QUICK GUIDE CREATE SCHEDULE FROM ESTIMATE DATA

- 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.

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

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0 4.9	,	in Fan Pad	1.00	15	\$24,050.94	\$24,060.94	U.S. Dollar	1		(e
				15	415 (477 m)	A15.047 TO				

- 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.

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Add new schedule Add new folder Add new schedule from Estimate		Ŧ	Schedule ID	Ŧ	Project Suite T	Start Y Jumey 2024	Finish T	
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	Monoith - Kiewit Industrial					01 Jan 2024	06 Sep 2024	
	Mountain Shadow Energy				203720 - Mountain-	13 Aug 2024	23 Oct 2040	

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

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ESTIMATE

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Select Est Project	imate Schedule Details			
	- Mountain Shadow Energy			
Select the	desired estimate to create a schedule f	iom.		
Estimat	es		Search	0,
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- 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.

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.

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	0.8	BS Isation Code In	Description	Forecast (1)(2) Quantity	Unit of Measure	Unit Cast	Total Cest (Porecast)	Currency	Scheduled	Roll Up Schedule	WEG Benera
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			Prime Bond	1.00	Lump Sum	\$0.00	\$0.00	U.S. Doller			
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			Job Financing	1.00	Lump Sum	\$0.00	\$0.00	U.S. Dollar			
e			Job Hanagement & Equipment	1.00	Lump Sum	\$0.00	\$0.00	U.S. Dollar			
			General Expense	1.00	Lump Sum	\$0.00	\$0.00	U.S. Dollar			
et .	=	1	Commercial Cost	1.00	15	\$205,001.00	\$205,001.00	U.S. Dolar	E.1		X
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QUICK GUIDE ESTIMATE | SCHEDULE INTEGRATION



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.

Select an Annotatio	n • 💿	0 3	Views	î↓ ▼	Integ	rations C	5	
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Mountain Shadow Energy - Mi		22 Aug 2024	19 Mar 2025	150	Estimate			
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Hand Backfill Area A		22 Aug 2024	8 Jan 2025	100	Estimate			
Hand Excavation		22 Aug 2024	30 Oct 2024	50	Estimate			
Machine Backfill Area A	***	22 Aug 2024	25 Sep 2024	25	Estimate			
Machine Excavation	***	22 Aug 2024	19 Mar 2025	150	Estimate			
∧ Victors Foundation		22 Aug 2024	27 Sep 2024	27	Estimate			
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Formwork		22 Aug 2024	22 Aug 2024	0	Estimate			
Hand Excavate Sensiti	***	22 Aug 2024	27 Sep 2024	27	Estimate			

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.

n Y		Update Schedule f	rom Estimate initiate	ed.	
tegrations	N.				1
	D This schedu	e is being updated fr	om Estimate and is in a	view only state.	
	May 2024	June 2024	July 2024	August 2024	Seg

• 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.

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

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• 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.