PRIMAVERA INTEGRATION

InEight® ESTIMATE

LOGIN OPTIONS TAB

1. Job Properties ▶ Schedule tab

2. From the Integrated Schedule drop-down list, select **Primavera ▶**

3. On the Login Options sub-tab ▶ select the **Use these login settings** radio button.

4. Type your user name in the User Name field.

5. Type your password into the Password field.

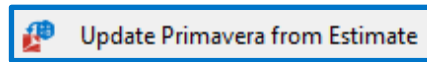|	
Instance:	-Default-
Database:	pmdb
User Name:	admin
Password:	*****************************

6. Click **OK**.

SCHEDULE A COST ITEM IN INEIGHT ESTIMATE

1. In your Job, from the Estimate tab, select **Cost Breakdown Structure**.

2. In Saved Views, select **Schedule Setup View**.

3. Select 2 or more cost items, then press **Tab**.

CBS Position Code	Description	Scheduled
+ 1	Mobilization	✓
+ 2	Clearing & Grubbing	✓
– 3	Unclassified Excavation	✓

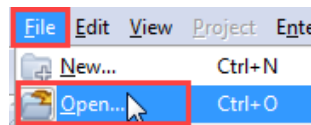## UPDATE PRIMAVERA FROM INEIGHT ESTIMATE

1. From the Estimate tab, select **Schedule ▶ Update Primavera from InEight Estimate**.

   [Update Primavera from Estimate]

2. Make sure **Resources** and **Expenses** are checked. Deselect **Actuals** (For Job Tracking purposes) if auto selected, then click **OK**.

3. Click **Yes** to save the job before updating Primavera.

4. Open Primavera P6 (Project Management) client.

5. Log in, using the same Username and Password that was entered on the Schedule ▶ Login Options.
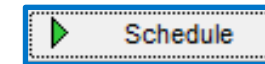
6. In Primavera, open the project.

File	Edit	View	Project	Ente
New...	Ctrl+N			
Open...	Ctrl+O			

7. Expand the **BID*BUILD** folder.

8. Select your Job (with your initials) so that it is highlighted, and then select **Open**.

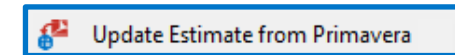 | BID*BUILD | |
   |---|---|
   | R19 | Yes |
   | S1 | Yes |
   | Training Job21 | Yes |
   | AJL Sched Test | Yes |
   | Test job3 | Yes |
   | Training Job | Yes |

9. Select the **Resources** tab to see the resources & costs that imported for each activity.

UPDATE INEIGHT ESTIMATE FROM PRIMAVERA

1. Open your project in Primavera.

2. Create Start and Finish relationships between activities as needed.

3. To schedule this new relationship, select the **Schedule** button (or press the **F9** key).

   [▶ Schedule]

4. On the Schedule Project window, keep the default settings and select the **Schedule** button.

5. To update InEight Estimate with this change, go back to InEight Estimate and select **Estimate** tab.

6. Select **Schedule ▶ Update Estimate from Primavera**.

   [Update Estimate from Primavera]

7. On the Update InEight Estimate from Primavera prompt, keep the default **Update the estimate to stay in synch with the schedule** selected, then click **OK**.

8. On the Schedule Setup View, you can see the Start and Finish dates updated from Primavera.

PRIMAVERA INTEGRATION

InEight® ESTIMATE

⬡ SCHEDULE PLUG DAYS

1. Look at the Days (Duration driven) column for one of your cost items to confirm the duration the estimated costs are based on.

2. Make sure the **Schedule Plug Days** checkbox is selected on the cost item, then enter a Plug Days duration for the number of days the item will be scheduled in Primavera (**7** days).

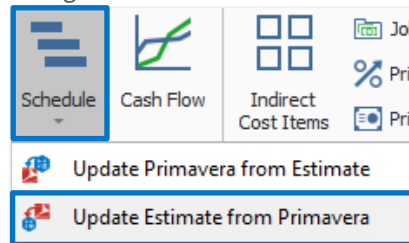| CBS Position Code	Description	Schedule Plug Days	Plug Days
+ 6.2	Excavate RCP Trench	☐	4.65

Note that your Plug Days can be different than the Days (Duration driven) being used in your estimate.

NEED SOME MORE HELP?

📖 Learn more in our Knowledge Library
learn.ineight.com

🖱 Take a course at InEight U
university.ineight.com

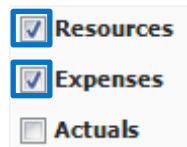## ⬡ UPDATE PRIMAVERA WITH INEIGHT ESTIMATE CHANGES

1. In your Job from the Estimate tab, select **Cost Breakdown Structure**.

2. Change the quantity in the Forecast (T/O) Quantity field in the CBS (see example below):

Quantity Change for Cost Item			
CBS Code	Description	Old Quantity	New Quantity
5	Asphalt Concrete Hot Mix Type A	35,000	25,000

3. From the Estimate tab, select **Schedule ► Update Primavera from InEight Estimate** to send the changed hours to Primavera.

Schedule | Cash Flow | Indirect Cost Items | Job / Pri... / Prin...

Update Primavera from Estimate

Update Estimate from Primavera

4. Make sure Resources and Expenses are checked, then select **OK**.

☑ Resources
☑ Expenses
☐ Actuals

5. Open Primavera (P6 Web Client).

6. Open your Job project.

7. On the Activities screen, compare the Planned Duration to the Days (Duration driven) in InEight Estimate.

8. To schedule this change in Primavera, select the **Schedule** button (or press the **F9** key) and select the **Schedule** button on the Schedule Project window.

9. Your start and finish dates are different now. In InEight Estimate, from the Estimate tab, select **Schedule ► Update InEight Estimate from Primavera** to update InEight Estimate with the new dates.