

InEight Integration Estimate-Schedule



InEight[®]
ESTIMATE



InEight[®]
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.
2.0	18-MAY-2026	Removed Schedule content and created a topic in the Knowledge Library.

Contents

Introduction..... 4

Set scheduling options in Estimate 5

 Schedule cost items 6

 Schedule multiple cost items 7

Update Estimate from Schedule..... 8

Update Schedule from Estimate..... 8

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.

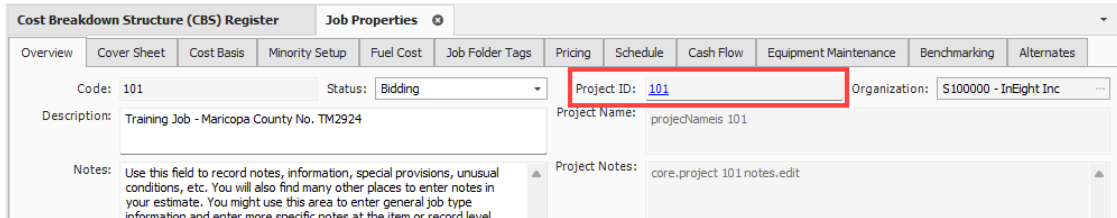
In Schedule, you can do the following:

- Add Estimate schedules to workspaces.
- Sync changes made to the Estimate job.
- Add estimate activities and resources to a schedule.
- 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.



Cost Breakdown Structure (CBS) Register Job Properties

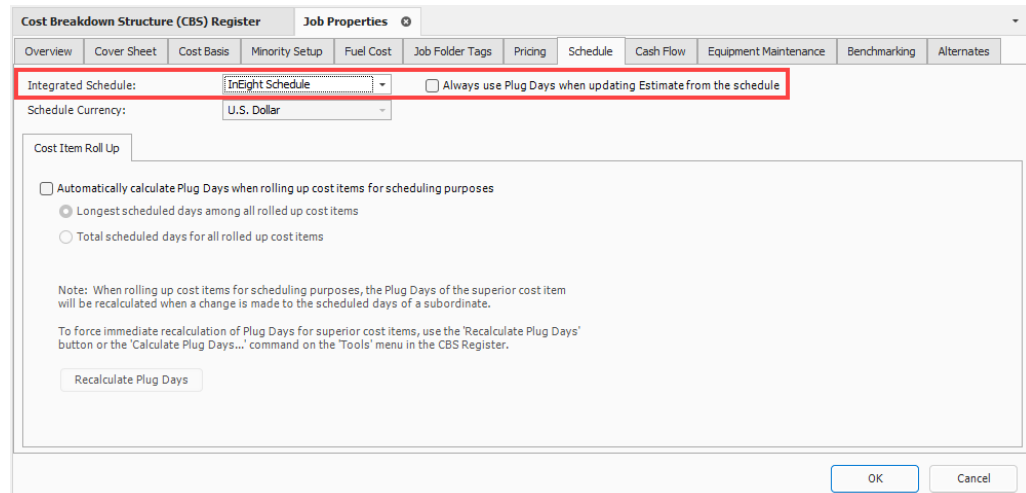
Overview Cover Sheet Cost Basis Minority Setup Fuel Cost Job Folder Tags Pricing Schedule Cash Flow Equipment Maintenance Benchmarking Alternates

Code: 101 Status: Bidding Project ID: 101 Organization: S100000 - InEight Inc

Description: Training Job - Maricopa County No. TM2924 Project Name: projectNameis 101

Notes: Use this field to record notes, information, special provisions, unusual conditions, etc. You will also find many other places to enter notes in your estimate. You might use this area to enter general job type information and enter more specific notes at the item or record level. Project Notes: core.project 101 notes.edit

- **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 Breakdown Structure (CBS) Register Job Properties

Overview Cover Sheet Cost Basis Minority Setup Fuel Cost Job Folder Tags Pricing Schedule Cash Flow Equipment Maintenance Benchmarking Alternates

Integrated Schedule: InEight Schedule Always use Plug Days when updating Estimate from the schedule

Schedule Currency: U.S. Dollar

Cost Item Roll Up

☐ Automatically calculate Plug Days when rolling up cost items for scheduling purposes

☒ Longest scheduled days among all rolled up cost items

☐ Total scheduled days for all rolled up cost items

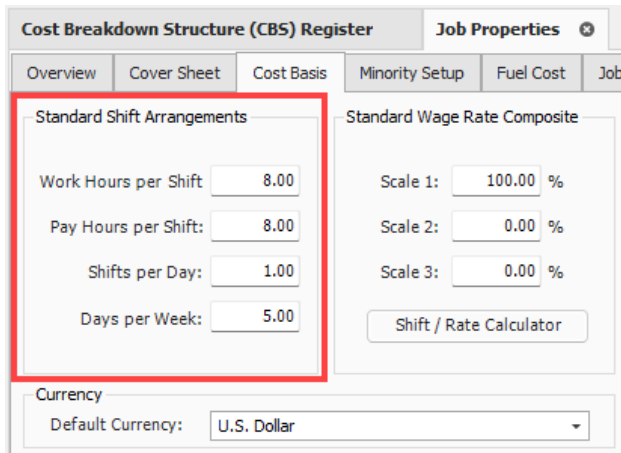
Note: When rolling up cost items for scheduling purposes, the Plug Days of the superior cost item will be recalculated when a change is made to the scheduled days of a subordinate.

To force immediate recalculation of Plug Days for superior cost items, use the 'Recalculate Plug Days' button or the 'Calculate Plug Days...' command on the 'Tools' menu in the CBS Register.

Recalculate Plug Days

OK Cancel

- **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.



Cost Breakdown Structure (CBS) Register **Job Properties**

Overview Cover Sheet **Cost Basis** Minority Setup Fuel Cost Job

Standard Shift Arrangements

Work Hours per Shift: 8.00

Pay Hours per Shift: 8.00

Shifts per Day: 1.00

Days per Week: 5.00

Standard Wage Rate Composite

Scale 1: 100.00 %

Scale 2: 0.00 %

Scale 3: 0.00 %

Shift / Rate Calculator

Currency

Default Currency: U.S. Dollar

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.

Saved views: Schedule Setup View 

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
JOB		☒	☐	☒	238.00
+	Prime Bond	☐	☐	☐	0.00
+	Price % Add-On	☐	☐	☐	0.00
+	Job Financing	☐	☐	☐	0.00
+	Indirect Cost Escalation	☐	☐	☐	0.00
+	Direct Cost Escalation	☐	☐	☐	0.00
+	Indirect Cost Add-On	☐	☐	☐	0.00
+	Direct Cost Add-On	☐	☐	☐	0.00
1	SITEWORK & ROADWAY	☒	☐	☒	107.00
2	WATER & SEWER	☒	☒	☒	85.66
2.1	36 Inch RCP Culvert Class III	☐	☐	☒	23.66
2.2	10 Inch PVC Force Main (SDR21)	☐	☐	☒	45.00
2.3	24 Inch PVC Gravity Sewer (SDR35)	☐	☐	☒	45.08
2.4	4 Foot Diameter Manhole	☐	☐	☒	17.00
3	STRUCTURAL CONCRETE & BRIDGES	☒	☐	☒	147.46
4	INDUSTRIAL & REMEDIATION	☒	☐	☒	58.54
5	COMMERCIAL	☐	☐	☒	20.00
6	GUARDRAIL & SIGNING	☐	☐	☒	6.00
7	Indirect Costs	☐	☐	☒	238.00
8	Special Risk Allowance	☐	☐	☐	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	SITEWORK & ROADWAY	☒	☐
2	WATER & SEWER	☒	☒
2.1	36 Inch RCP Culvert Class III	☐	☐
2.2	10 Inch PVC Force Main (SDR21)	☐	☐
2.3	24 Inch PVC Gravity Sewer (SDR35)	☐	☐
2.4	4 Foot Diameter Manhole	☐	☐
3	STRUCTURAL CONCRETE & BRIDGES	☒	☐
4	INDUSTRIAL & REMEDIATION	☒	☐
5	COMMERCIAL	☒	☐
6	GUARDRAIL & SIGNING	☒	☐
7	Indirect Costs	☒	☐

Schedule multiple cost items

You can schedule multiple cost items by doing the following:

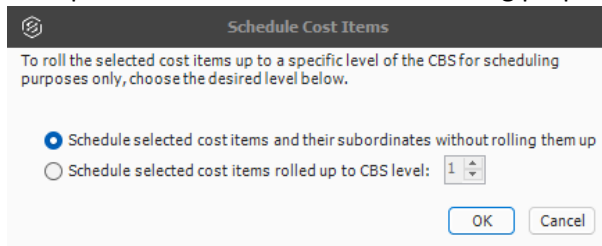
1. Highlight the row for each cost item that you want to schedule.
2. Use the Shift and Ctrl keys to select multiple rows. To select all cost items, highlight the **JOB** row.
3. Right-click on the selected rows, and then select **Schedule Selection**.

The screenshot shows the 'Cost Breakdown Structure (CBS) Register' window. On the left is a 'CBS Tree (Navigation Mode)' showing a hierarchy from 'JOB' down to 'Special Risk Allowance'. The main table displays the following data:

CBS Position Code	Description	Scheduled	Roll Up Schedule	Schedule Plug Days	Plug Days
1	SITEWORK & ROADWAY	☒	☐	☒	107.00
2	WATER & SEWER	☒	☐	☒	85.66
3	STRUCTURAL CONCRETE & BRIDGES	☒	☐	☐	46.00
3.1	Structural Excavation & Backfill	☒	☐	☐	33.00
3.1.1	Structure Excavation	☒	☐	☐	00.00
3.1.2	Backfill & Furnish Materials	☒	☐	☐	00.00
3.2	Steel Reinforcement	☒	☐	☐	00.00
3.2.1	Furnish Lifting Crane for Rebar	☒	☐	☐	00.00
3.2.2	Subcontract Rebar	☒	☐	☐	00.00
3.3	Retaining Wall	☒	☐	☐	30.00
3.3.1	Standard Retaining Wall Assembly	☒	☐	☐	06.00
3.3.1.1	Furnish Retaining Wall Materials	☒	☐	☐	20.00
3.3.1.2	Retaining Wall Footings	☒	☐	☐	64.00
3.3.1.2.1	Form Footing	☒	☐	☐	21.00
3.3.1.2.2	Pour Footing	☒	☐	☐	02.00
3.3.1.2.3	Strip Footing	☒	☐	☐	07.00
3.3.1.3	Retaining Wall Wall	☒	☐	☐	17.00
3.3.1.3.1	Form Wall	☒	☐	☐	00.00
3.3.1.3.2	Pour Wall	☒	☐	☐	14.00
3.3.1.3.3	Strip Wall	☒	☐	☐	86.00
3.4	Paint Existing Steel Bridge Structure	☒	☐	☐	16.00
3.4.1	Setup Equipment	☒	☐	☐	00.00
3.4.2	Wash-Remove-Dispose of Water	☒	☐	☐	00.00
3.4.3	Sandblast	☒	☐	☐	00.00
3.4.4	Apply Primer	☒	☐	☐	50.00
3.4.5	Paint Top Coat	☒	☐	☐	67.00
4	INDUSTRIAL & REMEDIATION	☒	☐	☐	54.00
4.1	Process Equipment	☒	☐	☐	00.00
4.1.1	Material Processing Section	☒	☐	☐	00.00
4.1.1.1	Install Feeder Controls	☒	☐	☐	00.00
4.1.1.2	Raw Materials Tanks	☒	☐	☐	00.00

A right-click context menu is open over the 'INDUSTRIAL & REMEDIATION' row, showing options like 'Open', 'New', 'Delete', 'Cut', 'Copy', 'Paste', 'Fill Down', 'Link these fields to Excel', 'UnLink from Excel', 'Indent', 'Outdent', 'Insert', 'Insert Subordinate', 'Insert Dependent Cost Item', 'Insert Cost Item Assembly', 'Insert Cost Item Assembly as Subordinate', 'Split', 'Split by Cost Type', 'Merge Cost Items', 'Insert Resource', 'Insert Resource Assembly', 'Toggle Suspended', 'Go To Cost Allocation Item', 'Schedule Selection' (highlighted), 'Unschedule Selection', 'Calculate Plug Days...', 'Subtotal Calculator', 'Roll Up Quantities', and 'Add Quote...'.

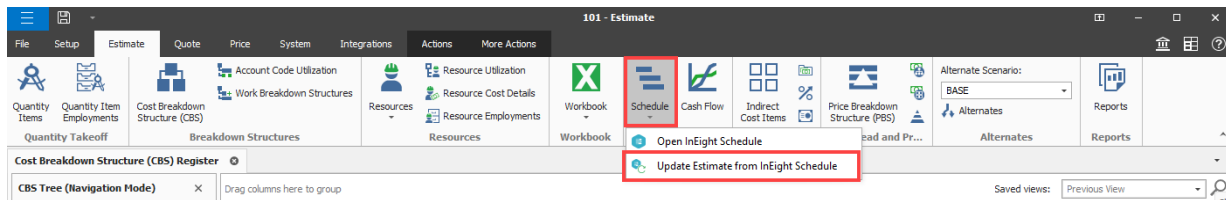
- In the Schedule Cost Items dialog box, select whether you want to roll up the selected cost items to a specific level of the CBS for scheduling purposes, and then click **OK**.



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

Update Estimate from Schedule

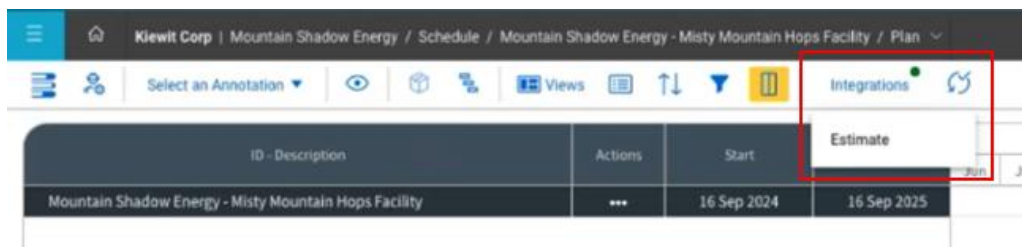
After activity relation logic updates have been made in Schedule, you can sync updates to your Estimate job. In the Estimate tab, click **Schedule > Update Estimate from InEight Schedule** to sync changes.



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.