••• | 2/ | Baseline End | Apr - Jun | Jul - Sep | Oct - Dec | Jan - Mar | Apr - Jun | Jul - Sep | Oct - Dec | Jan - Mar | | Jul - Sep | Oct - Dec | Jan - Mar | Apr - Ju |
| Baseline | 2196 | ••• | | 22 May 21 | | - | | | Data Date | | | | | | | | Dura |
| Benchmark 🗸 | 76% | | 2, | 09 Jul 19 | | | | | | Duration Phase Del | Delta: +49d | | | | | | |
| Continuity | 00% | | 2/ | 01 Feb 19 | vings (50) | | | Durati | on Delta: +45 Delta: 096 | | | | | | | | |
| Cost | 50% | | 2, | 09 Jul 19 | | Permits (| 30) | | _ | Duration Phase Del | Delta: +20d lta: +2% | | | | | | |
| Detail | 0% | | 2/ | 09 Jul 19 | | | | | P | | | | | | | | |
| Float | 00% | | 2 | 01 Mar 19 | | | | | | | | | | | | | |
| Productivity Rates | 0% | | 2/ | 15 Jun 19 | | | | | - |] | | | | | | | |
| Realism | 00% | *** | 2/ | 18 Dec 18 | | | - | | | | | | | | | | |
| | 4296 | ••• | 2/ | 10 May 19 | | | | 4 | | | | | | | | | |
| BASIS BENCHMARK ANALYSIS | 2096 | | | 04 Sep 19 | | | | - | | P | uration Delta hase Delta: + | : +19d 496 | | | | | |
| None | 096 | | 2, | 15 Apr 21 | | | | Flo | ors (25) 🖷 | | | | | | | | uration D hase Delt |
| Selected Row | 096 | | 2, | 15 Apr 21 | | | | | | | | | R | ooms (80) | - | D | uration |
| All | 096 | | 2 | 09 Mar 21 | | | | | | | | | | | - | - | |
| Project | 096 | ••• | 2 | 28 Jan 21 | | | | | | | | | | | P | 18 | |
| Level 2 | 0% | ••• | 2/ | 27 Feb 21 | | | | | | | | | | | | - | |
| Level 3 | 0% | ••• | 2 | 09 Mar 21 | | | | l. | | | | | | | | →┣┓ | |
| Level 4 | 0% | ••• | 2/ | 19 Feb 21 | | | | | | | | | | | | | |
| Level 5 | 0% | ••• | 2/ | 14 Jan 21 | | | | | | | | | | | 0 | | |
| | 096 | | 2 | 16 Jan 21 | | | | | | | | | | | | | |
| KNOWLEDGE TAGS | 096 | ••• | 2/ | 15 Apr 21 | | | | | | | | | | | C | | |
| None 🗸 | 0% | ••• | 2/ | 13 Feb 21 | | | | | | | | Steel (tonne | es) (5000) | _ | | Duration D Phase Delt | Delta: +6d ta: 0% |
| As-Built Performance | 096 | | 2 | 13 Feb 21 | | | | | | | | | | | (| 2 | |
| 13 Aug 20 68 16 Nov 20 68 24 Jun 20 70 | | | 2 | 25 Dec 20 | | | | | | | | | | - | | | - |
| 24 Jun 20 72 | 0% | ••• | 2/ | 11 Nov 20 | - | | | | | | | | | Duration De | law and | | - |
| 0100120 | | | | | | | | | | | | | | ouration De | DCS- SOC | 1 | |
| 01 Oct 20 03 Mar 20 23 Jun 20 17 Jun 19 222 | 0% | | • • | 01 Aug 20 23 Apr 20 | | | | ubic yards) | | | | | Durchie | Phase Delta in Delta: +8d | s: +396 | | - |

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

| ANNOTATION | | | | | | 2018 | | 2019 | | | | |
|--------------------------|--------|------|----|--------------|------------|-----------|--------------|-----------|-----------|-----------|-----|--|
| None 🗸 | ogress | ••• | 2/ | Baseline End | Apr - Jun | Jul - Sep | Oct - Dec | Jan - Mar | Apr - Jun | Jul - Sep | Oct | |
| Baseline | 21% | •••• | | 22 May 21 | | | | | Data Date | | | |
| Benchmark | 76% | •••• | 2, | 09 Jul 19 | | | | | | | | |
| Continuity | 00% | •••• | 2/ | 01 Feb 19 | /ings (50) | | - Pre- | - | | | | |
| Cost | 00% | •••• | 2 | 19 Jul 18 | 0 | Ъ-О | | | | | | |
| Detail | 00% | ••• | 2/ | 04 Sep 18 | | -0 | | | | | | |
| Float | 00% | ••• | 2/ | 06 Nov 18 | | - 50 | | | | | | |
| Productivity Rates | 00% | ••• | 2/ | 01 Feb 19 | | | - | | | | | |
| Realism | 50% | •••• | 2/ | 09 Jul 19 | | Permits (| 30 | | | • | | |
| | 0% | ••• | 2/ | 09 Jul 19 | | | | | P1 | | | |
| BASIS BENCHMARK ANALYSIS | 00% | ••• | 2/ | 01 Mar 19 | | | | | | | | |
| None | 0% | ••• | 2/ | 15 Jun 19 | | | | | -04 | | | |
| Selected Row 🗸 | 00% | | 2/ | 18 Dec 18 | | | 40 | 4 | | | | |
| All | 42% | ••• | 2/ | 10 May 19 | | | | 4 | | | | |
| Project | 20% | •••• | | 04 Sep 19 | | | | _ | | | | |
| Level 2 | 9% | •••• | | 04 Sep 19 | | | Modul | es (34) 🗖 | | 2 | | |
| Level 3 | 36% | ••• | | 10 May 19 | | | | P. | | | | |
| Level 4 | 0% | *** | | 06 Jun 19 | | | | | P | | | |
| Level 5 | 0% | | | 04 Sep 19 | | | | | | | | |
| | 0% | *** | | 13 Jul 19 | | | | | | | | |
| KNOWLEDGE TAGS | 2% | | | 31 May 19 | | | | | | | | |
| None 🗸 | 42% | •••• | | 18 Jun 19 | | C | Contracts (2 | .5 | | | | |

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.



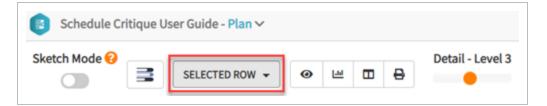
This is based on the % of tolerance defined in the project settings, the start date of the summary WBS in the current project, and the duration of the benchmark from the Knowledge Library.

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.

| SELECTED ROW 👻 🕑 | <u>[.01</u> | |
|--------------------|-------------|-----|
| ANNOTATION | | |
| None | ~ | ' I |
| Baseline | | - 1 |
| Benchmark | | |
| Continuity | | |
| Cost | | |
| Detail | | |
| Float | | |
| Productivity Rates | | |
| Realism | | |
| 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:

| lcon | 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. |
| 2 0 | Lead or Lag | Predecessor and / or successor logic links contain lag. |
| ж | Insufficient Detail | The activity spans more than 10 % of the overall project duration. |
| ж | 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. |
| \otimes | Negative Float | Total float is less than zero. |
| _ | | |
| NOTE T | he color of each icon represents the cri | iticality of a critique. Blue icons are typically |

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.

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.



COLUMN SET BUILDER MENU

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

| 🔛 Views 🔢 | 11 T | | |
|-------------|-------------|---------------------|--|
| Finish | At Complet | Column set builder | |
| 30 Mar 2023 | 503 | Saved column sets | |
| 18 May 2021 | 17 | Recent column sets | |
| 28 Apr 2021 | 3 | Paul's | |
| 30 Apr 2021 | 2 | | |
| 4 May 2021 | 2 | 📁 Revert to default | |
| 6 May 2021 | 2 | \$0. | |

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

| Colum | nn set name | | | | |
|------------|-----------------------------|----------|---------|----------------------|--------|
| Paul | s | | | \otimes | Delete |
| wailat | ole columns 🛛 Display by gr | oup | Selecte | d columns | |
| Sea | arch Q | | Sea | rch | Q |
| | Column name | - | | Column name | 1 |
| v (| COST | ^ | | ID - Description | 1 |
| ~ | Cost | | | Actions | |
| 2 | Baseline Actual Cost | | | Start | |
| ~ | SN 1 Actual Cost | | | Finish | |
| | SN 2 Actual Cost | | | At Complete Duration | |
| | Baseline Cost | | | | |
| | SN 1 Cost | | | | |
| | SN 2 Cost | | | | |
| | Variance - Baseline Cost | - | | | - |

QUERY BUILDER MENU

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

| Views 🔛 | ↓† | 7 | |
|--------------|--------|------------------------|---|
| Finish | At Cor | Y Query builder | |
| | | 🗄 Saved queries | • |
| 30 Mar 2023 | 5 | | |
| 27 Oct 2022 | 1 | Recent queries | |
| 24 Oct 2022 | | Start date | |
| 27 Oct 2022 | - L | | |
| 2 Dec 2022 | 3 | 📰 Quick Templates | • |
| 26 Oct 2022 | | 🖉 Clear query | |
| 28 Oct 2022 | | | |

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

| uery name Start date | | | | 🚫 Delete |
|-------------------------|-------------------------|---------------|-----------|----------|
| AND OR (+) Ad | ld Filter 🕘 Add Group 🤅 | D | | |
| Start | ▼ Is after | ▼ 10/1/2022 🛱 | \otimes | |

SORT BUILDER MENU

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

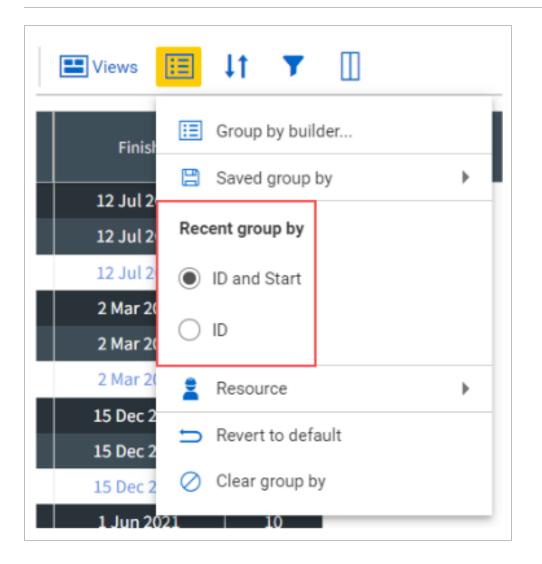
| Uiews 🔢 | LT 🔻 🔲 | |
|-------------|-----------------|---|
| Finish | ↓↑ Sort builder | |
| | Saved sorts | • |
| 30 Mar 2023 | | |
| 18 May 2021 | Recent sorts | |
| 28 Apr 2021 | Cost | |
| 30 Apr 2021 | | |
| 4 May 2021 | New sort | |
| 6 May 2021 | 🚫 Clear sorts | |
| 18 May 2021 | _ | |

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

| Sort name | | | |
|-----------|--------------|----------|------|
| Cost | 🗙 Delete | | |
| Column | Position Sor | t | |
| Cost | ▼ 1 A | scending | , |
| Start | ▼ 2 A | scending | • 🛇 |

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.

| Group by name | | |
|---------------|----------|----------|
| ID and Start | | 🚫 Delete |
| Column | Levels | Position |
| ID | ↓ Levels | 1 😌 🛞 |
| Start | ↓ Levels | 2 🛞 |

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.

| ₩Views 🗄 🕴 🍸 | |
|-------------------|--|
| Save current view | |
| View builder | |
| Saved views | |
| Recent templates | |
| New view | |
| Combined | |
| 🖉 Clear view | |

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

| lame | | | | |
|--------------|--------------------------|---|--------|----------|
| New view (1) | | | | 🚫 Delete |
| Group by 🔝 | Select one | ٠ | | |
| Sort ↓↑ | Select one | • | | |
| Query 🍸 | Select one | • | | |
| | Select one Start date | | | |
| Reset | | | Cancel | Save |

HIDE NO RESULTS

In View Options, the Hide No Results toggle has been added that lets you hide WBS items that do not return any results. The new Hide No Results toggle lets you hide any WBS groupings on the Plan page that do not yield any results.

| ☰ ᡎ InEight | | / Schedule / Commercial Buildi | ng / Plan 🗸 |
|------------------------|---------|--------------------------------|-------------|
| Select an Annotation | on 🔻 | ● 🕅 🖪 🖬 Views 🔚 | ↑↓ ▼ |
| ID - Description | Actions | General | At Complet |
| ∧ Commercial Building | ••• | Hide No Results | 0 |
| ∧ Preconstruction | ••• | | 0 |
| Design | ••• | Resources | 0 |
| Permitting | ••• | Histogram | 0 |
| ∧ Procurement | ••• | | 0 |
| Fabrication & Delivery | ••• | Baseline/Snapshots | 0 |
| Submittals & Approvo' | | Active Beesline | 0 |

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

| Select an Annotatio | | | | ↑↓ ▼ | |
|--------------------------|---------|-------------|-------------|------------|--|
| ID - Description | Actions | Start | Finish | At Complet | 2021 2022 Apr - Juljul - Ser <mark>Oct - De</mark> Jan - MaApr - Juljul - Ser <mark>Oct - De</mark> Jan - MaApr |
| ✓ Contract Milestones | ••• | 15 Jul 2021 | 14 May 2025 | 946 | |
| Interim Milestones | ••• | 15 Jul 2021 | 15 Jul 2021 | | |
| ∧ Design | ••• | 15 Jul 2021 | 14 Jan 2025 | 860 | |
| ✓ Administration | ••• | 15 Jul 2021 | 24 Mar 2023 | 416 | |
| ✓ Integration Milestone | ••• | 29 Apr 2022 | 24 Mar 2023 | 182 | |
| ✓ DM01 to DM31-Project M | ••• | 12 Aug 2021 | 24 Mar 2023 | 396 | |

When the Hide No Results switch is turned *On*, Interim Milestones is removed from the Plan view.

| Select an Annotatio | on 🔻 🛛 🧿 | | Views 📰 | ↑↓ ▼ | | 1 active user |
|--------------------------|----------|-------------|-------------|------------|---|-----------------|
| ID - Description | Actions | Start | Finish | At Complet | 2021 2022 Apr - Ju Jul - SetOct - De Jan - MApr - Ju Jul - SetOct - De | Jan - MaApr - J |
| ✓ Contract Milestones | ••• | 15 Jul 2021 | 14 May 2025 | 946 | | _ |
| ∧ Design | ••• | 15 Jul 2021 | 14 Jan 2025 | 860 | | _ |
| ✓ Administration | ••• | 15 Jul 2021 | 24 Mar 2023 | 416 | | - 1 |
| ✓ Integration Milestone | ••• | 29 Apr 2022 | 24 Mar 2023 | 182 | | - 1 |
| ✓ DM01 to DM31-Project M | ••• | 12 Aug 2021 | 24 Mar 2023 | 396 | | _ |

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 PRODUCTIVIT | TY RATES | KNOWLEDGE T | AGS | CALENDARS | REGISTER | RESOURCES | MACHINE LEARNING | | |
|---|----------------------|----------------------|-------------|-------------|-----|-------------|-------------|-------------|------------------|---|---|
| | | | | | | | | | | • | Q |
| | Schedules 🖡 | s | Schedule ID | | | Start | Finish | Data Date | Verified | | |
| | MPP Project | s | SCHED-17 | 1 | | 2 Jul 2018 | 18 Jun 2023 | 2 Jul 2018 | • | | |
| | 🖻 ms proj | s | SCHED-18 | 1 | | 1 Jul 2019 | 26 Feb 2023 | 1 Jul 2019 | • | | |
| | MS project | s | SCHED-1 | 1 | | 3 Jul 2018 | 13 Sep 2020 | 3 Jul 2018 | • | | |
| | New CPM Schedule | s | SCHED-19 | 1 | | 9 Jun 2021 | 9 Jun 2022 | 19 Aug 2021 | • | | |
| | 🖻 new kb | s | SCHED-70 | 1 | | 12 Apr 2022 | 12 Apr 2023 | 12 Apr 2022 | • | | |
| | New Sch on 6.27 | s | SCHED-83 | 1 | | 27 Jun 2022 | 27 Jun 2023 | 27 Jun 2022 | • | | |
| | New schedule from | Scratch S | SCHED-54 | 1 | | 14 Feb 2022 | 14 Feb 2022 | 14 Feb 2022 | • | | |
| | 🖻 no ID | ١ | NO ID | 1 | | 3 Jul 2018 | 13 Sep 2020 | 3 Jul 2018 | • | | |
| | 🖻 not | s | SCHED-37 | 1 | | 27 Sep 2021 | 27 Sep 2021 | 1 Apr 2019 | • | | |
| | Offshore Platform | s | SCHED-20 | 1 | | 8 May 2019 | 8 May 2020 | 8 May 2019 | ٠ | | |
| | Offshore Platform [C | OUTLINED @ 7/15/20 S | SCHED-21 | 1 | | 8 May 2019 | 8 May 2019 | 8 May 2019 | • | | |
| | Paradise | s | SCHED-22 | 1 | | 29 Oct 2020 | 29 Oct 2020 | 26 Mar 2017 | • | | |
| | Preconstruction | s | SCHED-23 | 1 | | 2 Jul 2018 | 16 May 2024 | 27 Oct 2020 | • | | |
| | Procurement | s | SCHED-24 | 1 | | 1 Oct 2017 | 1 Oct 2018 | 1 Oct 2017 | • | | |
| | ProjectCode Match | s | SCHED-80 | 1 | | 16 Jun 2022 | 16 Jun 2023 | 16 Jun 2022 | • | | |
| | 🗗 PT | s | SCHED-112 | 1 | | 26 Oct 2022 | 26 Oct 2023 | 26 Oct 2022 | • | | |
| | Publish to KB | s | SCHED-49 | 1 | | 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.

| | | | | | | • |
|--|-------------|-------------|-------------|-------------|----------|---|
| 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 | • | |
| P 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 | • | |
| P New schedule from Scratch | SCHED-54 | 14 Feb 2022 | 14 Feb 2022 | 14 Feb 2022 | • | |
| 🖻 no ID | NO ID | 3 Jul 2018 | 13 Sep 2020 | 3 Jul 2018 | • | |
| 🖻 not | SCHED-37 | 27 Sep 2021 | 27 Sep 2021 | 1 Apr 2019 | • | |
| Offshore Platform | SCHED-20 | 8 May 2019 | 8 May 2020 | 8 May 2019 | • | |
| Offshore Platform [OUTLINED @ 7/15/20. | SCHED-21 | 8 May 2019 | 8 May 2019 | 8 May 2019 | • | |
| 🖻 Paradise | SCHED-22 | 29 Oct 2020 | 29 Oct 2020 | 26 Mar 2017 | • | |
| Preconstruction | SCHED-23 | 2 Jul 2018 | 16 May 2024 | 27 Oct 2020 | • | |
| Procurement | SCHED-24 | 1 Oct 2017 | 1 Oct 2018 | 1 Oct 2017 | • | |
| ProjectCode Match | SCHED-80 | 16 Jun 2022 | 16 Jun 2023 | 16 Jun 2022 | • | |
| PT | SCHED-112 | 26 Oct 2022 | 26 Oct 2023 | 26 Oct 2022 | • | |
| Publish to KB | SCHED-49 | 21 Feb 2022 | 20 Feb 2023 | 19 Feb 2022 | | |

ACTIVITY PRODUCTIVITY RATES

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

| CPM SCHEDULES ACTIVITY P | RODUCTIVITY RATES KNOV | LEDGE TAGS | CALENDARS | REGISTER | | RESOURCES | MACHINE LEARNING | |
|--------------------------|------------------------|-------------|-----------------|---------------|---|------------------|------------------|---|
| | | | | | | | | • |
| Description | Output | UOM | Duration/Output | Duration Unit | | \$/Output | | |
| Act 1 | 1250 | Sec | | Days | • | \$5,000,500.00 | ⊗ ^ | |
| Act1 | 8500 | Hours | 150 | Days | • | \$787,878,778.00 | \otimes | |
| APR 1 | 2 | 10 | 200 | Hours | • | \$6,000,000.00 | \otimes | |
| Brian Test Rate | 1 | 23 | 23 | Days | • | \$230.00 | \otimes | |
| Concrete | 80 | Cubic Yards | 144 | Days | • | \$40,000.00 | \otimes | |
| Concrete Pour (generic) | 400 | Sq Feet | 1 | Days | • | \$36,000.00 | \otimes | |
| Concrete Pour (generic) | 8 | Cubic Yards | 1 | Days | • | \$0.00 | \otimes | |
| Concrete Pour (refinery) | 6 | Cubic Yards | 1 | Days | ۲ | \$0.00 | \otimes | |
| Concrete Pour (refinery) | 60 | Cubic Yards | 1 | Days | • | \$52,000.00 | \otimes | |
| Controls | 1 | Unit | 4 | Days | • | \$20,000.00 | \otimes | |
| Controls | 1 | Unit | 4 | Days | • | \$0.00 | \otimes | |
| Drywall | 1 | 1 | 5 | Days | • | \$0.00 | \otimes | |
| Early Works | 1 | Acre | 1 | Days | + | \$0.00 | \otimes | |
| Early Works | 1 | Acre | 1 | Days | • | \$2,000.00 | \otimes | |
| Early Works | 1 | Acre | 1 | Days | + | \$2,000.00 | \otimes | |
| EIA | 1 | Unit | 24 | Days | + | \$30,000.00 | \otimes | |
| EIA | 1 | Unit | 24 | Days | • | \$0.00 | \otimes | |
| Excavation | 200 | Linear Feet | 1 | Days | • | \$0.00 | \otimes | |
| 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 LEARNIN | G |
|-------------------|-------------------------|-----------------------------|----------------|-----------|----------|-----------|-----------------|---|
| Codes / Project 🔺 | | | | | | | | |
| Codes | Design Codes | | | | | | | |
| Project | Project Codes | | | | | ~* | | * |
| Activity | 10/7 Project Code | | | | | Ľ | ⊗ | |
| Register Event | 7/12 T code | | | | | Ľ | 8 | |
| Resource | 7/5 - KB - Codesproject | | | | | ď | \otimes | |
| | Business Groups | | | | | Ľ | \otimes | |
| UDFs | Code 25.25-3 | | | | | ď | 8 | |
| Project WBS | CodesProject 1 | | | | | Ľ | 8 | |
| Activity | CodesProject 2 | | | | | ď | 8 | |
| Register Event | CodesProject 3 | | | | | Ľ | \otimes | |
| Resource | KB - Code Project 1 | | | | | Ľ | 8 | |
| | KB - Code Project 2 | | | | | Ľ | \otimes | |
| | Locations | | | | | Ľ | 8 | |
| | Project Code 10/6 | | | | | Ľ | \otimes | |
| | ProjectCodes 1 | | | | | Ľ | 8 | |
| | ProjectCodes 2 | | | | | ľ | \otimes | |
| | ProjectCodes 3 | | | | | Ľ | \otimes | |
| | Prosjekt kode 9-16 | | | | | Ľ | \otimes | |
| | Regression Code | | | | | Ľ | \otimes | |
| | Srini 5 C/H tag | | | | | Ľ | \otimes | |
| | SriniProjectCode | | | | | Ľ | | |

CALENDARS

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

| CPM SCHEDULES | ACTIVITY PRODUCTIVITY RATES | KNOWLEDG | 2.000 | | LENDARS | | REGISTE | | nico. | OURCES | MACHINE LE |
|-----------------|-----------------------------|----------|-------|-----|---------|-----|---------|-----|-------|------------|------------|
| | | | | | | | | | | | |
| Calendar | | Hours/d | Sun | Mon | Tue | Wed | Thu | Fri | Sat | Exceptions | Actions |
| 2 Days | | 10 | 0 | • | • | • | 0 | 0 | 0 | 4 | 1 |
| 22 Day | | 10 | 0 | • | • | 0 | 0 | 0 | 0 | 0 | |
| 3 Day | | 8 | 0 | • | • | • | 0 | 0 | 0 | 0 | |
| 4 Day | | 8 | 0 | • | • | • | • | 0 | 0 | 0 | 1 |
| 5 Day | | 8 | 0 | • | • | • | • | • | 0 | 0 | |
| 6 Day | | 8 | 0 | • | • | • | • | • | • | 0 | |
| 7 Day | | 8 | • | • | • | • | • | • | • | 0 | 1 |
| Brian Default V | ork Schedule | 1 | 0 | 0 | 0 | 0 | • | 0 | 0 | 0 | 1 |
| Global Calenda | r | 8 | 0 | • | • | • | • | ٠ | 0 | 0 | |
| My calendar | | 5 | 0 | 0 | • | • | • | 0 | 0 | 2 | |
| Tatyana's caler | dar | 6 | 0 | • | • | • | • | • | 0 | 2 | 1 |

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

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

| Event | s Register Registe | r Types Matrix Del | finition | | | | | | | | | • | ? 0 |
|----------|--------------------|--------------------|--|-------------|-------------|-------------|-------|------------|---------------|------------|--------------|--------|------------|
| Event Id | Title | Туре | Description | \$ | Dur | s | Score | Mitigation | Status | Activities | Created By | Verifi | |
| 01111 | Opportunity | General + | Opportunity of opp due to 1 resulting in 2 | | | | | Test desc | Closed + | | robin martin | | 8 |
| R105 | Test | Threat + | • Test | Very High 🔶 | Very High 🕨 | Very High 🔸 | 25 | gzgdhfg | Mitigated + | | Jonathan Bo | | 8 |
| R114 | New New | Schedule Ch > | New New | | | | | 🖬 M5 | Mitigated + | 0 | Srinivasa Bh | | 8 |
| R114.2 | New New | Threat + | New New | Very High 🔸 | Very High 🕨 | Very High 🔸 | 25 | 🖬 new | Unmitigated + | 0 | Kim Scott | ۲ | 8 |
| 8122 | Regression T | Threat • | This is going to be used for the regression testing team teeffort today. Let's take a took at these mitigation modals and risks to see if this will be usefut to the customer: ajiothjarditsjädifjasdifja sitjasio flajod flajodf ajiodflja sidja isdjifsdrasdf lajosf laj flajod flajodflja sidja isdjifsdrasdf adstji ajofljasdifja sidflja isdji isdjifsdrasdf adstji ajofljasdifja sidflja isdfi ad ad as ssssssssssssssssssssssssssssss | Very High 🕨 | Very High 🔸 | High 🕨 | 23 | æ | Unmitigated 🕨 | | Kim Scott | Ð | 8 |
| R14 | Risk from Co | Threat > | Risk from Cost risk Desc | Very High 🕨 | Very High 🕨 | Very Low 🕨 | 25 | 🖬 mit | Unmitigated • | | Srinivasa Bh | | 8 |
| R42 | Threat 5 | Threat + | Threat 5 | Very High | Very High 🕨 | Very High 🕨 | 25 | ÷ | Unmitigated > | | Tatyana Pust | | 8 |

REGISTER TYPES

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

| | CPM SCHEDULES ACTIVITY PRODUCTIVITY RATE | S KNOWLEDGE TAGS | CALENDARS | REGIS | TER | RESOURCES | MACHINE | LEAR |
|--|--|------------------|-------------|-----------------|-------------|-----------------|---------|------|
| Events Register Register Types Matrix Definition | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | Name | Prefix | Probability | Schedule Impact | Cost Impact | Positive Impact | Edit | |
| | Opportunity | 0 | | 2 | | | 8 | |
| | Idea | 1 | | | | | â | |
| | Srini Test | SR | | | | | ď | 0 |
| | Tatyana Test | ТР | | 2 | | | Ľ | 6 |
| | Schedule Change Request | s | | | | | 8 | |
| | Test 9-16 | TP | | 2 | | | ď | 0 |
| | Type 1 | ТР | | 2 | | | Ľ | 0 |
| | General | GEN | | | | | a | |
| | Threat | R | | | | | 8 | |
| | Issue | U | | V | ~ | | 8 | |

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 F | PRODUCTIVITY RATES KNOWL | EDGE TAGS CALENDARS | REGISTER RESOURCES | MACHINE LEARNING |
|--|--------------------------|--------------------------|---------------------|--------------------|------------------|
| Events Register Register Types Matrix Definition | | | | | |
| | Description | Probability | Schedule Impact | Cost Impact | Color |
| | Very Low | 10% | ≤11 days | ≤ \$13 | |
| | Low | 25% | ≤ 30 days | ≤ \$10,000 | |
| | Medium | 50% | ≤ 60 days | ≤ \$100,000 | |
| | High | 75% | ≤ 90 days | ≤ \$1,000,000 | |
| | Very High | 95% | ≤ 180 days | ≤ \$10,000,000 | |
| | | | | | |

RESOURCES

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

| Resources Categories | | | | | | | 3 | 9 |
|----------------------|-------------------|--------------|------------|-------|-----------------|-----------|-----|---|
| | Name | Category | Color | UoM | Default Units/d | Cost/Unit | | |
| m Test for Keith | Kim Test | Labor | • | Hours | 8.00 | 1.00 | ⊗ ^ | |
| obin Tester | Tester | Material | • | Each | 1.00 | 200.00 | 8 | |
| oject resource | project resource | Nonlabor | • | Each | 1.00 | 75.00 | 8 | |
| 9 | Resource 9 | Nonlabor | • | Each | 1.00 | 0 | 8 | |
| obal | Global | New Category | • | Each | 1.00 | 0 | 8 | |
| ini Import ID | Srini Import Desc | Unique | • | Each | 1.00 | 0 | 8 | |
| dent | Indent | Labor | • | Hours | 8.00 | 0 | 8 | |
| tyana Reg Test | Ressurs 009 | Supply | • | Hver | 25.00 | 5080.00 | 8 | |
| 32 | | Labor | • | Hours | 8.00 | 0 | 8 | |
| 5 | Ski Patroller | Labor | > • | Hours | 8.00 | 25.00 | 8 | |
| DUOM | UOM No | Labor | • | | 1.00 | 0 | 8 | |
| Jonny B | Bonny J | Labor | • | Hours | 8.00 | 0 | 8 | |
| Baby jon | jonny babe | Labor | • | Hours | 2.00 | 3.00 | 8 | |
| 9 Res 1 | Res 1 | Labor | • | Hours | 8.00 | 0 | 8 | |
| 9 Res 2 | Res 2 | Labor | • | Hours | 8.00 | 0 | 8 | |
| /12 | Resource 3 | Labor | • | Hours | 8.00 | 0 | 8. | |

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

| • | | Import Resources | | × | | | | D D | ۹ |
|----------|----------|---|-------------|-----|------|-----------|-------------|-----|---|
| 10 | Name | inport resources | | | NI . | Cost/Unit | Assignments | | |
| MST_TEST | MST_TEST | Import Type | | - 1 | | 20.00 | 6 | ۲ | |
| | | KNOWLEDGE LIBRARY * | | - 1 | | | | | |
| | | A Indicates resource already exists and will be duplicated. | | . 1 | | | | | |
| | | Knowledge Library Resources | include | | | | | | |
| | | BELT Beiting | ۲ | i I | | | | | |
| | | Concrete Concrete | ۲ | | | | | | |
| | | Concrete Finisher Concrete Finisher | ۲ | | | | | | |
| | | Crane Crane | ۲ | | | | | | |
| | | Design Engineer Design Engineer | ۲ | | | | | | |
| | | Parallelanda | | - | | | | | |
| | | | Cancel Impo | 4 | | | | | |
| | | | | _ | | | | | |

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 | | ► |

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 Categ | ories | | | | | | | |
| Search | | | EXPOR | т | IMPORT | | ADD RESOU | RCE |
| | | | | | | | | |
| Name | Description | | Category | Unit | Default Units/d Cost/ | Unit | Assignments | Delete |

| | CPM SCHEDULES | RESOURCES | MACHINE LEARNING |
|--------------------------|---------------------|-----------|------------------|
| Resources Categories | | | |
| | Name | | |
| | Labor | | |
| | Material | | |
| | Nonlabor | | |
| | Installed Equipment | | 8 |
| | Installed Material | | 8 |
| | New Category | | 8 |
| | Ny kategori 1 | | 8 |
| | Supply | | 8 |
| | Supply Non | | 8 |
| | Unique | | \otimes |

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

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

| Resources Categories | |
|----------------------|------------------------------|
| | Name |
| | Labor |
| | Material |
| | Nonlabor |
| | Installed Equipment |
| | Installed Material |
| | New Category |
| | Ny kategori 1 Add Category × |
| | Supply |
| | Supply Non Name |
| | Unique |
| | Cancel Add |
| | |

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 | ACTIVITY PRODUCTIVITY RATES | KNOWLEDGE TAGS | CALENDARS | REGISTER | RESOURCES | MACHINE LEARNING |
|------------------------|---|--|--------------------------------|--------------------------------|-------------------------------|--------------------------|------------------|
| ble Machine Learning 💽 | | | | | | | |
| | Schedule Machine L suggestion is detaile | earning allows Inference Engine sugge ed below. | stions to be automatically tun | ed and calibrated by the selec | tions you choose. The relativ | e influence of each part | that makes up a |
| | | | | Description | | | +12% |
| | | | | Less | Neutral | | More |
| | <u> </u> | | | Duration | | | +3% |
| | | | | Less | Neutral | | More |
| | Ç | | | Parent Description | | | 0% |
| | | | | Less | Neutral | | More |
| | 0 | | | Phase | | | +9% |
| | | | | Less | Neutral | • | More |
| | Q | | | Project Codes | | | -195 |
| | | | | Less | Neutral | | More |
| | | ç | | Project Code Values | | | 0% |
| | | | | | | | |

SET UP RESOURCES

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

| | CPM SCHEDULES | ACTIVITY PRODUCTIVITY RATES | KNOWLEDGE TAGS | CALENDARS | REGISTER | RESOURCES | MACHINE LEARNING | | | |
|-----------------------|---------------|-----------------------------|----------------|-----------|----------|-----------|------------------|-----------|-----------|---|
|) Resources Categorie | 'S | | | | | | | | 3 | • |
| | Name | | Category | | Color | UoM | Default Units/d | Cost/Unit | | |
| m Test for Keith | Kim Test | | Labor | • | • | Hours | 8.00 | 1.00 | 8 | * |
| bin Tester | Tester | | Material | • | • | Each | 1.00 | 200.00 | \otimes | 1 |
| oject resource | project reso | ource | Nonlabor | • | | Each | 1.00 | 75.00 | 8 | |
| 19 | Resource 9 | | Nonlabor | • | • | Each | 1.00 | 0 | \otimes | |
| obal | Global | | New Category | • | | Each | 1.00 | 0 | 8 | - |

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

| CPM SCHEDULES | ACTIVITY PRODUCTIVITY RATES | KNOWLEDGE TAGS | CALENDARS | REGISTER | RESOURCES | MACHINE LEARNIN |
|---------------|--|------------------|--|--|--|--|
| | | | | | | |
| Name | | Category | | Color | UoM | Default Units/d |
| Kim Test | | Labor | • | | Hours | 8.00 |
| Tester | | Material | • | ۲ | Each | 1.00 |
| project reso | ource | Nonlabor | • | | Each | 1.00 |
| Resource 9 | | Nonlabor | • | • | Each | 1.00 |
| | Name Kim Test Tester project resc | Name Kim Test | Name Category Kim Test Labor Tester Material project resource Nonlabor | Name Category Kim Test Labor Tester Material project resource Nonlabor | Name Category Color Kim Test Labor ● Tester Material ● project resource Nonlabor ● | Name Category Color UoM Kim Test Labor Image: Category Image: Category |

• A dialog box opens.

| D | | Name |
|------------------|---|-----------|
| ID | | Name |
| Category | | Unit |
| Labor | ~ | Hours |
| Default Units/d | | Cost/Unit |
| 8 | | 0 |
| Color assignment | | |
| | | |
| | | |

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

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

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

| 754 | |
|----------------|-----------|
| / J4 | Electric |
| ategory | Unit |
| Material | ✓ Each |
| efault Units/d | Cost/Unit |
| 1 | 0 |

• The new resource is added to the Resource register

| its/d Cost/Unit |
|-----------------|
| its/d Cost/Unit |
| |
| 0 🛞 |
| 100.00 🛞 |
| 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.

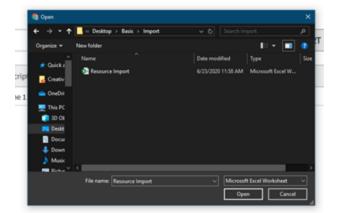
- 1. In the Knowledge Library Resource register, click the **Export**button.
 - Once selected, an Excel file downloads to your local drive. The file contains the list of resources currently in the organization's Resource register.

| | А | В | С | D | E | F | G | | | |
|-----------------------|---|--|---|---|------|---------------------------------------|-------------------------------|--|--|--|
| 1 | REQUIRED | Field is required for impo | ort | | | | | | | |
| 2 | OPTIONAL | Field is optional for impo | ort | | | | | | | |
| 3 | VALIDATED | Field must match maste | data available in application | | | | | | | |
| 4 | IGNORED | Field not to be populate | d | | | | | | | |
| | Notes: 1. Create New Resources - To create a new Resource enter valid input for the required fields. Rows that are left blank with required fields will not be entered into Schedule as a new Resource. 2. The default Category is Labor 3. Colors are defined using predefined set of hexadecimal characters, the default Color is 0066CC | | | | | | | | | |
| | with required fields will not be en 2. The default Category is Labor | tered into Schedule as a ı | new Resource. | | | | | | | |
| 5 | with required fields will not be ent 2. The default Category is Labor 3. Colors are defined using predef | tered into Schedule as a ı | new Resource. | | Unit | Default Units Per Day | Cost Per Unit | | | |
| 5 6 | with required fields will not be ent 2. The default Category is Labor 3. Colors are defined using predef | tered into Schedule as a r | new Resource. characters, the default Color is 006 | 6CC Color | | Default Units Per Day Numeric: > 0 | Cost Per Unit Numeric: > 0 | | | |
| 5 6 7 | with required fields will not be ent 2. The default Category is Labor 3. Colors are defined using predef ID | tered into Schedule as a r ined set of hexadecimal Name | new Resource. characters, the default Color is 006 Category | 6CC Color | | · · · · · · · · · · · · · · · · · · · | | | | |
| 5 6 7 8 | with required fields will not be ent 2. The default Category is Labor 3. Colors are defined using predef ID Text | tered into Schedule as a r ined set of hexadecimal Name Text | new Resource. characters, the default Color is 006 Category | 6CC Color | | · · · · · · · · · · · · · · · · · · · | | | | |
| 5 6 7 8 9 | with required fields will not be end 2. The default Category is Labor 3. Colors are defined using predef ID Text 256 | tered into Schedule as a i ined set of hexadecimal Name Text 256 | new Resource. characters, the default Color is 006 <u>Category</u> Text: "Labor", "Construction Equi Labor | 6CC Color Text: "0066CC", "800000" 7 | Text | Numeric: > 0 | | | | |

- 2. In Excel, populate the columns with additional resources and details.
 - Once complete, save the .xlsx file

- TIVITY RATES KNOWLEDGE TAGS CALENDARS REGISTER RESOURCES Import Resources • Q Category Color UoM Labor Hours \otimes ۲ Material ۲ Each \otimes Nonlabor ۲ Each \otimes \otimes Import Resources \times \otimes \otimes 1 \otimes t \otimes 4 \otimes - \otimes Drop file here to upload or click to \otimes Browse \otimes \otimes Cancel \otimes
- 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 | 8 |
| Robin Tester | Tester | Material | • | • | Each | 1.00 | 200.00 | 8 |
| Project resource | project resource | Nonlabor | • | • | Each | 1.00 | 75.00 | 8 |
| 009 | Resource 9 | Nonlabor | • | • | Each | 1.00 | 0 | 8 |
| Global | Global | New Category | • | | Each | 1.00 | 0 | 8 |
| Srini Import ID | Srini Import Desc | Unique | • | • | Each | 1.00 | 0 | 8 |

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.

| 三 命 Acme Corp | |
|-------------------------------|---|
| INEIGHT® | |
| PT Paul Trippi | |
| Main Menu | |
| FAVORITES | ☆ |
| 10/5 Test Copy | > |
| KNOWLEDGE BASE | |
| 命 CPM Schedules | |
| 🐔 Activity Productivity Rates | |
| 🔗 Knowledge Tags | |
| 옲 Register | |
| | |
| Machine Learning | |
| SETTINGS | |
| Site Administration | |
| 윤 Profile | |
| ② InEight | > |
| Ø About | > |

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 | | | |
| \$ | | | |

USERS

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

| | | | | GENERAL | USERS | | | | |
|---|------------|--------------------------|---|---------|---|---|----------|---|---|
| ľ | D | | | | | | | | Q |
| | Name 1 | Email | | Status | Permissions | | Projects | | |
| | T | | Ŧ | (All) T | (All) | * | | ÷ | Ŧ |
| | aananthan | aan @pkglobal.com | | Active | Project Member | | 9 | | |
| | Aaquibulla | Aaquibulla. @INEIGHT.COM | | Active | Project Member | | 6 | | |
| | Aaronen | Aaron. DINEIGHT.COM | | Active | Project Member | | 2 | | |
| | abdul | abdul i@ineight.com | | Active | Project Member | | 0 | | |
| | abdulghan | abdulghani @ineight.com | | Active | Administrator, Knowledge Base Administrator, Schedule Creator, Project Member | | 2 | | |
| | Adam | Adam. b@INEIGHT.COM | | Active | Project Member | | 0 | | |
| | Adesh | Adesh. @INEIGHT.COM | | Active | Project Member | | 3 | | |



LESSON 4 – PROJECT CREATION

IMPORT A SCHEDULE

IMPORTING A SCHEDULE

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

| ≡ ≙ | / Schedule | | | | | | | |
|--|-------------------------------------|---|-------------|---|---------------------|-------------|-------------|---|
| 🕒 👻 🖄 Move schedules 🗈 🗈 🖉 Link project 🔗 Unlink 👻 | | | | | | | | |
| | | | | | | | | |
| | Name | ٣ | Schedule ID | ٣ | Project Suite T | Start T | Finish 📍 | с |
| | ▶ 104179 | | | | | 01 Jun 2019 | 27 Jan 2026 | |
| | ▶ 104257 | | | | | 28 May 2024 | 06 May 2025 | |
| | ▶ 104690 DoD | | | | 104690 - DoD JOC | 20 Jun 2023 | 09 Jun 2028 | |
| | ► 105542 Nursing Facility | | | | 105542 - Fircrest N | 01 May 2024 | 29 May 2025 | |
| 7 | 105781 35 5 P66 Rodeo Solar Project | | | | 105781, 35 SMW | 31 Oct 2023 | 31 Dec 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 dropdown lists.

| Schedule import | | × |
|-------------------------------------|---|---------------------------|
| Select a Primavera XER or MS Projec | ct file to be imported as either a New Schedule or as Knowledge to be stored in the Knowle | dge 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.

| 🖥 🧟 Cost 🔻 💿 🗮 🎯 🗮 | | | | | | | | 7 🛇 | @(V | * 3 |) [🕄 | 5 Q | ę |
|--|---------|-----------------------|-----------|-----------------------------|-----------|--------|-------------------------|---------|-------|----------|-------------------|-----------|------|
| ID - Description | Actions | Start Date | r May Jun | 2018 Jul Aug Sep Oct Nov | Dec Jan F | eb Mar | 2019 Apr May Jun Jul | Aug Sep | Oct N | ov Dec | Export Jan Feb | Mar Apr | |
| Vasey Building | ••• | 3 Jul 2018 12:00 AM A | | | | | Data Date | | | | | | - 10 |
| Preconstruction | | 3 Jul 2018 12:00 AM A | | | | _ | | _ | _ | _ | | | - 10 |
| ∧ Design | | 3 Jul 2018 12:00 AM A | | | | | | | | | | | |
| Create Early Stage Construction Docs | | 7 Nov 2018 12:00 A | | | | | | | | | | | |
| Establish Permitting Documents | | 5 Sep 2018 12:00 A | | | | | | | | | | | |
| Proposal Reviews & Approvals from Board | | 20 Jul 2018 12:00 A | | | | | | | | | | | |
| Proposal Submissions | ••• | 3 Jul 2018 12:00 AM A | | | | | | | | | | | |
| ∧ Permitting | ••• | 7 Nov 2018 12:00 A | | - | | | | | | | | | - |
| Building Permit | | 2 Mar 2019 12:00 A | | | | + | | | | | | | |
| Fire Permit | | 7 Nov 2018 12:00 A | | L) COM | | | | | | | | | |
| Foundation Permit | | 19 Nov 2019 8:00 AM | | | | | | | կ | * | | | 4 |
| Sitework Permit | ••• | 2 Feb 2019 12:00 A | | | | | | | | | | | |
| Water Permit | ••• | 14 Jun 2020 8:00 AM | | | | | | | | | | | |
| ∧ Procurement | ••• | 2 Feb 2019 12:00 A | | | - | | | _ | _ | _ | | | - 14 |
| ∧ Submittals & Approvals | ••• | 2 Feb 2019 12:00 A | | | - | _ | | | | | _ | | - 10 |
| Elevators | ••• | 9 Mar 2019 12:00 A | | | | | | | | | | | |
| Fixtures | ••• | 21 Dec 2019 8:00 AM | | | | | | | | ~ | | | |
| Glass (Windows) | | 3 Apr 2020 8:00 AM | | | | | | | | | | → | |
| HVAC | ••• | 30 Mar 2019 12:00 | | | | + | | | | | | | |
| Structural Steel | | 2 Feb 2019 12:00 A | | | 4 | | | | | | | | |
| Fabrication & Delivery | ••• | 9 Mar 2019 12:00 A | | | | | | | | _ | | | - |
| Elevator Fab & Delivery | | 30 Mar 2019 12:00 | | | | | | | | | | - | |
| Fixtures Delivery | | 3 Apr 2020 8:00 AM | | | | | | | | | |) | 4 |
| Glass Fab & Delivery | | 22 Jun 2020 8:00 AM | | | | | | | | | | | |
| HVAC Delivery | | 21 Dec 2019 8:00 AM | | | | | | | | 4 | | | |

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

| EXPORT TYPE | | | |
|----------------------------------|----------|--|--|
| SELECT EXPORT TYPE | • | | |
| Primavera P6 XER Excel Export | | | |
| MS Project MPP | | | |
| Resource Spread | | | |
| | | | |
| | | | |

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.

| Ξ | ሴ | Acme Corp | |
|------------|-----------|-----------------|------------|
| (\div) | • | | |
| Ado | d new Pro | oject Workspace | |
| Ado | d new scł | hedule | Projects 🖡 |

DETAILS

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

| Add a new scl | hedule | | | × |
|-------------------|---------|---------|---------|-----------|
| | Details | Context | Outline | |
| Schedule ID | | | | |
| SCHED | | | | |
| Schedule Name | | | | |
| PT1 | | | | |
| Project Workspace | | | | \otimes |
| 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.

| Add a new schedule | × |
|--|------|
| 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 | |
| ♥ Prosjekt 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.

| Add a new sch | edule | × |
|-------------------|--|--------|
| | Details — Context — Outline | |
| Fast track the bu | ilding of your plan by starting with an outline structure. | |
| | Knowledge Base Schedule | |
| | NONE | |
| | RECOMMENDED SCHEDULES | |
| | edit schedule name | |
| PREVIOUS | 46878878787878 | CREATE |
| | Training Schedule - Job | _ |
| | OTHER SCHEDULES | |
| | None 🗸 | |
| | 7/12 Updated | |
| | 9/13 Regression | |
| | Commercial Building | |
| | CPM on Mar 31 On | |

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

| Add a new schedule | × |
|--|------------------------------|
| Details ——— Cont | ext Outline |
| Fast track the building of your plan by starting | g with an outline structure. |
| Knowledge Ba | ase Schedule |
| COMMERCIAL BUILDING | • |
| Include Risk Register | Include Levels |
| | ALL |
| | Include |
| Commercial Building | |
| Preconstruction | |
| Procurement | |
| Onstruction | |
| Closeout | |
| Summary | |
| PREVIOUS | CREATE |

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

| Submittale & Approvale | Commercial Building Caseout Closeout Construction Castry Sitework Entry & Access Roads Parking Lot Utilities Structure Foundations Interior Structure Preconstruction Design Permitting Procurement Fabrication & Delevy | | |
|--|---|--|--|
| Summary Contract Strengthered S | Submittals & Approvals | | |

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

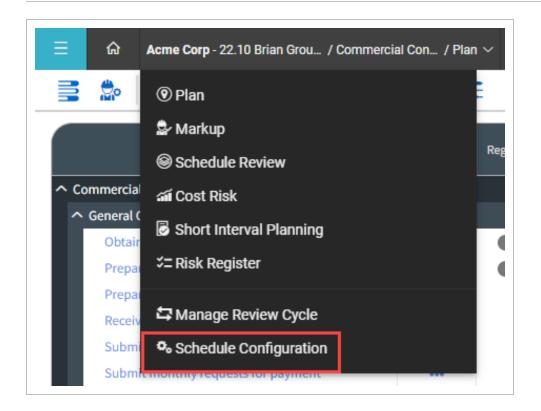
| Include | Levels |
|---------|---|
| ALL | ~ |
| All | ~ |
| Level 1 | |
| Level 2 | |
| Level 3 | |
| Level 4 | |
| | ALL All Level 1 Level 2 Level 3 |

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.

| Acme Corp - 22.10 Brian Grou / Jonathan's Old F | / Schedule Configuration 🗸 🚄 | - | | | | | |
|---|--|--------------|----------------|-----------|-----------|---------------|---------------|
| | GENERAL | CONTRIBUTORS | KNOWLEDGE TAGS | CALENDARS | RESOURCES | SIP RESOURCES | PROJECT SUITE |
| | | | | | | | |
| | Schedule ID SCHED-514 | | | | | | |
| | Schedule Name Jonathan's Old Fashioned Levi | iathan | | | | | |
| | Location Location not set | | | | | | |
| | Include Cost Estimation | | | | | | |
| | Default Activity Percent Compl Duration | ete Type | | | | | |

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 Com | plete 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.

| Codes / Project 🔺 | | | | | | | • |
|-------------------|----------------------------------|---|--|--|---|-----------|---|
| Codes | | | | | | | |
| Project | Project Codes | | | | | | |
| Activity | Business Unit / Region | | | | Ľ | \otimes | |
| Register Event | Default for Scheduled Svcs | | | | Ľ | \otimes | |
| Resource | Development | | | | ď | ⊗ | |
| | Development Manager | | | | ď | ⊗ | |
| UDFs Project | MAdshead | | | | Ľ | ⊗ | |
| WBS | Major Projects | | | | Ľ | ⊗ | |
| Activity | Project Lead Planner / Scheduler | r | | | Ľ | \otimes | |
| Register Event | | | | | | | |
| Resource | | | | | | | |

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.

| | GENERAL CONTRIBUTORS | KNOWLEDGE TAGS | | CALENDARS | | RESOU | | | P RESOURCE | | JECT SUITE |
|---|---------------------------------|----------------|-----|-----------|-----|-------|-----|-----|------------|------------|------------|
| | | | | | | | | | | | |
| * | Calendar | Hours/d | Sun | Mon | Tue | Wed | Thu | Fri | Sat | Exceptions | Actions |
| ۲ | 724 Su-Sa 12:00A-12:00A No Hol | 24 | • | • | • | • | • | ٠ | • | 0 | / |
| 0 | *508 M-F 8:00A-5:00P US Hol | 8 | 0 | • | • | • | • | • | 0 | 1431 | 1 |
| 0 | 0.Standard 5 Day w/ Hol | 8 | 0 | • | • | • | • | • | 0 | 1377 | 1 |
| 0 | 24 hours / 7 days | 24 | • | • | • | • | • | • | • | 9 | / |
| 0 | 24x7 w/ Turtle Season | 24 | • | • | • | • | • | • | • | 6642 | / |
| 0 | 24x7 w/ Turtle Season | 24 | • | • | • | • | • | • | • | 6642 | 1 |
| 0 | 510 M-F No Holidays | 10 | 0 | • | • | • | • | • | 0 | 477 | / |
| 0 | 510 Su-Th 7:00A-5:00P No Hol | 10 | • | • | • | • | • | 0 | 0 | 477 | / |
| 0 | 7d-24h (no holidays continuous) | 24 | • | • | • | • | • | • | • | 0 | / |
| 0 | KOS G 5d x 10hr w Holidays | 10 | 0 | • | • | • | • | • | 0 | 657 | 1 |

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.

| (+) | | | | | | | | 99 |
|--------------------|---|----------|-------|-------|-----------------|-----------|-------------|-----------|
| ID | Name | Category | Color | UoM | Default Units/d | Cost/Unit | Assignments | |
| *EXPT | Export Vessel | Labor + | • | Hours | 80.00 | 500000.00 | 1 | 8 |
| *SURV | Survey Vessel | Labor + | | Hours | 80.00 | 500.00 | 2 | 8 |
| *FLAY | Flowline Vessel | Labor + | • | Hours | 80.00 | 100000.00 | 1 | \otimes |
| SPL-1 | Subsea Package Lead - Doiron | Labor + | | Hours | 80.00 | 1.00 | 47 | 8 |
| SPL-2 | Subsea Package Lead - Pyron | Labor + | | Hours | 80.00 | 1.00 | 167 | 8 |
| SPL-3 | Subsea Package Lead - Timte | Labor + | • | Hours | 80.00 | 1.00 | 81 | \otimes |
| SPL-4 | Subsea Package Lead - Gaston | Labor + | • | Hours | 80.00 | 1.00 | 40 | 8 |
| SPL-5 | Subsea Package Lead - Blockhus | Labor + | | Hours | 80.00 | 1.00 | 36 | 8 |
| SPL-6 | Subsea Package Lead - Anderson | Labor + | • | Hours | 80.00 | 1.00 | 17 | \otimes |
| SPL-8 | Subsea Package Lead - Tavassoli | Labor + | • | Hours | 80.00 | 1.00 | 4 | 8 |
| SPL-9 | Subsea Package Lead - Ferguson | Labor + | | Hours | 80.00 | 1.00 | 10 | 8 |
| Nbl Ops & Eng Serv | Noble Operations and Engineering Services | Labor + | | Hours | 8.00 | 0 | 0 | \otimes |

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.

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

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.

| | | | | ? ? |
|------------|-------------------------------|----------|--------|-------------|
| | Category | Color | UoM | |
| | Labor > | | Hours | ⊗ _ |
| | Material 🕨 | | Each | \otimes |
| | Nonlabor • | | Each | \otimes |
| | | | | \otimes |
| Import Res | ources | | × | ⊗ |
| | | | | ⊗ |
| | | | | ♦ 1 |
| | | | | ⊗ _ |
| | | | | ⊗ → |
| | Drop file here to upload or (| click to | | \otimes |
| | Browse | onor to | | \otimes |
| | | | | \otimes |
| | | | | \otimes |
| | | Cancel | Import | \otimes |
| | Labor > | | Hours | \otimes |
| | Labor | | Hours | ⊗ . |

SIP RESOURCES

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

| Name | Color | Unit of Measure | Steps in Use | | |
|-------------------|-------|-----------------|--------------|---|--|
| SIP TEST Resource | • | EA | 0 | 8 | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

PROJECT SUITE

| GENERAL C | ONTRIBUTORS | KNOWLEDGE TAGS | CALENDARS | RESOURCES | SIP RESOURCES | PROJECT SUITE |
|-------------------------------------|----------------|----------------|-----------|-----------|---------------|---------------|
| | | | | | _ | |
| elect a project to connect to |) | | | | | |
| X Type or select | | · | | | | |
| FERMI Carrying Job | | ^ | | | | |
| FERMI Carrying Job Int'l Payroll | | | | | | |
| FERMI LBNF | | | | | | |
| FMI Lone Star | | | | | | |
| FN | | | | | | |
| FORECAST NOTES | | | | | | |
| FW Hill WRF Tertiary-Pretreat Mer | nbranes | | | | | |
| FWC - PIIC Micro Piles & Drilled Pi | ers | | | | | |
| FWC - Small Cap Jobs | | | | | | |
| FWC 5B | | | | | | |
| FWC Arbutus Rd Attenuation Tank | - Anchor TESTT | | | | | |
| EWIC Dia Dar Dilina | | - | | | | |

PRINT VIEW

The Go To Print View button lets you save a printable version to a PDF file and also customize printable output by modifying the settings in the Page Setup and Gantt Setup tabs.

| rch 2024 April 2024 Ma 2024 | | | | | | |
|-----------------------------|-----------------------------------|---------|----------------------------|---------------------------|-----------------|--|
| | 27 03 | | | | | |
| Print settings | « | | Letter (8.5 | x 11.0 in) Land | scape - 8 pages | 0- |
| 2 Page Setup 3 Gantt Setup | | | | | | |
| Paper Size | ID - Description | Actions | Start | Finish | At Complet | September October 2023 18 25 02 09 16 23 |
| Letter (8.5 x 11.0 in) | ▼ EPC - 123 | | 20 Dec 2023 | 18 Apr 2024 | 87 | |
| | WBS SCHED-70.1 | | 20 Dec 2023 | 18 Apr 2024 | 87 | |
| Orientation | Activity A1000 12 | | 20 Dec 2023 | 29 Jan 2024 | 29 | |
| Landscape | Activity A1010 | | 30 Jan 2024 | 8 Mar 2024 | 29 | |
| | Activity A1020 | | 11 Mar 2024 | 18 Apr 2024 | 29 | |
| Scaling | WBS SCHED-70.1.1 | | 20 Dec 2023 | 30 Jan 2024 | 30 | |
| Default | WBS SCHED-70.1.2 | | 20 Dec 2023 | 30 Jan 2024 | 30 | |
| berdart | WBS SCHED-70.1.3 | | 20 Dec 2023 | 30 Jan 2024 | 30 | |
| Header | WBS SCHED-70.2 | ••• | 20 Dec 2023 | 18 Apr 2024 | 87 | |
| | Activity A1030 Activity A1040 | | 20 Dec 2023 30 Jan 2024 | 29 Jan 2024 8 Mar 2024 | 29 29 | |
| None | Activity A1040 Activity A1050 | | 11 Mar 2024 | 18 Apr 2024 | 29 | |
| Footer | WBS SCHED-70.2.1 | | 20 Dec 2023 | 30 Jan 2024 | 30 | |
| | WBS SCHED-70.2.2 | | 20 Dec 2023 | 30 Jan 2024 | 30 | |
| None | WBS SCHED-70.2.3 | | 20 Dec 2023 | 30 Jan 2024 | 30 | |
| | WBS SCHED-70.3 | | 20 Dec 2023 | 18 Apr 2024 | 87 | |
| | Activity A1060 | | 20 Dec 2023 | 29 Jan 2024 | 29 | |
| | Activity A1070 | | 30 Jan 2024 | 8 Mar 2024 | 29 | |
| | Activity A1080 | | 11 Mar 2024 | 18 Apr 2024 | 29 | |
| | | | | | | |

PAGE SETUP OPTIONS

The Paper Size drop-down menu lets you choose several different types of paper sizes.

| Ŭ | | |
|--------------------------|-------------|---|
| Page Setup | Gantt Setup | |
| aper Size | | |
| Letter (8.5 x 11.0 in) | | • |
| Letter (8.5 x 11.0 in) | | |
| Legal (8.5 x 14.0 in) | | |
| Tabloid (11.0 x 17.0 in) | | |
| ANSI C (17.0 x 22.0 in) | | |
| ANSI D (22.0 x 34.0 in) | | |
| ANSI E (34.0 x 44.0 in) | | |
| ARCH A (9.0 x 12.0 in) | | |
| ARCH B (12.0 x 18.0 in) | | |
| ARCH C (18.0 x 24.0 in) | | |
| ARCH D (24.0 x 36.0 in) | | |
| ARCH E (36.0 x 48.0 in) | | |
| ARCH E1 (30.0 x 42.0 in) | | |
| ISO A0 (841 x 1189 mm) | | |
| ISO A1 (594 x 841 mm) | | |
| ISO A2 (420 x 594 mm) | | |
| ISO A3 (297 x 420 mm) | | |
| ISO A4 (210 x 297 mm) | | |

The Orientation drop-down menu lets you choose between a landscape or a portrait orientation.

| Gantt Setup | |
|-------------|---|
| | |
| | • |
| | |
| | - |
| | |
| | |
| | |

Scaling for the PDF can be set at High, Default, Low or Very low settings.

| Print settings | < | K |
|------------------------|-------------|---|
| Page Setup | Gantt Setup | |
| Paper Size | | |
| Letter (8.5 x 11.0 in) | • | , |
| Orientation | | |
| Landscape | • | , |
| Scaling | | |
| Default | - | - |
| High | | |
| Default | | |
| Low | | |
| Very Low | | |
| All pages | • | |

The header drop-down menu lets you add headers to the PDF.

| Print settings | < | « | | | Letter (8. | 5 x 11.0 in) Por | trait - 24 page | S | |
|------------------------|-------------|----------|---|----------------------------------|------------|----------------------------|----------------------------|------------|------------|
| Page Setup | Gantt Setup | | | ۲ | | (\neq) | | (e) |) |
| Paper Size | | | ſ | ID - Description | ▲ Actions | Start | Finish | At Complet | 6L 0 10 |
| Letter (8.5 x 11.0 in) | | • | | EPC - 1 - 3 | | 20 Dec 2023 | 18 Apr 2024 | 87 | |
| | | | | V BS SCHED-70.1 | | 20 Dec 2023 | 18 Apr 2024 | 87 | |
| Orientation | | | | Activity A1000 12 | | 20 Dec 2023 | 29 Jan 2024 | 29 | |
| Portrait | | • | | Activity A1010 | | 30 Jan 2024 | 8 Mar 2024 | 29 | |
| | | | | Activity A1020 | | 11 Mar 2024 | 18 Apr 2024 | 29 | |
| Scaling | | | | WBS SCHED-70.1.1 | ••• | 20 Dec 2023 | 30 Jan 2024 | 30 | - |
| Default | | . / | | WBS SCHED-70.1.2 | | 20 Dec 2023 | 30 Jan 2024 | 30 | |
| Derdan | | | | WBS SCHED-70.1.3 | ••• | 20 Dec 2023 | 30 Jan 2024 | 30 | - |
| Header | | | | WBS SCHED-70.2 | ••• | 20 Dec 2023 | 18 Apr 2024 29 Jan 2024 | 87 | |
| | | _ | | Activity A1030 Activity A1040 | | 20 Dec 2023 30 Jan 2024 | 29 Jan 2024 8 Mar 2024 | 29 29 | |
| All pages | | • | | Activity A1040 | | 11 Mar 2024 | 18 Apr 2024 | 29 | |
| None | | | | WBS SCHED-70.2.1 | | 20 Dec 2023 | 30 Jan 2024 | 30 | |
| All pages | | | | WBS SCHED-70.2.2 | | 20 Dec 2023 | 30 Jan 2024 | 30 | |
| All pages | | | | WBS SCHED-70.2.2 | | 20 Dec 2023 | 30 Jan 2024 | 30 | |

Select one of the three header add icons to insert one of the header content types from the dropdown menu.

| \oplus | | Œ | | Ð | |
|-------------------|---------|-------------|----------------------------|------------|------------|
| ID - Description | Actions | Start | Finish | At Complet | sL 0 10 |
| EPC - 123 | | 20 Dec 2023 | 18 Apr 2024 | 87 | |
| WBS SCHED-70.1 | ••• | 20 Dec 2023 | 18 Apr 2024 | 87 | _ |
| Activity A1000 12 | ••• | 20 Dec 2023 | 29 Jan 2024 | 29 | |
| Activity A1010 | | 30 Jan 2024 | 8 Mar 2024 | 29 | |
| Activity A1020 | ••• | 11 Mar 2024 | 18 Apr 2024 | 29 | |
| WBS SCHED-70.1.1 | | 20 Dec 2023 | 30 Jan 2024 | 30 | - |
| WBS SCHED-70.1.2 | | 20 Dec 2023 | 30 Jan 2024 | 30 | - |
| | | 2023 | 30 Jan 2024 | 30 | _ |
| Insert content | | ☓ :2023 | 18 Apr 2024 | 87 | |
| | | : 2023 | 29 Jan 2024 | 29 | |
| Content Type | | 12024 | 8 Mar 2024 | 29 | |
| None | | • 2024 | 18 Apr 2024 | 29 | |
| None | | ÷ 2023 | 30 Jan 2024 30 Jan 2024 | 30 | |
| None | | : 2023 | 30 Jan 2024 | 30 | |
| Created By | | : 2023 | 18 Apr 2024 | 87 | |
| Created Date/Time | | :2023 | 29 Jan 2024 | 29 | |
| 1 | | Jan 2024 | 8 Mar 2024 | 29 | |
| Image | | Mar 2024 | 18 Apr 2024 | 29 | |
| Legend | | | | | |
| | | | | | |

The footer drop-down menu lets you add footers to the PDF.

| Print settings | * | | Letter (8. | 5 x 11.0 in) Port | trait - 24 pages | 3 | |
|------------------------|-------------------|-----------------------|------------|-------------------|------------------|------------|--------------|
| Page Setup | Gantt Setup | Schedule ID: SCHED-70 | | ۲ | | (i) | |
| Paper Size | | ID - Description | Actions | Start | Finish | At Complet | iaL 30 10 |
| Letter (8.5 x 11.0 in) | - | EPC - 123 | | 20 Dec 2023 | 18 Apr 2024 | 87 | |
| | | WBS SCHED-70.1 | | 20 Dec 2023 | 18 Apr 2024 | 87 | |
| Orientation | | Activity A1000 12 | ••• | 20 Dec 2023 | 29 Jan 2024 | 29 | |
| Portrait | • | Activity A1010 | | 30 Jan 2024 | 8 Mar 2024 | 29 | |
| - or other | | Activity A1020 | | 11 Mar 2024 | 18 Apr 2024 | 29 | |
| Scaling | | WBS SCHED-70.1.1 | | 20 Dec 2023 | 30 Jan 2024 | 30 | - |
| | | WBS SCHED-70.1.2 | ••• | 20 Dec 2023 | 30 Jan 2024 | 30 | - |
| Default | • | WBS SCHED-70.1.3 | ••• | 20 Dec 2023 | 30 Jan 2024 | 30 | _ |
| Header | | WBS SCHED-70.2 | ••• | 20 Dec 2023 | 18 Apr 2024 | 87 | |
| neauei | | Activity A1030 | ••• | 20 Dec 2023 | 29 Jan 2024 | 29 | |
| All pages | • | Activity A1040 | ••• | 30 Jan 2024 | 8 Mar 2024 | 29 | |
| | | Activity A1050 | ••• | 11 Mar 2024 | 18 Apr 2024 | 29 | |
| Footer | | WBS SCHED-70.2.1 | ••• | 20 Dec 2023 | 30 Jan 2024 | 30 | - |
| All pages | * | WBS SCHED-70.2.2 | ••• | 20 Dec 2023 | 30 Jan 2024 | 30 | - |
| | | WBS SCHED-70.2.3 | ••• | 20 Dec 2023 | 30 Jan 2024 | 30 | - |
| None | N | WBS SCHED-70.3 | ••• | 20 Dec 2023 | 18 Apr 2024 | 87 | |
| All pages | | Activity A1060 | | 20 Dec 2023 | 29 Jan 2024 | 29 | |
| | | Activity A1070 | | 30 Jan 2024 | 8 Mar 2024 | 29 29 | |
| | | Activity A1080 | ••• | 11 Mar 2024 | 18 Apr 2024 | 29 | |
| | Revert to default | • | | (+) | | (+) | |

Select one of the three footer add icons to insert one of the footer content types from the drop-down menu.

| Schedule ID: SCHED-70 | | | (+) | | | \oplus | |
|-----------------------|---------|----------|---------|-------------|-------------|----------|--------------|
| ID - Description | Actions | St | art | Finish | At Complet. | | iaL 30 10 |
| EPC - 123 | ••• | 20 De | c 2023 | 18 Apr 2024 | 87 | | |
| WBS SCHED-70.1 | ••• | 20 De | c 2023 | 18 Apr 2024 | 87 | | _ |
| Activity A1000 12 | ••• | 20 De | c 2023 | 29 Jan 2024 | 29 | | |
| Activity A1010 | ••• | 30 Jai | n 2024 | 8 Mar 2024 | 29 | | |
| Activity A1020 | ••• | 11 Ma | ir 2024 | 18 Apr 2024 | 29 | | |
| WBS SCHED-70.1.1 | | 20 De | c 2023 | 30 Jan 2024 | | | _ |
| WBS SCHED-70.1.2 | | 20 De | c 2023 | 30 Jan 2024 | | | |
| | | | : 2023 | 30 Jan 2024 | | | |
| Insert content | | \times | : 2023 | 18 Apr 2024 | 87 | | _ |
| | | | : 2023 | 29 Jan 2024 | 29 | | |
| Content Type | | | 2024 | 8 Mar 2024 | 29 | | |
| None | | • | 2024 | 18 Apr 2024 | 29 | | |
| | | | : 2023 | 30 Jan 2024 | | | _ |
| None | | | : 2023 | 30 Jan 2024 | | | - |
| Created By | | | : 2023 | 30 Jan 2024 | | | |
| Created Date/Time | | | : 2023 | 18 Apr 2024 | 87 | | |
| Created Date/ Time | | | : 2023 | 29 Jan 2024 | 29 | | |
| Image | | | n 2024 | 8 Mar 2024 | 29 | | |
| Legend | | . Ma | ir 2024 | 18 Apr 2024 | 29 | | |
| Legend | | | | | | | |
| Page # | | | | | | | |
| Page # of # Pages | | - | | | | | |
| T uge # VI # T uges | | | | | | | |
| | | | | | | | < <u>)</u> |
| (+) | | | (+) | | | (+) | |

GANTT SETUP OPTIONS

The Gantt Start Date and Gantt End Dates lets you choose beginning and end dates to show on the Gantt chart.

| Print settings | | « |
|------------------|-------------|---|
| Page Setup | Gantt Setup | |
| Gantt Start Date | | |
| 1 Jan 2024 | | |
| Gantt End Date | | |
| 29 Feb 2024 | | |
| Timescale | | |
| Week | | • |
| Hide Gantt | | |
| Histogram | | |

The Timescale drop-down menu lets you select a period of time to show on the Gantt chart.

| Print settings | « | | Letter (8. | 5 x 11.0 in) Portrait - 1 pa | ige | |
|------------------|-------------------|----------------------------------|------------|------------------------------|---------------|-----------|
| Page Setup | Gantt Setup | Schedule ID: SCHED-70 | | ۲ | ۲ | |
| Gantt Start Date | | ID - Description | Actions | January 2024 | February 2024 | Mar 26 |
| 1 Jan 2024 | | EPC - 123 | | | | |
| | | WBS SCHED-70.1 | | | | |
| Gantt End Date | | Activity A1000 12 | ••• | | | |
| 29 Feb 2024 | | Activity A1010 | | | | |
| | | Activity A1020 | | | | |
| Fimescale | | WBS SCHED-70.1.1 | | | - | |
| Week | *) | WBS SCHED-70.1.2 | | | - | |
| week | | WBS SCHED-70.1.3 | | | - | |
| Day | | WBS SCHED-70.2 | ••• | | | |
| Week | | Activity A1030 | | | • | |
| Month | | Activity A1040 Activity A1050 | | | | |
| Ouarter | | WBS SCHED-70.2.1 | | | _ | |
| Year | | WBS SCHED-70.2.2 | | | | |
| Decade | | WBS SCHED-70.2.3 | | | - | |
| Decaue | | WBS SCHED-70.3 | | | | |
| | | Activity A1060 | | | | |
| | | Activity A1070 | | | | |
| | | Activity A1080 | | | | |
| | Revert to default | • | | ۲ | ۲ | |

The Hide Gantt toggle lets you hide the Gantt chart from the PDF.

| Print settings | « | | Letter (8 | 8.5 x 11.0 in) Po | ortrait - 1 page | |
|------------------|-------------------|----------------------------------|-----------|----------------------------|------------------|------------|
| Page Setup | Gantt Setup | Schedule ID: SCHED-70 | | ۲ | | |
| Gantt Start Date | | ID - Description | Actions | Start | Finish | At Complet |
| 1 Jan 2024 | | EPC - 123 | | 20 Dec 2023 | 18 Apr 2024 | 87 |
| | | WBS SCHED-70.1 | ••• | 20 Dec 2023 | 18 Apr 2024 | 87 |
| antt End Date | | Activity A1000 12 | | 20 Dec 2023 | 29 Jan 2024 | 29 |
| 29 Feb 2024 | | Activity A1010 | | 30 Jan 2024 | 8 Mar 2024 | 29 |
| | | Activity A1020 | | 11 Mar 2024 | 18 Apr 2024 | 29 |
| imescale | | WBS SCHED-70.1.1 | | 20 Dec 2023 | 30 Jan 2024 | 30 |
| | | WBS SCHED-70.1.2 | | 20 Dec 2023 | 30 Jan 2024 | 30 |
| Week | - | WBS SCHED-70.1.3 | | 20 Dec 2023 | 30 Jan 2024 | 30 |
| | | WBS SCHED-70.2 | ••• | 20 Dec 2023 | 18 Apr 2024 | 87 |
| Hide Gantt | | Activity A1030 | | 20 Dec 2023 | 29 Jan 2024 | 29 |
| listogram | | Activity A1040 | ••• | 30 Jan 2024 | 8 Mar 2024 | 29 |
| histograffi | | Activity A1050 | ••• | 11 Mar 2024 | 18 Apr 2024 | 29 |
| | | WBS SCHED-70.2.1 | ••• | 20 Dec 2023 | 30 Jan 2024 | 30 |
| | | WBS SCHED-70.2.2 | ••• | 20 Dec 2023 | 30 Jan 2024 | 30 |
| | | WBS SCHED-70.2.3 | ••• | 20 Dec 2023 | 30 Jan 2024 | 30 |
| | | WBS SCHED-70.3 | ••• | 20 Dec 2023 | 18 Apr 2024 | 87 |
| | | Activity A1060 | | 20 Dec 2023 | 29 Jan 2024 | 29 |
| | | Activity A1070 Activity A1080 | | 30 Jan 2024 11 Mar 2024 | 8 Mar 2024 | 29 |
| | | Activity A1080 | ••• | 11 Mar 2024 | 18 Apr 2024 | 29 |
| | Revert to default | • | | + | | |

The Histogram toggle controls the display of the histogram in the PDF.

| rint settings | * | | | | | Tabloid (11. | 0 x 17.0 in) Landsc | ape - 2 pages | | |
|---------------------|-------------|------------------------------------|----|----------------------------|----------------------------|--------------|-----------------------|---------------|----|---------|
| | | Schedule ID: SCHED-70 | | | | | ÷ | | | \odot |
| Page Setup | Gantt Setup | | | | | | G | | | e |
| antt Start Date | | ID - Description | | | | At Complet | | | | - 2028 |
| 1 Jan 2024 | | EPC - 123 | •• | 20 Dec 2023 | 18 Apr 2024 | 87 | | | | |
| | | WBS SCHED-70.1 | | 20 Dec 2023 | 18 Apr 2024 | 87 | | | | |
| antt End Date | | Activity A1000 12 | | 20 Dec 2023 | 29 Jan 2024 | 29 | , | | | |
| 14 Sep 2024 | | Activity A1010 | | 30 Jan 2024 | 8 Mar 2024 | 29 | | | | |
| | | Activity A1020 | | 11 Mar 2024 | 18 Apr 2024 | 29 | | | | |
| mescale | | WBS SCHED-70.1.1 | | | | 30 | | | | |
| /ear | - | WBS SCHED-70.1.2 | | 20 Dec 2023 | | 30 | | | | |
| rear | | WBS SCHED-70.1.3 WBS SCHED-70.2 | | 20 Dec 2023 20 Dec 2023 | 30 Jan 2024 18 Apr 2024 | 30 87 | | | | |
| ide Gantt | | Activity A1030 | | 20 Dec 2023 20 Dec 2023 | 18 Apr 2024 29 Jan 2024 | 29 | | | | |
| | 2 | Activity A1030 | | 30 Jan 2024 | 8 Mar 2024 | 29 | | | | |
| istogram | | Activity A1050 | | 11 Mar 2024 | 18 Apr 2024 | 29 | | | | |
| Status | | WBS SCHED-70.2.1 | | 20 Dec 2023 | 30 Jan 2024 | 30 | | | | |
| Status | | WBS SCHED-70.2.2 | | 20 Dec 2023 | 30 Jan 2024 | 30 | | | | |
| 4 statuses selected | - | WBS SCHED-70.2.3 | | 20 Dec 2023 | | 30 | | | | |
| Display | | Nam | | | lanned Ac | ual Rem: | aining Remaining Late | | | - 2028 |
| Units | | | | | | | | | 20 | 124 |
| omus | • | All Resources | | 0 Units | i 0 Units | 0 Units | 0 Units | Data Date | | |
| S-Curve | | | | | | | | | | |
| Over-allocation | | | | | | | | | | |
| a | | | | | | | | | | |

The Status field under Histogram lets you show the Planned, Actual, Remaining and Remaining Late columns in the PDF.

| rint settings | « | Letter (8.5 x 11.0 in) Portrait - 12 pages | | | | | | |
|---------------------|-------------|--|-----------|----------------------------|----------------------------|------------|------|----------|
| Page Setup | Gantt Setup | Schedule ID: SCHED-70 | | ۲ | | | (+) | |
| Gantt Start Date | | ID - Description | ▲ Actions | Start | Finish | At Complet | - | 01 |
| 1 Jan 2024 | | EPC - 123 | | 20 Dec 2023 | 18 Apr 2024 | 87 | - | |
| | | WBS SCHED-70.1 | ••• | 20 Dec 2023 | 18 Apr 2024 | 87 | | -11 |
| antt End Date | | Activity A1000 12 | | 20 Dec 2023 | 29 Jan 2024 | 29 | • | - 1 |
| 29 Feb 2024 | | Activity A1010 | | 30 Jan 2024 | 8 Mar 2024 | 29 | | |
| | | Activity A1020 | ••• | 11 Mar 2024 | 18 Apr 2024 | 29 | | |
| ïmescale | | WBS SCHED-70.1.1 | | 20 Dec 2023 | 30 Jan 2024 | 30 | | |
| Week | | WBS SCHED-70.1.2 | ••• | 20 Dec 2023 | 30 Jan 2024 | 30 | | - 1 |
| week | • | WBS SCHED-70.1.3 | ••• | 20 Dec 2023 | 30 Jan 2024 | 30 | | - 1 |
| lide Gantt | | WBS SCHED-70.2 | ••• | 20 Dec 2023 | 18 Apr 2024 | 87 | | -1. |
| ide Ganti | | Activity A1030 | ••• | 20 Dec 2023 | 29 Jan 2024 | 29 | | - |
| listogram | | Activity A1040 | ••• | 30 Jan 2024 | 8 Mar 2024 | 29 | | - 1 |
| | _ | Activity A1050 WBS SCHED-70.2.1 | | 11 Mar 2024 20 Dec 2023 | 18 Apr 2024 30 Jan 2024 | 29 30 | | -1 |
| Status | | WBS SCHED-70.2.1 WBS SCHED-70.2.2 | | 20 Dec 2023 | 30 Jan 2024 | 30 | - | |
| 4 statuses selected | _ | WBS SCHED-70.2.3 | ••• | 20 Dec 2023 | 30 Jan 2024 | 30 | | |
| ☑ Planned | | Name | ; | P | lanned | tual R | | Remainir |
| Actual | | All Resources | | 0 Units | 0 Units | 0 Unit | - 01 | Inits |
| Remaining | | All Resources | | 0 Ollits | 0 0 mits | 00111 | 5 00 | liits |
| Remaining Late | | | | | | | | |
| Over-allocation | () | | | | | | | |
| | | | | | | | | |

Resources can be displayed as Units, FTE, Cost or Burn Rate in the Display drop-down.

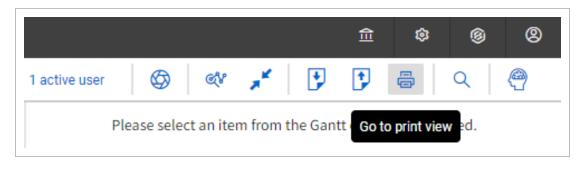
| Print settings | < |
|---------------------|-------------|
| Page Setup | Gantt Setup |
| Gantt Start Date | |
| 202 | \sim |
| ally. | |
| Histogram | |
| Status | |
| 4 statuses selected | • |
| Display | |
| Display | |
| Units | |
| - | |
| Units | |
| Units Units 🗸 | |

Toggles for S-Curve, Over-allocation and Stacked Histogram can also be turned On or Off.

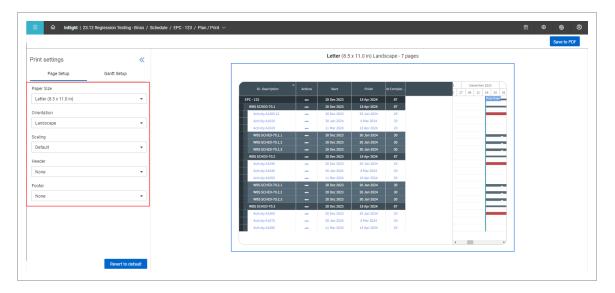
| Page Setup | Gantt Setup | | |
|-----------------------------|-----------------|--|--|
| 5 1 | · | | |
| antt Start Date | | | |
| Jan 2024 | $\wedge \wedge$ | | |
| | | | |
| | | | |
| | | | |
| 4 sv ⇒s selecteu | | | |
| | | | |
| 4 s. ₂s selecteu Display | | | |
| | | | |
| Display Units | | | |
| Display | | | |

SAVE TO PDF

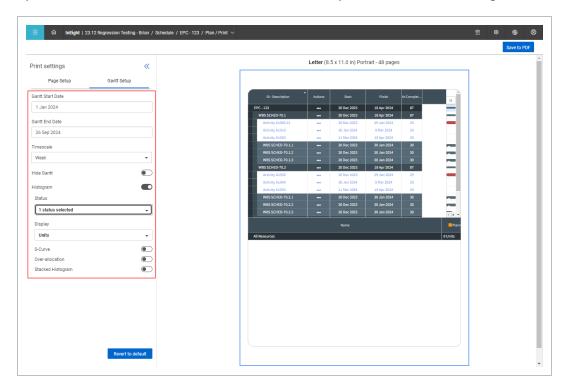
1. In Plan view, click the **Go to print view** icon at the top right of the page.



The print view defaults to the Page Setup tab where you can change the page setup paper size, orientation, scaling, header and footer settings.



On the Gantt tab, you can select Gantt start and end dates, a timescale time period, an

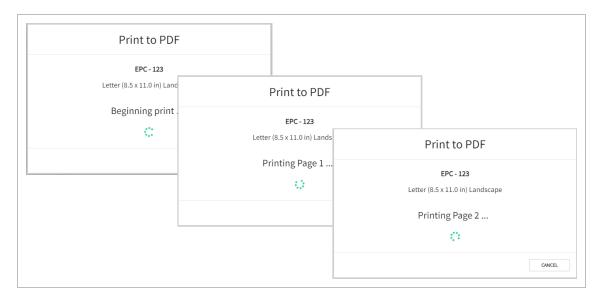


option to show or hide the Gantt chart, and the option to show the histogram.

- 2. Click Save to PDF.
- 3. In the Save As window, select a file name and choose a file location, then select **Save**.

| 🚱 Save As | × |
|---|------------------------------|
| \leftrightarrow \rightarrow \checkmark \bigstar This PC \Rightarrow Documents | C Search Documents |
| Organize 🔻 New folder | ≣≡ ▾ (?) |
| Image: Pictures Name Image: Videos Image: Pictures Image: Videos Image: Pictures Image: OSDisk (C:) Image: Pictures Image: Pictures Image: Pictures | Size ^ 1,363 КВ 200 КВ |
| File name: epc_2024_1_22.pdf Save as type: PDF File (*.pdf) | ~ |
| ∧ Hide Folders | Save Cancel |

The Print to PDF windows will show printing status.



A success message will show when the PDF printing is complete.

| ерс 123_ | _2024_1_18.pdf saved successfully |
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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 | •••• | 2, | | |
|--------------------|------------------------|-----|------|----|---|----|
| • Early Sitework | 05 Jul 21 29 Apr 22 | 215 | •••• | 2, | | |
| Foundations | 16 Mar 22 09 Aug 22 | 105 | | 2, | | 1 |
| Grade & Support Be | 16 Mar 22 12 Apr 22 | 20 | | 2, | 2 | 24 |
| Stub-in Utilities | 13 Apr 22 03 May 22 | 15 | | 2, | 2 | 24 |
| Drainage | 04 May 22 24 May 22 | 15 | ••• | 2, | 2 | 24 |
| Pour & Cure | 25 May 22 26 Jul 22 | 45 | ••• | 21 | 2 | 24 |
| Enclosures | 27 Jul 22 09 Aug 22 | 10 | | 2; | 2 | 24 |

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

| D | |
|---------------------------|----------------------------|
| A1000 | |
| Description | |
| Activity A1000 | |
| Calendar | |
| Project Default | |
| Smart Planning | ~ |
| Planned (d) | Cost (\$) |
| 0 | 0 |
| Remaining (d) | Start |
| 0 R | 0 |
| Actual (d) | Finish |
| 0 | 0 |
| At Complete (d) | Percent Complete |
| 0 | Dur - 0 |
| Early Ctart | Forty Finish |
| Early Start 6 Oct 2022 | Early Finish 6 Oct 2022 |
| Late Start | Late Finish |
| 31 Dec 1969 | 31 Dec 1969 |
| Planned Start | Planned Finish |
| 6 Oct 2022 | 6 Oct 2022 |
| Total Float | Free Float |

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

| | | ost of this activity using a Pr | |
|-------------------|-------------------|---|---------|
| | Unit R | ate Manhour Rate | |
| Rate | | | |
| Description | | | |
| Engineering | | | |
| Output 😯* | UOM 🚱 | Hours/unit * | \$/unit |
| 1 | | Hours - 328 | 0 |
| Work | | | |
| How many units? | k | Crew/Equip Count * | * |
| 1 | | 1 | |
| Productivity Rate | 1 unit of Enginee | duration is currently 41 days ring with 1 crew will take 41 | |

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.

| Description Engineering Output ?* UOM ? Hours/unit * 1 Hours ▼ 328 Work | \$/unit 0 |
|---|--------------|
| Output ?* UOM ? 1 Hours/unit * 1 Hours ~ 328 Work How many units?* Crew/Equip Count 1 1 Remaining duration is currently 41 days | 0 |
| Engineering Output ?* 1 1 Hours ~ 328 Work How many units?* Crew/Equip Count 1 1 1 Remaining duration is currently 41 days | 0 |
| Output ?* UOM ? 1 Hours/unit * 1 Hours ~ 328 Work How many units?* Crew/Equip Count 1 1 Remaining duration is currently 41 days | 0 |
| 1 Hours ▼ 328 Work How many units?* Crew/Equip Count 1 1 Remaining duration is currently 41 days | 0 |
| Work How many units?* 1 Remaining duration is currently 41 days | |
| How many units?* Crew/Equip Count 1 1 Remaining duration is currently 41 days | * |
| 1 1 Remaining duration is currently 41 days | * |
| Remaining duration is currently 41 days | |
| | |
| | days |
| Productivity Rate Suggestions Act 1 | Q |
| days @ \$5MM per 1,250.00 Sec | ADOPT |
| 1 Sec will take 0 days and cost \$4K | |
| Srin new act 555.0000 hours @ \$2 per Sec | ADOPT |
| 1 Sec will take 555 days (555 hours) and cost \$2 | ~ |

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

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

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

| | Unit R | Manhour Rate | |
|-------------------|-------------|---|---------|
| Rate | | | |
| Description | | | |
| WBS SCHED-99. | 2 | | |
| Output 🕜* | UOM 😯 | Manhours | \$/unit |
| 1 | | 2920 | 0 |
| Work | | | |
| How many manho | ours?* | Crew/Equip Count | * |
| 2920 | | 1 | |
| | | uration is currently 365 day D-99.2 with 1 crew will take | |
| Productivity Rate | Suggestions | | c |

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 manho | urs?* | Crew/Equip Count | * | | |
| 2920 | | 1 | 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.

| te escription | | | | |
|---|---------------------|----------------------------------|-----------|--------------|
| | | | | |
| ngineering | | | | |
| ingineering | | | | |
| ıtput 🚱* | UOM 😢 | Hours/unit * | \$/unit | |
| l | | Hours - 32 | 28 0 | |
| | | | | |
| ork ow many units?* | | Crew/Equip Co | upt * | |
| | | 1 | unt | |
| | | | | |
| | | uration is currently 41 d | | |
| | 1 unit of Engineeri | ng with 1 crew will take | e 41 days | |
| oductivity Rate Su t 1 | ggestions | | | Q ADOPT ^ |
| | | | | |
| ays @ \$5MM per 1 , Sec will take 0 day s | | | | |
| rt 1 | ,250.00 Sec | | | A |

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.

| | Unit Ra | Manhour Rate | |
|----------------------|--------------------|--|---------|
| Rate | | | |
| Description | | | |
| Engineering | | | |
| Output 😚* | UOM 🔞 | Hours/unit * | \$/unit |
| 1 | | Hours - 328 | 0 |
| Work | | | |
| How many units?* | | Crew/Equip Count * | |
| 1 | | 1 | |
| Productivity Rate \$ | 1 unit of Engineer | uration is currently 41 days ing with 1 crew will take 41 days | ADOPT |

NOTE Pay attention to how this impacts the activity duration and cost

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

| 3 | Select an Annotation 🔺 | Ξ | Ô | = |
|---------------|---|---|---------|---|
| | Annotation None | - | Actions | F |
| へ EPC Knowled | ○ AWP | | ••• | |
| へ Engineerir | Continuity | | ••• | |
| Activity | Cost Cost | | •••• | |
| Activity | ○ Float | | ••• | |
| Activity | Productivity Rates Schedule Critique | | | |
| | Description | | ••• | |
| Activity | - | | ••• | |

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

| Early Sitework | 05 Jul 21 29 Apr 22 | | | 21 | | | | : (cubic yards) (30000) Top-Down: \$1,800,000 Bottom-Up: 50 |
|--------------------|------------------------|----|------|----|---|---|----|---|
| Foundations | 16 Mar 22 09 Aug 22 | | | 2, | | 0 | | Concrete Cubic (Yards) (10000) Top-Down: \$500,000 Bottom-Up: 50 |
| Grade & Support Be | 16 Mar 22 12 Apr 22 | 20 | •••• | 21 | 2 | | 24 | |

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.

| Smart Planning | |
|---------------------------------------|-------------|
| Search | Q |
| Work Package Long Lead Procurement | 70 1% |
| •• | ۹ |
| Schedule Suggestions | |
| Commercial Building: Procurement | 318d |

- 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 | Size to Fit |
|---------------|-------------|
|---------------|-------------|

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

- 4. Select either Native Import or Size to Fit.
- 5. When complete, click Preview.

| Select an Annotation 🔻 🛛 🤇 |) <u> </u> | © Ξ | | | | | | | | Y 🕲 🔍 💉 🖪 🗗 🖨 🔍 |
|---|------------|-------------------------------|-------------|--------------------|---------------------------------|----|-----------|------|---|--|
| | | | | | dge Base Im it Imported Subn | | | | | ID SCHED_CC. 2 |
| | | | | | Yes | No | | | | Description |
| | | | | | | | 2021 | 2022 | - | Long Lead Procurement |
| ID - Description Artions Register Start Date Finish Date Remaining Dura Resources Resources | | Jan - Mar Apr - Jun Jul - Sep | Oct - Dec | Default Calendar 😯 | | | | | | |
| Commercial Construction | ••• | | 26 Apr 2021 | 22 Sep 2022 | 368 | | Data Date | | | Project Default |
| ↑ General Conditions | | | 26 Apr 2021 | 18 May 2021 | 17 | | - | | | |
| Receive notice to proceed and sign c | | | 26 Apr 2021 | 28 Apr 2021 | 3 | 2 | | | | Smart Planning |
| Submit monthly requests for payment | | | 29 Apr 2021 | 29 Apr 2021 | 1 | 2 | | | | Schedule is currently in Preview Mode. Please confirm or cancel th |
| Obtain building permits | | • | 29 Apr 2021 | 4 May 2021 | 4 | 2 | 1 | | | current import before continuing. |
| Prepare and submit schedule of values | | | 5 May 2021 | 6 May 2021 | 2 | 2 | 1 | | | |
| Prepare and submit project schedule | | 0 | 3 May 2021 | 4 May 2021 | 2 | 2 | 1 | | | Knowledge Tags |
| Submit preliminary shop drawings | | | 5 May 2021 | 18 May 2021 | 10 | 2 | • | | | Project Register |
| Submit bond and insurance docume | | | 29 Apr 2021 | 30 Apr 2021 | | | | | | |

- 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.

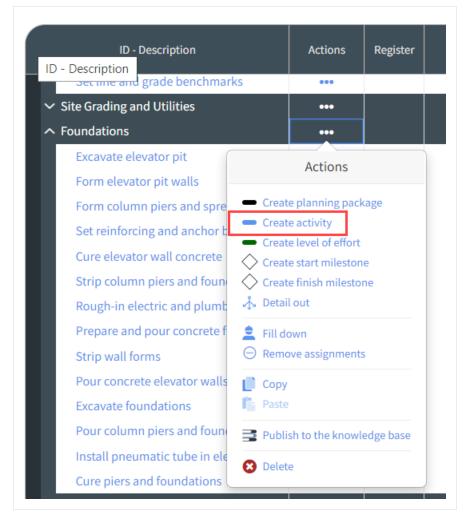


ACTIVITIES FROM SCRATCH

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

| Preconstruction | 07 Dec 20 17 Dec 21 | 376 | ••• | 2, | | |
|-----------------|------------------------|-----|-----|------|-----|----|
| Design | 07 Dec 20 23 May 21 | | | 2, | | |
| Activity A1010 | 07 Dec 20 23 May 21 | 168 | ••• | 2/ 2 | 723 | 0: |
| Permitting | 16 Mar 21 17 Dec 21 | 277 | ••• | 2, | 515 | |

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

| | | | ₽- | Zoom - Quarter | ID | | | |
|------------------------------|------------------------|-----|--------|--|--------------|----------|------------|---|
| Commercial Building | 07 Sep 20 36 May 23 | 982 | 2/ | | 0.1.1.1. | A1010 | | |
| Multi-level | 07 Sep 20 36 May 23 | | 2/ | | Description | | | |
| Preconstruction | 07 Dec 20 17 Dec 21 | | 2/ | | beschpoon | | | _ |
| | 07 Dec 20 23 May 21 | | | | Proposal Sub | missions | | |
| Proposal Submissions | 07 Dec 20 23 May 21 | 168 | 81 | 2022 | Calendar | | Constraint | _ |
| Permitting | | | 2/ | ep - NcDec - Fe Mar - MaJun JAuSep - N | Calendar | | Constraint | |
| | 11 May 21 11 Jun 21 | | 2/ | ap indee relation indee relation | 7 Day | * | None 👻 | |
| Construction | 05.Jul 21 12 Apr 23 | | 2/ | | | | | _ |
| | 05.Jul 21 16 May 23 | | 81 | | | | | |
| Closeout | 07 Sep 20 16 May 23 | | 2 | | Smart Pla | anning | | ~ |
| | 07 Sep 20 16 May 23 | | 81 | | | | | |

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.

| ID - Description | | Actions | Cost (\$) | Start Date | Finish Date | |
|--------------------|-----------|-------------------|------------|-------------|-------------|--|
| 1BR Beach Villa | | ••• | \$0 | 14 Sep 2020 | 14 Nov 2021 | |
| へ 1BR Beach Villa | | ••• | \$0 | 14 Sep 2020 | 14 Nov 2021 | |
| ↑ Concrete Works | | ••• | \$0 | 14 Sep 2020 | 18 Oct 2021 | |
| Activity A1000 | | Actions | p | 14 Sep 2020 | 18 Oct 2021 | |
| Lean Concrete an | | A CERTIFIC | D | 7 Dec 2020 | 23 Mar 2021 | |
| Roof Beam | - Create | | D | 21 Jun 2021 | 30 Jun 2021 | |
| Ground Slab | Create | e planning packa | oge D | 4 May 2021 | 7 May 2021 | |
| Site Set Out | | e level of effort | D | 12 Oct 2020 | 13 Oct 2020 | |
| Ground Beam | Create | start milestone | D | 14 Apr 2021 | 21 Apr 2021 | |
| Column | · · · | e finish mileston | 0 | 24 May 2021 | 28 May 2021 | |
| Clean site availab | Create | WBS summary | activity D | 14 Sep 2020 | 14 Sep 2020 | |
| Excavation | - | | D | 11 Nov 2020 | 17 Nov 2020 | |
| Roof Cover | 🙎 Fill do | | D | 26 Jul 2021 | 18 Oct 2021 | |
| ∧ Masonry Works | Remo | ve assignments | D | 5 Jun 2021 | 27 Aug 2021 | |
| Activity A1010 | 🚺 Сору | | D | 5 Jun 2021 | 27 Aug 2021 | |
| External Wall clad | Paste | | D | 5 Jul 2021 | 17 Jul 2021 | |
| External wall and | Bublic - | h to the knowle | dee base | 5 Jun 2021 | 5 Jul 2021 | |

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

| | | 2020 | | | | | | | | | 20 | 21 | | | | | | 20 | 22 |
|-----|-----|------|--------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb |
| | | Dat | a Date | | | | | | | | | | | | | | | | |
| | | _ | | | | | | | | | | | | | | _ | | | |
| | _ | | | | | | | | | | | | | | | | | | |
| | _ | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | ~ | -20 | | | |
| | | | | | | | | | | | | | 7 | | | e | | | |
| | | | | | | | | | | | | | | | | | | | |

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.

CHANGE ACTIVITY TYPE

You can select an Activity Type in the plan schedule and change it from one type to another via a dropdown 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.

| | | Tatyana / Schedule , | | |
|------------------|--------------|----------------------|-------------|----------------------------|
| Select an Annot | tation 🔻 🛛 💿 | > 🔁 🚳 🗄 | ÷ | ve user 🔻 🊱 🕸 🖈 🕒 🔁 🔍 🤗 |
| ID - Description | ▲ Actions | Start Date | Finish Date | |
| | | | | A1010 |
| SCHED.3 | ••• | 4 Sep 2023 | 2 May 2024 | Description |
| ivity A1000 | ••• | 4 Sep 2023 | 22 Nov 2023 | Activity A1010 |
| vity A1010 | ••• | 23 Nov 2023 | 12 Feb 2024 | Activity Type 🔺 |
| ivity A1020 | ••• | 13 Feb 2024 | 2 May 2024 | |
| | | | | Task dependent |
| | | | | Calendar |
| | | | | |
| | | | | Project Default |
| | | | | Project Default Constraint |
| | | | | |
| | | | | Constraint |
| | | | | Constraint None 🗸 |
| | | | | Constraint None 🗸 |

- • Ø \bigcirc × ¢ 8 Q e user Y ID A1010 Description Activity A1010 Activity Type 🔺 Task dependent Ŧ Select one... Start milestone Finish milestone Task dependent Level of effort WBS summary Logic **Knowledge Tags Project Register** Delegation **Resource Assignments**
- 3. Click on Activity type drop-down, and select an activity type.

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 deta | iled schedules by creating | Multiple activities or | planning packages. Esta | ablish as a logical sequence or | in parallel (concurrent). |
|-------------------------|-------------------------------|------------------------|----------------------------------|---------------------------------|---------------------------|
| | | Wo | rk or Scope | | |
| | | Activity | Planning Package | | |
| | Sequence | | | Duration | |
| | In Succession | Parallel | Aut | tomatic Manual | |
| | Quantity | | | Lag Duration | |
| | 4 | | | 0 | |
| So | chedule will create 4 Activit | ties In Succession e | ach with a duration of 31 | I days under WBS SCHED-379 | 2. |

9. Change the activity names and their respective duration.

| ID - Description | Actions | | Start Date | Finish Date | | A | | | 2022 | | | 20 | 23 | | | 2024 | |
|--------------------------------------|---------|----------|-------------|----------------|----------------|-----------|------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-------|
| ID - Description | Actions | Register | Start Date | T III SIT Date | Remaining Dura | Resources | Resource A | Apr - Jun | Jul - Sep | Oct - Dec | Jan - Mar | Apr - Jun | Jul - Sep | Oct - Dec | Jan - Mar | Apr - Jun | Jul - |
| SCHED-379000 Cost Risk WBS Import | | | 11 Jul 2022 | 15 May 2024 | 675 | | | | Data Date | | | | | | | _ | |
| SCHED-379000.1 WBS SCHED-379.1 | | | 11 Jul 2022 | 15 May 2024 | | | | | | | | | | | | _ | |
| A1020 Activity A1020 | | 2 | 27 Apr 2023 | 15 May 2024 | 385 | 2 | | | | | | • | | | | | |
| A1000 Activity A1000 | | 2 | 11 Jul 2022 | 29 Nov 2022 | 142 | 2 | | | | | | | | | | | |
| A1010 Activity A1010 | | 2 | 30 Nov 2022 | 26 Apr 2023 | 148 | 2 | | | | | | | | | | | |
| SCHED-379000.2 WBS SCHED-379.2 | | | 10 Nov 2022 | 13 Mar 2023 | 124 | | | | | _ | | | | | | | |
| A1110 Activity A1110 | ••• | | 10 Nov 2022 | 10 Dec 2022 | 31 | 2 | | | | | | | | | | | |
| A1120 Activity A1120 | | | 11 Dec 2022 | 10 Jan 2023 | 31 | 2 | | | | 4 | | | | | | | |
| A1130 Activity A1130 | | | 11 Jan 2023 | 10 Feb 2023 | 31 | 2 | | | | 0 | • | | | | | | |

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

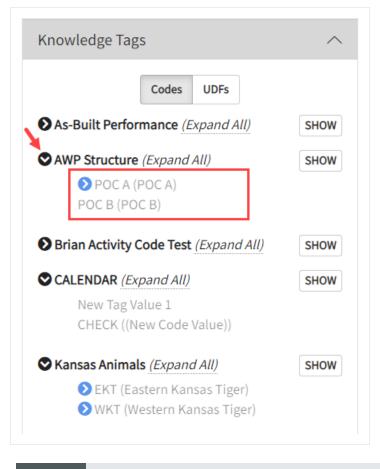
The process of associating Knowledge Tags to activities is fundamentally the same for planning packages.

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.

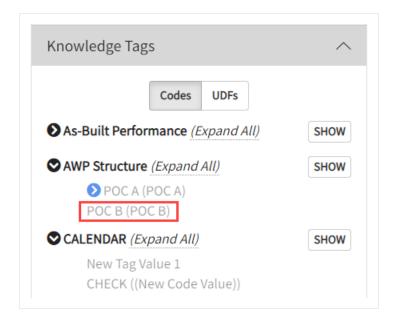


2. Click on the arrow to expand the Knowledge Tags available within each group.



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 | | | 2/ | | | | Planned | ic (Yards) (19 <mark>000)</mark> |
|--------------------|------------------------|----|-----|----|---|--|----|---------|----------------------------------|
| Grade & Support Be | 16 Mar 22 12 Apr 22 | 20 | ••• | 21 | 2 | | 24 | Planned | 0 💭 0 |
| Stub-in Utilities | 13 Apr 22 03 May 22 | 15 | | 81 | 2 | | 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

| 0000) 🗧 | |
|---------|-----------------------------|
| 0 | • |
| | ь <u>бо</u> |
| | |
| | Grade & Support Beams (end) |
| | Pour & Cure (start) |
| | Steel (tonnes) (5000) |

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

| Function (Connect the Dots) | Logic | (How to Connect) |
|--|--------------------------|--|
| Grade & Support Beams (start) Stub-in Utilities (start) | Start-to-Start (SS) | Connect the start of one activity to the start of another activity |
| Grade & Support Beams (end) Drainage (start) | Finish-to-Start (FS) | Connect the end of one activity to the start of another activity |
| Grade & Support Beams (end) Stub-in Utilities (end) | Finish-to-Finish (FF) | Connect the end of one activity to the end of another activity |
| Stub-in Utilities (start) | 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.

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. In Eight 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.

| Select an Annotatic | | |
|---|---|-------|
| ID Description | January 2024 Fe | ebrua |
| | 26 27 28 29 30 31 1 2 3 4 5 6 7 8 9 10 11 12 13 1 | 4 1 |
| 2468218 reproducing WBS SCHED-67.1 | Schedule Settings × | |
| ✓ WBS SCHED-67.1.1 WBS SCHED-67.1.2 | GENERAL PROGRESS FLOAT | |
| VBS SCHED-67.1.3 | Schedule Mode (i) | I |
| | Scheduling 🗸 | |
| | Scheduling | |
| | Planning | |
| | Hetained Logic | |
| | | |
| | Auto Progress () | |
| | | |
| | Recalculate Actual Units When Duration % Complete Changes (i) | |
| | | |
| | | |
| | Relationship Lag Mode 🧃 | |
| | Predecessor | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | Cancel Schedule and Save | |
| | | |

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

| Relationship Lag Mode 🧻 | |
|-------------------------|--------------------------|
| Predecessor | • |
| | |
| | |
| | Cancel Schedule and Save |
| | |

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

TIP

| ID - Description | Dates | Rem Dur | 2, | Resources | Resource As | • | Float |
|---------------------------------|------------------------|---------|--------|-----------|-------------|---|-------|
| Commercial Building | 07 Sep 20 16 May 23 | 982 | 2, | | | | |
| Multi-level | 07 Sep 20 16 May 23 | 982 | 2, | | | | |
| Preconstruction | 07 Sep 20 25 Jul 21 | 322 | 2/ | | | | 660 |
| Procurement | 22 Feb 21 14 Sep 21 | 205 | 2/ | | | | 609 |
| Construction | 05 Jul 21 12 Apr 23 | 647 | 2/ | | | | 34 |
| Summary | 05 Jul 21 16 May 23 | 681 | 2/ | | | | |
| Closeout | 08 Mar 23 16 May 23 | 70 | 2, | | | | |
| WBS 0.1.6 | 07 Sep 20 16 May 23 | 702 | 2, | | | | 0 |

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

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

| Commercial Building | 07 Sep 20 16 May 23 | 982 | ••• | 2, | | | |
|---------------------|--------------------------|-----|-----|----|--|---|-----|
| • Multi-level | 07 Sep 20 16 May 23 | 982 | ••• | 2, | | | |
| Preconstruction | 07 Sep 20 25 Jul 21 | 322 | ••• | 2, | | | 660 |
| Procurement | 22 Feb 21 14 Sep 21 | 205 | ••• | 2, | | 1 | 609 |
| Construction | 05 Jul 21 12 Apr 23 | 647 | ••• | 2, | | | 34 |
| Summary | 05 Jul 21 16 May 23 | 681 | ••• | 2, | | | 0 |
| Closeout | 07 Sep 20 16)Maye2320 | 702 | ••• | 2 | | | 0 |
| QC Signoffs | 076493023 16 May 23 | 702 | | 2, | | | |

- 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**.

| Select | an Annotatio | on • 📔 🧿 | |
|-----------------------|--|--|-------------------|
| ID - Description | ı | Actions | Start |
| へ 2468218 reproducing | | ••• | 26 Apr 2024 |
| ∽ WBS SCHED-67.1 | | ••• | 26 Apr 2024 |
| ✓ WBS SCHED-67. | 1.1 | ••• | 26 Apr 2024 |
| WBS SCHED-67. | | 2024 2024 | |
| | Create Create Create Create Create Create Fill do Remo Copy Paste | e level of effort e start mileston e finish milesto e WBS summa out wn ve assignment | ne ny activity |

| Quickly build more de | tailed schedules by creating | multiple activities or | planning packages. Esta | ablish as a logical sequence or i | n parallel (concurrent). |
|-----------------------|-------------------------------|------------------------|-----------------------------------|-----------------------------------|--------------------------|
| | | Wor | rk or Scope | | |
| | | Activity | Planning Package | | |
| | Sequence | | | Duration | |
| | In Succession | Parallel | Aut | tomatic Manual | |
| | Quantity | | | Lag Duration | |
| | 3 | | | 0 | |
| | Schedule will create 3 Activi | ties In Succession e | ach with a duration of 2 (| days under WBS SCHED-67.1.1 | |

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

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

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.

| 三 命 Acme Corp / Schedule | | | | | | | | |
|--------------------------|--|--|--|--|--|--|--|--|
| ⊕ ▼ ⊗ | | | | | | | | |
| × | | | | | | | | |
| | | | | | | | | |
| • | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |

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

| ≡ | ☐ Acme Corp / Schedule | | | | | | | | | | |
|------------|------------------------|------------------------------|-------------|---|--------------------|---|-------------|---|-------------|---|---|
| () | | | | | | | | | | | |
| | | Project/Schedule name T | Schedule ID | Ŧ | Project Suite | Ŧ | Start | Ŧ | Finish | Ŧ | с |
| | | 23.4 Group Test - Regression | | | 123459 - Project 5 | | 01 Jun 2015 | | 21 Nov 2020 | | |
| | | ▶ 00001 BUG TEST | | | | | 24 Apr 2023 | | 24 Apr 2024 | | |
| | | ► 001. Baseline Regression | | | 123456 - Project 2 | | 23 Dec 2013 | | 07 Dec 2034 | | |
| | | ▶ 1 | | | | | 30 Mar 2021 | | 06 Oct 2028 | | |
| | | 22_2_Brian_Group_Testing | | | | | 20 May 2022 | | 23 Nov 2023 | | |

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

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

| | | | | ish Date | | | | 202 | 8 - 2027 | | | Pleas | e selec | t an iten | from the |
|---|---------------------------------|---------------|-------------|----------|--------|--------|----------|--------------------------|----------------------|------|------|-------|---------|-----------|----------|
| | | | | | | | 023 | 2024 | 2025 | 2 | 026 | | | | |
| | ••• NEL-001 775 | 16 Jan 2023 A | | an 2026 | | 81 D 3 | - | | | | | | | | |
| | ••• NEL-001.1 278 | 16 Jan 2023 A | 1 78 | eb 2024 | H | - | - | | | | | | - | | _ |
| | 0 | | | A | dvai | nce | d W | ork Packaging | | | | | | | - 1 |
| | | | | | | | | ucture with AWP elements | | | | | | | - 1 |
| | | | | Associat | e your | sch | rouse st | acture with AWP elements | | | | | | | - 1 |
| | | | | | | | | | | | | | | | _ |
| | Search Schedule | | | | | | 3 | Search AWP Structure | | | | | + | 8 | • |
| 1 | Name ID | Туре | Start | End | | | | Name | Description | Туре | Task | Start | E | ind | |
| | ✓ Ring Road interchange Upgrade | WBS | 16 Jan | 2 Jan 2 | | 8 | | ~ 5100.01 | Zone 5100 Bulleen R | CWA | | | | | - 1 |
| | ~ Preconstruction | WBS | 16 Jan | 7 Feb 2 | 111 | 8 | | V CWP-Bulleen Roa | Bulleen Road Temp | CWP | | | | | |
| | > Design | WBS | 16 Jan | 4 Sep 2 | 111 | 8 | | IWP- Concrete - F | Concrete for Bulleen | IWP | | | | | |
| | > Permitting | WBS | 8 Jun 2 | 7 Feb 2 | 111 | 8 | | IWP-Temporary D | Temporary Diversion | IWP | | | | | |
| | ~ Procurement | WBS | 5 Sep 2 | 4 Apr 2 | 111 | 8 | | ~ 5100.02 | Zone 5100 Bulleen R | CWA | | | | | |
| | > Submittais & Approvals | WBS | 5 Sep 2 | 17 Jan | 111 | 8 | | CWP-BR101 - Bulleen | BR101 - Bulleen Rd O | CWP | | | | | |
| | > Fabrication & Delivery | WBS | 10 Oct | 4 Apr 2 | ::: | 8 | | 5100.03 | Zone 5100 Bulleen R | CWA | | | | | |
| | ~ Construction | WBS | 16 Jan | 2 Jan 2 | 111 | 8 | | 5100.10 | Zone 5100 EF IB Entr | CWA | | | | | |
| | > Key Milestones | WBS | | 2 Jan 2 | 111 | | | | | | · | | | | |
| | > Early Sitework | WBS | | 21 Nov | | | | | | | | | | | |
| | > Foundations | WBS | 3 Oct 2 | 23 Jan | | | | | | | | | | | |
| | > Structure | WBS | | 7 Aug 2 | | | | | | | | | | | |
| | > External | WBS | 6 May | 6 Oct 2 | 111 | 8 | | | | | | | | | |

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

| Finish 🍸 | Schedule type 🍸 | Data date 🏾 🍸 |
|-------------|-----------------------------|---------------|
| 28 Sep 2024 | | |
| 5 Nov 2021 | None | =18 May 2022 |
| 28 Sep 2024 | Active Estimate Estimate | 8 May 2022 |
| 4 Feb 2023 | ✓ Active Baseline | 3 May 2022 |
| 3 Nov 2022 | Baseline Re-Baseline | |
| 5 Dec 2021 | Active Updete | 8 May 2022 |
| 18 May 2022 | What if | B May 2022 |
| 14 Aug 2022 | Estimate 🗸 | 18 May 2022 |

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

|) 🗾 | Melbourne Airport | SCHED-45 | 06 Dec 2021 |
|-----|---|----------|-------------|
|) 🧌 | Metropolitan ring r | NEL-002 | 06 Dec 2021 |
| Ì | inked to Ridgegate Camp Ring Road intercha | NEL-001 | 16 Jan 2023 |
|) 🖻 | Ring Road intercha | NEL-005 | 16 Jan 2023 |

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.

| | | | | | | | | 2008 | | | | |
|---|--------------------------------|-------------|------------|-----------------|---------------|---|------------|------------|------------|-----------|----------|--|
| | Project/Schedule name | Schedule ID | т) | Project S 🔻 | Start T | Finish T | Calendar | Sep | Oct | Nov | Dec | |
| 2 | ▶ 23.4 Group Test - Regression | | | 123-59 - Projec | 01 Jun 2015 | 21 Nov 2020 | | | | | | |
| כ | 00001 BUG TEST | | | | 24 Apr 2023 | 24 Apr 2024 | | | | | | |
| כ | 001. Baseline Regression | | | 123456 - Projec | 23 Dec 2013 | 07 Dec 2034 | | | | | | |
| כ | ▶ 1 | | | | 30 Mar 2021 | 06 Oct 2028 | | | | | | |
| כ | ► 22_2_Brian_Group_Testing | | | | 20 May 2022 | 23 Nov 2023 | | | | | | |
| כ | 22_4_brian_test | | | | 20 Ma Warning | | | | | | × | |
| כ | ▶ 22.10 Brian Group Test | | | | 01 No 🕂 Ar | e you sure you wa | nt to unli | nk Proiect | t 5 from 2 | 3.4 Grour | o Test - | |
| כ | ▶ 22.10 Brian Group Test 3 | | | | 01 Jui Re | Regression? | | | | | | |
| כ | ► 22.10 Nicole Test | | | | 21 Jui | All AWP associations will be lost. This cannot be undone. | | | | | | |
| | 22.10 Regression | | | | 01 Jui | | | | | Yes | No | |

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.

| Acme Corp Schedule / CPM - Relationship Type 1 / Sche | le Configuration $$ | 2 2 | | 盦 | ٥ | 6 | 8 |
|---|---|-------|---------------|---|---|---|---|
| GENER | CONTRIBUTORS | KNQ F | PROJECT SUITE | | | | |
| This workspac | cannot have project suite associations. | < | | | | | |
| | | 1 | | | | | |

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

| | | ► None | | | 01 Nov 2010 | 19 Sep 2032 |
|------|-----------------|-------------|-------------------|--------------|-------------|-------------|
| Disp | ayed results: 0 | Selected: 0 | View selected Cle | ar selection | - | |

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.

| | | | | | | | 20 | 21 | | | | 2022 | | 20 | 023 |
|---------------------------------------|---------|----------|-------------|-----------------|--------|------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| ID - Description | Actions | Register | Start Date | Finish Date | Free F | Jan - Mar | Apr - Jun | Jul - Sep | Oct - Dec | Jan - Mar | Apr - Jun | Jul - Sep | Oct - Dec | Jan - Mar | Apr - Jun |
| Commercial Construction | ••• | | 26 Apr 2021 | 30 Mar 2023 | | | Data Date | | | | | | | | |
| ∧ General Conditions | ••• | | 26 Apr 2021 | 18 May 2021 | | | — | | | | | | | | |
| Receive notice to proceed and sign c | ••• | | 26 Apr 2021 | 28 Apr 2021 | 0 | | | | | | | | | | |
| Submit monthly requests for payment | ••• | | 29 Apr 2021 | 29 Apr 2021 | 0 | | | | | | | | | | |
| Obtain building permits | ••• | 1 | 29 Apr 2021 | 4 May 2021 | 0 | | ->10 | | | | | | | | |
| Prepare and submit schedule of values | ••• | | 5 May 2021 | 6 May 2021 | 494 | | • | | | | | | | | |
| Prepare and submit project schedule | ••• | 1 | 3 May 2021 | 4 May 2021 | 0 | | | | | | | | | | |
| Submit preliminary shop drawings | ••• | | 5 May 2021 | 18 May 2021 | 0 | | | | | | | | | | |
| | | | | | ÷ | 4 | 1997 | | | | | | | | • |
| | Name | | | Pla | nnod | | 20 | 21 | | | 2 | 2022 | | 20 | 023 |
| | Name | | | Fla | | Jan - Mar | Apr - Jun | Jul - Sep | Oct - Dec | Jan - Mar | Apr - Jun | Jul - Sep | Oct - Dec | Jan - Mar | Apr - Jun |
| All Resources | | | | 4400 Uni | ts | 1.3K | Data Date | | | | | | | | |
| A Labor | | | | 4400 Hou | urs | 1.1K | | | | | | | | | |
| CNC | | | | 800 Hour | | 1K | | | | | | | | | |
| FDN | | | | 559 Hour | rs | 900 | _ | | | | | | | | |
| GRD | | | | 690 Hour | rs | 800 | _ | | | | | | | | |
| INT | | | | 1800 Hot | | 700 | | | | | | | | | |
| STL | | | | 551 Hour | | 600 | | | | | | | | | |
| | | | | | | 500 400 | | | | | | | | | |
| | | | | | | 300 | | | | | | | | | |
| | | | | | | 200 | | | | | | | | | |

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.

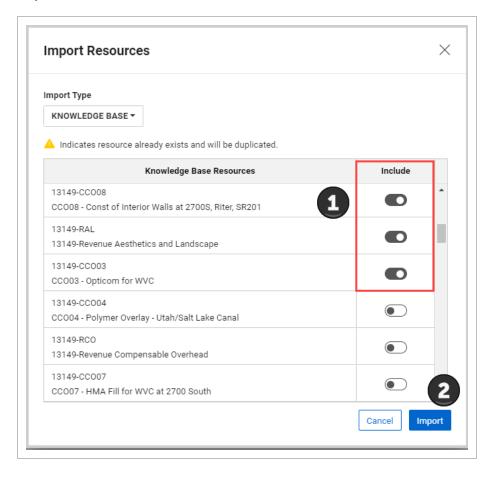
| obin Tester Material Image: Second Sec | Resources Categories | | | | | | | | 3 | C C |
|--|----------------------|-------------|---------|--------------|-------|-------|-----------------|-----------|---|-----|
| obin Tester Material Image: Second Sec | | Name | | Category | Color | UoM | Default Units/d | Cost/Unit | | |
| project resource project resource Nonlabor Each 1.00 75.00 6 09 Resource 9 Nonlabor Nonlabor Each 1.00 0 6 lobal Global Nonlabor Import 10 Each 1.00 0 6 atyana Stimi Import Desc Unique Import 10 Each 1.00 0 6 dent Stimi Import Desc Unique Import 10 Each 1.00 0 0 6 dent Indent Labor A Import 10 Stimi Import Desc Import 10 Hours Each 1.00 0 0 6 | 100100-000 | Kim Test | | Labor | | Hours | 8.00 | 1.00 | 8 | |
| 09 Resource 9 Nonlabor Each 1.00 0.0 6 lobal Global New Category Import Each 1.00 0.0 | n | Tester | | Material | • | Each | 1.00 | 200.00 | ⊗ | |
| Index New Category Each 1.00 0.00 | ect resource | project res | ource | Nonlabor | · 🕘 | Each | 1.00 | 75.00 | 8 | |
| Import ID Srin Import Desc Unique Each 1.00 0. | | Resource | 9 | Nonlabor | • | Each | 1.00 | 0 | 8 | |
| Atyana Resurs 009 Supply Mer 25.00 5080.00 % odent Indent Labor Indent B0.00 | al | Global | | New Category | | Each | 1.00 | 0 | ⊗ | |
| Indent Labor Hours 8.00 0 8 82 Labor Hours 8.00 0 8 | Import ID | Srini Impo | rt Desc | Unique | · 😑 | Each | 1.00 | 0 | 8 | |
| B2 Labor Hours 8.00 0 6 | ana | Ressurs 0 | 09 | Supply | • | Hver | 25.00 | 5080.00 | 8 | |
| | nt | Indent | | Labor | . 🔴 | Hours | 8.00 | 0 | 8 | |
| P Ski Patroller Labor Hours 8.00 25.00 8 | | | | Labor | • | Hours | 8.00 | 0 | 8 | |
| | | Ski Patroll | er | Labor | • | Hours | 8.00 | 25.00 | 8 | |
| lo UOM No Labor + 1.00 0 8 | JOM | UOM No | | Labor | | | 1.00 | 0 | 8 | |

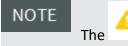
IMPORT RESOURCES FROM KNOWLEDGE BASE RESOURCE REGISTER INTO PROJECT RESOURCES REGISTER

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

| CONTRIBUTORS KNOWLEDGE TAGS | CALENDARS | RESOURCES SIP RESO | DIRCES | *) |
|---|---|--------------------|-----------------------|--------|
| Category | Color UoM | Default Units/d | Cost/Unit Assignments | Ŭ |
| Import Resources | | × | | |
| Import Type EXCEL • • Excel Knowledge Base | <u>+</u> | - 64 | | |
| | op file here to upload SX files are allowed. | | | |
| Select Files | Drop files h | ere to select | | |

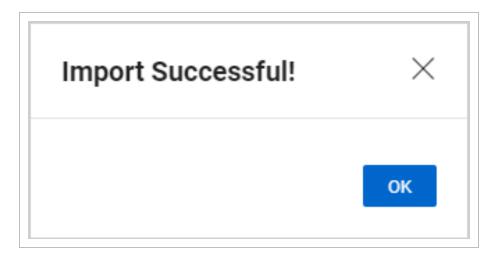
2. Select the **Knowledge Base resources** that you want to include in your project, and then click **Import**.





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 CONTRIB | JTORS KNOWLED | IGE TAGS | CALENDARS | RESOURCES | SIP RESOURCE | ES . | | |
|-------------|--|---------------|----------|-----------|-----------|-----------------|-----------|-------------|-----------|
| ÷ | | | | | | | | | D D |
| 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 | \otimes |
| 13149-RAL | 13149-Revenue Aesthetics and Landscape | Material | • | | Dollars | 1.00 | 1.00 | 0 | \otimes |
| 13149-CC003 | CC003 - Opticom for WVC | Nonlabor | • | • | Each | 1.00 | 1.00 | 0 | \otimes |

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 the 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**.

| Project R | egister | | | | \sim |
|---------------------|-------------------|--------|------|-----------|--------|
| Delegatio | on | | | | \sim |
| Resource | Assignm | ents | | | ^ |
| ID | Category | Curve | Plan | Remaining | Actual |
| | | | | | |
| SCE_COST | Nonlabor | Linear | 1 | 1 | 0 |
| SCE_COST SCE-CRE | Nonlabor Labor | | | 1 | 0 0 |

• 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 Assignment |
|------|----------------------------------|---------|----------|-------------|-------------|----------------|-----------|---------------------|
| ABCI | Building Project Baseline | ••• | | 21 Jun 2021 | 14 Jul 2022 | 268 | | |
| ∧ AE | SC 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 | ••• | 14 | 4 Aug 2021 | 16 Aug 2021 | | | |
| | Temp Trailer Install | ••• | 5 | 11 Aug 2021 | 11 Aug 2021 | 1 | 2 | SCE_COST, SCE-CF |
| | Temporary Electric Install | ••• | 5 | 5 Aug 2021 | 11 Aug 2021 | 5 | 2 | SCE_COST, SCE-CF |
| | Existing Conditions Document | ••• | 5 | 4 Aug 2021 | 6 Aug 2021 | 3 | 2 | SCE_COST, SCE-CF |
| | Install Temporary Barracades | ••• | 5 | 9 Aug 2021 | 10 Aug 2021 | 2 | 4 | SCE_COST, SCE-CF |
| | Temp Sanitary Facilities Install | ••• | 5 | 11 Aug 2021 | 11 Aug 2021 | 1 | 2 | SCE_COST, SCE-CF |
| | Dig Alert | ••• | 5 | 4 Aug 2021 | 6 Aug 2021 | 3 | :2: | SCE_COST, SCE-CF |

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

| Add new resource | | Q | | | | | | | | | | | | |
|------------------------------|----------|----------|-------------|----------|-----|-------|------|-------|------|------|------|-----|-----|-----------|
| Available Resources | | ЮŢ | Name | Category | Col | Curve | Unit | Unit | Cost | FTE/ | Plan | Rem | Act | |
| SCE-CRE SCE CRE Resources | | SCE-CRE | SCE CRE Res | Labor | | Lin 🕨 | 0 | Hours | 0 | - | 0 | 0 | 0 | \otimes |
| SCE_COST SCE Cost | | SCE_COST | SCE Cost | Nonlabor | | Lin 🕨 | 1 | Hours | 0 | 1 | 3 | 3 | 0 | \otimes |
| | → | | | | | | | | | | | | | |

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

| + Add new resource | | Q | | | | | | | | | | | | |
|------------------------|---|----------|---------------|----------|-----|-------|------|-------|------|------|------|-----|-----|-----------|
| Available Resources | | ID 个 | Name | Category | Col | Curve | Unit | Unit | Cost | FTE/ | Plan | Rem | Act | |
| SP Ski Patroller | | 332 | Crane | Labor | | Lin 🕨 | 8 | Hours | 0 | 1 | 328 | 328 | 0 | \otimes |
| Jonny B Bonny J | | 754 | Exavator 2 | Labor | | Lin 🕨 | 8 | Hours | 0 | 1 | 328 | 328 | 0 | \otimes |
| Baby jon jonny babe | | Baby jon | jonny babe | Labor | | Lin 🕨 | 2 | Each | 3 | 1 | 82 | 82 | 0 | \otimes |
| 332 Crane | | Jonny B | Bonny J | Labor | | Lin ▶ | 8 | Hours | 0 | 1 | 328 | 328 | 0 | \otimes |
| Steel | | SP | Ski Patroller | Labor | | Lin 🕨 | 8 | Hours | 25 | 1 | 328 | 328 | 0 | \otimes |
| 754 Exavator 2 | - | Steel | | Labor | | Lin ► | 8 | Hours | 0 | 1 | 328 | 328 | 0 | \otimes |
| 5343 Iron Worker | | | | | | | | | | | | | | |

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.

| ➔ Add new resource | Q | | | | | | | | | | | | |
|------------------------|----------|---------------|----------|-----|-------|------|-------|------|------|------|-----|-----|-----------|
| Available Resources | ID 个 | Name | Category | Col | Curve | Unit | Unit | Cost | FTE/ | Plan | Rem | Act | |
| SP Ski Patroller | 332 | Crane | Labor | | Lin 🕨 | 8 | Hours | 0 | 1 | 328 | 328 | 0 | \otimes |
| Jonny B Bonny J | 754 | Exavator 2 | Labor | | Lin 🕨 | 8 | Hours | 0 | 1 | 328 | 328 | 0 | \otimes |
| Baby jon jonny babe | Baby jon | jonny babe | Labor | | Lin 🕨 | 2 | Each | 3 | 1 | 82 | 82 | 0 | \otimes |
| 332 Crane | Jonny B | Bonny J | Labor | | Lin ▶ | 8 | Hours | 0 | 1 | 328 | 328 | 0 | \otimes |
| Steel | SP | Ski Patroller | Labor | | Lin 🕨 | 8 | Hours | 25 | 1 | 328 | 328 | 0 | \otimes |
| 754 Exavator 2 | Steel | | Labor | | Lin 🕨 | 8 | Hours | 0 | 1 | 328 | 328 | 0 | \otimes |
| 5343 Iron Worker | | | | | | | | | | | | | |

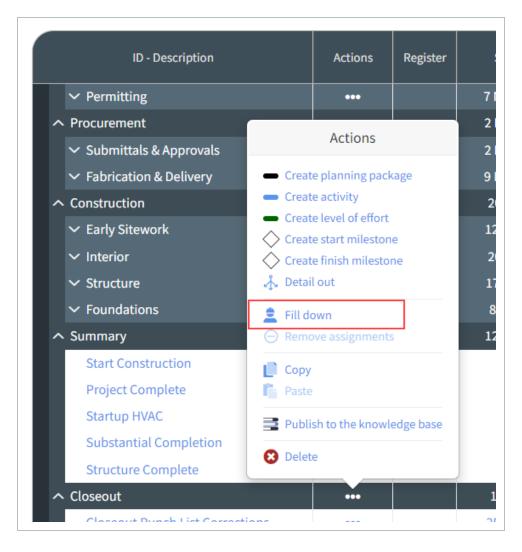
- TIP Double clicking a resource will also add it to the activity's Resource register.
- 4. Once added, details for each resource can be modified for the activity. Fields that can be adjusted at this level include Curve, Units/d, Cost/Unit, FTE/Qty, and Plan.

| ID个 | Name | Category | Col | Curve | Unit | Unit | Cost | FTE/ | Plan | Rem | Act | |
|----------|---------------|----------|-----|-------|------|-------|------|------|------|-----|-----|-----------|
| 332 | Crane | Labor | | Lin 🕨 | 8 | Hours | 0 | 1 | 328 | 328 | 0 | \otimes |
| 5343 | Iron Worker | Labor | | Lin 🕨 | 8 | Hours | 0 | 1 | 328 | 328 | 0 | \otimes |
| 754 | Exavator 2 | Labor | | Lin ▶ | 8 | Hours | 0 | 1 | 328 | 328 | 0 | \otimes |
| Baby jon | jonny babe | Labor | | Lin ▶ | 2 | Each | 3 | 1 | 82 | 82 | 0 | \otimes |
| Jonny B | Bonny J | Labor | | Lin ▶ | 8 | Hours | 0 | 1 | 328 | 328 | 0 | \otimes |
| SP | Ski Patroller | Labor | | Lin 🕨 | 8 | Hours | 25 | 1 | 328 | 328 | 0 | \otimes |

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.

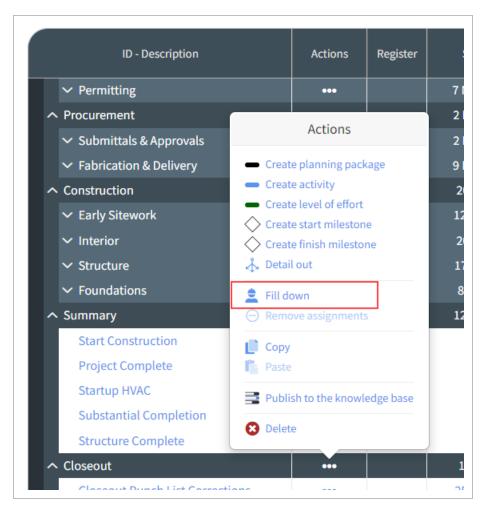


FILL DOWN FROM THE SUMMARY LEVEL

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

| Construction | 11 Nov 19 30 Dec 21 | 557 | •••• | 2, |
|------------------------------------|------------------------|-----|------|----|
| Early Sitework | 11 Nov 19 09 Nov 20 | 259 | | 2, |
| Entry & Access Roads | 11 Nov 19 22 Jan 20 | 53 | | 2, |

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



• The Fill down window appears

| Fill down | | | | | | \times |
|----------------------------------|----------|-------------------------|-----------|----------|--------------------|-----------|
| Milestones SCHED-514.LEV-HOST | -002.0 | | | | | |
| CALENE | DAR | CODES | RESOURCES | | Selected calendar | |
| Current calendar | Avail | able calendars | | | | |
| 724 Su-Sa 12:00A-1 | Sea | ırch | | ۹ | Selected codes | Clear all |
| | О коз | G 5d x 10hr w Holidays | | ^ | | |
| | O Turtle | e Season (2015-18) | | | | |
| | ○ 24x7 | w/ Turtle Season | | | | |
| | O 0.Sta | ndard 5 Day w/ Hol | | | | |
| | O Turtle | e Season (2015-18) | | | | |
| | ○ 24x7 | w/ Turtle Season | | | Selected resources | Clear all |
| | ○ 510 M | И-F No Holidays | | | | |
| | О коз | G 7d x 10hr No Holidays | | | | |
| | Окоз | G 5d x 10hr w Holidays | | | | |

3. Under Calendar, choose a calendar from available calendars

| Milestones SCHED-514.LEV-HOST- | 002.0 | | | |
|-----------------------------------|-------|---------------------------------|-------------------------------|-----------|
| CALEND | AR | CODES RESOURCES | Selected calendar | |
| Current calendar | | Available calendars | KOS G 7d x 10hr No Holidays × | |
| 724 Su-Sa 12:00A-1 | | Search | Selected codes | Clear all |
| | 0 | 510 M-F No Holidays | | |
| | ۲ | KOS G 7d x 10hr No Holidays | | |
| | 0 | KOS G 5d x 10hr w Holidays | | |
| | 0 | TIC - 5x10 (w/holidays) | | |
| | 0 | WMB.GLB.GD - 7 x 10 hour | | |
| | 0 | 24 hours / 7 days | Selected resources | Clear all |
| | 0 | 7d-24h (no holidays continuous) | | |
| | 0 | 510 Su-Th 7:00A-5:00P No Hol | | |
| | 0 | 724 Su-Sa 12:00A-12:00A No Hol | | |
| | 0 | *508 M-F 8:00A-5:00P US Hol | | |

4. Click on the Codes and select any Activity Code.

| Milestones SCHED-514.LEV-HOST | -002.0 | D | | | | | | |
|----------------------------------|---------|------------------|---------------|----------|-------|---|-------------------------------|----------|
| CALEN | DAR | C | ODES | RESOU | IRCES | | Selected calendar | |
| Activity codes | | LEV - Cost Break | lown Structur | e values | | | KOS G 7d x 10hr No Holidays × | |
| Search Q | | Search | | | ٩ | | Selected codes | Clear al |
| *LEV Monthly R | \odot | ✓ 540 | | | | 4 | LEV - CoStructure: 540 × | |
| *LEV Schedule | | | | | | | | |
| *MP Ad Hoc Sel | | | | | | | | |
| 3 - Sub-Phase | | | | | | | | |
| LEV - Area | | | | | | | | |
| LEV - Cost Brea | | | | | | | | |
| LEV - Discipline | | | | | | | Selected resources | Clear al |
| LEV - Equipment | | | | | | | | |
| LEV - Long Leads | | | | | | | | |
| LEV - RFP Numb | | | | | | | | |
| LEV - Schedule I | | | | | | | | |
| | | | | | | | | |

5. Click on Resources and select any Resource value.

| Milestones SCHED-514.LEV-HOST | -002.0 | |
|----------------------------------|---|---------------------------------------|
| CALEN | DAR CODES RESOURCES | Selected calendar |
| Resource category | All resources values | KOS G 7d x 10hr No Holidays × |
| Search Q | Search Q | Selected codes Clear all |
| All resources | L *EXPT A | LEV - CoStructure: 540 × |
| Installed Equipment | FLAY Flowline Vessel | |
| Installed Material | SURV Survey Vessel | |
| Labor | Nbl Ops & Eng Serv Noble Operations and Engineering Services | |
| Material | SPL-1 Subsea Package Lead - Doiron | |
| New Category | SPL-2 Subsea Package Lead - Pyron | |
| Nonlabor | SPL-3 Subsea Package Lead - Timte | Selected resources Clear all |
| Ny kategori 1 | SPL-4 Subsea Package Lead - Gaston | Labor: Subsea Package Lead - Doiron 🗡 |
| Supply | SPL-5 Subsea Package Lead - Blockhus | |
| Supply Non | SPL-6 Subsea Package Lead - Anderson | |
| Unique | SPL-8 Subsea Package Lead - Tavassoli | |
| | SPL-9 | |

- 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 act 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.

| ◎ = © = | |
|----------------------------|-----|
| General | - 1 |
| ID | |
| Resources | |
| Histogram | |
| Baseline/Snapshots | |
| Active Baseline | |
| Snapshot - 18 Apr 2023 | |
| Snapshot - 18 Apr 2023 (1) | |
| Logic Links | |
| O On | |
| ◯ Off | |
| Smart Logic | |
| | 0 |

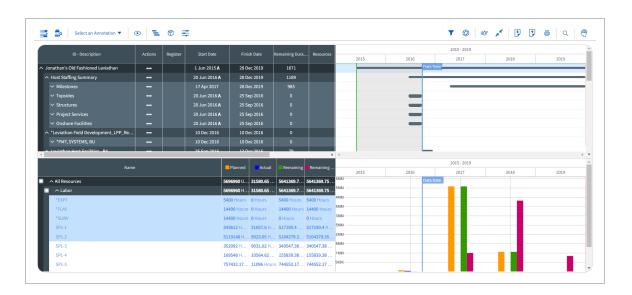
A histogram shows below the Gantt Chart. The resource histogram plots resource utilization over time depending on the following:

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

| • = • = | |
|----------------------------|-----------|
| General | - 1 |
| ID | |
| Resources | |
| Histogram | |
| Comparison Mode | |
| Status | |
| 1 status selected | • |
| Display | |
| Units | • |
| S-Curve | |
| Over-allocation | |
| Stacked Histogram | \bullet |
| Baseline/Snapshots | |
| Active Baseline | |
| Snapshot - 18 Apr 2023 | |
| Snapshot - 18 Apr 2023 (1) | |
| Logic Links | |
| 🔘 On | |
| Off | |
| Smart Logic | - |

| 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 resource quantities, Remaining or Remaining |

| Setting | Function |
|---------|--|
| | 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.

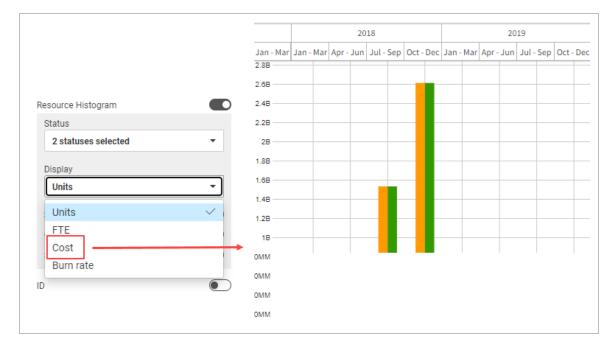
| T | ঙ্খ | * | • | • | ē | Q |
|---------------|-----|----------|---|---|----|---------|
| | 1 | | | | | |
| 2018 | • | Day | | | | |
| Jun Jul-Sep C | o o | Week | | | ct | - Dec J |
| | 0 | Month | | | | _ |
| | 0 | Quarter | | | | |
| | 0 | Year | | | | |
| ٠ | 0 | Decade | | | | |
| | | | | | | |

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.

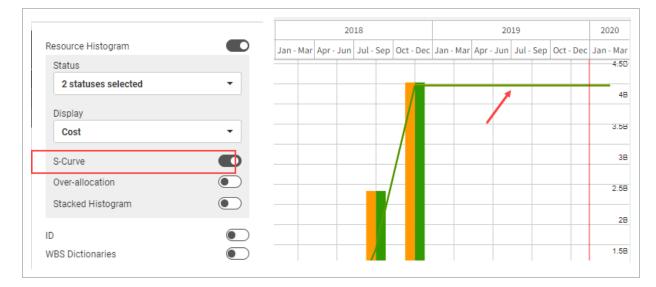
| Status | All Resources | 5696960 Units | 5641369.75 U. |
|---------------------|---------------|--------------------|----------------------|
| 2 statuses selected | ▼ □ ^ Labor | 5696960 Hours | 5641369.75 H. |
| Planned | *EXPT | 5400 Hours | 5400 Hours |
| Actual | *FLAY | 14400 Hours | 14400 Hours |
| Remaining | *SURV | 14400 Hours | 0 Hours |
| Remaining Late | SPL-1 | 543612 Hours | 517190.4 Hour |
| /er-allocation | SPL-2 | 5119148 Hours | 5104379.35 H. |
| acked Histogram | 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.



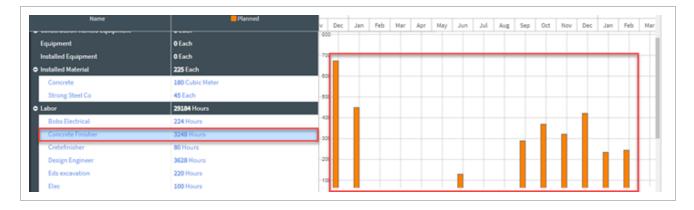
NOTE

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.

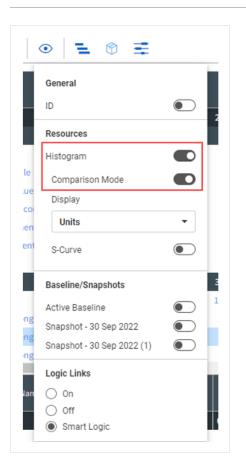
In the image below, the Resource Histogram is filtering based on the selected resource: *Concrete Finisher*.



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

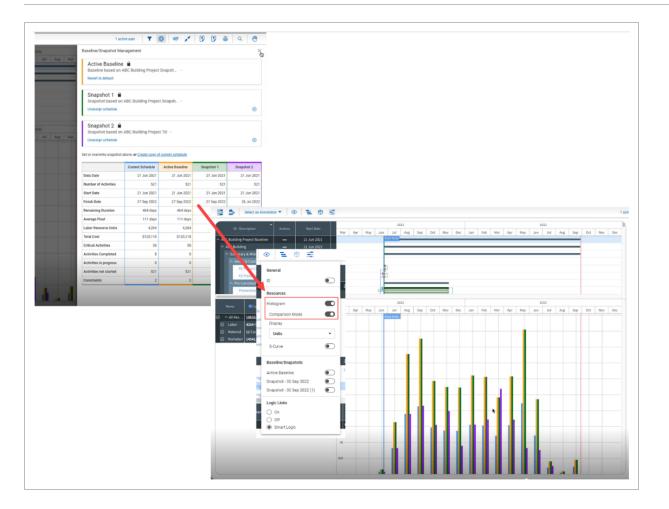
HISTOGRAM COMPARISON MODE

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.

| Resources | |
|-------------------|--------|
| Histogramson Mode | |
| Comparison Mode | |
| Display | |
| Units | - |
| Units | \sim |
| Burn rate | |
| B 11 10 1 1 | |

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.

| T | 🚳 🛷 💉 🗜 🗗 🖶 🭳 🤭 |
|---|--|
| art Date Finish Date Remaining Dura 2021 Apr 2021 22 Sep 2022 368 Data Date Apr commercial Construction X Select the file type you would like to export below | ID SCHED_CC Description Commercial Construction |
| A EXPORT TYPE | Default Calendar 😯 Project Default |
| SELECT EXPORT TYPE | Smart Planning \checkmark |
| Iz Primavera P6 XER Aj Excel Export | Knowledge Tags |
| MS Project MPP | Project Register V |
| Resource Spread | Delegation \checkmark |
| | |
| | |
| A | |

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.

| ≣ ଜ | Acme Corp - 22.10 Brian Grou / Commercial Con / Plan \sim |
|-----------------------|---|
| 📑 🎰 | |
| | ₽ Markup |
| | Schedule Review |
| ∧ Commercia | ណ៍ Cost Risk |
| ▲ General (Receiv | Short Interval Planning |
| Submi | ∜= Risk Register |
| Obtair | S Manage Review Cycle |
| Prepa | Schedule Configuration |
| Subm | preaminary shop drawings |

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

This brings you to the project-level resource register

| Acme Corp - 22.10 Brian Grou / Commercial Con / | Schedule Configuration $ arsigma$ | | | | | | | |
|---|-----------------------------------|--------------|----------------|-----------|-----------|---------------|---------------|--|
| | GENERAL | CONTRIBUTORS | KNOWLEDGE TAGS | CALENDARS | RESOURCES | SIP RESOURCES | PROJECT SUITE | |
| | | | | | | | | |
| | | | | | | | | |

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

| Acme Corp - 22.10 Brian Grou / Commercial | I Con / Schedule Configuration \sim | | | | | | | | | | 6 |
|---|---------------------------------------|--------------|----------------|--------|---------|------------|-----------------|------------|--------------|---|-----|
| | GENERAL | CONTRIBUTORS | KNOWLEDGE TAGS | CALEND | ARS RES | OURCES SIF | RESOURCES PRO | UECT SUITE | | | |
| | | | | | | | | | | 3 | ø |
| | | | | | | | | A | | | i i |
| | Name | | Category | | Color | UoM | Default Units/d | Cost/Unit | Assignments | | |
| N | Foundations | | Labor | • | • | Hours | 8.00 | 100.00 | 15 | 8 | |
| | | | | | | | | | | | |
| IC . | Concrete | | Labor | • | | Hours | 8.00 | 200.00 | 22 | 8 | |
| ю Ю | Concrete Grading | | Labor | > > | • | Hours | 8.00 | 200.00 | 22 7 | 8 | |
| | | | | > > | • | | | | 22 7 7 | | |

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.

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.

| Search | + |
|------------------------------|----------|
| Available Resources | |
| CONSTRUCTION EQUIPMENT | - |
| Excavator | |
| Excevetor | 4 |
| Str Steel | a |
| Structurel Steel | Ψ |
| CONSTRUCTION RENTED EQUIPMEN | т |
| EK160 | |
| EK160 Drill Rig | 0 |
| SR-125 | æ |
| SR-125 Drill Rig | Ψ |
| EQUIPMENT | |
| ECR110 | æ |
| Crene 110 Ton | · · · . |
| | |

• The Add Resource opens to add a project specific resource

| lame | Description |
|-----------------|-------------|
| Name | Description |
| Category | Unit |
| Labor 🗸 | Hours |
| Default Units/d | Cost/Unit |
| 8 | \$ 0 |

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.

| ID - Description | Resource Histogram | | | |
|--------------------------|--------------------|---|--|--|
| ∧ Multi-Use Commercial | ID | | | |
| ∧ Preconstruction | WBS Dictionaries | | | |
| ✓ Design | Sketch Mode | | | |
| ✓ Permitting | | | | |
| ∧ Procurement | Snapshots | _ | | |
| ✓ Submittals & Approvals | Snapshot 2 | | | |
| ✓ Fabrication & Delivery | Snapshot 1 | | | |
| | | | | |
| ✓ Early Sitework | Logic Links | | | |
| ✓ Foundations | () On | | | |
| ✓ Structure | O Off | | | |
| ✓ Interior | Smart Logic | | | |

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.

| ID - Description | Resource Histogram | Start Date | Finish Date | Total Dur | | 2020 | 2119 | |
|--|---------------------|--------------------------|------------------------|---------------|-----------|------|--------|--|
| | Status | | | | | 2020 | - 2029 | |
| Multi-Use Commercial | 1 status selected v | 03 Mar 20 A | | 925 | Data Date | | | |
| Preconstruction | | 09 Mar 20 A | | 619 | | | | |
| ✓ Design | Display | 09 Mar 20 A | | 145 | | | | |
| ✓ Permitting | Units • | 11 May 20 | | 556 | | | | |
| ∧ Procurement | S-Curve | 03 Aug 20 | 29 Apr 22 19 Jan 22 | 635 535 | | | | |
| Submittals & Approvals Fabrication & Delivery | Over-allocation | 03 Aug 20 16 Sep 20 | 19 Jan 22 29 Apr 22 | 535 | | | | |
| Fabrication & Delivery Construction | Stacked Histogram | 16 Sep 20 03 Mar 20 A | | 925 | | | | |
| Construction Early Sitework | | 03 Mar 20 A | | 736 | | 1 | | |
| Foundations | ID O | 07 Dec 20 | 05 May 21 | 150 | | | | |
| ✓ Structure | WBS Dictionaries | 06 May 21 | 30 May 22 | 390 | | | | |
| | Sketch Mode | 15 mp 21 | 13 Sep 22 | 364 | | | | |
| Summary | | | 30 May 22 | 223 | | 1 | | |
| Start Construction | Snapshots | 20 OCT 21 | 15 Oct 21 | 0 | • | | | |
| | Snapshot 2 | | | | · · | 2020 | 2110 | |
| | Snapshot 1 | | | Planned | | 2020 | | |
| ^ All Resources | | | 01 | inits | Data Date | | | |
| Installed Equipment | O On | | 0 8 | ach | _ | | | |
| Crane | O off | | 18 | Day | | | | |
| Excavator | Smart Logic | | 10 | Day | | | | |
| Installed Material | | | 0 E | ach | _ | | | |
| NLB-CONC | | | 16 | 2 Cubic Meter | | | | |
| NL-07-B Terrace | | | 22 | Square Me | | | | |
| □ ^ Labor | | | 01 | lours | | | | |
| L71 | | | 48 | Hours | - | | | |
| Operator | | | 32 | Hours | | | | |
| Task days | | | | L44 Hours | | | | |
| Onique | | | 0 E | ach | | | | |

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

| ID | O Day | |
|------------------|----------|--------|
| 1 | O Week | |
| Description | Month | |
| Multi-Use Commer | Quarter | - |
| | O Year | 0 |
| Default Calendar | O Decade |)own 🚱 |
| 7 Day | - APPA | |

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

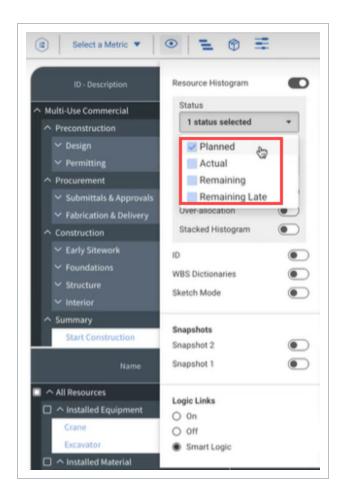
The histogram now shows resources allocated based on the month. By default, only the Planned status is selected.

| | Planned | | 2021 | | | | | | | | | | | 2022 | | | | | | | | | |
|---------------------|------------------|------|------|-----|-----|-----|-----|-----|-----|-----|--------|---------|----------|------|-----|-----|-----|-----|-----|-----|-----|----|--|
| | Planed | Dec | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | Jun | Jul | Au | |
| ∧ All Resources | 13512 Units | -1K | | - | - | | | | | | | | | | | | | | | | | | |
| Installed Equipment | 0 Each | -900 | | | | | | - | | | Oct 20 | 021 | | | | | | | | | | | |
| Crane | 18 Day | 800 | | | | | | | | | Plann | ed: 760 | .6 Units | | 10 | | | | | | | | |
| Excavator | 10 Day | 800 | | | | | | | | | | | | _ | | | | | | | | | |
| Installed Material | 0 Each | -700 | | | | | | | | - | | | | | | | - | | | | + | | |
| NLB-CONC | 162 Cubic Meter | -600 | | | | | | | | | | | | | | | _ | | | | | | |
| NL-07-B Terrace | 220 Square Meter | | | | | | | | | | | | | | | | | | | | | | |
| ☑ ^ Labor | 13512 Hours | -500 | | | | | | | | | | | | | | | | | | | | | |
| L71 | 48 Hours | | | | | | | | | - | - | - | | | | | - | - | | | | | |
| Operator | 320 Hours | | | | | | | | - | | | | | | | | | | | | | | |
| Task days | 13144 Hours | | | | | | | | | | | | | | | | | | | | | | |
| 🗆 ^ Unique | 0 Each | - | | - | | | | | | | | | | | | | | | | - | + | | |
| Nicks Electrical | 38 Each | | | | _ | | | | | | | b | | | | | | | | | | _ | |
| - | | | | | | | | | | | | ~ | | | | | | | | | | | |

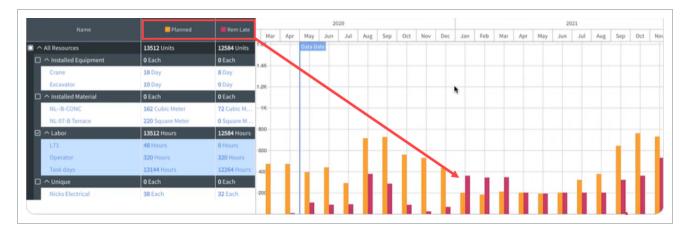
Use the following instructions to add statuses to the histogram.

ADD STATUSES TO THE RESOURCE HISTOGRAM

- 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 Th

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.

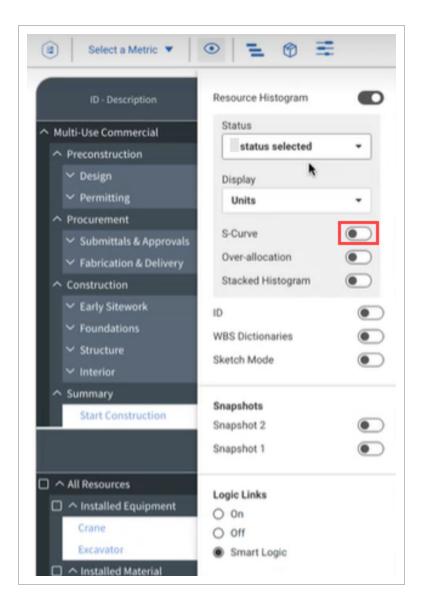
S-CURVE

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.

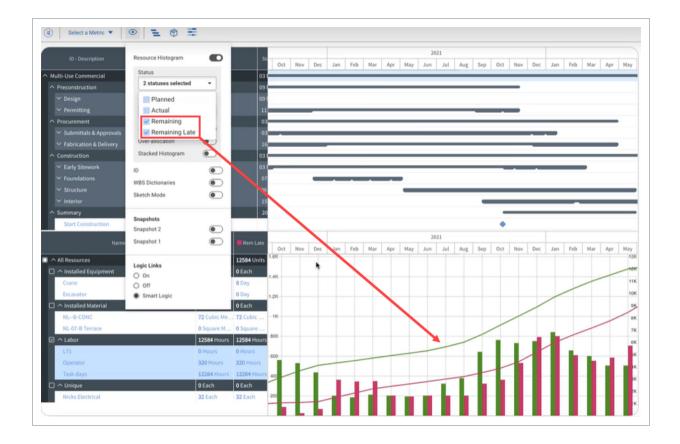
Use the following step by step to enable the S-curve in the Resource histogram.

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.

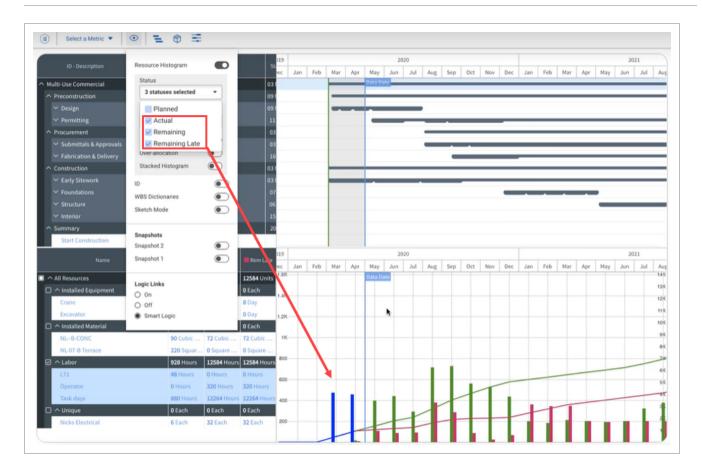


Two S-curves show on the histogram. At the conceptual phase of a project, you are shown these early and late dates. The space between those curves is the float on the project.



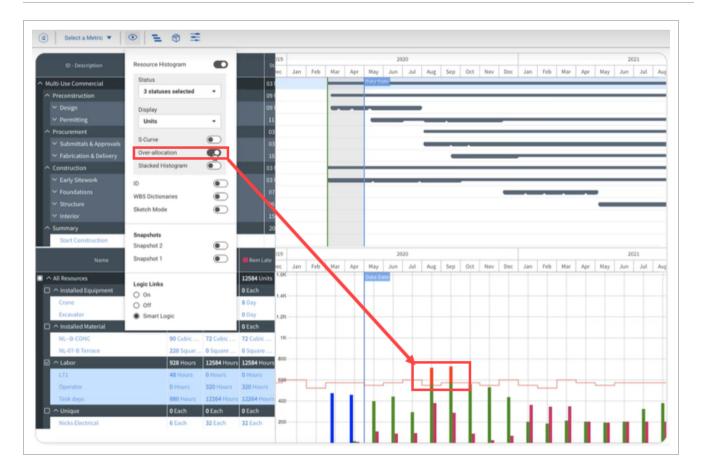
ACTUAL STATUS ENABLED WITH S-CURVE

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.

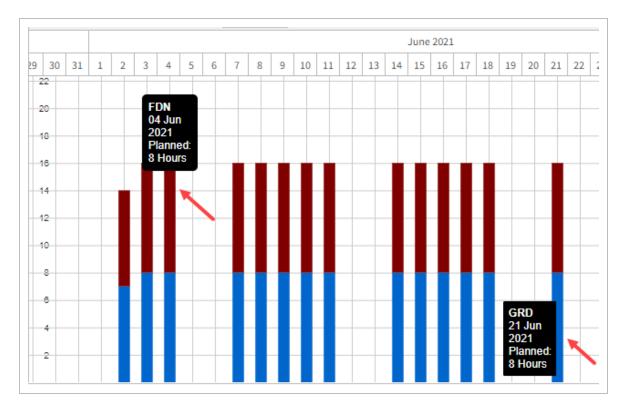
ENABLE THE OVER-ALLOCATION

- 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.

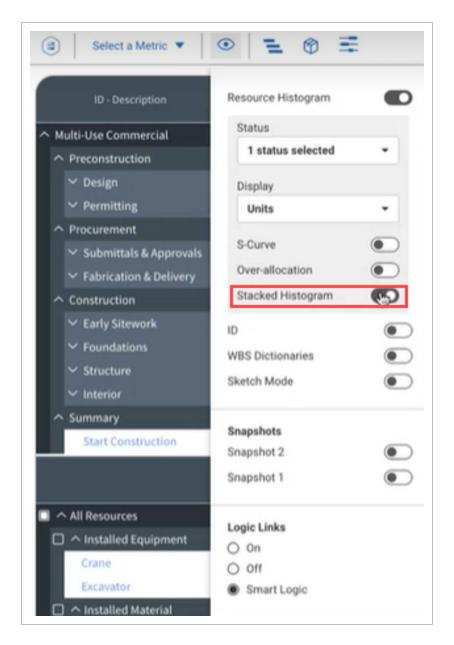
The Stacked Histogram contains advanced filtering capabilities, letting you click on a specific colored bars in a specific time period. Schedule then builds a filter to show that resource for that time period in the Gantt chart.



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.



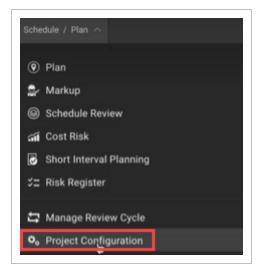
CHANGING THE STACKED HISTOGRAM COLORS

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.

| Add new resource | | | | | | | | 9 | Q |
|------------------|-------------------------------|--------------------|---|-------|--------------|-----------------|-----------|-------------|-----------|
| D | Name | Category | | Color | Unit | Default Units/d | Cost/Unit | Assignments | |
| lask days | | Labor | • | | Hours | 8 | 100 | 76 | \otimes |
| NL-07-B Terrace | NL-07-B (Mat) Constr ~ Terrac | Installed Material | • | ٠ | Square Meter | 22 | 100 | 1 | \otimes |
| NLB-CONC | NL-07-B (Mat) Constr ~ Concre | Installed Material | • | | Cubic Meter | 9 | 100 | 2 | \otimes |
| Nicks Electrical | Nicks Electrical | Unique | • | ٠ | Each | 1 | 100 | 2 | \otimes |
| Operator | Operator | Labor | • | • | Hours | 10 | 100 | 1 | \otimes |
| Excavator | Excavator | Installed Equipm | • | | Day | 1 | 100 | 1 | 8 |
| Crane | Crane | Installed Equipm | • | • | Day | 1 | 100 | 2 | \otimes |
| .71 | Mechanical (Labor) | Labor | | | Hours | 8 | 100 | 1 | \otimes |

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

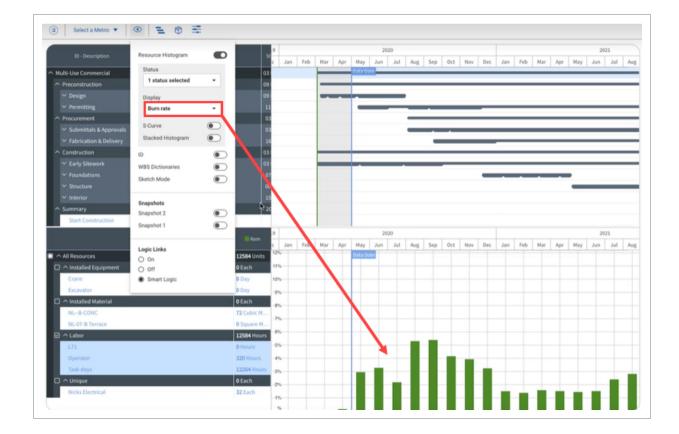
Use the following step by step to enable the Burn rate on the Resource Histogram.

ENABLE THE BURN RATE

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

| Select a Metric | ◎ 1 0 1 |
|---|---|
| ID - Description | Resource Histogram |
| Multi-Use Commercial Preconstruction | Status 1 status selected |
| ✓ Design✓ Permitting | Display Units - |
| Procurement Submittals & Approvals Fabrication & Delivery Construction Early Sitework Foundations Structure | Units FTE Cost Burn rate ID WBS Dictionaries |
| Interior Summary Start Construction | Sketch Mode Snapshots Snapshot 2 Snapshot 1 |
| All Resources All Resources Crane | Snapshot 1 Logic Links O On O Off |
| Excavator | Smart Logic |

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

| | 0 = | | | | | | | T 🕲 🔍 🗶 🖪 🗐 🖶 🔍 |
|---------|----------------------|---|--|--|---|--|---|---|
| Actions | Description | | e Jan | Feb | 2020 Mar Apr May Jun Jul Jug Sep Oct Nov Dec J | an Feb Mat Apr May Jun Jul Aug | | D 1 |
| | Multi-Use Commercial | | | | Cuta Date | | | Description |
| | | | | | | | | But Ose Commercial |
| | | | 2 | | | | | Default Calendar 🚱 Calendar Fill Down 🚱 |
| | | | 1 | | | | | 7 Day - APPLY |
| | | | 3 | | | | | 100 |
| | | | 3 | | Resources Building | × | | Smart Planning |
| | | | 16 | | Select the file type you would like to export below. | | | amarcPlanning |
| | | | 3 | | | | | Knowledge Tags 😡 |
| | | | 2 | | EXPORT TYPE | | | |
| | | | 57 | | SELECT EXPORT TYPE | | | Project Register 🥹 |
| | | | 6 | | | | | |
| | | | 15 | | | | | Delegation |
| | Summary | | 2 | | | | | |
| | | | | | | | | |
| | | (Bl Rem | | Feb | Benchmark XLS Resource Spread | 2021 F Jun Jul Aug | | |
| | | 12264 Units | 12% | | | | | |
| | | | 11% | | | | | |
| | | 8 Day | 10% | | | | | |
| | | 0 Day | 0% | | CAN | LOOKI | | |
| | Actions | Multi-Use Commercial Preconstruction Preconstruction Design Preconstruction Preconstruction Submitting Provinement Submitting & Approvals Construction Construction Construction Construction Structure Submitting Summary Submitting Submitting Submitting Submitting Submitting Submitting Submitting Submitting Submitting | Actions Overrights of the Actions Overrights of the Action | Actions Description of Actions Description of Adde to def conservation of Adde to def cons | Actions Description 9 2 2 2 2 1 2 rd v 4 Met Und Commercial 01 4 Met Und Commercial 01 4 Met Und Commercial 01 4 Met Und Commercial 01 4 Parentizità & Approvinti 01 4 Addreasti & | Actions Description Image: Second public description Image: Second pu | Actives Overrgress Image: Second Sec | Active Description PD 202 100 <td< td=""></td<> |

- 2. Select the **Export Type** drop-down menu.
- 3. Select Excel Export, and then select Export
 - An Excel project file opens

| | 8 | | | | | |
|---|--|---------|-------------|----------------------|---------------|--|
| REQUIRED | Field is required for import | | | | | |
| OPTIONAL | Field is optional for import | | | | | |
| VALIDATED | Field must match master data available in application | a | | | | |
| IGNORED | Field not to be populated | | | | | |
| Notes: 1. WBS ID must be unique 2. When a WBS is deleted, all child W | 85's will be delete and activities will be placed in the root of the p | roject | | | | |
| W85ID | W8S Description | Cost | Deliverable | Deliverable Quantity | Delete Record | |
| Text | Text | Numeric | Text | Numeric: >0 | Text: "Yes" | |
| 256 | 256 | | 128 | | | |
| 1 | 1-Use Commercial | 7200 | | 1 | | |
| 1.1 | Preconstruction | 5 | | 5 | | |
| 1.1.1 | Design | 5 | | 5 | | |
| 1.1.2 | Permitting | 5 | | 5 | | |
| 5.2 | Procurement | 5 | | 5 | | |
| 1.2.1 | Submittals & Approvals | 5 | | 5 | | |
| 1.2.3 | Fabrication & Delivery | 5 | | 5 | | |
| 5.3 | Construction | 5200 | | 5 | | |
| 1.3.1 | Early Sitework | 7200 | | 5 | | |
| 1.3.1.1 | Parking Structure | 5200 | | 5 | | |
| 1.3.1.2 | Utilities Structure | 5 | | 5 | | |
| 1.3.1.3 | Entry & Access Roads | 5 | | 5 | | |
| 1.3.2 | Foundations | 5 | | 5 | | |
| 1.3.3 | Structure | 5 | | 5 | | |
| 1.3.3.1 | Floor 1 | 5 | | 5 | | |
| 1.3.3.2 | Floor 2 | 0 | | 5 | | |
| 1.3.3.3 | Floor 3 | 5 | | 5 | | |
| 1.3.5 | Interior | 6 | | 5 | | |
| 1.3.5.2 | Floor 2 | 5 | | 5 | | |
| 1.3.5.1 | Floor 1 | 6 | | 5 | | |
| 1.3.5.3 | Floor 3 | 5 | | 5 | | |
| 1.5 | Summary | 0 | | 5 | | |
| 5.4 | Closeout | 10 | | ñ | | |
| | | | | | | |
| | | | | | | |

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.

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LESSON 7 – SCHEDULING

SCHEDULING OVERVIEW

SCHEDULING

SETTING SCHEDULE PROGRESS ATTRIBUTES

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

| Select an Annotation 🔻 🤇 | • 1 | © Ξ |
|--------------------------------------|---------|----------|
| ID - Description | Actions | Register |
| ∧ Commercial Construction | ••• | |
| ∧ General Conditions | ••• | |
| Receive notice to proceed and sign c | ••• | |

- 2. Populate the following information on the General tab:
 - Project Start This is the project start date.
 - Data Date Sets the "current" or as-of date that you are looking at in the system.
 - Project Finish This is the project finish date.
 - Auto CPM This should generally be set to On, so logic is automatically applied to

items in your schedule.

| GENERAL | PROGRESS | FLOAT | |
|---------------------|----------|-------|--|
| Project Start | | | |
| 13 Sep 2021 | | | |
| Data Date | | | |
| 13 Dec 2021 7:00 AM | | | |
| Project Finish | | | |
| 10 Feb 2026 | | | |
| Auto CPM (i) | | | |
| | | | |
| | | | |
| | | | |

- 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.

| GENERAL | PROGRESS | FLOAT | |
|-------------------------------|-----------------------------|-------|--|
| Schedule Mode (i) | | | |
| Scheduling | | • | |
| Out of Sequence Progress (j) | | | |
| Retained Logic | | • | |
| Auto Progress (j) | | | |
| | | | |
| Recalculate Actual Units When | Duration % Complete Changes | () | |
| Relationship Lag Mode (| | | |
| Predecessor | | • | |

- 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.

| GENERAL | PROGRESS | FLOAT |
|----------------------------------|-----------------------------|-------|
| Identity Critical Activities by | | |
| Total Float | | • |
| Total Float | | |
| | Hours | |
| 51 | | |
| Float Paths | | |
| Manually Configure Settings | | |
| On On | | |
| Define Critical Activities Using | | |
| Total Float | | • |
| Select Activity to Stop Displayi | ing Multiple Float Paths at | • |
| | | |
| Number of Paths to Calculate | | |

To see the float paths in plan, 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 Floa |
|-------------------------------|---------|---------------|--------------|------------|----------|-----------|
| 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 | 105 | 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.

| ۹۲. נייייי אני נייייי | | ī 📝 🖶 | × V |
|--------------------------|--------------|------------|--------|
| Task depen | dent | | • |
| Smart P | lanning | | \sim |
| Logic | | | ^ |
| | Predecessors | Successors | |
| | | | |
| Туре | Activity | Lag (d) | |
| FF • FF: 0 | A1010B ⊕ | 0 | |
| | Se | earch | |

PROGRESSING

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

| 1.1. A3320 | | | |
|----------------------|--------------------|------------|-------------------------------|
| escription | | | |
| Activity A3320 | | | |
| alendar | | Constraint | t |
| test.7 day.1874 | • | None - | |
| Smart Plann | ing | | ~ |
| Planned (d) | | Cost (\$) | |
| 120 | | 7515000 | 2 |
| Remaining (d) | | Start | |
| 0 | R | 09 Oct 20 | 17 |
| Actual (d) | | Finish | |
| 167 | | 24 Mar 20 | 18 |
| At Complete (d | 0 | Percent Co | omplete |
| 167 | | Phys • | 100 |
| Early Start | Late Star | t | Planned Start |
| None Facto Finish | None | | 09 Oct 2017 Planned Finish |
| Early Finish None | Late Finis None | in | 05 Feb 2018 |
| Total Float 0 | Free Floa | t | |
| Logic | | | > |
| Knowledge T | ags 😧 | | > |
| Project Regis | ter 🔞 | | > |
| Delegation | | | > |

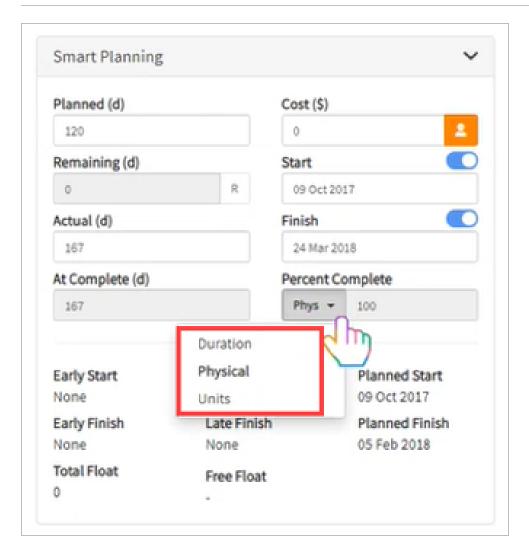
Activities can be marked as started by clicking the **Start** toggle. As activities progress, they can be updated by changing the remaining duration, the finish date, or the Percent Complete fields. When a task is finished, the Finish flag can be switched to *On* to indicate this in the system.

| Smart Planning | | ` |
|-----------------|---|------------------|
| Planned (d) | | Cost (\$) |
| 120 | | 0 🚨 |
| Remaining (d) | | Start |
| 0 | R | 09 Oct 2017 |
| Actual (d) | | Finish |
| 167 | | 24 Mar 2018 |
| At Complete (d) | | Percent Complete |
| 167 | | Phys - 100 |

PERCENT COMPLETE

Percent complete can be calculated in three different ways:

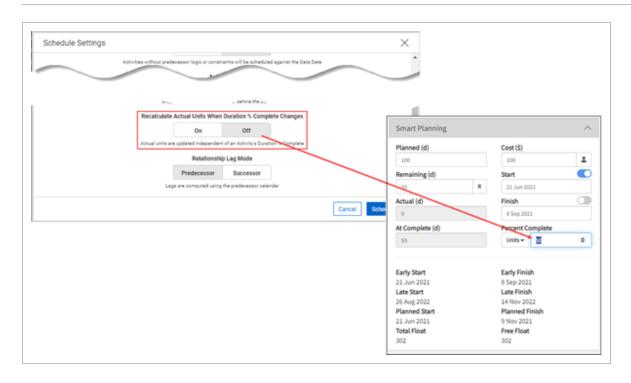
- Duration
- Units
- Physical



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.

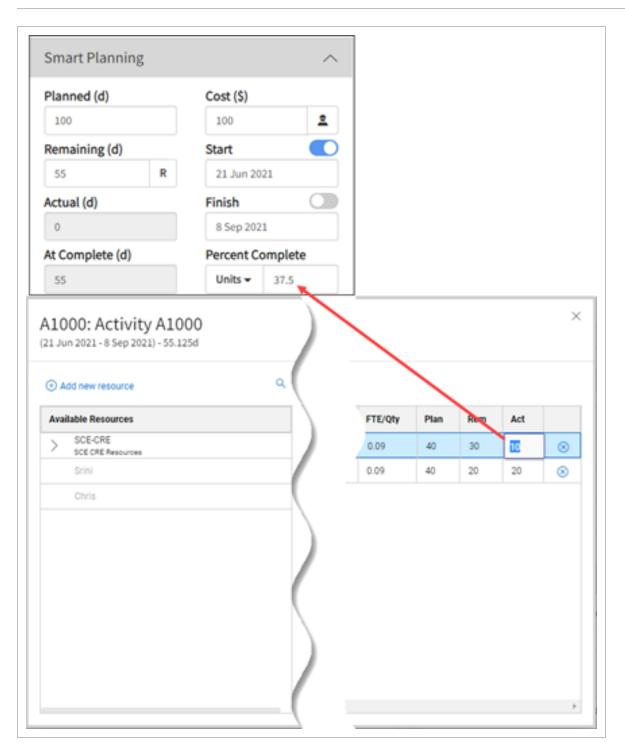
You can also update the Units Percent Complete at the activity level. When the Recalculate Actual Units When Duration % Complete Changes toggle in Schedule Settings is set to Off, you can manually edit the Unit Percent Complete field in Smart Planning.



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

| Planned (d) 100 Remaining (d) | | Cost (\$) | Cost (\$) | | | | | |
|-------------------------------------|-------|-------------|-------------------|--------|------|-----------|--------|--|
| | | 100 | | | | | | |
| | | Start | Start | | | | | |
| 55 R | | 21 Jun | 21 Jun 2021 | | | | | |
| Actual (d) | | Finish | | C | | | | |
| 0 | | 8 Sep 2 | 021 | | | | | |
| At Complete (d) | | Percent | Complete | | | | | |
| 55 | | Dur 🕶 | 44.88 | ¢ | | | | |
| | Resou | irce Assign | ments Category | Curve | Plan | Remaining | Actual | |
| | | | Labor | Linear | 40 | 20 | 20 | |
| | | | | | 40 | 20 | 20 | |
| | | | Labor | Linear | 40 | 20 | 20 | |

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



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

ADDING % COMPLETE COLUMNS TO THE GANTT CHART

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



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

| urrent Template | | |
|-----------------------------|--------------|----------------------|
| Default Smart Planning View | * | * 8 6 🚺 |
| Available Columns | > | Selected Columns |
| Planned Start | | ID - Description |
| | ~ | Actions |
| DURATION | | Start/End Date |
| Actual Duration | \uparrow | Remaining Duration |
| Baseline Dur | | Markup Assignment |
| Duration | \downarrow | Resource Assignments |
| Float | | Resources |
| Free Float | RESET | Register |
| Plann | | Start Date |
| 0 | | Calendar |
| GENERAL | | Finish Date |
| Cost | | % Complete |
| Deliverable | | % Complete Type |
| Description | | Dur % Complete |
| Field Execution Assignment | | Phys % Complete |
| Id | | Unit % Complete |
| Quantity | | |

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

SNAPSHOT AND SCHEDULE SETTINGS

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 Te | ower Commercial Building | | | 01 Aug 19 | 31 Mar 22 | | | • |
| • Multi | -level | | | 01 Aug 19 | 31 Mar 22 | | | 🔶 |
| • Pr | econstruction | | | 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.

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 v | • = | © Ξ |
|--------------------------------------|---------|----------|
| ID - Description | Actions | Register |
| ∧ Commercial Construction | ••• | |
| ∧ General Conditions | ••• | |
| Receive notice to proceed and sign c | ••• | |

| edule Settings | | | | |
|------------------------------|-----------------------------|---------------------------|-------------------------|-------------------------|
| Project Start | | Data Date | | Project Finish |
| 26 Apr 2021 | 26 Apr 2021 1 | 2:00 AM | | 21 Sep 2022 |
| | S | chedule Mode | | |
| | Plannin | ng Schedulin | g | |
| Activities | without predecessor logic o | r constraints will be sch | eduled against the Data | Date |
| | | Auto CPM | | |
| | On | Off | | |
| | Automatically perform | n CPM on any changes to | o the schedule | |
| c | ritical Activities Contai | in Total Float Less T | han or Equal To | |
| | 0 | | hours | |
| | Out of | Sequence Progress | | |
| | | rogress Override | Actual Dates | |
| Relationships are maintained | - | | | and continued after the |
| | predecessor | has finished (recommen | nded) | |
| | A | Auto Progress | | |
| | On | Off | | |
| | Drag activities forwa | ard that occur before the | e Data Date | |
| R | ecalculate Actual Units | When Duration % Co | omplete Changes | |
| | On | Off | | |
| A.c. | tual units are updated inde | pendent of an Activity's | Duration % Complete | |
| A | | ionship Lag Mode | | |
| AU | Relat | lionship Lag Mode | | |
| A | Relat Predeces | | r | |

DATA DATE



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

| | | 20 | 19 | | | | | | | |
|------|------|-------|------|-----|-----|-----|-----|-----|-----|-----|
| Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May |
| | Data | Date | | | | | | | | |
| | | _ | _ | _ | _ | _ | _ | _ | _ | _ |
| | | _ | _ | _ | _ | _ | _ | _ | _ | |
| (50) | | | | | _ | | | | | |
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| | | | | | | | | | | |
| | Pe | rmits | (30) | | | | | | | |
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| | | | | | | | | | | • |

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.

| Schedu | le Mode |
|----------|------------|
| Planning | Scheduling |

- 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.

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.

| Auto | СРМ |
|------|-----|
| On | Off |

Out of Sequence Progress

| Ou | t of Sequence Progr | ess |
|----------------|---------------------|--------------|
| Retained Logic | Progress Override | Actual Dates |

- **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.

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.

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.

| | active user | (C) (C) (C) | (🕑 🕑 | ⊜ ⊂ | 6 |
|--|---|---|--|---|--|
| aseline/Snapshot Ma | anagement | | | | |
| Active Baseline | | | | | |
| Baseline based on | Copy 1221 Gemini S | olar - Co Gopala I | Penmesta - 2 Feb 2 | 2023 | |
| Assign schedule | | | | | |
| Snapshot 1 | | | | | |
| Snapshot - 18 Apr 2 | 2023: Paul 18 | Apr 2023 | | | |
| Overwrite snapshot | Promote to project list | 1 | | ď | \otimes |
| Snapshot 2 Snapshot - 18 Apr 2 | 2023 (1): Paul | - 18 Apr 2023 | | | |
| Overwrite snapshot | Promote to project list | t | | Ľ | \otimes |
| Snapshot 3 has been s | aved to your schedule li | <u>st</u> | View | r in schedule li | ist |
| Snapshot 3 has been s | Current Schedule | st Active Baseline | View Snapshot 1 | r in schedule li Snapsho | |
| | | _ | | Snapsho | |
| Data Date | Current Schedule | Active Baseline | Snapshot 1 | Snapsho | t 2 |
| Data Date Number of Activities | Current Schedule 30 Jun 2022 | Active Baseline 20 May 2022 | Snapshot 1 30 Jun 2022 | Snapsho 30 Ju | t 2 in 2022 |
| Snapshot 3 has been s Data Date Number of Activities Start Date Finish Date | Current Schedule 30 Jun 2022 9 | Active Baseline 20 May 2022 9 | Snapshot 1 30 Jun 2022 9 | Snapsho 30 Ju 30 Ju | t 2 in 2022 9 |
| Data Date Number of Activities Start Date | Current Schedule 30 Jun 2022 9 30 Jun 2022 | Active Baseline 20 May 2022 9 20 May 2022 | Snapshot 1 30 Jun 2022 9 30 Jun 2022 | Snapsho 30 Ju 30 Ju 30 Ju 13 De | t 2 in 2022 9 in 2022 |
| Data Date Number of Activities Start Date Finish Date | Current Schedule 30 Jun 2022 9 30 Jun 2022 13 Dec 2022 | Active Baseline 20 May 2022 9 20 May 2022 2 Nov 2022 | Snapshot 1 30 Jun 2022 9 30 Jun 2022 13 Dec 2022 | Snapsho 30 Ju 30 Ju 30 Ju 13 De 16 | t 2 in 2022 9 in 2022 cc 2022 |
| Data Date Number of Activities Start Date Finish Date Remaining Duration Average Float | Current Schedule 30 Jun 2022 9 30 Jun 2022 13 Dec 2022 167 days | Active Baseline 20 May 2022 9 20 May 2022 2 Nov 2022 167 days | Snapshot 1 30 Jun 2022 9 30 Jun 2022 13 Dec 2022 167 days | Snapsho 30 Ju 30 Ju 30 Ju 13 De 16 | t 2 in 2022 9 in 2022 ic 2022 57 days |
| Data Date Number of Activities Start Date Finish Date Remaining Duration | Current Schedule 30 Jun 2022 9 30 Jun 2022 13 Dec 2022 167 days 35 days | Active Baseline 20 May 2022 9 20 May 2022 2 Nov 2022 167 days 10 days | Snapshot 1 30 Jun 2022 9 30 Jun 2022 13 Dec 2022 167 days 35 days | Snapsho 30 Ju 30 Ju 30 Ju 13 De 16 | t 2 9 10 2022 9 10 2022 10 2022 10 2022 10 2022 10 4 10 4 10 4 10 4 10 4 10 4 10 4 10 4 |
| Data Date Number of Activities Start Date Finish Date Remaining Duration Average Float Labor Resource Units | Current Schedule 30 Jun 2022 9 30 Jun 2022 13 Dec 2022 167 days 35 days 0 | Active Baseline 20 May 2022 9 20 May 2022 2 Nov 2022 167 days 10 days 0 | Snapshot 1 30 Jun 2022 9 30 Jun 2022 13 Dec 2022 167 days 35 days 0 | Snapsho 30 Ju 30 Ju 30 Ju 13 De 16 | t 2 9 in 2022 ic 2022 ic 2022 57 days 35 days 0 |
| Data Date Number of Activities Start Date Finish Date Remaining Duration Average Float Labor Resource Units Total Cost Critical Activities | Current Schedule 30 Jun 2022 9 30 Jun 2022 13 Dec 2022 167 days 35 days 0 \$0 | Active Baseline 20 May 2022 9 20 May 2022 20 May 2022 20 May 2022 10 days 10 days \$0 \$0 | Snapshot 1 30 Jun 2022 9 30 Jun 2022 13 Dec 2022 167 days 35 days 0 \$0 | Snapsho 30 Ju 30 Ju 30 Ju 13 De 16 | t 2 9 10 2022 10 202 10 2022 10 2022 10 2022 10 10 2022 10 2022 10 2022 10 2022 10 20 |
| Data Date Number of Activities Start Date Finish Date Remaining Duration Average Float Labor Resource Units Total Cost | Current Schedule 30 Jun 2022 9 30 Jun 2022 13 Dec 2022 167 days 35 days 0 \$0 \$0 | Active Baseline 20 May 2022 9 20 May 2022 2 Nov 2022 167 days 10 days 0 \$0 \$0 | Snapshot 1 30 Jun 2022 9 30 Jun 2022 13 Dec 2022 167 days 35 days 0 \$0 \$0 | Snapsho 30 Ju 30 Ju 30 Ju 13 De 16 | t 2 9 10 2022 10 202 10 2022 10 2022 10 2022 10 10 2022 10 2022 10 2022 10 2022 10 20 |
| Data Date Number of Activities Start Date Finish Date Remaining Duration Average Float Labor Resource Units Fotal Cost Critical Activities Activities Completed | Current Schedule 30 Jun 2022 9 30 Jun 2022 13 Dec 2022 167 days 35 days 0 \$0 \$0 110 Dec 2022 167 days \$0 \$0 \$0 \$167 days \$167 days | Active Baseline 20 May 2022 9 20 May 2022 2 Nov 2022 167 days 10 days 0 \$0 \$0 4 0 | Snapshot 1 30 Jun 2022 9 30 Jun 2022 13 Dec 2022 167 days 35 days 0 \$0 \$0 4 1 | Snapsho 30 Ju 30 Ju 30 Ju 13 De 16 | t 2 9 in 2022 c 2022 57 days 35 days 0 \$0 \$0 4 1 |

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.

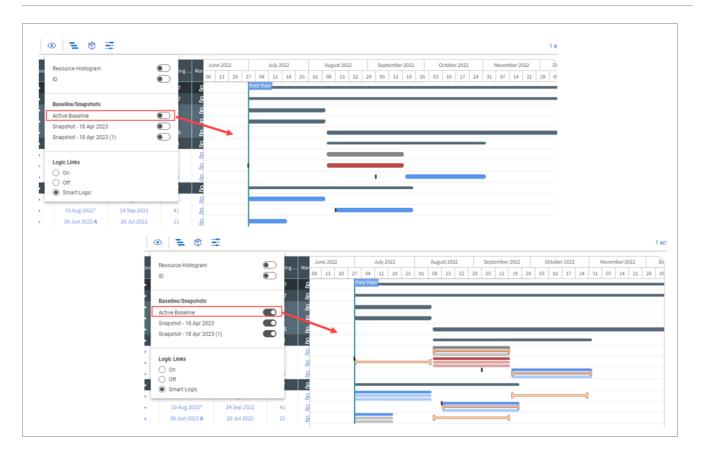
| Baseline/Snapshot Management Active Baseline Baseline based on Copy 1221 Gemi Assign schedule | ini Solar - Co Gopala · 2 Feb 2023 |
|--|--|
| Baseline/Snapshot | |
| | eline/Snapshot Management Select schedule Snapshot 3 Snapshot 3 Test Copy of Current Test Schedule Copy Test Schedule Copy 2 |
| | Baseline/Snapshot Management Active Baseline Baseline based or Snapshot 3: Paul Revert to default |

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

| Revert to default Baseline/Snapshot Management Active Baseline | Active Bas | eline 🔒 ed on Snapshot 3: Paul Trippi - 18 Apr 2023 |
|--|---------------------------------------|--|
| Active Baseline | | |
| Active Baseline 🔒 | | |
| | · · · · · · · · · · · · · · · · · · · | |
| | | |

ACTIVE BASELINE

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



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.

| n Design 66 Apr 21 16 Nov 22 590 Set or overwrite a snapshot below, or <u>Save as a new schedule.</u> hy UBIN Design 3rd Party UBIN Design 66 Apr 21 14 Jan 22 284 Set or overwrite a snapshot below, or <u>Save as a new schedule.</u> nement Procurement 29 Apr 21 15 Apr 22 361 Set or overwrite a snapshot below, or <u>Save as a new schedule.</u> notion Construction work by others 05 Apr 21 27 Aug 23 418 Set or overwrite a snapshot below, or <u>Save as a new schedule.</u> | | |
|--|--|---|
| n Design 66 Apr 21 16 Nov 22 590 Set or overwrite a snapshot below, or <u>Save as a new schedule.</u> hy UBIN Design 3rd Party UBIN Design 66 Apr 21 14 Jan 22 284 Set or overwrite a snapshot below, or <u>Save as a new schedule.</u> nement Procurement 29 Apr 21 15 Apr 22 361 Set or overwrite a snapshot below, or <u>Save as a new schedule.</u> notion Construction work by others 05 Apr 21 27 Aug 23 418 Set or overwrite a snapshot below, or <u>Save as a new schedule.</u> | management vans a Appro | |
| why Utility Design why Utility Design 66 Apr 21 14 Jan 22 284 Set 0 overwrite a snapshot Design of a land to be overwrite a land to be overwrite a snapshot Design of a land to be overwrite a land to be overwrit | Design Design 06 Apr 21 16 Nov 22 590 | |
| rement | | Set or overwrite a snapshot below, or Save as a new schedule. |
| nuction work by others | | |
| naction work by others | | |
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| ones en Releasones us Personal Value 20 07 00124 2231 | Milestones Milestones OS Feb 21 O9 Jul 24 1251 | Snapshot - O Set snapshot Promote to schedule |
| | | |
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| | | |
| | | |

- 2. In the Snapshot Management menu, select **Set snapshot**. The snapshot automatically saves as Snapshot [date].
- 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.

| Snapshot Management | | | | × |
|---|-----------|---------------|---------------------|---|
| | | | | |
| Set or overwrite a snapshot below, or Say | ve as a n | iew.schedule. | | |
| Set or overwrite a snapshot below, or Say Snapshot - 24 Sep 2021 | | | Promote to schedule | 8 |

OVERWRITE A SNAPSHOT

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



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

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

OVERWRITE A SNAPSHOT

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

| Snapshot Management | | × |
|---------------------------------------|-------------------------|--------------------------------|
| Set or overwrite a snapshot below, or | ave as a new schedule | |
| | are we written astronom | |
| Snapshot - 24 Sep 2021 1 | | snapshot Promote to schedule 8 |

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.

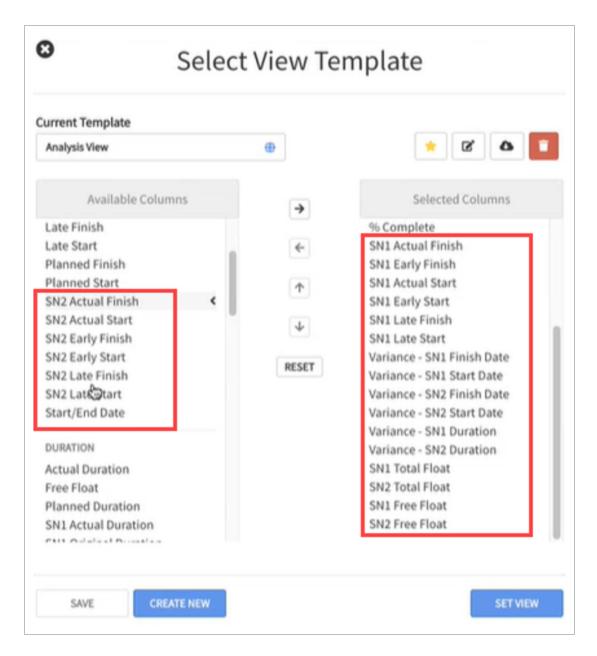


2. In the Current Template field, select the blue icon on the right. A drop-down menu opens.

| urrent Template | | | | | | |
|-----------------------------|---|----------|----------------------------|--|--|--|
| Analysis View | Ð | | 🔸 🛯 🗖 🚺 | | | |
| GLOBAL TEMPLATES | Ð | 1 | | | | |
| > Analysis View | | -> | Selected Columns | | | |
| Default Smart Planning View | * | - | | | | |
| Deliverables View | | * | ID - Description | | | |
| Resources View | | • | Actions | | | |
| Resources new | | Ť | Description | | | |
| USER TEMPLATES | | - | Start Date Finish Date | | | |
| Parke Fields | | 4 | Duration | | | |
| Early Finish | | • | Remaining Duration | | | |
| Early Start Late Finish | | RESET | Float | | | |
| Late Start | | POLICE I | % Complete | | | |
| Planned Finish | | | SN1 Actual Finish | | | |
| Planned Start | | | SN1 Early Finish | | | |
| SN2 Actual Finish | | | SN1 Actual Start | | | |
| SN2 Actual Start | | | SN1 Early Start | | | |
| SN2 Early Finish | | | SN1 Late Finish | | | |
| SN2 Early Start | | | SN1 Late Start | | | |
| SN2 Late Finish | | | Variance - SN1 Finish Date | | | |
| SN2 Late Start | | | Variance - SN1 Start Date | | | |

3. Under Global Templates, select Analysis View.

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



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

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.

| | | Start Date | | | Joint Jun Jul Aug Sep Oct Nov Dec Jan Feb Mar Apr May EAREADGID.DG30 |
|--|--|------------|-----------|------|--|
| | | 05 Feb 21 | 23 Jul 24 | 1265 | Description |
| ✓ Management Plans & Appro… | Management Plans & Approvals | 05 Feb 21 | 10 Apr 23 | | Bathymetry - Project Wide |
| ↑ Design | Design | 06 Apr 21 | 16 Nov 22 | | Calendar Constraint |
| | | 18 Jun 21 | 16 Nov 22 | | HBRLidays • None • |
| ^ Seismic Memo | Seismic Memo | 06 Apr 21 | 25 May 21 | 50 | nor - lioays • nore • |
| Seismic Design Memo | Seismic Design Memo | 06 Apr 21 | 19 Apr 21 | 10 | |
| Seismic Design Memo | Seismic Design Memo - Owner Re | 20 Apr 21 | 10 May 21 | 15 | Smart Planning |
| Seismic Design Memo | Seismic Design Memo - Address C | 11 May 21 | 25 May 21 | 10 | Logic |
| Geotech Investigations | Geotech Investigations | 02 Jun 21 | 17 Sep 21 | 108 | Logic Contraction of the second secon |
| Geotechnical Investig | Geotechnical Investigations - Proj | 02 Jun 21 | 30 Jun 21 | 20 | Knowledge Tags 😣 |
| Geotechnical Investig | Geotechnical Investigations - Cen | 03 Sep 21 | 17 Sep 21 | 10 | |
| ^ Survey | | 20 Apr 21 | 19 Jan 22 | 275 | Project Register 📀 |
| Survey and SUE - Proj | Survey and SUE - Project Wide | 20 Apr 21 | 03 May 21 | 10 | |
| Site Visit for Hydraulics | Site Visit for Hydraulics | | 30 Apr 21 | 5 | Delegation |
| Bathymetry - Project | Bathymetry - Project Wide | | | | 22 Jul 21 O to Aug 21 Resource Assignments |

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.

| ID - Description | Resource His | stogram | | Start Date | Finish Date | Total Dur | 2021 Mar Apr May Jun Jul Aug Sep Oct Nov Dec | EAREAID6ID.DG1040 | |
|--|---------------------|--|----------|------------------------|------------------------|-----------|---|-------------------------------|---|
| | WBS Diction | | ment - L | 05 Feb 21 | 23 Jul 24 | 1265 | | Description | |
| Management Plans & Appro | Sketch Mode | | rovals | 05 Feb 21 | 10 Apr 23 | | | Inspection of Existing Bridge | |
| ∿ Design | Sketch Mode | | | 06 Apr 21 | 16 Nov 22 | 590 | | Calendar Constrain | t |
| ∨ мот | | | | | 16 Nov 22 | | | HBRlidays • None • | |
| ^ Seismic Memo | Snapshots Update | | | | 25 May 21 | 50 | _ | | |
| Seismic Design Memo | None | | | | 19 Apr 21 | 10 | • | Smart Planning | |
| Seismic Design Memo | NOTE | | vner Re | 20 Apr 21 | | 15 | - | Smart Hamming | |
| Seismic Design Memo | Logic Links | | dress C | 11 May 21 | | 10 | • | Logic | |
| ^ Geotech Investigations | O On | | | | 17 Sep 21 | 108 | | | |
| Geotechnical Investig. | O Off | | | 02 Jun 21 | | 20 | _ | Knowledge Tags 😣 | |
| Geotechnical Investig. | Smart Lo | gic | is - Cen | 03 Sep 21 | | 10 | - | Parlant Parlate O | |
| Survey | | Survey and SUE - Proje | | | 20 Oct 21 | 184 | | Project Register 🥹 | |
| Survey and SUE - Proj Site Visit for Hydraulics | | Site Visit for Hydraulics | | | 03 May 21 30 Apr 21 | 5 | | Delegation | |
| | | | | 26 Apr 21 06 Oct 21 | 30 Apr 21 20 Oct 21 | 10 | | | |
| Bathymetry - Project Inspection of Existing | | Bathymetry - Project W Inspection of Existing B | | | 10 May 21 | 10 | | Resource Assignments | |

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.

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.

| Select a Me | etric 🔹 💿 🔁 1 | 0 ₹ | | | | | | | Y 🕲 🔍 💉 🖪 🖪 🔍 🖓 |
|---------------------|----------------------------------|------------------------|-----------------|----------------|----------------------------|---------------------------|--------------------------------------|-------------------------|---|
| 11 Actual Finish SI | N1 Early Finish SN1 Actual Start | SN1 Early Start | SN1 Late Finish | SN1 Late Start | Variance - SN1 Finish Date | Variance - SN1 Start Date | Variance - SN2 FinVariance - SN2 Sta | Variance - SN1 Duration | 2021 Mar Apr May Jun Jul Aug Sep Oct Nov D |
| _ | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | 20 Apr 21 | 06 Apr 21 | 10 Mar 22 | 24 Feb 22 | 0 | 0 | | 0 | |
| | 11 May 21 | 20 Apr 21 | 31 Mar 22 | 10 Mar 22 | 0 | 0 | | 0 | |
| | 26 May 21 | 11 May 21 | 14 Apr 22 | 31 Mar 22 | 0 | 0 | | 0 | - |
| | 01 Jul 21 | 02 Jun 21 | 27 Jul 21 | 25 Jun 21 | 0 | 0 | | 0 | |
| | 18 Sep 21 | 02 Jun 21 03 Sep 21 | 29 Jan 22 | 17 Jan 22 | 8 | 0 | | 0 | |
| | | | | | | | | | |
| | 20 Jan 22 | 15 Dec 21 | 20 Jan 22 | 15 Dec 21 | 255 | 240 | | 0 | 0 - 0 |
| | 04 May 21 | 20 Apr 21 | 04 Jan 22 | 06 Dec 21 | 0 | 0 240d | | 0 | |
| | 01 May 21 | 26 Apr 21 | 23 Sep 21 | 16 Sep 21 | 0 | 0 | | 0 | 1 |
| | 02 Jun 21 | 18 May 21 | 07 Oct 21 | 23 Sep 21 | 141 | [14] | | 0 | |
| | | | | | | | | | |
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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.

| Snapshot Management | | × |
|---|--------|--|
| New snapshot schedule name: | Update | Cancel Create new schedule |
| Update 🗹 created by . 24 Sep 2021 | ٩ | Overwrite snapshot Promote to schedule 🛞 |
| Logic Changes C created by 24 Sep 2021 | ٩ | Overwrite snapshot Promote to schedule 🛞 |

- 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.

| Snapshot Management | × |
|---|--|
| Update has been saved to your project list | View in project list |
| Logic Changes C created by - 24 Sep 2021 | Overwrite snapshot Promote to schedule 😣 |
| Snapshot - | Set snapshot Promote to schedule 🛞 |

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 perfom the following:

- Edit Project Workspace Name
- Move schedules
- Delete

| Projects 1 | Schedule ID | Start - | Finish Schedule | Type Data Date | Markup |
|---------------|-------------|---|----------------------|----------------|--------|
| new workspace | | 1 | | | |
| ^ > | | 1 | | | |
| 1 | SCHED-130 | Edit Project Work Move schedules | Estimate | ✓ 23 Sep 2021 | • ¢ |
| 1 - Promo 2 | SCHED-129 | Delete 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

| Projects 1 ^A / ₂ | Schedule ID | Start | Finish | Schedule Type | Data Date | Markup | |
|--|------------------------|----------------------|-------------|-----------------------|-------------|--------|----|
| new workspace | | 1 | | | | | |
| ^ > | | 1 | | | | | |
| 1 | SCHED-130 | 23 Sep 2021 | 23 Sep 2022 | Estimate \lor | 23 Sep 2021 | • | \$ |
| A 🖿 🚺 1 | | 🗹 Edit Schedule Name | | | | | |
| 1 - Promo 2 | SCHED-129 | 🗹 Edit Schedule ID | 2022 اد | Estimate \checkmark | 13 Jul 2021 | | Ŷ |
| | | 📑 Mave schedule | | | | - | |
| A Test | | 🔁 Сору | | | | | |
| duplicate name | 12345678910111213141- | Ø Delete | ⊪p 2022 | Estimate \checkmark | 24 Sep 2021 | • | Ŷ |
| 🕑 duplicate name Copy | 12345678910111213141-1 | 24 Sep 2021 | 24 Sep 2022 | Estimate \sim | 24 Sep 2021 | • | Ŷ |

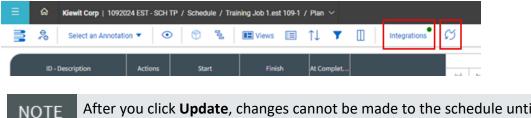
You can also edit the Schedule Type for each schedule. By default, the Schedule Type field is set to **Estimate**.

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.



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 <u>InEight Integration</u> <u>Estimate-Schedule</u> 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.

| Delegation | ^ |
|---------------|----------------------|
| | Manage Review Cycle |
| Marku | p Requests 😯 |
| Nicole | Nate |
| Michael | Jordan |
| Jordan Brooks | Jonathan |
| Short Inte | ••• erval Planners 😯 |
| Nicole | Michael |
| Jordan Brooks | |
| | Assignments |
| Jonathan | |
| | ••• |

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.

| ≡ | Acme Corp - 22.10 Brian Grou / Commercial Con / Plan | ~ |
|-----------------------|--|----------|
| | Plan | |
| | 🗟 Markup | |
| | Schedule Review | |
| ∧ Commercia | ấi Cost Risk | 2 |
| ∧ General C Receiv | 🗟 Short Interval Planning | 2(2) |
| Submi | Հ⊐ Risk Register | 2! |
| Obtair | | 2! |
| Prepa | 🛱 Manage Review Cycle | 5 |
| Prepa | Schedule Configuration | 3 |
| Submi | | 5 |

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.

| tart Review Cycle | | | | START | REVIEW CY | CLE |
|------------------------------------|---|--------------------------------------|------------------------------|-----------------------|--------------|-----------------|
| tart Review Cycle to solicit exper | t feedback from project team members | | | | | |
| essage | | | | | | |
| plain to your team members the | e purpose of the review cycle as well as what to fo | ocus on. This message will appear in | popup at the start of Markup | | | |
| Please review before end of wee | ek | | | | | |
| egister Threshold | | | | | | |
| | Feam Member Markup that requires a Register en | try | | | | +/- 50% - |
| | | | | | | |
| am Member Markup | | | | | | |
| Assignee | Team Contribution | Last Accessed | Ready For Review? | Show Whole Project | Show Cost | Clear Markup |
| 3en Heights | 38% (3) 50% (4) 13% | 4 months ago | ${}_{\bigcirc}$ | | | Î |
| Allen Paddock | . 38% (3) 13% 50% (4) | 1 week ago | ${}_{\bigcirc}$ | | | Î |
| Paul Self | 13% 50% (4) 38% (3) | 4 months ago | | | | î |
| Christy Tuppence | 100% (8) | 4 months ago | \odot | | | Î |
| Overall | 22% (7) 53% (17) 25% (8) | | | | | REMOVE ALL |
| | | | | | · | 1.52 |
| | | | | | EXPORT | USER MARKUP |
| ncertainty | | | | | | |

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.

| تر 🗿 🖾 🔶 Detail - Proje | ect | 21% | | | | | T Search | Zoom - | Quarte | (B) | Duration Uncertainty |
|--|-------------------------------------|-------------------------------------|-----------------|-------------------|--------|--------|---|--------|--------|------------|---|
| ID - Description | Start Date | Finish Date | Dur | Float | Uncert | Risk . | 2019 2020 Ju Jul - SerOct - De Jan - MrApr - Ju Jul - SerOct - | ٢ | áá | 5 | Uncertainty Type |
| Steel Deliveries | 24 Jun 20 | 01 Jul 20 | 6 | 0 | | | abut seloct began maapi subut seloct | ali | áá | 4 • | Markup Manual |
| Foundations | 24 Jun 20 03 Mar 20 | 01 Jul 20 23 Jun 20 | 6 113 | 0 | | | | - 10 | âí | 5 | Basis will create a distribution based on team markup. |
| Drainage | 03 Mar 20 22 Apr 20 | 23 Jun 20 13 May 20 | 113 16 | 0 | | | | at | ái | - | |
| Enclosures | 22 Apr 20 10 Jun 20 | 13 May 20 23 Jun 20 | 16 10 | 0 | | | | all | ái | 4 | Layer Rem Dur Constraint |
| Grade & Support Beams | 10 Jun 20 03 Mar 20 | 23 Jun 20 30 Mar 20 | 10 20 | 0 | | | | at | áá | - - | Deterministic 13 |
| Pour & Cure | 03 Mar 20 14 May 20 | 30 Mar 20 09 Jun 20 | 20 19 | 0 | | | 0 | al | áá | ÷. | |
| Stub-in Utilities | 14 May 20 31 Mar 20 | 09 Jun 20 21 Apr 20 | 19 16 | 0 | | | | all | ái | 5 | 9 |
| Early Sitework | 31 Mar 20 17 Jun 19 | 21 Apr 20 21 Apr 20 | 16 310 | 0 | | | | | âí | Ş | 17 |
| Entry & Access Roads | 17 Jun 19 03 Mar 20 | 21 Apr 20 21 Apr 20 | 310 50 50 | | | | _ | | áí | 5 | EH 17 |
| Curb & Gutter | 03 Mar 20 17 Mar 20 17 Mar 20 | 21 Apr 20 24 Mar 20 24 Mar 20 | - <u>50</u> | 255 255 | | | | aff | áá | 5 | 17 |
| Pedestrian Access | 17 Mar 20 16 Apr 20 16 Apr 20 | 24 Mar 20 21 Apr 20 21 Apr 20 | 4 | 255 255 255 | | | | at | âă | 4 | - II |
| Pour & Cure | 25 Mar 20 25 Mar 20 | 15 Apr 20 15 Apr 20 | 16 | 255 | | | | all | 33 | - | Distribution |
| Rough-in & Lighting | 03 Mar 20 03 Mar 20 | 16 Mar 20 | 10 | 255 | | | 1 | at | áá | 5 | Triangular Uniform |
| • Utilities Structure | 09 Jan 20 09 Jan 20 | 02 Mar 20 02 Mar 20 | 54 54 | 200 | | | _ | | áí | 5 | Basis will apply the below percentages against |
| Permanent Fencing | 24 Feb 20 24 Feb 20 | 02 Mar 20 02 Mar 20 | 6 | 0 | | | | at | âă | 5 | the deterministic remaining duration to create |
| Pour Foundation | 09 Jan 20 09 Jan 20 | 22 Jan 20 22 Jan 20 | 10 | 0 | | | 1 | at | áá | 3 | an uncertainty distribution. |
| Service to Transformer | 11 Feb 20 11 Feb 20 | 21 Feb 20 21 Feb 20 | 9 | 0 | | | 1 | at | âă | 5 | Min |
| Transformer Installation | 23 Jan 20 23 Jan 20 | 10 Feb 20 10 Feb 20 | 13 13 | 0 | | | | ail | âă | - | 9 |
| Parking Lot | 01 Oct 19 01 Oct 19 | 08 Jan 20 06 Jan 20 | 100 100 | | | | _ | | áú | 5 | Likely |
| Curb & Gutter | 15 Oct 19 15 Oct 19 | 11 Nov 19 11 Nov 19 | 20 20 | 0 | | | | at | âă | 5 | 15 |
| Pedestrian Access (Sidewal | 12 Nov 19 12 Nov 19 | 27 Nov 19 27 Nov 19 | 12 12 | 0 | | | 1 | at | âă | 5 | Max |
| Pour & Cure | 28 Nov 19 28 Nov 19 | 08 Jan 20 08 Jan 20 | 30 30 | 0 | | | | all | âă | 5 | 17 |
| Rough-in & Lighting | 01 Oct 19 01 Oct 19 | 14 Oct 19 14 Oct 19 | 10 10 | 0 | | | 1 | at | âă | 5 | ė 18 |
| Excavation | 29 Jul 19 29 Jul 19 | 30 Sep 19 30 Sep 19 | 46 46 | 0 | | | | at | âă | 5 | |
| Fencing | 17 Jun 19 17 Jun 19 | 28 Jun 19 28 Jun 19 | 10 10 | 0 | | | I. | at | âi | 3 | Rem Dur Constraint |
| Mobilization | 01 Jul 19 01 Jul 19 | 26 Jul 19 26 Jul 19 | 20 20 | 0 | | | • | aff | âí | 5 | (exp) None 👻 |
| Summary | 17 Jun 19 17 Jun 19 | 13 Apr 21 13 Apr 21 | 667 667 | | | | | | ilil | 5 | 14 Apply as Lag |
| Project Complete | | 13 Apr 21 13 Apr 21 | 0 | 0 | | | | | âil | 5 | |
| Start Construction | | 16 Jun 19 18 Jun 19 | 0 | 477 477 | | | | | âil | 5 | сомміт |
| Startup HVAC | | 27 Jan 21 27 Jan 21 | 0 | 54 54 | | | | | âă | - | |
| Structure Complete | | 05 Jan 21 | 0 | 70 | 0 | | | 4 | đấ | - | |
| | | | | | | | | | | | Register 👻 |

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**.

| Delegation | ^ |
|---------------|---------------------|
| | Manage Review Cycle |
| Mark | up Requests 😯 |
| Nicole | Nate |
| Michael | Jordan |
| Jordan Brooks | Jonathan |
| | ••• |
| Short In | terval Planners 😯 |
| Nicole | Michael |
| Nicole | Michael |
| Jordan Brook | s lordan on lordan |
| Jonathan | ify Assignments |
| Jonathan | |
| | ••• |
| | |

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 feedbac | k from project team members | | | | START REVI | EW CYCLE |
|---|--|----------------------------------|-----------------------|--------------|------------|--------------|
| lessage | | | | | | |
| xplain to your team members the purpose | of the review cycle as well as what to focus on. Thi | is message will appea | r in popup at the sta | rt of Markup | | |
| 22.10 Markup Group Testing! Let's Marku | D! | | | | | |
| Register Threshold lifference in Schedule Duration and Team N | 4ember Markup that requires a Register entry | | | | | None • |
| eam 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 | | | | |
| | 66% (85) 17% (22) 12% 51% (66) 16% (21) 27% (35) | 9/30/22 | | | | |
| Nicole Phillips | | | | | | |
| Brian Mikinski | 51% (66) 16% (21) 27% (35) | 10/12/22 | Ø | | | |
| Nicole Phillips | 51% (66) 16% (21) 27% (35) 29% (38) 50% (64) 16% (20) | 10/12/22 | Ø | | | |
| Nicole Phillips | 51% (66) 16% (21) 27% (35) 29% (38) 50% (64) 16% (20) 36% (47) 11% 39% (50) | 10/12/22 10/12/22 10/27/22 | | | | |
| Nicole Phillips Jonathan Bordelon Srian Basis Planning Mikinski Nate St. John 15% | 51% (66) 16% (21) 27% (35) 29% (38) 50% (64) 16% (20) 36% (47) 11% 39% (50) 6 (19) 6 6 | 10/12/22 10/12/22 10/27/22 | | | | |

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 feedba | ack from project team members | | | START REVIEW | W CYCLE |
|--|---|--|----------------|--------------|------------|
| Message | | | | | |
| Explain to your team members the purpo | se of the review cycle as well as what to focus on. Th | is message will appear in popup at the s | tart of Markup | | |
| 22.10 Markup Group Testing! Let's Mark | kup! | | | | |
| | | | | | |
| | | | | | |
| Register Threshold | | | | | |
| - | n Member Markup that requires a Register entry | | | | None 🔺 |
| - | n Member Markup that requires a Register entry | | | | None None |
| Register Threshold Difference in Schedule Duration and Tean Team Member Markup | n Member Markup that requires a Register entry | | | | |
| Difference in Schedule Duration and Tean | n Member Markup that requires a Register entry Team Contribution | Last Accessed Ready For Rev | Show Whole P | Show Cost | None |

TEAM MEMBER MARKUP

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

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

| signee | Team Contribution | Last Accessed | Ready For Rev Show Whole P | Show Cost | Clear Markup |
|--------|--|---------------|----------------------------|-----------|--------------|
| ian | 66% (85) 17% (22) 12% | 9/30/22 | | | |
| cole | 51% (66) 16% (21) 27% (35) | 10/12/22 | | | Î |
| nathan | 29% (38) 50% (64) 16% (20) | 10/12/22 | | | Î |

| 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



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.

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.

| art Review Cycle | START REVIEW CYCLE |
|---|--------------------|
| art Review Cycle to solicit expert feedback from project team members | |
| | |
| ssage | |
| plain 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 Mar | rkup |
| 22.10 Markup Group Testing! Let's 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

| eam Member Markup | | | | | | | |
|-------------------------------|----------|-------------------|---------------|---------------|--------------|-----------|--------------|
| Assignee | Теа | m Contribution | Last Accessed | Ready For Rev | Show Whole P | Show Cost | Clear Markup |
| Brian Mikinski | 66% (85) | 17% (22) 12% | 9/30/22 | | | | Î |
| Nicole Phillips | 51% (66) | 16% (21) 27% (35) | 10/12/22 | | | | |
| Jonathan Bordelon | 29% (38) | 50% (64) 16% (20) | 10/12/22 | | | | Î |
| Brian Basis Planning Mikinski | 36% (47) | 1% 39% (50) | 10/27/22 | \oslash | | | • |

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

| 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 | | | | |
| Nicole Phillips | 51% (66) | 16% (21) 27% (35) | 10/12/22 | | | | |
| Jonathan Bordelon | 29% (38) | 50% (64) 16% (20) | 10/12/22 | | | | |
| Brian Basis Planning Mikinski | 36% (47) 11 | % 39% (50) | 10/27/22 | \oslash | | | • |

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 th beginning this Project Baselines allow you to visualize th | Review Cycle? |
|---|---------------|
| YES | ΝΟ |

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

| Assignee | Team Contribution | Last Accessed | Ready For Review? | Show Whole Project | Show Cost | Clear Markup |
|-----------------------|--|---------------|----------------------|--------------------------|--------------|-----------------|
| Allen Paddock | <mark>25%</mark> 15% 58% (28) | 2 years ago | | | | |
| Ben Heights | <mark>17%</mark> 29% (14) 52% (25) | 2 years ago | | | | |
| Christy Tuppance | <mark>31% (15)</mark> 10 <mark>9 40% (19)</mark> | 2 years ago | | | | |
| Bridgette Quintero | 10 [°] 10' 24% | 5 months ago | | | | |
| Susan Cappelloni | 20% | 2 years ago | | | | |
| Overall | 22% 16% 46% (78) | | | | | REMOVE AL |

NOTE The color coding of the Team Contribution visualizes the summaries:

Green: Percent of items marked up reducing durationOrange: Percent of items marked up increasing durationYellow: Percent of items marked as planned duration is OKWhite: Percent of items pending review

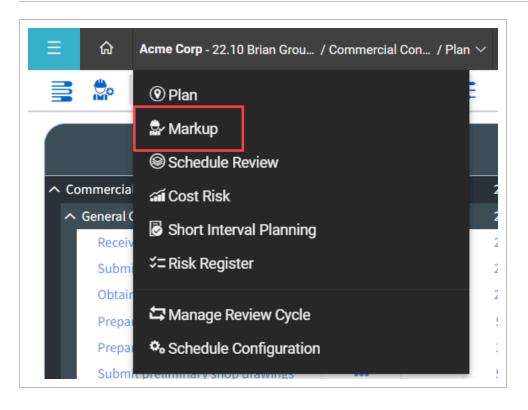
6. Click End Review Cycle after markups have been submitted.

| End Review Cycle | END REVIEW CYCLE |
|---|------------------|
| End Review Cycle to review Markup from team members | |

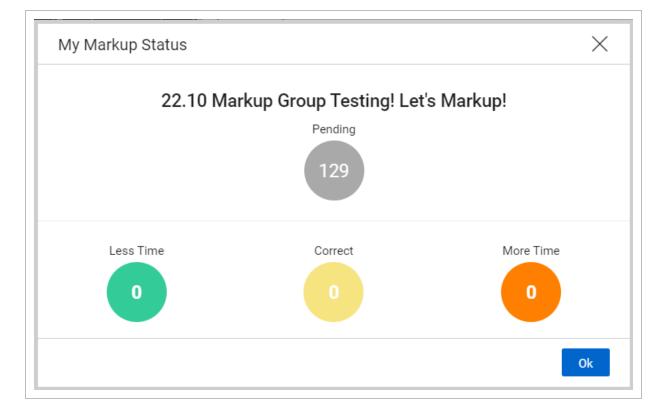
MARKING UP THE SCHEDULE

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.

| ▶ ⊙ ਵ | | | | | | | | Let's | get started! | READY FOR REVIEW? | | | | 1 | r e | × * | | · ' |
|--|-------------|-------------|-----------|----------|----------|------------|-------------|-------|--------------|--|---|------|------|------|------------|------|------|-------|
| ID - Description | Start Date | Finish Date | Remaining | △Remaini | Duration | ∆Total Dur | . Markup Co | | April 2021 | May 2021 Jule 2021 July 2021 August 2021 26 03 10 17 24 31 07 14 21 28 05 12 19 26 02 09 16 23 | | -50% | -25% | -10% | ок | +10% | +25% | +50% |
| Commercial Construction | 26 Apr 2021 | 22 Sep 2022 | 368 | | 368 | | | | | Data Date | | 50 | 25 | 10 | OK | 10 | 25 | 50 |
| General Conditions | 26 Apr 2021 | 18 May 2021 | | | 17 | | | | | | | | 25 | | | | 25 | |
| Obtain building permits | 29 Apr 2021 | 4 May 2021 | 4 | 0 | 4 | 0 | 0 | | | * | 0 | 50 | 25 | 10 | OK | 10 | 25 | 50 |
| Prepare and submit proj | 3 May 2021 | 4 May 2021 | 2 | 0 | 2 | 0 | 0 | | | 0 | 0 | | | | | | | |
| Prepare and submit sche | 5 May 2021 | 6 May 2021 | 2 | 0 | 2 | 0 | 0 | | | 0 | | | | | | | | |
| Receive notice to procee | 26 Apr 2021 | 28 Apr 2021 | 3 | 0 | 3 | 0 | 0 | | | p | | | | | | | | |
| Submit bond and insura | 29 Apr 2021 | 30 Apr 2021 | 2 | 0 | 2 | 0 | 0 | | | 0 | | | | | | | | |
| Submit monthly request | 29 Apr 2021 | 29 Apr 2021 | 1 | 0 | 1 | 0 | 0 | | | 1 | | | | | | | | |
| Submit preliminary shop | 5 May 2021 | 18 May 2021 | 10 | 0 | 10 | 0 | 0 | | | | | | | | | | | |
| Cong Lead Procurement | 30 Apr 2021 | 5 Aug 2021 | 70 | | 70 | | | | | | | | 25 | 10 | ОК | 10 | 25 | |
| Detail, fabricate and deli | 14 May 2021 | 5 Aug 2021 | 60 | 0 | 60 | 0 | 0 | | | | | | | | | | | |
| Submit shop drawings a | 19 May 2021 | 1 Jun 2021 | 10 | 0 | 10 | 0 | 0 | | | | | | | | | | | |
| Submit shop drawings a | 19 May 2021 | 1 Jun 2021 | 10 | 0 | 10 | 0 | 0 | | | | | | | | | | | |

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.

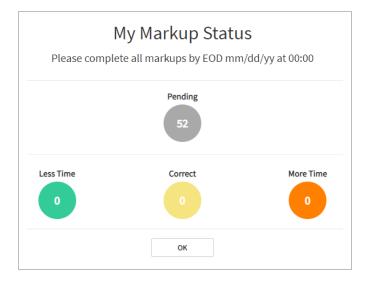
| • | -50% | -25% | -10% | ОК | +10% | +25% | +50% |
|---|------|----------|------|----|------|------|------|
| G | 50 | 25 | 10 | ОК | 10 | 25 | 50 |
| G | 50 | 25 | 10 | OK | 10 | 25 | 50 |
| | 50 | 25 | 10 | OK | 10 | | 50 |
| | | a | 10 | OK | 10 | 25 | |
| G | | 25 | 10 | OK | 10 | 25 | |
| | | 25 | 10 | OK | 10 | 25 | |
| | | 25 | 10 | | 10 | 25 | |
| G | | 25 | 10 | OK | 10 | 25 | |
| D | 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.

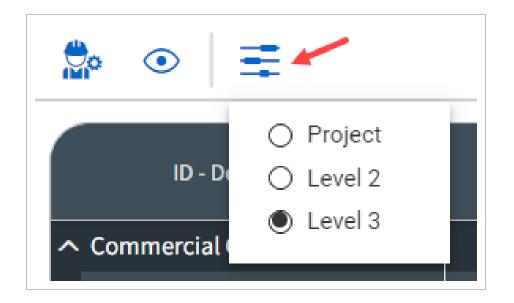
| Apri | | May 2 | 2021 | | | Jur | ne 2021 | | | 50 0/ | 250/ | 100/ | 01/ | 2 |
|----------|-----|-------|------|----|----|-----|---------|---|---|--------------|----------|------|----------|---|
| 26 | 03 | 10 | 17 | 24 | 31 | 07 | 14 | D | | -50% | -25% | -10% | ОК | l |
| Data D | ate | | | | | | | G | | 50 | 25 | 10 | ОК | |
| | | | | | | | | G | | | 25 | 10 | ОК | |
|) | | | | | | | | | 1 | | 25 | 10 | OK | |
| | | | | | | | | G | 1 | | a | 10 | OK | |
| | 0 | | | | | | | D | | | 25 | 10 | OK | |
| | | | | | | | | G | | | 25 | 10 | OK | |
| | | | | | | | | D | | | 25 | 10 | a | |
| D | | | | | | | | D | | | 25 | 10 | OK | |
| L | | | | | | | | G | | | 25 | 10 | OK | |

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.

| | | | | | | | 202 | D | | -50% | -25% | -10% | ок | +10% | +25% | +509 |
|-----|-----|-----|-----|-----|-----|-----|-----|---|---|------|----------|----------|----------|------|-------|------|
| Nov | Dec | Jan | Feb | Mar | Apr | May | Jun | | | -30% | -2370 | -1070 | ÖR | 1070 | 12370 | |
| | | | | _ | | _ | | | | | | | | | | |
| | | | | | | | | | | | | | | | | |
| | | | | | | | | D | | 50 | 25 | 10 | ОК | 10 | | 50 |
| | _ | | | | | | | D | 1 | 50 | 25 | 10 | | 10 | | 50 |
| | | | | | | | | D | | | a | | ОК | | | |
| | | | | | | | | D | | | | | ОК | | | |
| | (| | | | | | | | | | | a | ОК | | | |
| | | | | | | | | | | | | | a | | | |
| | | | | _ | | | | | | | | | ок | | | |

- 6. Go to the Gantt chart and slide the start or end bars around to adjust duration.
 - The scorecard will changes the icons to a pencil, signifying a custom duration adjustment was made.

| | | 50 | 25 | 10 | ОК | 10 | 25 | 50 |
|------|---|----|----|----|---|----|----|----|
| r• — | D | 50 | 25 | 10 | ø 1990 - 1990 - 1990 - 1990 - 1990 - 1990 - 1990 - 1990 - 1990 - 1990 - 1990 - 1990 - 1990 - 1990 - 1990 - 1990 | 10 | 25 | 50 |
| | | | 25 | 10 | ø | 10 | 25 | |
| - | | | 25 | 10 | ø | 10 | 25 | |
| | | | 25 | 10 | ø | 10 | 25 | |
| | | 50 | 25 | 10 | ОК | 10 | 25 | 50 |
| - | | | | | | | | |

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.



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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.

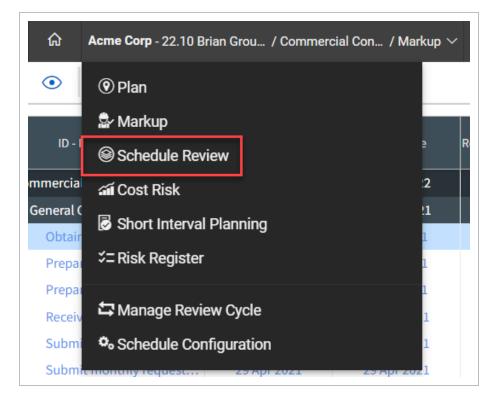
A **Risk Event** is an external factor where events are discrete and measurable, such as third-party delays or unexpected labor shortages. It evaluates the probability of the event occurring, the schedule impact should the event occur, and any impact in associated costs.

Projects often tend to mix uncertainty and risks events together resulting in less accurate NOTE 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** Quantity growth External factors such as: Productivity loss/gain 3rd party delays Evaluates duration/cost realism Labor shortages & plan confidence Evaluates probability of occurring event plus schedule impact & associated impact costs

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

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

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



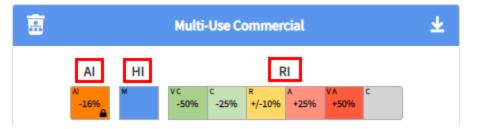
2. Select a P-value for instant insight during the review process by first selecting the P-value icon .

| ، 💿 م | 2 | | | | | | | |
|--------------------|--------|---------|----------|---------|--------|---------|------------|---|
| ID - De | P-Val | ue | | | | | | |
| ∧ Commercial | Show s | pread o | f simula | tion ou | tcomes | (select | t up to 3) | |
| ∧ General Co | 0 | 5 | 10 | 15 | 20 | 25 | 30 | |
| Obtain | 35 | 40 | 45 | 50 | 55 | 60 | 65 | |
| Prepare Prepare | 70 | 75 | 80 | 85 | 90 | 95 | 100 | |
| Receive | | | | | | | | _ |

- 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.

| ▲ Uncert | Events | 9 | áá | Ļ |
|-------------|--------|----------|-------|-----|
| | | Δ | í í í | ۱¢, |
| | | | iii | i, |
| | | <u> </u> | áú | Υ, |
| | | | álí | 5 |

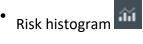
- 4. Move down the project and review contributor's Uncertainty rankings for each line item.
 - When reviewing Uncertainty, there are three main options for generating adjustments to the project: Artificial Intelligence (AI), Human Intelligence (HI), and Risk Intelligence (RI)

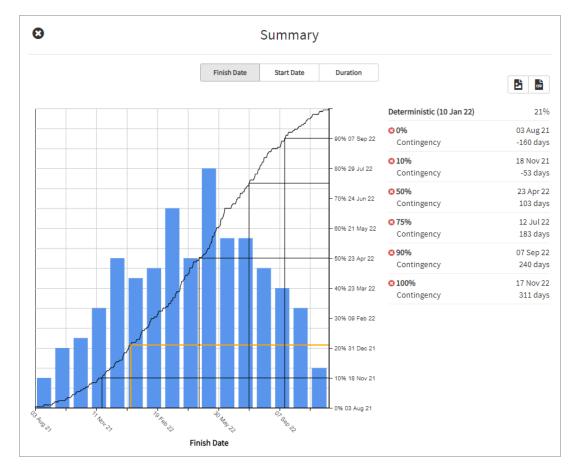


- 5. As needed, assign **Register Events** to project items.
 - Any item in a project may be assigned a Register Event
 - The default categories are shown below:

| Add new register event | * |
|---|-----------|
| * Title (required) Title | |
| Threat Opportunity Issue Idea Schedule Change Request | Clear Add |

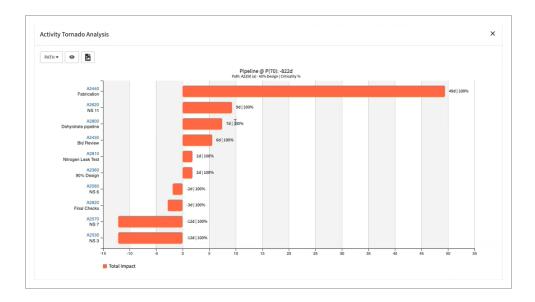
• After all uncertainty and events have been agreed to, you can access two main reports that provide insight into the project's risk:



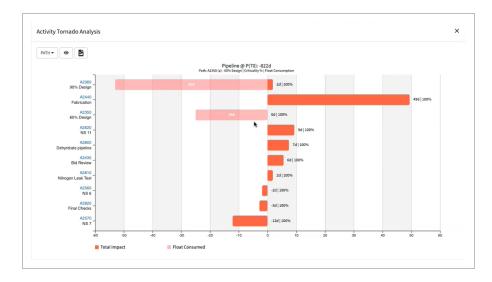


Tornado analysis

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



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



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

IMPORT/EXPORT

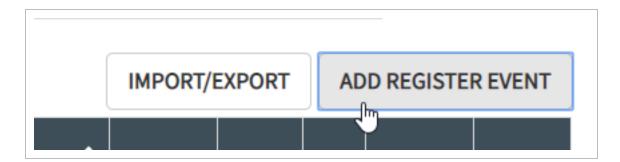
You can Import and Export risks in the project register. There are options for Oracle PRA – Pertmaster and Deltek Acumen. These are simple Excel formats that can also be generated outside of any tool and used for importing into Schedule.

| IMPORT/EX | PORT | ADD RE | GISTER EVENT |
|-----------|------|--------|--------------|
| | | | |

| 8 | f | } |
|-----------------|---------------------------------|--|
| | Acti | ion |
| | Import | Export |
| Import new or u | updated register events and the | eir associations to activities within this project |
| | File Fo | ormat |
| | Oracle PRA - Pertmaster | Deltek Acumen |
| | File (. Choose File No fi | |
| | ІМРО | ORT |

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 | | | • |
|---------|--------|--------------|---|
| | C | f | |
| Event | | | |
| Cause | | | |
| Effect | | | |
| | | | |
| Risk of | due to | resulting in | |
| | ADD | CANCEL | |

FILTER

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

| T | | | | | | | | | IMPORT/E | XPORT | AD | D REGISTE | R EVENT |
|--------|----|------|-------------|------------|-------------|--------------------|----------------|---------|----------|-------|----|-----------|---------|
| Active | Id | Туре | Description | Mitigation | Probability | Schedule Impact | Cost Impact | Score 🔺 | Markup | Basis | • | Publish | Delete |
| | | • | | | • | - | - | • | | | | | |

MATRIX DEFINITION

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

| vents Register Register Type | Matrix Definition | | | |
|------------------------------|-------------------|-----------------|-------------|-------|
| TTRIBUTES | | | | EDF |
| Description | Probability | Schedule Impact | Cost Impact | Color |
| Very Low | 5% | 7 days | \$100 | |
| Low | 25% | 30 days | \$1,000 | |
| Medium | 50% | 60 days | \$10,000 | |
| High | 75% | 90 days | \$100,000 | |
| Very High | 95% | 180 days | \$1,000,000 | |

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

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

| | 75 |
|---|----|
| × | |

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 | | | |
| Preconstruction | 18 Feb 19 A 18 Feb 19 A | 21 Feb 20 11 Dec 20 | 369 663 | | | |
| Design | 18 Feb 19 A 18 Feb 19 A | 17 Sep 19 26 Jun 20 | 212 495 | | | |
| Create Early Stage Construction Docs | 21 Jun 19 21 Feb 20 | 17 Sep 19 26 Jun 20 | 63 91 | 0 | | |

MARKUP FEEDBACK AND CONSENSUS

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

| | Sitework Permi | it 👱 |
|------------------------|----------------------------|---------------------|
| AI HI | | RI |
| AI H +4% +149 | vc c R -50% -25% +/-10% | A VA C +25% +50% |
| A+1 | 14% Markup distribution w | ill be applied. |
| | | |
| Layer | Rem Dur | Constraint |
| Layer Deterministic | Rem Dur 21 | Constraint |

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%.

| AI | н | | | F | 21 | | | |
|-----------|-----------|------------|-----------|-------------|-----------|------------|---|--|
| AI +4% | м +14% | vc -50% | c -25% | R +/-10% | A +25% | VA +50% | c | |

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 | | | 2 |
|------------------------|--------|----------------|-------------|-----------|------------|-------|
| AI | н | | F | 21 | | |
| +496 | +14% | -50% -25% | R +/-10% | ^ +25% | VA +50% | c |
| | A +14% | Markup distrib | ution wil | l be app | lied. | |
| | | | | | | |
| Layer | | Rem Du | · | | Constr | raint |
| Layer Deterministic | | Rem Dui | r | | Constr | raint |

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 | | | | | |
| | -16% VC C R A VA C -50% -25% +/-10% +25% +50% | | | | | |
| | Inference Engine suggests a distribution of 84% to 100% | | | | | |
| | | rence Eng | e suggests a distribution of 84% to 100% | | | |
| | | rence chi | Distribution | | | |
| | | | | | | |
| Min % | | | Distribution | | | |

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.

| AI | HI | RI | | | | | |
|----------------------|--------|------------|-----------|-------------|-----------|------------|-------|
| AI +195 | -27% | vc -50% | с -25% | R +/-10% | A +25% | va +50% | с |
| | A -27% | Markup | distribu | tion will | be app | lied. | |
| Layer | | Re | m Dur | | | Const | raint |
| Deterministic | | | 26 | | | | |
| -7 AP | | | 19 | | | | |
| +13 BH | | | 39 | | | | |
| + 7 ст | | | 33 | | | | |

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 | |
| -7 АР | 19 | |
| +13 BH | 39 | |
| 47 CT | 33 | |

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

| Deterministic | 26 |
|---------------|--------------------|
| 7 AP | 19 |
| 13 BH | 39 |
| 2 CT | 33 |
| | Distribution |
| | Triangular Uniform |
| Min | |
| 19 | |
| Likely | |
| 30 | |
| Мах | |
| | |

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.

| Deterministic | 26 | |
|---------------|------------|---------|
| -7 AP | 19 | |
| 913 BH | 39 | |
| 17cT | 33 | |
| | Distrib | oution |
| | Triangular | Uniform |
| Min | | |
| 19 | | _ |
| Likely | | |
| 26 | | |
| | | |
| Max | | |

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.

| | Distrib | ution | |
|--------|------------|---------|----|
| | Triangular | Uniform | |
| Min | | | |
| 15 | | | |
| Likely | | _ | |
| 20 | | | |
| Max | | | |
| 21 | | | |
| | 15 | | 22 |

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.

| | Distrib | oution | |
|-----|------------|---------|--|
| | Triangular | Uniform | |
| Min | | | |
| 15 | | | |
| Max | | | |
| 21 | | | |
| | | | |

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) |

| Syr | mbol | Markup Feedback Assigned |
|------|--------------------------------|--|
| 2 | N | Human Intelligence (HI) with no markup values |
| | al | Human Intelligence (HI) with strong consensus, with little variations |
| | al | Human Intelligence (HI) with a large variation |
| 1 | a | Risk Intelligence (RI) Very Conservative (-50%) |
| | | Risk Intelligence (RI) Conservative (-25%) |
| | a | Risk Intelligence (RI) Realistic (+/-10%) |
| 1 | a | Risk Intelligence (RI) Aggressive (+25%) |
| - | a | Risk Intelligence (RI) Very Aggressive (+50%) |
| | A | Risk Intelligence (RI) Custom |
| NOTE | | gence (HI) feedback, you can hover over the symbol to find the variation |
| | ercentage. or Inference Eng | gine (AI) and Risk Intelligence (RI) feedback, the Uncertainty Status |
| | ymbol will be a istribution. | 🔺 if using Triangular distribution and a square 🞴 if using Uniform |

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.

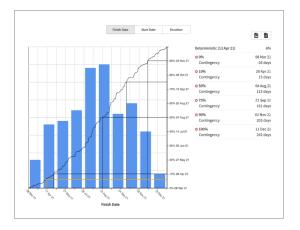
Once feedback on uncertainty and events are reviewed, you are ready to generate outcomes via Risk Histograms and Tornado Analysis.

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.

| T Search | 8 | Zoom | - Qua | rter | (H)) |
|---|---|--------|-------|------|------|
| 202 Aug - OctNov - JarFeb - AprMay - J | |)ctNov | 0 | âŭ | 5 |
| | | | âıl. | âí | Ę |
| | | | .ıl | ili | Ξ, |
| | | | | άŭ | Π, |
| • | | | | áií | 5 |
| • | | | | áií | Ξ. |
| • | | | | áií | Ξ. |
| • | | | | áá | ٩ |

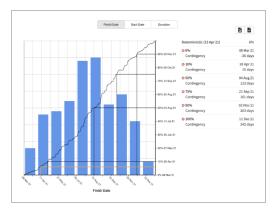
By clicking on the Risk histogram icon at the top level, you can report on the total project, as shown below.



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.



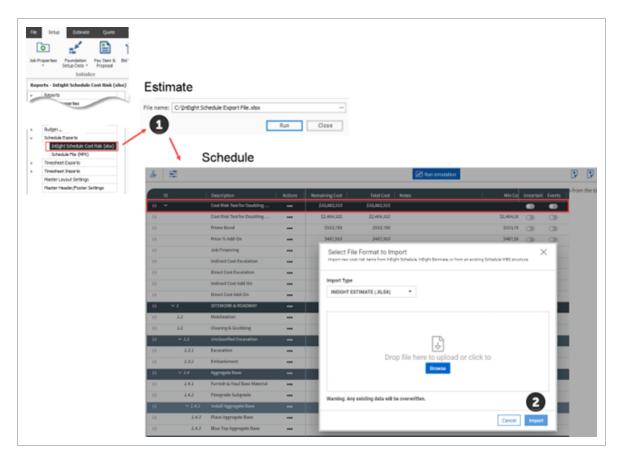
Interact with the following options to explore your project in Cost Item Mode:

- View
- Level
- Display Number



ROOT NODE IN COST RISK

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



RISK MODE

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

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

| Act: Establish Permitting Documents R3: Risk of New Event to Test due to Trying to figure this out resulting in it all Blows UP | | 130d 5%/180d/\$10ММ |
|---|---------------------------|------------------------|
| Act: Establish Permitting Documents R11: Local regulatory authority changing – requirements | 82d 50%/90d/51MM | |
| Act: Design R12: Lack of specs leads to re-design | 63d 75% / 00d / \$100K | |

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.

| | View | ws îļ 🍸 🛄 | | | | | | 🖂 Run simul | C |
|----|----------------------------|------------------------------|---------|---------|-------------|----------------|------------|-------------------------|----|
| I | D | Description | Actions | Exclude | Actual Cost | Remaining Cost | Total Cost | P(80) Rem Cost | 2) |
| `` | / 101004690_00.0 | I-15 Tropicana_Proposal S | | | \$10 | \$20 | \$30 | | |
| 1 | ~ 1.0100 | Project Management | | | \$10 | \$20 | \$30 | 10% +25% +50% | |
| | ✓ 1.1.0100 | Contract Milestones | | | \$10 | \$20 | \$30 | y distribution applied. | |
| 1 | 1.1.1.NA | Notice of Award | | | \$0 | \$0 | \$0 | | |
| 8 | 1.1.1.NT. | Notice to Proceed 1 | | 0 | \$0 | \$0 | 50 | \$) Max (\$) | |
| 1 | 1.1.1.NT. | Notice to Proceed 2 | | 0 | \$0 | \$0 | \$0 | 20 | |
| | 1.1.1.SC | Substantial Completion (Ma | | | \$10 | \$20 | \$30 | .) Max (%) | |
| | 1.1.1.PC. | Project Closeout | | | \$0 | \$0 | \$0 | 100 | |
| | 1.1.1.PC | Project Completion | | | \$0 | \$0 | 50 | | |
| | 1.1.0200 | Interim Milestones | | | \$0 | \$0 | 50 | | |
| 1 | ✓ 1.0200 | Design | | | \$0 | \$0 | \$0 | | |
| | V 1.2.1 | Administration | | | \$0 | \$0 | \$0 | | |
| | | Design Milestones | | | \$0 | \$0 | \$0 | | |
| 1 | 1.2.1 | Design Complete | | | \$0 | \$0 | 50 | \$21 | |
| 1 | ✓ 1.2.1. | Indirects | ••• | | \$0 | \$0 | <i>\$0</i> | | |
| | | Kiewit | | | 50 | | <i>\$0</i> | | |
| 1 | 1 | KIE Management Project Ma | | | \$0 | \$0 | 50 | gister | |
| | 1 | KIE Management Project Ma | | | \$0 | \$0 | \$0 | | |
| 1 | 1 | KIE Traffic Project Managem | | | \$0 | \$0 | 50 | | |
| 1 | 1 | KIE Roadway Project Manag | | | \$0 | \$0 | 50 | DD EVENT | |
| 1 | 1 | KIE Landscape Project Man | | | \$0 | \$0 | 50 | | |
| 1 | 1 | KIE Maintenance of Traffic P | | | \$0 | \$0 | \$0 | | |
| 1 | 1 | KIE Utilities Project Manage | | 0 | \$0 | \$0 | \$0 | | |
| 1 | 1 | KIE Drainage Project Manag | | 0 | \$0 | \$0 | \$0 | | |
| | 1 | KIE Transportation Structur | | 0 | \$0 | \$0 | \$0 | | |
| 1 | 1 | KIE Environmental Project | | 0 | \$0 | \$0 | \$0 | | |
| 1 | ~ 1. | Atkins | | | \$0 | 50 | \$0 | | |
| | 1 | ATK Landscape Project Man | | | \$0 | \$0 | \$0 | | |

This column can also be edited directly on the page.

| ID | Description | Actions | Exclude | Actual Cost |
|----------------------|---------------------|---------|---------|-------------|
| ✓ 104969_01.01.00.00 | I-15 Tropicana_Re | ••• | | \$4,323 |
| ✓ 1.0100 | Project Management | ••• | | \$4,323 |
| ✓ 1.1.0100 | Contract Milestones | ••• | | \$4,323 |
| 1.1.1.DS | Design Start | ••• | | 4323 |

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

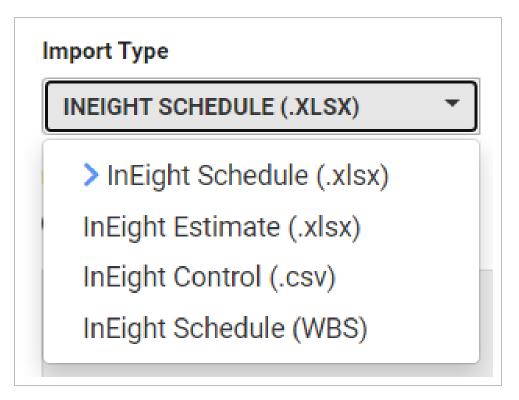
| Job Pro |) pert | ties Foundation Setup Data * Proposal Initialize | Bid Wizard | Resour | rces | | Resource Assemblies | Cost Item Assemblies Asser | Standard Tables mblies | Reports Reports | | |
|---------|-----------|--|------------|---------|------|------------------|------------------------|----------------------------------|------------------------------|--------------------|-----------------|------------------|
| Repor | rts - | InEight Schedule Cost Risk (xls | x) O | | | | | | | | | |
| ~ | Rep | ports | File nat | ne: C:V | lise | rs\Paul. \Docume | nts\InFight | Schedule Exp | ort File, vlsv | | | |
| C | 6 | Job Properties | The fig | | pac | pocune | and progre | oo icouic cxp | OF CT INCOME. | | | |
| | 1 | Foundation Setup Data | | | | | | | | | | |
| ~ | 2 | Resources | | | | | | | | | | |
| | | Resource Register | | Г | 4 | | | | | | | |
| | | Resource Changes | | - 1 | 4 | A | | | В | | C Total Cost | D |
| | | Resource Rate Details | | | | CBS Position Cod | Deceri | ntion | | | (Forecast) | Suspend |
| | | Resource Utilization | | | 2 | CB3 POSICION COU | Prime | | | | \$46,977.85 | Suspend FALSE |
| | | Resource Utilization (Excel) | | | 23 | | | 6 Add-On | | | \$294,100.61 | |
| | | Resource Currency Comparison | | | 4 | | | nancing | | | \$21,729.23 | |
| > | 12 | Resource Assemblies | | | 5 | | | ct Cost Esc | alation | | \$2,131.11 | |
| > | - | Cost Breakdown Structure | | | 6 | | | Cost Escal | | | \$15,048.80 | |
| > 5 | 9 | Quotes | | | 7 | | Indire | ct Cost Add | d-On | | \$5,749.87 | |
| > | - | Price Breakdown Structure | | | 8 | | Direct | Cost Add- | On | | \$103,828.34 | |
| > | * | Pay Item & Proposal | | 1 | 9 ' | 1 | SITEW | ORK & RO | ADWAY | | \$2,464,161.56 | FALSE |
| > | | Billing Rate Reports | | 1 | 10 | 1.1 | Mobil | zation | | | \$11,909.51 | FALSE |
| | | Estimate Comparison Report | | 1 | 11 | 1.2 | Cleari | ng & Grubb | bing | | \$39,184.97 | FALSE |
| | | Audit | | 1 | 12 | 1.3 | Unclas | sified Exca | avation | | \$233,915.81 | FALSE |
| | | Job Register | | 7 1 | 13 | 1.3.1 | Excava | tion | | | \$149,922.88 | FALSE |
| | | InEight Schedule Cost Risk (xlsx) | | 1 | 14 | 1.3.2 | Embar | kment | | | \$83,992.94 | FALSE |
| > | | Library Module | | _ | | | | | | | | |
| - í | Cus | stom Reports | | | | | | | | | | |
| • | Sav | ved Views | | | | | | | | | | |
| | Mas | ster Layout Settings | | | | | | | Run | Close | | |
| | | ster Header/Footer Settings | | | | | | ' | Kuni | 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.

| ž | Lews | ↑↓ ▼ [] | 7 | | | | 0 [J] (Q C |
|---|----------------------|---------------------|------|----------------|-----|------------------|---|
| | ID | Description | Acti | er | îŭ | Ę | Design Start |
| | ✓ 104969_01.01.00.00 | I-15 Tropicana_Re | 7 | | ái | ₹, ^ | VC C R A VA C |
| | ✓ 1.0100 | Project Management | | 2 | iii | Ţ, | -50% -25% +/-10% +25% +50% |
| | ✓ 1.1.0100 | Contract Milestones | | 2 | iii | ₩, | Conservative distribution applied from 75% to 105%. |
| | 1.1.1.DS | Design Start | | 5 | âă | H _b , | |
| | 1.1.1.Mobe | Mobilization | 7 | 2 | áŭ | μ, | Min (\$) Likely (\$) Max (\$) |
| | 1.1.1.NTP2 | Notice to Proceed 2 | _(| 2 | ái | μ, | 3 4 4 |
| | 1.1.1.Duratio | Project Duration | - | $\overline{)}$ | âŭ | Ψ, | Min (%) Likely (%) Max (%) |
| | 1.1.1.Start | Design and Constru | | 2 | ili | ₩, | 75 100 105 |
| | 1.1.1.SC | Substantial Compl | -(| 2 | áú | ų, | |

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 fromSchedule, 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.

| | 侴 | | ¢ | 8 | | <u>®</u> |
|--------------------------|-----------|------------|--------|------|---|----------|
| ٥ | ľ | | | Q | ę |) |
| Desig | n Start | | | | | |
| 6 ^R +/-10% | A +25% | VA +50% | с | | | |
| stribution a | applied f | from 75 | % to 1 | 05%. | | |

- 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.

| | 鉝 | \$ | 8 | 8 |
|--------------------------|-----------------|------------|------|---|
| ٥ | Ğ | | ۹ | Ŷ |
| Design | Start | | | Î |
| € ^R +/-10% | A VA +25% +5 | c | | |
| stribution a | pplied fror | n 75% to 1 | 05%. | |

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.

| port Type | | |
|---------------------------|-----------------------------------|--|
| NEIGHT SCHEDULE (.XL | SX) • | |
| e Min, Likely, Max Percer | ntages | |
| | | |
| | <u>+</u> | |
| | Drag and drop file here to upload | |
| | Only .XLSX files are allowed. | |
| | only incovince are anonea. | |
| | ony mean nee are unored. | |

- 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.

| Select File Format to Import Import new cost risk items from InEight Schedule, InEight Estimate, or i | from an existing Schedule WBS structure. |
|--|--|
| | |
| Warning: Any existing data will be overwritten. | |
| | Cancel Import |

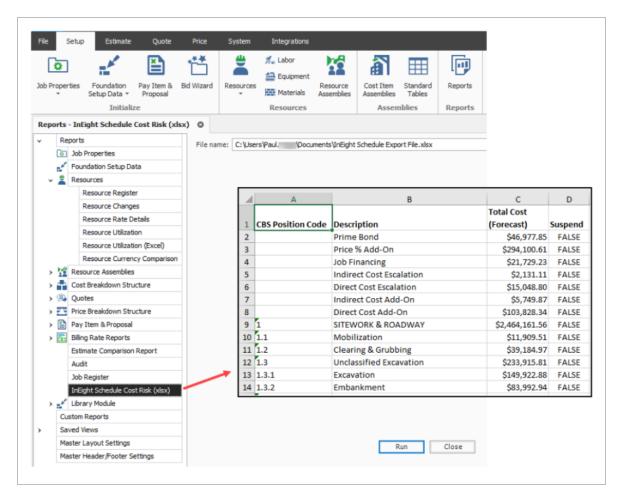
ESTIMATE COST RISK EXPORT

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) fine can be generated from



CONTROL COST RISK EXPORT

You can create a Cost Risk .CSV export specific view from Control in Control Workspaces. See the <u>Viewsets</u> 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.

| ≡ | ଜ | Ten Mile Slide - | Phase : | 2 (Carrying) 103961 / C | Control / Workspaces | T01-24.3 Q | A () A | ç <mark>ı</mark> © | |
|----------|-------|------------------|---------|---------------------------|----------------------|---------------------|-----------------------------|--------------------|---------------------|
| | | | | | свя | View : | Control Cost | Risk Expor | t 🔻 |
| Ac | tions | • (+) | ľ | \otimes | | \$ 🖽 | Ğ | 1 | ≡ Q |
| T | Task | (S | | : | Control Cost Ris | < | ••• > | | |
| - | | | 1 | Description | CBS position | ,ast = .⊣rs/unit | Forecast total productivity | - | Forecastotal unit c |
| - | | 1 | | Financial Results | 1 | 0.00 | | 0.00 | ^ |
| | | ✓ 2 | | Misc. Rev Internal | 2 | 7,030.50 | | 1.15 | \$ 2,4 |
| IA | | 2 1 | | General Project Ri | 21 | 0.00 | | 0.00 | |

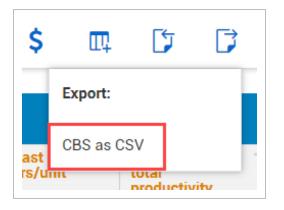
Create a new datablock to show the CBS Position Code, Description, Actual Cost (to date), and the Forecast Remaining Cost columns. View the <u>Datablocks</u> topic to view more information how to to create datablocks.

| Act | ions | | ß | \otimes | | | | | / | <u>л</u> | ۲ | 3 | t≡ Q |
|-----|-------|-------------------|---|--------------------|--------------|-----|----------------------|--------------------------|-------------------------|----------------|-----------------------------|------|----------------------|
| AU | 10113 | • | | | | | | | | ш 4 | L# | | - 4 |
| | Tasl | s | | : | Control Cost | Ris | sk View 🛛 < | • > | : 丿 | | •• > | | |
| | | ⊗ CBS position | - | Description = | CBS position | | Description | Actual cost (to date) | Forecast remaining cost | T | Forecast total productivity | Ŧ | Foreca total unit |
| | | 1 | | Financial Results | 1 | | Financial Results A | \$ 0.00 | \$ 1,000.00 | | | 0.00 | |
| | | ✓ 2 | | Misc. Rev Internal | 2 | | Misc. Rev Internal | \$ 2,401,829.03 | \$ 0.00 | 50 | | 1.15 | \$ 2 |
| | | 2.1 | | General Project Ri | 2.1 | | General Project Risk | \$ 0.00 | \$ 0.00 | | | 0.00 | |
| | | 2.2 | | Misc. Rev Internal | 2.2 | | Misc. Rev Internal | \$ 0.00 | \$ 0.00 | 00 | | 0.00 | |

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

| | CBS | ACS | PAY | | View : Ur | nsaved (Live fore | ecast) | • |
|-----------------|----------------------|--------------------------|-------------------------|-------------|------------------|-------------------|--------|---|
| | | | | | D\$ | 5 | €≣ | Q |
| Control Cost Ri | sk View < 🤆 | • > | : | | C 01/01/2024 | | | |
| CBS position | Description | Actual cost (to date) | Forecast remaining cost | ecast = | Forecast method | | | |
| I | Financial Results A | \$ 0.00 | \$ 1,000.00 | \$ 1,000.00 | Current estimate | | | |
| 2 | Misc. Rev Internal | \$ 2,401,829.03 | \$ 0.00 | ,401,829.03 | Rollup | | | |
| 2.1 | General Project Risk | \$ 0.00 | \$ 0.00 | \$ 0.00 | Manual (EAC) | | | |
| 2.2 | Misc. Rev Internal | \$ 0.00 | \$ 0.00 | \$ 0.00 | Manual (EAC) | | | |
| | Escalation/Conting | \$ 0.00 | \$ 0.00 | \$ 0.00 | None | | | |
| 2.3 | | | | | | | | |

Select Export: CBS as CSV.



LESSON 10 – SHORT INTERVAL PLANNING

SIP OVERVIEW

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.

| | | | | | | 1 | | | | | | | | | | | |
|---|-----------|-----------|------|---------|-------|----|----|----|----|----|----|----|----|----|----|----|--|
| | | | | | | т | W | TH | F | SA | SU | м | т | w | TH | F | |
| Activities | Start 👃 | End | Days | Planner | Units | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | |
| ∽ Commercial Construction | 26 Apr 21 | 22 Sep 22 | | | | | | | | | | | | | | | |
| General Conditions | 26 Apr 21 | 18 May 21 | | | | | | | | | | | | | | | |
| ^ Long Lead Procurement | 30 Apr 21 | 5 Aug 21 | | | | | | | | | | | | | | | |
| 2.1 Submit shop drawings and order long L. | 30 Apr 21 | 13 May 21 | | | | | | | | | 3 |) | | | | | |
| 2.2 Submit shop drawings and order long L. | 19 May 21 | 1 Jun 21 | | | | | | | | _ | | | | | | | |
| 2.4 Submit shop drawings and order long L. | 19 May 21 | 1 Jun 21 | 2 | | | | | | | | | | | | | | |
| 2.3 Submit shop drawings and order long I | 19 May 21 | 1 Jun 21 | | | | | | | | | | | | | | | |
| 2.5 Submit shop drawings and order long I | 19 May 21 | 1 Jun 21 | | | | | | | | | | | | | | | |
| 2.6 Submit shop drawings and order long I | 19 May 21 | 1 Jun 21 | | | | | | | | | | | | | | | |
| 2.7 Detail, fabricate and deliver steel | 14 May 21 | 5 Aug 21 | | | | | | | | | | | | | | | |
| $^{\vee}$ Mobilize on Site | 29 Apr 21 | 12 May 21 | | | | | | | | | | | | | | | |
| △ Site Grading and Utilities | 13 May 21 | 23 Aug 21 | | | | | | | | | | | | | | | |
| 4.1 Clear and grub site | 13 May 21 | 19 May 21 | | | | | _ | | | | | | | | | | |

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.

| ^ A2350 60% Design | 11 Nov 21 | 16 Feb 22 | | | | 9,000 |
|-------------------------|-----------|-----------|---|-------------|---|-------|
| Step 35 | dd a step | 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 |

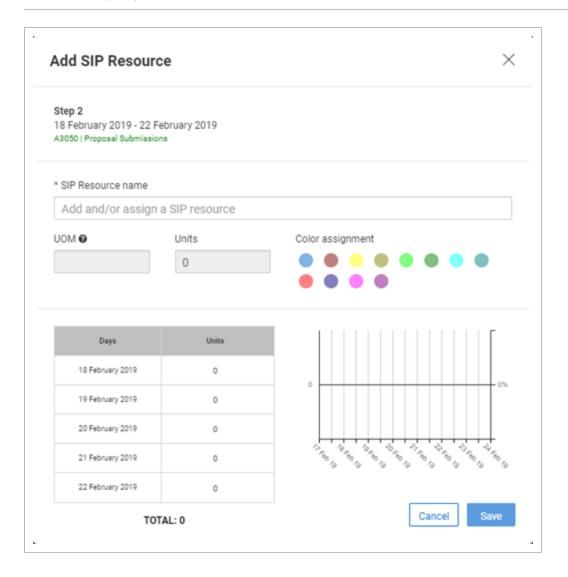
MILESTONES

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.



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.



SIP GENERAL NAVIGATION

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.

| Sroup by WBS 🔻 💿 🗮 | Refresh SIP | uata | | | | | | | L | | - Sep 2021 | | | \rightarrow | • | Toda | · | • | (Y |
|--|-------------|-----------|------|---------|-------|----|----|----|----|----|------------|----|---|---------------|---|------|----|----|----|
| | | | | | | w | тн | F | SA | SU | м | т | w | | w | | тн | F | |
| Activities | Start 🖡 | End | Days | Planner | Units | 25 | 26 | 27 | 28 | 29 | 30 | 31 | 1 | | 8 | | 9 | 10 | |
| I-15 Tropicana_Proposal Schedule (Ba | 15 Jul 21 | 14 May 25 | | | | | | | | | | | | | | | | | |
| $ \sim $ Project Management | 15 Jul 21 | 14 May 25 | | | | | | | | | | | | | | | | | |
| ∧ Design | 15 Jul 21 | 14 Jan 25 | | | | | | | | | | | | | | | | | |
| ∧ Administration | 15 Jul 21 | 11 Aug 23 | | | | | | | | | | | | | | | | | |
| ∧ Design Milestones | 11 Aug 23 | 11 Aug 23 | | | | | | | | | | | | | | | | | |
| DGNFIN Design Complete | | 11 Aug 23 | | | | | | | | | | | | | | | | | |
| ∧ Indirects | 15 Jul 21 | 23 Mar 23 | 2 | | | | | | | | | | | | | | | | |
| | 15 Jul 21 | 16 Mar 23 | | | | | | | | | 3 | | | | | | | | |
| CONTRACTION CTS00. PKE Traffic Project Manage | 26 Aug 21 | 1 Sep 21 | | | | | | | | | | | | | | | | | |
| Step 1 | 26 Aug 21 | 1 Sep 21 | 5 | None | | | | | | | | | | \square | | | | | |
| | 12 Aug 21 | 10 Aug 23 | | | | | | | | | | | | | | | | | |
| ^ DM-30 Geotechnical Exploratio | 8 Sep 21 | 7 Jul 22 | | | | | | | | | | | | | | | | | |
| EDM30GEDM.GR300. NWF Geotech Reports Geotech | 8 Sep 21 | 7 Jul 22 | | | | | | | | | | | | | | _ | | | |

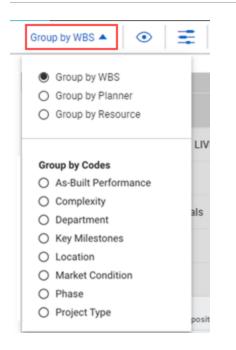
In the SIP view there are three primary sections:

| 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

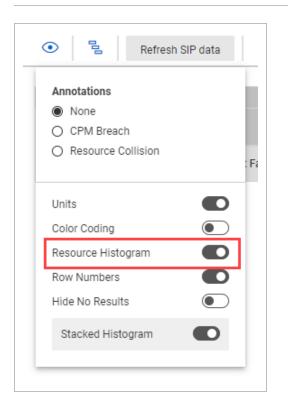
The Group by drop-down menu lets you see activities grouped together based on the option selected. This functionality provides flexibility to schedulers and execution planners in how they want to organize and assess tasks, resource utilization, and activity progress. You can also group activities and 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.

| Annotations | - 6 | | | |
|----------------------|------|---|-------------|------------|
| None | | | | |
| O CPM Breach | _ | | | |
| O Resource Collision | | | | |
| Units | | ID - Description | Start ↑ | Finish |
| | | ^ I-15 Tropicana_Proposal Schedule (Ba | 15 Jul 2021 | 14 May 202 |
| Resource Histogram | | V Project Management | 15 Jul 2021 | 14 May 202 |
| | D 11 | ∨ Design | 15 Jul 2021 | 14 Jan 202 |
| Hide No Results | 2354 | | 3 Jan 2022 | 2 May 202 |
| | 2355 | | 3 Jan 2022 | 5 Feb 2023 |
| | 2356 | CPWDENV.110 Obtain Demo Permits | 3 Jan 2022 | 12 Jan 202 |
| | 2357 | CPWDENV.220 Complete Bird Nesting Survey | 3 Jan 2022 | 12 Jan 202 |

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 13 | 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.

 Mathematical BM
 ○
 20 Apr/11
 7 Mag/11
 7 Mag/11

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.

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.

| Activities | Start ↓} | End | Days | Planner | | Units | т 31 | F 1 | - | S 3 | M 4 | т 5 | W 6 | T 7 | F 8 |
|------------|------------|-------------|------|---------|---|-------|---------|--------|---|--------|--------|--------|--------|--------|--------|
| | 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 | | | | | | | | | | | |

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.

| F | S 11 | s | м | т⊗ | w | т∦к | F 🔆 | s 🔆 | s 💍 | м | т∦к | w | т | F | s | s |
|----|---------|----|----|----|----|-----|-----|-----|-----|----|-----|----|----|----|----|----|
| 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 |

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

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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

| = 6 | Acme Corp | | | | | | | | | <u> (8</u>) | Ø |
|------------------|---------------------------------------|---------------|-----------------------------|----------------|-----------|----------|-----------|------------------|---|--------------|---|
| | | CPM SCHEDULES | ACTIVITY PRODUCTIVITY RATES | KNOWLEDGE TAGS | CALENDARS | REGISTER | RESOURCES | MACHINE LEARNING | | | |
| () E | events Register Register Types Matrix | Definition | | | | | | | • | 3 | Q |

From the Knowledge Library, items can quickly be edited using the following fields:

| 1 rified | Id | 2 Туре | 3 Description | 4 Mitigation | Probability | St. | 5 mpact | Cost Impact | Score - | 7 Activities | 8 | Delet |
|-------------|-----|-------------|---|---|-------------|---------|------------|-------------|---------|-----------------|----|-------|
| D | R3 | Risk | Risk of competing work in the fabyard | Identify overflow yards | High | ▼ High | • | High 🔻 | 16 | 0 | | đ |
| 0 | R2 | Risk | Risk of change in permitting authority | Schedule review with permitting office | Medium | • High | | | 12 | 6 | M | Ō |
| D | R7 | Risk | Risk of unknown soil conditions | | | • High | | | 12 | 2 | M | Ō |
| O | R4 | Risk | Risk of final route may not be known until 30 days before site access | | Low | • High | | | 0 | 0 | KA | Ō |
| O | 02 | Opportunity | Opportunity of identify third party engineering firm to support design | | Medium | Low | | | 6 | 6 | M | Ō |
| D | R1 | Risk | Risk of design rework due to first of a kind design resulting in engineering dela | a Work with client to refine requirements prior to design | Low | | | | 6 | 14 | KA | Ō |
| D | R6 | Risk | Risk of weld issues causing rework | | Low | | | | 6 | 0 | M | |
| D | R5 | Risk | Risk of local regulatory changing requirements | | Very Low | • Mediu | | | 0 | 6 | M | |
| D | 01 | Opportunity | Opportunity of use alternate pre-fab modules to accelerate delivery | | Medium | • | | | | | KA | Ō |
| D | R10 | Risk | Risk of Hurricane due to weather resulting in destruction | | | | | | | 0 | BH | |

| Name | Description |
|----------|---|
| Verified | Items can be either created directly in the Knolwedge Library, or pushed from individual projects. Items pushed from projects shows here as unverified, and are not used as Smart Suggestion options in other projects until verified. |
| Туре | 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 automatical generated. |
| Activities | The number of times the register item appears schedules are shown here. Specific Project and WBS element appearances can be reviewed by clicking on the number. You can select the All drop- down to filter the list by project. |
| | |
| | Project ID Description Duration Probability Schedule Impact Cost Impact Created By |
| | Linear Pipeline 3 Construction 835d 75% 90 days \$100,000 KA Offshore Platform 1.2.1 FPSO 158d 75% 90 days \$100,000 KA |
| | |
| | CLOSE |
| | |
| Created By | The name of the user that raised the register item. |

REGISTER TYPES

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

| | CPM SCHEDULES ACTIVITY PRODUCTIVITY R | ATES KNOWLEDGE TAGS | CALENDAR | REGIS | STER | RESOURCES | MACHINE | LEAR |
|--|---------------------------------------|---------------------|-------------|--|-------------|-----------------|---------|------|
| Events Register Register Types Matrix Definition | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | Name | Prefix | Probability | Schedule Impact | Cost Impact | Positive Impact | Edit | |
| | Opportunity | 0 | | | 1 | | â | |
| | Idea | 1 | | | | | 8 | |
| | Srini Test | SR | | | V | | ď | 0 |
| | Tatyana Test | ТР | | | 2 | | ď | 8 |
| | Schedule Change Request | s | | | | | â | |
| | Test 9-16 | TP | | | 2 | | ď | 0 |
| | Type 1 | TP | | | | | ď | 8 |
| | General | GEN | | | | | 8 | |
| | Threat | R | | | 1 | | â | |
| | Issue | U | | Image: A state of the state | 1 | | 8 | |

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

| | CPM SCHEDULES ACTIVITY PR | ODUCTIVITY RATES KNOWLEDGE TAGS | CALENDA | RS REGIS | TER | RESOURCES |
|---|---------------------------|---------------------------------|-------------|-----------------|-------------|-----------|
| Events Register Register Types Matrix Definit | tion | | | | | |
| | | | | | | |
| | Name | Prefix | Probability | Schedule Impact | Cost Impact | Posi |
| | Opportunity | 0 | | | | |
| | Idea | 1 | | | | |
| | Srini Test | SR | | | | |
| | Tatyana Test | TP | | | | |
| | Schedule Change Request | Add Register Type | | | × | |
| | Test 9-16 | , au negiotei Type | | | | |
| | Type 1 | Name | | | | |
| | General | | | | | |
| | Threat | | | Cancel | Save | |
| | 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 | 0 | | | | | â | |
| Idea | 1 | | | | | â | |
| Srini Test | SR | ~ | | | V | ď | \otimes |
| Tatyana Test | TP | | | | | Ľ | \otimes |
| Schedule Change Request | s | | | | | a | |
| Test 9-16 | TP | ~ | | | | Ľ | \otimes |
| Туре 1 | TP | | | | | Ľ | \otimes |
| General | GEN | | | | | a | |
| Threat | R | | | | | â | |
| Issue | U | | | | | 8 | |

IMPORT AND EXPORT

You can import and export risks in the project register.

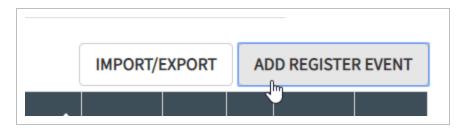
There are options for Oracle PRA – Pertmaster as well as Deltek Acumen. These are Excel formats that can also be generated outside of any tool and used for importing into Schedule.

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.

| | | | | | | | | | | [| | ۹ | | | |
|--|--------------|-----------------------|----------------------|------------------|----------|---|--|--|---|----------------------|------------------------------|--|---------------|---|---|
| Dur | s | Score | Mitigation | Status | | Activities | Created By | | / | Verifi | | | | | |
| | | | Test desc | Closed | • | | robin martin | | | | \otimes | A | | | |
| h 🕨 Verv High | | 25 | 🖬 azadhfa | Mitigated | + | | Jonathan Bo | | | | \otimes | | | | |
| Select File Format mport new or updated | | eir associations to | o activities. | | \times | 0 | Srimvasa Bh | | | | \otimes | | | | |
| | | | | | | 9 | Kim Scott | | | | \otimes | | | | |
| nport Type InEight Schedule | • | Dot | wnload InEight Sched | lule Excel Templ | late | | | | | | | | | | |
| | Drop file he | e to upload Browse | or click to | | | | Kim Scott | | | | 8 | | | | |
| | | | c | ancel Imp | / Ris | k Register 🗸 | PROJECT REGISTER EVEN | s | | ° © | | | | | |
| | | | | | | | 15 Bri | n Miki • | (<u>s</u> s_ | Publish | Export Registe | r Events its and their associations to activities | × | | |
| | | | | | s | | 12 Na | e St. J. | (10к) | · • | Export Type InEight Schedule | * | | | |
| | | | | | | 2 OPTIONAL 3 VALIDATE 4 IGNORED Notes: 1. Event ID 2. When a | must be unique Event is deleted, all event arges can import which fire Trate Text 236 | t ata available in assignments will ds are editable i | l be removed fr in the Register Type Text: 10 256 | General", "Idea", "S | thedule Change Regu | Cost risk mapping Misgat | Cancel Export | G | H Score (Taport On 7, Vent 255 |

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.

| T | | | | | | | | | IMPORT/E | XPORT | AD | O REGISTER | REVENT |
|--------|----|------|-------------|------------|-------------|--------------------|----------------|---------|----------|-------|----|------------|--------|
| Active | Id | Туре | 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.

| 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 | |

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.

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.

| Event Id | Title | % | | Dur | \$ | | Score | Mitigation | Status | Act |
|----------|----------------------------|---------|---|------------------------------------|------------------------|---------------------|-------|-------------|---------------|-----|
| G1 | Threat K | Ultra H | gh 🕨 | Ultra High 🕨 | Ultra H | igh 🕨 | 81 | ttyttrtrurt | Unmitigated 🕨 | |
| 32 | General Plan | tra H | gh 🕨 | Medium 🕨 | Low | Þ | 45 | Lorem ips | Closed + | |
| 33 | Threat P! | Lov | Add re | egister event | | | | | × | ٦ |
| 35 | General Pla | | • | Threat 🔻 | * Title (requ Title | ired) | | | | |
| 36 | General Opportu High | | Ger Idea Issu | 3 | |)ptional criptio | , | | 200 |) |
| GENERAL3 | General Risk register | | | oortunity edule Change I eat | Request | | | Car | Add | |
| BENERAL4 | 10/19 | | | | | | | ■ M1 | Unmitigated 🕨 | |
| 11 | think ah | | Cus TP⁻ | tom Type 1 Type | | | | D M1 | Closed + | |

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 | s to re-design | | | SCORE |
|---------------------|----------------|------|-----------|-------|
| ID | Prob. | Dur. | Cost | |
| R5 | × | 0 | 10 | |

- Probability: Likeliness of the listed event to occur and impact the schedule.
- Duration: Estimated days increased or decreased due to the event
- · Cost: Estimated cost associated with the event
- Score: System generated value based on the Probability, Duration, and Cost Factors involved

EVENT VALUES

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.

| D2 | Events Library | | |
|-----------------------------|--|---|---|
| | events Librar | 1 | |
| Smart Suggestions | Project | Knowledge Library | |
| | | | |
| | | | |
| | | | SCORE |
| | | | |
| × | 0 | 0 | |
| n will a sead an sine scien | tim sfra m a | | SCORE |
| | | 642 | 30046 |
| × | 0 | 0 | |
| to re-design | | | SCORE |
| Prob. | Dur. | Cost | |
| × | 0 | 0 | |
| | | | |
| | | | |
| | Prob. X n will extend engineering Prob. X to re-design Prob. | Prob. Dut. X 0 n will extend engineering timeframe Prob. Dut. X 0 to re-design Prob. Dut. | X O O n will extend engineering timeframe |

- 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 registe | er event |
|---------------------------------|-----------------------------|
| ● Threat 🔹 | * Title (required) Title |
| • Threat | A |
| Opportunity | |
| Issue | |
| Idea | |
| Schedule Cl | hange Request |
| • Test | |
| Test | :t |
| 0000-231th | • |

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 | + |
|----------|--------------------------|-------------------|--------------------------|---|
| | | | | |
| | | | | |
| | | | | |
| Diale | Additional Cure days due | | ulting in Cohedule Delev | |

- 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 of Additio | nal Cure days due to Cold Te | emperatures resulting i | n Schedule Delay | SCORE |
|-------------------|------------------------------|-------------------------|------------------|-------|
| ID | Prob. | Dur. | Cost | |
| R2 | × | 0 | | |

| Risk | | | | |
|---------------------|----------------------------|--------------------------|------------------|-------|
| 🕴 Risk of Additiona | al Cure days due to Cold T | emperatures resulting ir | n Schedule Delay | SCORE |
| ID | Prob. | Dur. (i) | Cost | 6 |
| R2 | 50% | 30d | \$10K | 0 |

8. Close when finished.

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 |

| Range | Score |
|----------------|-------|
| 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 project view from the first level drop-down menu in a project, and then select a WBS element.

| Select an Annotation 🔻 🤇 | ● = | ®/ = | 1 | | | | | T | 🎯 🔍 💉 🗗 🗗 🖶 | ۹ (|
|---------------------------------------|---------|----------|-------------|-------------|-----------|------------|--------|---|-------------------------|-----|
| | | | | | | 2021 | - 2025 | - | ID | |
| ID - Description | Actions | Register | Start Date | Finish Date | Remaining | 2021 | 2022 | | SCHED_CC | |
| Commercial Construction | / | | 26 Apr 2021 | 22 Sep 2022 | 36 | Data Date | | | Description | |
| ∧ General Conditions | /- | | 26 Apr 2021 | 18 May 2021 | 17 | - | | | Commercial Construction | |
| Receive notice to proceed and sign c | · ··· | | 26 Apr 2021 | 28 Apr 2021 | 3 | | | | Default Calendar 😯 | |
| Submit monthly requests for payment | ••• | | 29 Apr 2021 | 29 Apr 2021 | 1 | * | | | Project Default | |
| Obtain building permits | | 1 | 29 Apr 2021 | 4 May 2021 | 4 | * | | | Floject Deladit | |
| Prepare and submit schedule of values | ••• | | 5 May 2021 | 6 May 2021 | 2 | H | | | Count Discusion | |
| Prepare and submit project schedule | ••• | • | 3 May 2021 | 4 May 2021 | 2 | -+ | | | Smart Planning | |
| Submit preliminary shop drawings | ••• | | 5 May 2021 | 18 May 2021 | 10 | | | | Knowledge Tags | |
| Submit bond and insurance docume | | | 29 Apr 2021 | 30 Apr 2021 | 2 | | | | | |
| ∧ Long Lead Procurement | ••• | | 30 Apr 2021 | 5 Aug 2021 | 70 | | | | Project Register | |
| Submit shop drawings and order lon | | | 19 May 2021 | 1 Jun 2021 | 10 | → ● | | | Delegation | |
| Submit shop drawings and order lon | | | 19 May 2021 | 1 Jun 2021 | 10 | | | | Delegation | ~ |

2. In the rightmost panel, expand project register, and click **Add event**. This causes a dialog box to pop up, showing any currently existing register items. New items can be added by selecting the

item type, and typing in the event, cause, and effect.

| | 2021 - 202 | LD 2.5 | |
|-------------------------|--|--------------------|--|
| Submit shop drav 2.5 | vings and order long lead items - electric | × Description | |
| | | Submit shop drawin | ngs and order long lead items - electric |
| | | Calendar | |
| Add new regi | ster event | ✓ Project Default | |
| | * Title (required) | Constraint | |
| Fhreat • | Title | None - | |
| | Description (optional) | Smart Plannin | g |
| | Enter description | Logic | |
| | Cle | Add Knowledge Ta | gs |
| Existing regis | ter events | Project Registe | er |
| Suggested re | gister events | > | Add Event |
| | - | Delegation | |
| | | Resource Assig | |

3. Press 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.

| Site access delated access delate | | | | | |
|---|-------|-------------------|----------------|-------------------|---------|
| | | | | | SCORE |
| ID | ۲ | Prob. | Dur. | Cost | 9 |
| R2 | | 50% | 30d | \$100K | |
| | | | | | |
| | | | Events Library | | |
| | - | Smart Suggestions | Project | Knowledge Library | |
| Risk | | 6. | | | |
| | | | | | |
| Site access d | elays | | | | SCORE |
| | elays | Prob. | Dur. | Cost | SCORE |
| Site access d ID R1 | elays | Prob. | Dur. | Cost | SCORE |
| ID | elays | | | | SCORE |
| ID | elays | | | | SCORE + |

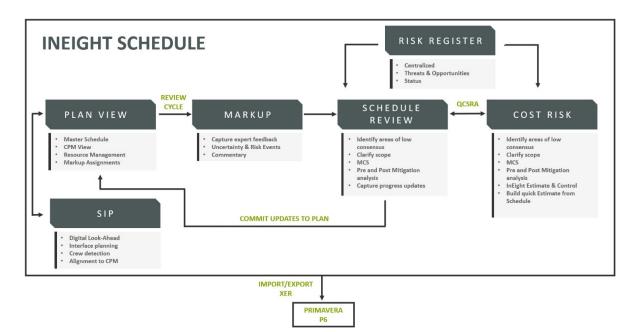
• An item has now been added to this WBS element.

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.

| ⊖ Ir | iterior | 25 Mar 21 26 Aug 21 | 155 | 111 | 0% | | ••• | 2/ | 03 Dec 21 |
|------|---------------------------|------------------------|-----|-----|----|---|------|----|-----------|
| ÷ | Floor 1 | 25 Mar 21 26 Aug 21 | 155 | 111 | 0% | | •••• | 2/ | 03 Dec 21 |
| 0 | Floor 2 | 25 Mar 21 31 May 21 | 68 | | 0% | | •••• | 2/ | 07 Sep 21 |
| • | Floor 3 | 14 May 21 20 Jul 21 | | | 0% | | •••• | 2/ | 27 Oct 21 |
| | Electrical Rough-in | 14 May 21 27 May 21 | 10 | 10 | 0% | 0 | ••• | 2/ | 03 Sep 21 |
| | Finishes - Drywall | 11 Jun 21 02 Jul 21 | 16 | 16 | 0% | 0 | | 21 | 09 Oct 21 |
| | Finishes - Final Paint | 13 Jul 21 20 Jul 21 | 6 | 6 | 0% | 0 | | 2/ | 27 Oct 21 |
| | Finishes - Lighting Insta | 05 Jul 21 12 Jul 21 | 6 | 6 | 0% | 0 | ••• | 2/ | 19 Oct 21 |
| | Plumbing Rough-in | 28 May 21 10 Jun 21 | 10 | 10 | 0% | 0 | | 2/ | 17 Sep 21 |
| o s | tructure | 15 Dec 20 28 Jun 21 | 196 | 140 | 0% | | •••• | 2, | 05 Oct 21 |

11.1 INEIGHT SCHEDULE WORKFLOWS 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.

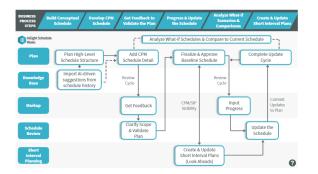


INEIGHT CONTROL GENERAL WORKFLOW



SCHEDULING & SHORT INTERVAL PLANNING WORKFLOW

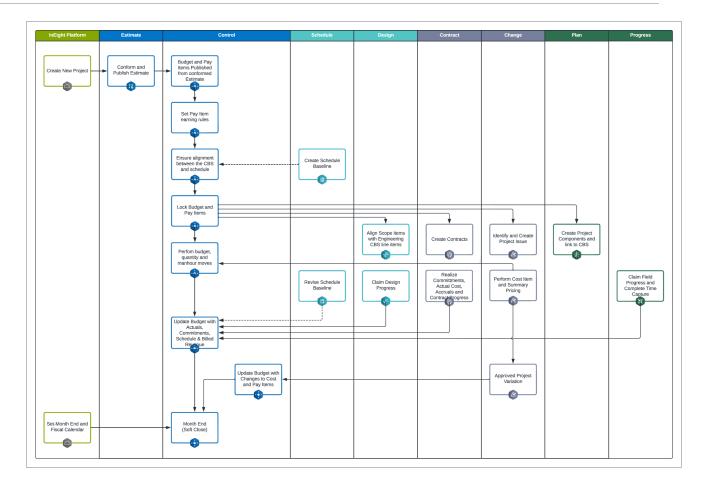
This interactive workflow looks at the key functions of InEight Schedule through the lens of a typical scheduling business process. As you click on each business process step, the workflow highlights the key functions involved, along with the InEight Schedule view you would use for that step.



SCHEDULING & SHORT INTERVAL PLANNING BUSINESS PROCESS

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.

| a | A | B Field not to be populated | С | D | E | F |
|----|-----------------------------|---------------------------------------|--------------------------|-----------------------------------|---------|------------------------------|
| * | Notes: | rield not to be populated | | | | |
| | Notes: | | | | | |
| | 1. To condute a logic link? | Type, you must delete the existing lo | ale link and second a se | | | |
| | 2. Lags can be both posit | | gic link and create a se | parate row for the new logic link | type | |
| | | Predecessor Activity Description | Successor Activity ID | Successor Activity Description | Lag | Type |
| 7 | Text | Text | Text | Text | Numeric | Text: "FS", "FF", "SF", "SS" |
| 8 | 256 | 256 | 256 | 256 | | 2 |
| 9 | A1430 | Install Spool 3 | A1540 | Complete Line A | 0 | FS |
| 10 | A1530 | Start Line A | A1410 | Install Spool 1 | 0 | SS |
| 11 | A1510 | Spool 5 | A1520 | Spool 6 | 0 | FS |
| 12 | A1500 | Spool 4 | A1510 | Spool 5 | 0 | FS |
| 13 | A1490 | Spool 3 | A1500 | Spool 4 | 0 | FS |
| 14 | A1290 | Mechanical O | A1270 | Mechanical B | 0 | FS |
| 15 | A1200 | Electrical "L" | A1190 | Electrical "B" | 5 | FS |
| 16 | A1280 | Mechanical L | A1290 | Mechanical O | 6 | FS |
| 17 | A1260 | Mechanical S | A1230 | Electrical "K" | 0 | FS |
| 18 | A1200 | Electrical "L" | A1210 | Electrical "O" | 0 | FS |
| 19 | A1230 | Electrical "K" | A1240 | Electrical "S" | 0 | FS |
| 20 | A1310 | Mechanical K | A1260 | Mechanical S | 0 | FS |
| 21 | A1270 | Mechanical B | A1190 | Electrical "B" | 40 | FF |
| 22 | A1290 | Mechanical O | A1210 | Electrical "O" | 40 | FF |
| 23 | A1280 | Mechanical L | A1200 | Electrical "L" | 40 | FF |
| 24 | A1260 | Mechanical S | A1240 | Electrical "S" | 40 | FF |
| 25 | A1310 | Mechanical K | A1230 | Electrical "K" | 40 | FF |
| | < → WBS A | tivity Logic Codes WBS UD | Fs Activity UDFs | Resource Assignments (+ | | |

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 Options** menu.

| | | | | | 1.4 | | | | | | | | | | | | | | | | |
|-----------------------|-------------------|-------------|-----|-------------|------------|------|-----|-----|----------|-----|-------|-----|------|-----|------|-----|-----------|----------|-----|------|-----|
| Spool 1 | 26 Jan 2024 A | 25 Oct 2024 | 196 | A1380 | | | | | | | | | | | | | - | o | | | |
| Spool 2 | 28 Oct 2024 | 7 Jul 2025 | 181 | A1390 | | | | | | | | | | | | | - | _ | - | | |
| Spool 3 | 8 Jul 2025 | 23 Mar 2026 | 185 | A1400 | | | | | | | | | | | | | | | | | |
| ↑ 60% DESIGN COMPLETE | 26 Jan 2024 | 18 Apr 2024 | 60 | SCHED-13.E. | 2 | | | | _ | _ | _ | | | | | | | | | | |
| | | | | | 2.1 | | | | | - | _ | | | | | | | | | | |
| | 19 Apr 2024 | | | SCHED-13.E. | 3 | | | | | | | | | | | | | | | | |
| | | | | | 4 | | | | | | | | | | | | | | | | |
| ∧ STRUCTURAL | 26 Jan 2024 | 21 Nov 2024 | 215 | SCHED-13.1 | | | _ | | _ | _ | _ | _ | | _ | _ | _ | _ | _ | | | |
| | | | | | , | 023 | | | | | | | 202 | 4 | | | | | | | |
| | | | | | Planned | lov | Dec | Jan | Feb | Mar | Apr | May | | Jul | Aug | Sep | 0/1 | Nov | Dec | Jan | Feb |
| ∧ All Resources | | | | | 1440 Units | 140 | | | Data Dat | _ | - Apr | | 3011 | | 1106 | oop | | | | 3011 | |
| A Labor | | | | | 1440 Hours | 100 | | _ | | - | | | | | | | | | | | |
| PIPING ENGINEERS | | | | | 1440 Hours | 120 | | _ | | | - | | | | - | | - | | _ | - | |
| | | | | | | 110 | | _ | | | | | - | | | | | | | | |
| | | | | | | 100 | | _ | | | | | | | | | | | | | |
| | | | | | | -90 | | _ | | | | | | | | | | | | | |
| | | | | | | -00 | | _ | | | | | | | | | | | | | |
| | | | | | | -70 | | _ | | | | | | | | | | | | | |
| | | | | | | - 60 | | _ | | | | | | | | | | | | | |
| | | | | | | -50 | | _ | | | | | | | | | | | | | |
| | | | | | | -10 | | _ | | | | | | | | | | | | | |
| | | | | | | - 30 | | _ | | | | | | | | | | | | | |
| | | | | | | 20 | | - | | | | | | | | | | | | | |
| | | | | | | 10 | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | |

I've set up groupings, filters, and column sets in my Plan view. How can I save them?

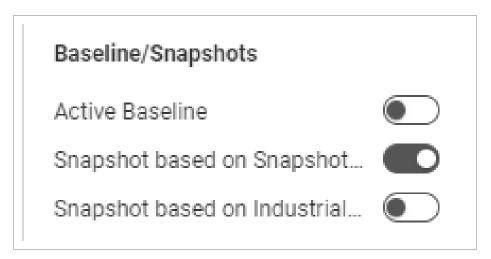
If you've customized your Plan view by applying groupings, filters or columns sets, you can save the view by selecting **Views** from the left toolbar and selecting **Save current view**.

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.

| Baseline/Snapshot Ma | anagement | | | |
|---|--|--|--|---|
| Active Baseline Baseline based on Revert to default | e 🔒 Industrial Plant - Bas | eline: Laura Koonce | e - 4 Apr 2024 | |
| Snapshot 1 | n Snapshot 05APR24 | : Laura Koonce - 10 | Apr 2024 | |
| Unassign schedule | | | | \otimes |
| | | | | |
| Unassign schedule | n Industrial Plant - Wh | | oonce - 10 Apr 202 | 4 |
| Unassign schedule | n Industrial Plant - Wh | | oonce - 10 Apr 202 Snapshot 1 | |
| | n Industrial Plant - Wh | f current schedule | | ⊗ |
| Unassign schedule | n Industrial Plant - Wh above, or <u>Create copy o</u> Current Schedule | f current schedule Active Baseline | Snapshot 1 | Snapshot 2 |
| Unassign schedule Set or overwrite snapshot Data Date | a Industrial Plant - Wh above, or <u>Create copy or</u> Current Schedule 26 Jan 2024 | f current schedule Active Baseline 26 Jan 2024 | Snapshot 1 15 Feb 2024 | Snapshot 2 9 Feb 2022 74 |
| Unassign schedule Set or overwrite snapshot Data Date Number of Activities | a Industrial Plant - Wh above, or <u>Create copy of</u> Current Schedule 26 Jan 2024 75 | f current schedule Active Baseline 26 Jan 2024 66 | Snapshot 1 15 Feb 2024 75 | Snapshot 2 9 Feb 2024 74 26 Jan 2024 |
| Unassign schedule Set or overwrite snapshot Data Date Number of Activities Start Date | a Industrial Plant - Wh above, or <u>Create copy or</u> Current Schedule 26 Jan 2024 75 26 Jan 2024 | Active Baseline 26 Jan 2024 66 26 Jan 2024 | Snapshot 1 15 Feb 2024 75 26 Jan 2024 | Snapshot 2 9 Feb 2024 |

Once designated, you can select which snapshots to include in your view by selecting them in the View Options menu.



You can then compare the activities of each schedule next to each other in the Gantt chart.

| ∧ PIPING | | 26 Jan 2024 🗛 | | 562 | |
|-----------|-----|----------------------|-------------|-----|--------|
| Spool 1 | ••• | 26 Jan 2024 A | 25 Oct 2024 | 196 | A1380 |
| Spool 2 | | 28 Oct 2024 | 7 Jul 2025 | 181 | A1390 |
| Course to | | o tutooor | | 205 | 43.400 |

See Also:

Baseline/Snapshot

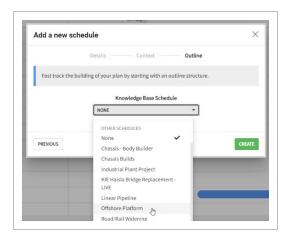
How can I store past schedules to be used as templates?

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**.

| CPM SCHEDULES | ACTIVITY PRODUCTI | VITY RATES KNOV | VLEDGE TAGS | CALENDARS | REGISTER | RESOURCES | MACHINE LEARNING |
|------------------------|---------------------------|------------------------|-------------|-------------|-------------|-------------|------------------|
| | | | | | | | Ŭ |
| Schedules \downarrow | | Schedule ID | | Start | Finish | Data Date | Verified |
| 🔋 30% Design C | omplete - MST | SCHED | ÷ | 26 Jan 2024 | 23 May 2024 | 26 Jan 2024 | • |
| 50% Design C | omplete - MST | SCHED-8 | : | 26 Jan 2024 | 8 May 2024 | 26 Jan 2024 | • |
| AIAL_DP001_ | L00_REVC_23 Feb 24 - Cos. | . DP.001.93343.4.501-3 | ÷ | 31 Oct 2022 | 15 Feb 2029 | 23 Feb 2024 | • |
| Chassis - Bod | Builder | SCHED-1 | : | 26 May 2021 | 8 Sep 2021 | 26 May 2021 | • |
| Chassis Build | | SCHED-2 | : | 26 May 2021 | 26 May 2021 | 26 May 2021 | • |
| Combined Cyc | le Estimate Schedule | CC Power Plant Bid | : | 2 Oct 2023 | 20 Oct 2026 | 2 Oct 2023 | • |
| Commercial B | uilding | SCHED-3 | : | 12 Jun 2018 | 17 Feb 2021 | 12 Jun 2018 | • |
| FC - MST | | SCHED-9 | : | 19 Apr 2024 | 19 Aug 2024 | 26 Jan 2024 | • |
| Industrial Plan | t Project | SCHED-10 | : | 26 Jan 2024 | 28 Aug 2026 | 9 Feb 2024 | • |
| 📴 KIE Haisla Brid | ge 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.

| Smart Plan | ning | ^ |
|----------------------------|--|---|
| ⊒ Q | | |
| Work Packag Parking Lot | Manually interrogate the Schedule doesn't give suggestion. | he Knowledge Base if you the correct |
| | • | ß |
| | | |
| Schedule Sug | gestions | |

See Also:

Knowledge Base

Can InEight Schedule integrate with other InEight applications?

InEight Schedule currently includes import/export functionality to share schedule data between applications via Microsoft Excel and .XER files. Development is underway to more tightly integrate InEight Schedule with other applications including InEight Estimate and InEight Plan.

What is the difference between Short Interval Planning (SIP) resources and resources?

Resources used for scheduling in the Plan view are for considering durations, productivity and costs for the entire CPM schedule for the project and are assigned at the higher activity level.

SIP resources represent the labor, equipment and materials tracked on look-ahead schedules managed by the field team. These look-ahead or short interval plans break schedule activities down into the day-to-day steps to execute the work in the field and track the SIP resources at the step or task level.

Is there a standardized fill-down option in InEight Schedule?

Yes, there is a fill-down feature for calendars, codes and resources, where you can specify a value at a summary level and have it apply to the child elements below it. You access the Fill down feature by clicking on the Actions ellipses of your summary level item.

See Also:

Project Resources

How do we manage multiple schedules with external relationships?

InEight Schedule does not support a program level of schedule management, where distinct schedules for different projects are managed under a single program and have external relationships between them. You can still manage multiple schedules with relationships between them, however, by importing the individual schedules into one "master" schedule and then establishing logic links between them as needed.

Use Case 1: InEight Schedule only

Publish each schedule to the Knowledge Base, then add WBS items representing each schedule and import the corresponding schedule from the Knowledge Base for each WBS item using the Smart Planning feature.

Use Case 2: InEight Schedule and Primavera

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

Can we copy/paste data from the InEight Schedule Plan view to Excel?

You can send data from the InEight Schedule Plan view to Excel using the **Column Set Builder** and the Export feature. From the Column Set Builder Menu, select the Column Set Builder to specify

what columns you would like to include for exporting to Excel.

| Fir C | olur | nn Set Builder - Unsave | d Colum | n Set | | | | > |
|-------|--------|--------------------------------|------------|-------|-------|----------------------|----------|---|
| | olumr | n set name | | | | | | |
| e | New | Column Set (2) | | | | | 🚫 Delete | |
| A | vailab | le columns 🛛 Display by | / group | Se | lecte | ed columns | | |
| | Sea | irch | Q | | Sea | arch | Q | |
| | | Column name | | → | | Column name | | |
| | - 0 | COST | | | | ID - Description | A | |
| | | | | | | Actions | | |
| | | Cost | | | | | | |
| | | Actual Cost | | | | Start | | |
| | | Baseline Actual Cost | | | | Finish | | |
| | | SN 1 Actual Cost | | | | At Complete Duration | | |
| | | SN 2 Actual Cost | | | | | | |
| | | Baseline Cost | | | | | | |
| | | SN 1 Cost | | | | | | |
| | | SN 2 Cost | - . | | | | | |

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.

| (+) • | \otimes | 🕀 🗂 Move schedules 🗈 🕢 | ∂ Li | nk project 🔗 Unlink | project | F | |
|--------------------|-----------|-----------------------------|------|---------------------|------------------|---------------|--|
| | | | | | Import schedules | | |
| | | Name | T | Schedule ID | T | Project Suite | |
| | | Chinery Pipeline | | | | | |
| | | ► DC Inc. | | | | | |
| | | ▼ E&T Schedules | | | | | |
| | 6 | Construction Phase Schedule | | SCHED-57 | | | |

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

| Resources Include Resources | |
|--------------------------------|--------------|
| | |
| Resource Codes to Import (0/0) | \sim |
| UDFs | |
| Project UDFs to Import (0/1) | \sim |
| Activity UDFs to Import (0/2) | \checkmark |
| WBS UDFs to Import (0/2) | \checkmark |
| Resource UDFs to Import (0/2) | ~ |
| Import historical data from: ① | |
| | |

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.

| Ξ | | Nate Co. / Schedule | | | | |
|----------|-----------|------------------------------------|------|--|---|-----|
| . | \otimes | Here Schedules 🗈 🖬 | ∂ Li | ² Link project & Unlink project | | |
| | | Name | Ŧ | Schedule ID | Ŧ | Pre |
| | | Blocks Project | | | | |

In the future, the schedule workspace will be created automatically when an InEight Platform project is created.

See Also:

Advanced Work Packaging