⬡ TIE ESTIMATE DATA TO SCHEDULE
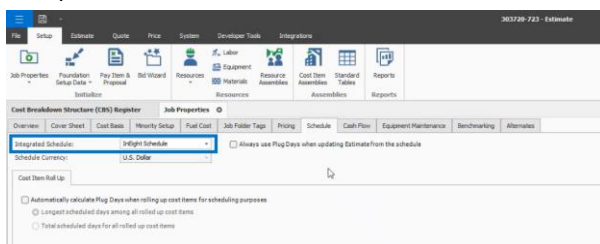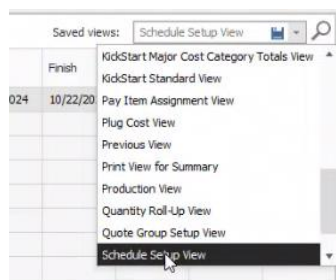
1. From InEight Estimate, go to the Job Properties > Schedule tab.

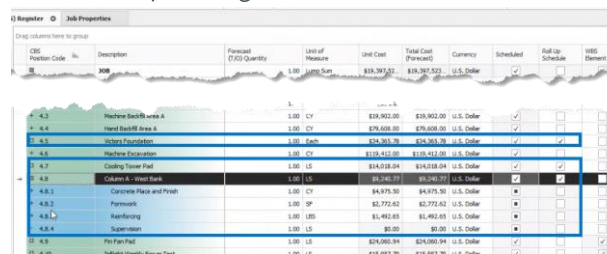2. Select InEight Schedule from the Integrated Schedule drop-down.

3. Click **OK**.

4. Return to the CBS and change the view to "Schedule Setup View."

5. From the Schedule column, select the items to add to InEight Schedule.
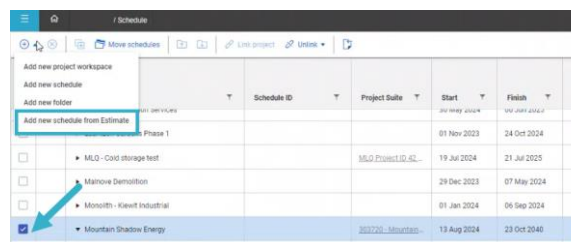

6. Select the checkboxes for the desired items you want to have rolled up in InEight Schedule.
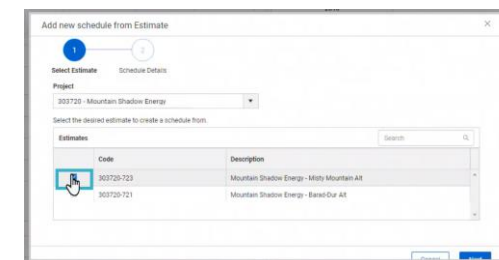

7. Click **Save**.
   • This is the trigger to send the refreshed data over to Schedule.

⬡ ADD NEW SCHEDULE FROM ESTIMATE

1. Within InEight Schedule, select the checkbox for the desired project workspace.

2. Select the **+ Add** button and then **Add new schedule from Estimate**.

3. Select the corresponding core project, and then the appropriate Estimate.

4. Click **Next**.

5. Optionally, select the appropriate Folder and then set the default calendar working days.

6. Click **Create**.
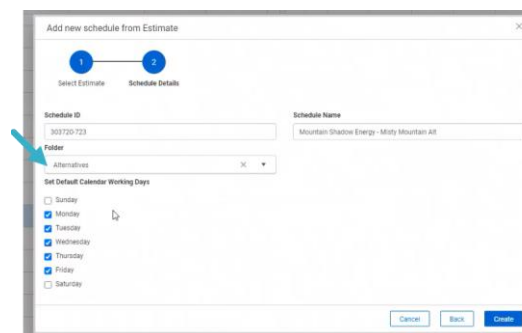
• That schedule is created, bringing in everything selected and opens up on the Schedule side.

• NOTE: your calendar hours per day in Schedule must lineup with your work hour shift arrangement in Estimate > Job Properties > Cost Basis for it to be a 1-to-1 calculation.
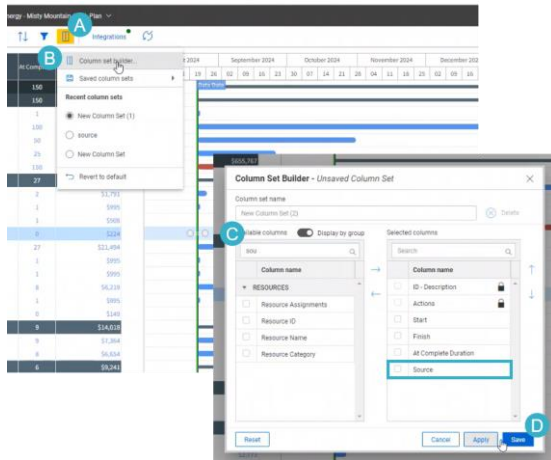
IDENTIFY THE SOURCE IN SCHEDULE

1. On the Menu Builder, select the **Column Set Builder** icon.

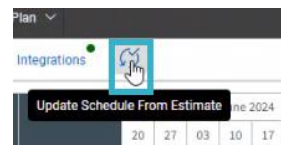2. Ensure the **Source** column is added.

3. Click **Save**.

- As a result, the Source column indicates if the data is coming over from Estimate or Schedule.
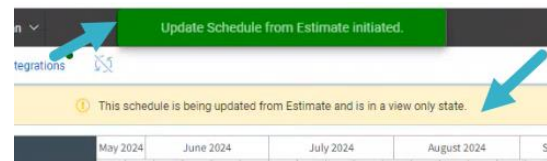

UPDATE SCHEDULE FROM ESTIMATE

Use this step when you're ready to update your schedule with costs and durations from the estimate.

1. Return to Schedule and click the **Update Schedule from Estimate** icon.
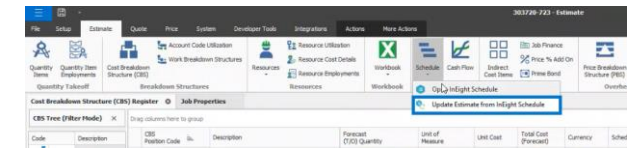

- A dialogue box and pop-up appear.

- Now you can begin tying that logic together so you can start scheduling your job.

UPDATE ESTIMATE FROM SCHEDULE

Use this step when you're ready to update your estimate with dates from the schedule.

1. Back on the Estimate > Schedule tab, select **Update Estimate from InEight Schedule** from the drop-down.

- You can now view the Start and Finish dates in the CBS.

- As a result, you can bring up your cash flow period, to make your cash flow curve.
- These total cost values are also being sent back to Schedule.
- You can perform a cost risk analysis in the tool as well.