## 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.

D Properties	Foundation Setup Data - Initial	Pay Item & Proposal	Bid Wizerd	Resources	f, Labor Equipment Materials Resources	Resturce Amerities	Cost Iten Assembles Assemb	Standard Tables	Reports Reports			
ost Breakdo	we Structure	(CBS) Regis	ter Jul	Properties	0							
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Automa	tically calculate	Plug Dava wi	ven rolling up co	at items for a	heduling purpo							
	oest schadulad	days among	all collect up con	t tens								

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

Reg	ister O Job Prog	erties								
110	columns here to group									
	CBS Position Cade Im	Description	Forecast (7,0) Quantity	Unit of Neasure	Unit Cost	Total Cout (Forecast)	Currency	Scheduled	Roll Up Schedule	WES Element
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			7		dame. All					
4	+ 43	Machine Backfill Icea A	1.00	CY	\$19,902.00	\$19,902.00	U.S. Dolar	1		
1	+ 44	Hand Backfill Area &	1.00	CY	\$79,608.00	\$79,608.00	U.S. Dolar	2	11	11
	1 45	Victors Foundation	1.00	Each	\$34,365.78	\$34,365,78	U.S. Dollar	4	1	0
1	9 46	Machine Excavation	1.00	CI	\$119,412.00	\$119,412.00	U.S. Dollar	2		
	3 4.7	Cooling Tower Pad	1.00	LS	\$14,018.04	\$14,018.04	U.S. Dollar	2	1	
	2 4.8	Column A - West Bank	1.00	15	\$4,245.77	\$9,24).77	U.S. Dollar		~	
	48.1	Concrete Place and Pinish	1.00	CT	\$4,975.50	\$4,975.50	U.S. Dolar			
	48.2	Pormwork	1.00	9	\$2,772.62	\$2,772.62	U.S. Dollar			
	· 400	Reinforcing	1.00	LES	\$1,492.65	\$1,492.65	U.S. Dollar			
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	0.410	Indialist Iteratily Frances Task	1.00	15	\$15 957 m	\$15 657 20	U.S. folar	121		121

- 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 p	Move schedules roroject workspace chedule schedule from Estimate roti pervices	а   <i>О</i> 1 т	ink project 22 Unlik Schedule ID	*•   C	Project Suite T	Start T somey away	Finish T UU Just 2023	c
-	Phase 1					01 Nov 2023	24 Oct 2024	
	<ul> <li>MLQ - Cold storage test</li> </ul>				MLO Protect ID 42	19 Jul 2024	21 Jul 2025	
	Malnove Demolition					29 Dec 2023	07 May 2024	
	Monoith - Kiewit Industrial					01 Jan 2024	06 Sep 2024	
	Mountain Shadow Energy				202220-Mountain-	13 Aug 2024	23 Oct 2040	
-								

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

+ ×

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ESTIMATE

Select Est	timate Schedule Details			
Event Existence     Social and Andreas       Partel     Image: I				
Select the	e desired estimate to create a schedule fr	om.		
Estimat	tes		Bearch	0,
	Code	Description		
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-0	303720-721	Mountain Shadow Energy - Barad-C	Dur At	

- 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.

	Dra	columns here to group									
		CBS Position Code In.	Description	Forecast (1)(0) Quantity	Unit of Measure	Unit Cost	Total Ceet (Porecast)	Currency	Scheduled	Roll Up Schedule	WES Benera
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			Prime Bond	1.00	Lump Sum	\$0.00	\$0.00	U.S. Doller			E
			Price % Add-On	1.00	Lump Sum	\$0.00	\$0.00	U.S. Oolar	1S		C
1			Job Financing	1.00	Lump Sum	\$0.00	\$0.00	U.S. Dollar			
			Job Hanagement & Equipment	1.00	Lump Sum	\$0.00	\$0.00	U.S. Dollar			1
			General Expense	1.00	Lump Sum	\$0.00	\$0.00	U.S. Dollar			E
4		= 1	Commercial Cost	1.00	15	\$205,001.00	\$205,001.00	U.S. Dollar			
×		C 2	Job Related Overhead	1.00	Stilk	\$6,831,270	\$6,831,270.27	U.S. Dolar			1
		03	Operational Support	1.00	PLS	\$11,548,39	\$11,548,391	U.S. Dollar			2
		II 4	Civil	1.00	Each	\$655,766.71	\$655,766.71	U.S. Dolar	2		2
		u s	Piping Systems	1.00	Each	\$157,093.87	\$157,093.87	U.S. Dolar	1		1

# 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.

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### **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 ~		Update Schedule f	from Estimate initiate	ed.	
tegrations	N.				1
0	D This schedul	e is being updated fro	om Estimate and is in a	view only state. 🎾	0
	May 2024	June 2024	July 2024	August 2024	Sep

• 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.

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- 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.