

# InEight Integration Estimate-Schedule



InEight<sup>®</sup>  
ESTIMATE



InEight<sup>®</sup>  
SCHEDULE



## Changelog

This changelog contains only significant or other notable changes to the document revision. Editorial or minor changes that do not affect the context of the document are not included in the changelog.

Rev	Date	Description
1.0	10-OCT-2024	Initial publication.

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## Introduction

This document provides guidance and requirements for the Estimate and Schedule integration. The purpose of this document is to help you successfully integrate Estimate data with Schedule workspaces, with the objective of planning and managing your estimate.

When you select InEight Schedule as your integrated schedule in Estimate you can do the following:

- Mark your items as scheduled.
- Choose to roll up cost items as needed.
- Sync Schedule's activity changes with your Estimate job.
- Integrate total cost values with Schedule to conduct cost risk analysis.
- Import cost risk items from the Schedule WBS structure created through the Estimate integration to run cost risk simulations.

In Schedule, you can do the following:

- Add Estimate schedules to workspaces.
- Sync changes made to the Estimate job.
- Conduct cost risk analysis with Estimate's total cost values.
- Run cost risk simulations using cost risk items from the Schedule WBS structure created through the Estimate integration

## Set scheduling options in Estimate

Prior to sending data to Schedule, the proper settings must be in place in the Estimate job properties.

- **Overview tab** – The estimate must be linked to a Platform project. You can select a Platform project in the Project ID field.

- **Schedule Tab** – You must select InEight Schedule as the integrated schedule. At the top of the Schedule tab, in the Integrated Schedule drop-down, select **InEight Schedule**.
  - The Always use Plug Days when updating Estimate from the schedule checkbox is not selected by default. On a job by job basis, you can select this feature later for jobs in which an estimator does not want updates from Schedule to change the duration and therefore the cost of your cost items in InEight Estimate.

- **Cost Basis tab** – In Cost Basis > **Standard Shift Arrangements** section, the days and work hours configuration must match Schedule’s calendar days and work hours setup so that your plug day durations align.

## Schedule cost items

Before you can integrate with Schedule, your cost items need to be marked as scheduled on the Cost Breakdown Structure (CBS) Register. You can view all of your schedule-related columns by selecting the **Schedule Setup View** from your Saved Views drop-down list in the CBS.



In the Scheduled column, you can select the CBS items to be included in your schedule. The Roll Up Schedule column lets you select which estimate items to roll up to the selected level when it imports into Schedule.

Drag columns here to group

CBS Position Code	Description	Scheduled	Roll Up Schedule	Schedule Plug Days	Plug Days
	<b>JOB</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	238.00
	Prime Bond	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0.00
	Price % Add-On	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0.00
	Job Financing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0.00
	Indirect Cost Escalation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0.00
	Direct Cost Escalation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0.00
	Indirect Cost Add-On	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0.00
	Direct Cost Add-On	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0.00
1	<b>SITework &amp; ROADWAY</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	107.00
2	<b>WATER &amp; SEWER</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	85.66
2.1	36 Inch RCP Culvert Class III	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	23.66
2.2	10 Inch PVC Force Main (SDR21)	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	45.00
2.3	24 Inch PVC Gravity Sewer (SDR35)	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	45.08
2.4	4 Foot Diameter Manhole	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	17.00
3	<b>STRUCTURAL CONCRETE &amp; BRIDGES</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	147.46
4	<b>INDUSTRIAL &amp; REMEDIATION</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	58.54
5	<b>COMMERCIAL</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	20.00
6	<b>GUARDRAIL &amp; SIGNING</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	6.00
7	Indirect Costs	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	238.00
8	Special Risk Allowance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0.00

To schedule cost items, in the Scheduled column, select the checkbox for each cost item that you want to schedule. When a cost item has subordinate cost items, selecting the superior cost item automatically schedules the subordinate cost items.

Your scheduled cost items will import into Schedule the next time you select to add a new schedule from Estimate in Schedule.

In the image below, you can see that all of the cost items are scheduled, but the subordinates for WATER & SEWER will be rolled up to the superior level.

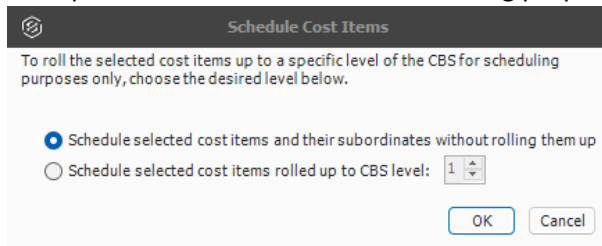
CBS Position Code	Description	Scheduled	Roll Up Schedule
1	SITWORK & ROADWAY	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2	WATER & SEWER	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2.1	36 Inch RCP Culvert Class III	<input type="checkbox"/>	<input type="checkbox"/>
2.2	10 Inch PVC Force Main (SDR21)	<input type="checkbox"/>	<input type="checkbox"/>
2.3	24 Inch PVC Gravity Sewer (SDR35)	<input type="checkbox"/>	<input type="checkbox"/>
2.4	4 Foot Diameter Manhole	<input type="checkbox"/>	<input type="checkbox"/>
3	STRUCTURAL CONCRETE & BRIDGES	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4	INDUSTRIAL & REMEDIATION	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5	COMMERCIAL	<input checked="" type="checkbox"/>	<input type="checkbox"/>
6	GUARDRAIL & SIGNING	<input checked="" type="checkbox"/>	<input type="checkbox"/>
7	Indirect Costs	<input checked="" type="checkbox"/>	<input type="checkbox"/>

### Schedule multiple cost items

You can schedule multiple cost items by doing the following:

1. Highlight the row for each cost item that you want to schedule.
2. Use the Shift and Ctrl keys to select multiple rows. To select all cost items, highlight the **JOB** row.
3. Right-click on the selected rows, and then select **Schedule Selection**.

4. In the Schedule Cost Items dialog box, select whether you want to roll up the selected cost items to a specific level of the CBS for scheduling purposes, and then click **OK**.



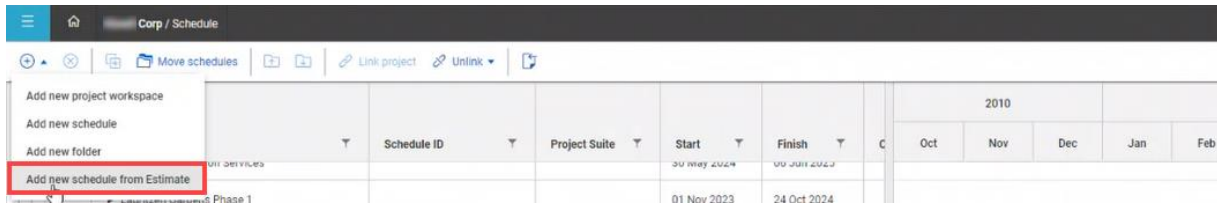
Your scheduled cost items sync the next time you select to add a new schedule from Estimate in the Schedule application.



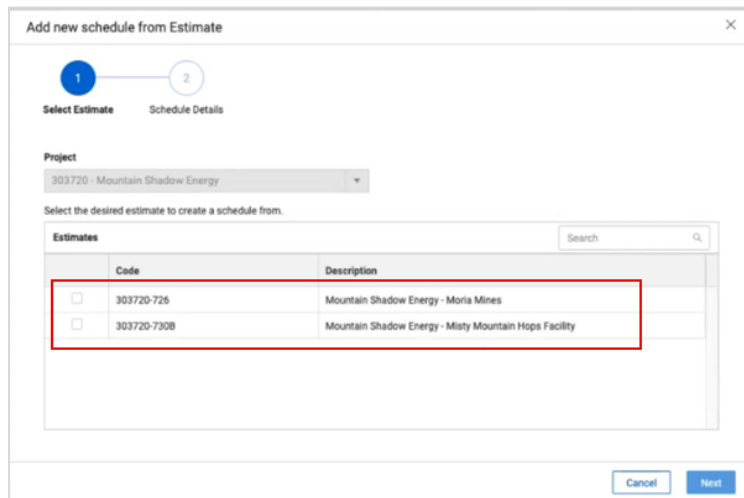
## Add new schedule from Estimate in Schedule

With the scheduled items selected in Estimate, in Schedule you can add a new schedule to the workspace project linked with your estimate. The Platform project must be associated to a workspace in Schedule.

Go to the corresponding workspace in Schedule for the project selected in Estimate. Click the **Add** icon, and then select **Add new schedule from Estimate**.



The Add new schedule from Estimate dialog box opens and shows the active estimates available that are specific to the project. Select an estimate, and then click **Next**.

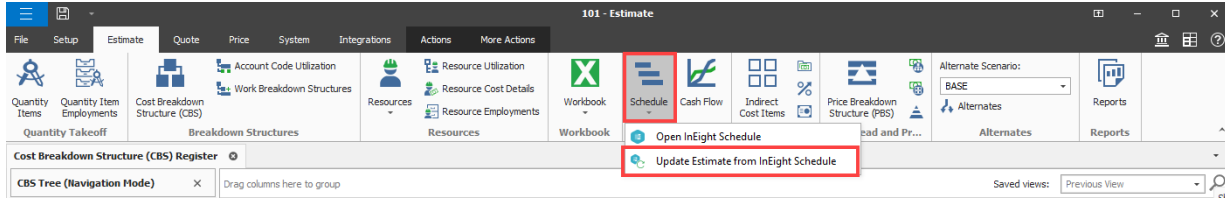


The Schedule ID and Schedule Name fields are populated with the Estimate job you selected. You can choose where to save the estimate in the available workspace folders and select the calendar working days. Click **Create**.

After the new schedule is created, you can open it from the workspace and start to add activity relation logic to your items to schedule the job. For example, you can select a terminal cost item where the Source is in Estimate and make changes to it as you would any other activity, except for read-only fields (e.g., ID, Description, Cost values), which cannot be edited in Schedule. Items synced that show *Estimate* as the source cannot be deleted.

## Update Estimate from Schedule

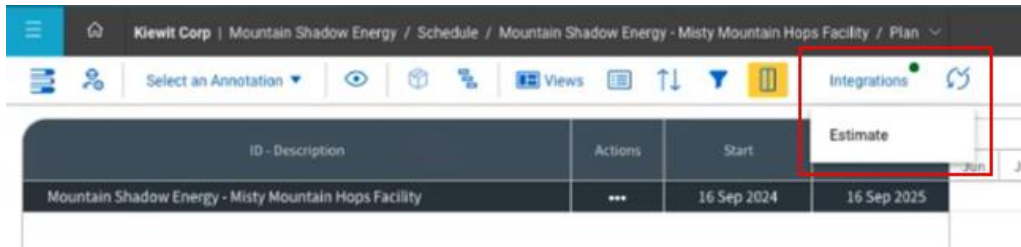
After activity relation logic updates have been made in Schedule, you can sync updates to your Estimate job. In the Estimate tab, click Schedule > **Update Estimate from InEight Schedule** to sync changes.



The Estimate job is updated with Schedule’s activity relation logic changes, updating all start and finish dates and plug days.

## Update Schedule from Estimate

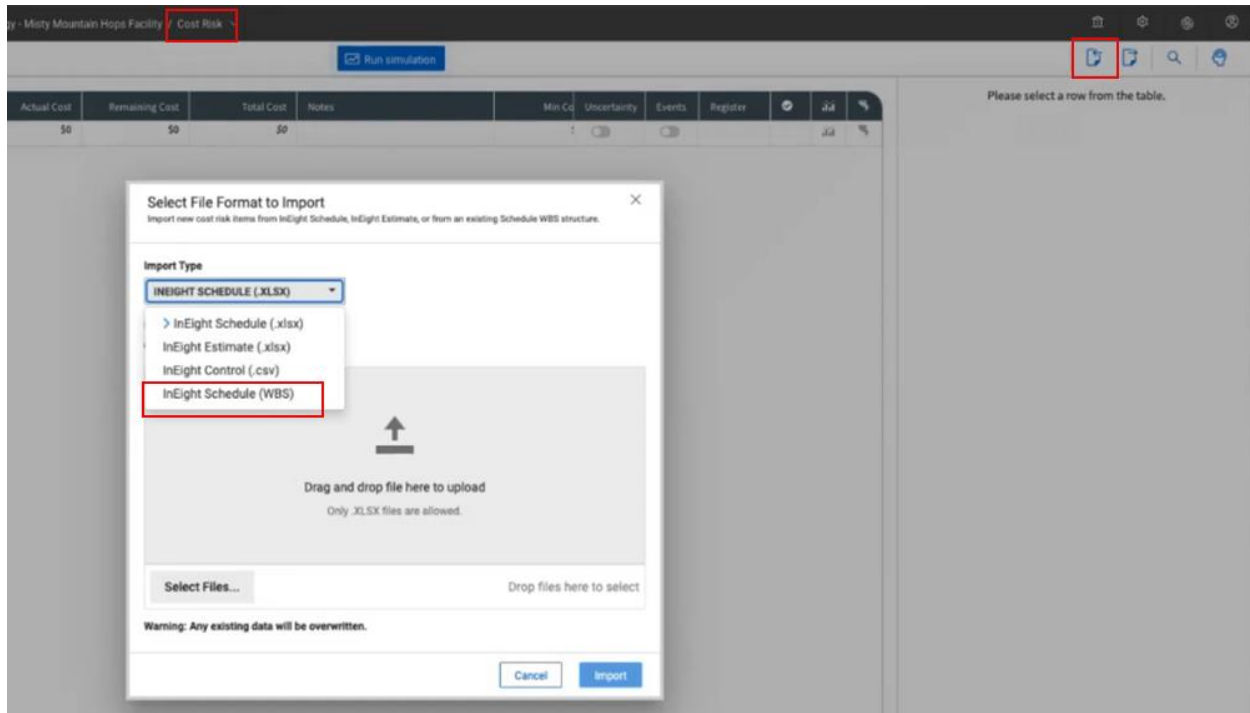
In the toolbar, click **Integrations** to show the products integrated into the schedule. The green circle icon indicates there is an active integration in Schedule.



In Schedule, click the **Update Schedule From Estimate** icon to pull in the changes made to the Estimate job into Schedule. No changes can be made to the schedule until updates from Estimate are completed.

## Cost Risk

Cost values integrate with Schedule to conduct cost risk simulations based on the risk and opportunities you see in your estimate. In the Schedule Cost Risk view, you can import the InEight Schedule (WBS) file created through the Estimate integration in the Plan view.



The actual projected cost from your estimate is imported to Cost Risk, where you can run simulations as you would typically do with cost risk scenarios and assign uncertainty, such as register events. After you run the simulations, you can provide a contingency value that can be manually input back into the estimate cost item to make it more accurately reflect the possible risks in the job.