

(Cloud) Estimate-Primavera Integration

InEight Integration



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	27-AUG-2025	Initial Release

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Introduction

This topic provides guidance for the settings requirements and integration of InEight Estimate and Primavera (P6) in the cloud. Instructions are provided for the configuration of Estimate and Primavera to manage, schedule, and analyze your project.

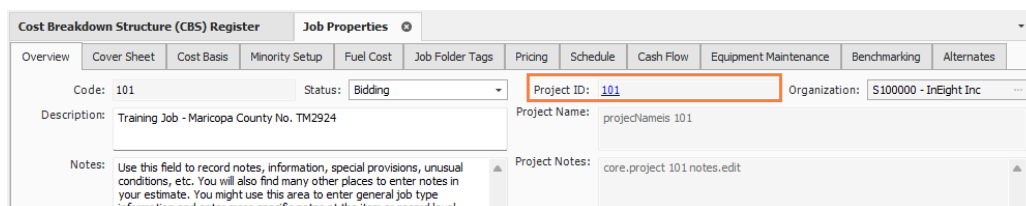
You can select Primavera as your integrated schedule to do the following in Estimate:

- Mark your items as scheduled.
- Choose to roll up cost items as needed.
- Sync Primavera's activity changes with your Estimate job.

Estimate configuration

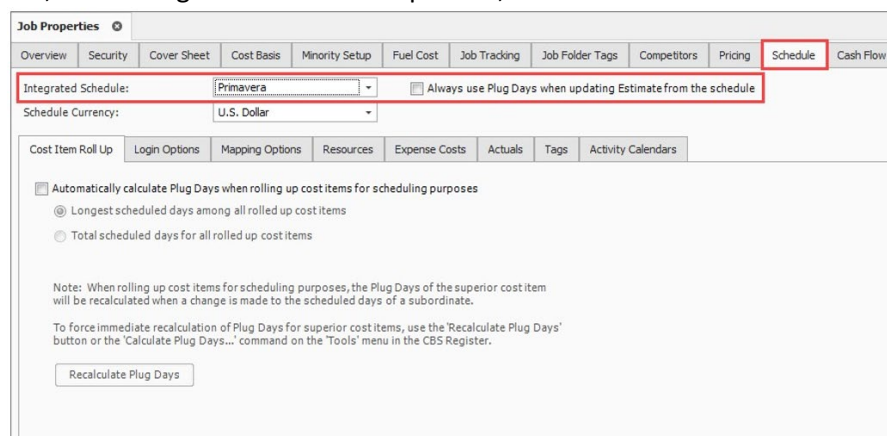
The proper settings must be in place in the Estimate job properties to integrate with P6.

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



The screenshot shows the 'Job Properties' window with the 'Overview' tab selected. The 'Project ID' field is highlighted with a red box and contains the value '101'. The 'Organization' field contains 'S100000 - InEight Inc'. Other fields include 'Code: 101', 'Status: Bidding', 'Description: Training Job - Maricopa County No. TM2924', and 'Project Name: project\nameis 101'.

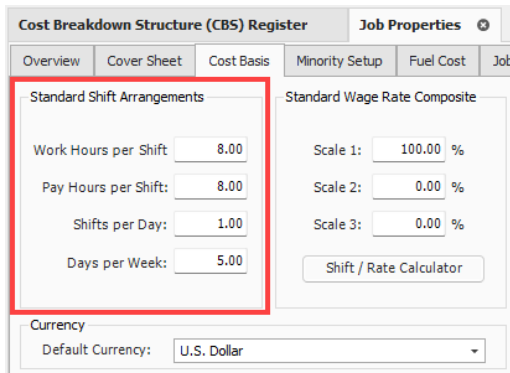
- **Schedule Tab** – You must select Primavera as the integrated schedule. At the top of the Schedule tab, in the Integrated Schedule drop-down, select **Primavera**.



The screenshot shows the 'Job Properties' window with the 'Schedule' tab selected. The 'Integrated Schedule' dropdown is set to 'Primavera' and is highlighted with a red box. The 'Always use Plug Days when updating Estimate from the schedule' checkbox is also highlighted with a red box. Other fields include 'Schedule Currency: U.S. Dollar' and a 'Recalculate Plug Days' button.

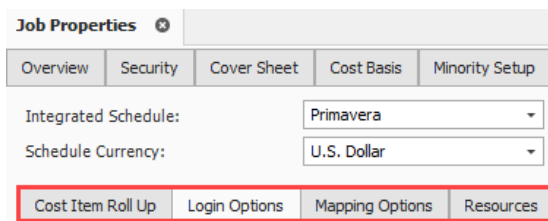
- The *Always use Plug Days when updating Estimate from the schedule* checkbox is not selected by default. On a job-by-job basis, you can select this feature later for jobs in which an estimator does not want updates from Primavera to change the duration and therefore the cost of your cost items in InEight Estimate.

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



Additional setting options

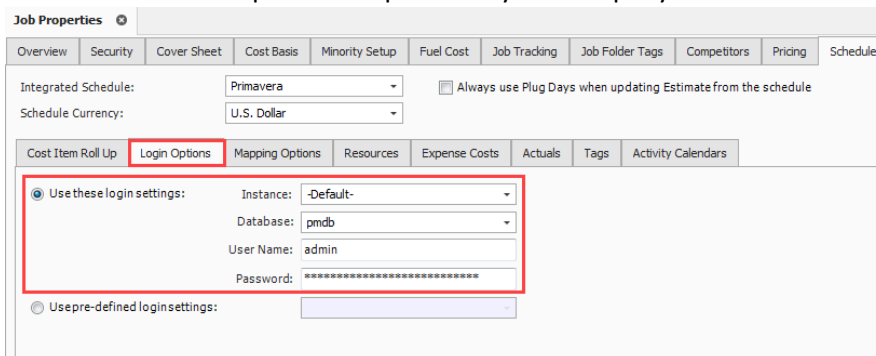
On the Schedule tab, there are other sub-tabs to set up to produce correct data behavior and ensure the correct passing of data to Primavera.



Login Options

In the Login Options tab, select **Use these login settings** and select the following:

1. Instance – Default
2. Database – Your database instance for Primavera.
3. User Name – Your username specific to your company.
4. Password – Your set password specific to your company.



When pre-defined login settings are required, select the **Use pre-defined login settings** option.

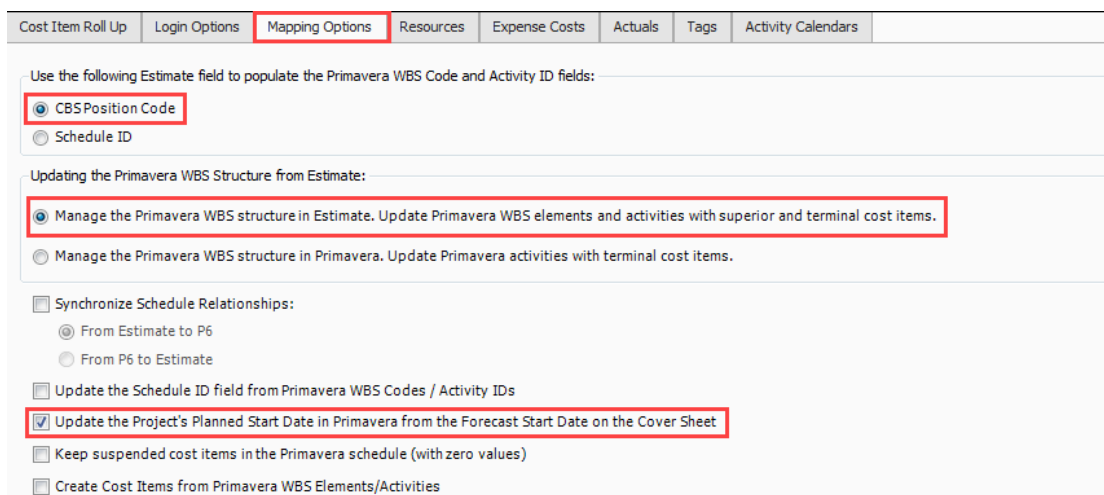
Mapping Options

The Mapping Options tab contains options critical to downstream applications. The following settings are selected by default:

1. **CBS Position Code** – This option is selected to populate the Primavera WBS Code and Activity ID fields.
2. **Manage the Primavera WBS structure in InEight Estimate** – This option is selected for the initial push from InEight Estimate to P6.
 - This means the WBS structure in Primavera will be controlled by the structure of superior and terminal cost items in InEight Estimate.
 - Selecting the other option would cause the WBS structure to be controlled in Primavera. Only terminal cost items would be sent from InEight Estimate to Primavera and all hierarchal structure (WBS Elements) would be created in Primavera manually.
 - This option can be changed later, on a job-by-job basis.
3. **Update the Project's Planned Start Date in Primavera from the Forecast Start Date** - This option automatically pulls the Forecast Start Date from the Job Properties > Cover Sheet tab to become the Planned Start Date in Primavera.

NOTE:

It is strongly recommended to verify that the correct start date is defined on the Job Properties > **Cover Sheet** tab.



Cost Item Roll Up | Login Options | **Mapping Options** | Resources | Expense Costs | Actuals | Tags | Activity Calendars

Use the following Estimate field to populate the Primavera WBS Code and Activity ID fields:

☒ CBS Position Code

☐ Schedule ID

Updating the Primavera WBS Structure from Estimate:

☒ Manage the Primavera WBS structure in Estimate. Update Primavera WBS elements and activities with superior and terminal cost items.

☐ Manage the Primavera WBS structure in Primavera. Update Primavera activities with terminal cost items.

☐ Synchronize Schedule Relationships:

☒ From Estimate to P6

☐ From P6 to Estimate

☐ Update the Schedule ID field from Primavera WBS Codes / Activity IDs

☒ Update the Project's Planned Start Date in Primavera from the Forecast Start Date on the Cover Sheet

☐ Keep suspended cost items in the Primavera schedule (with zero values)

☐ Create Cost Items from Primavera WBS Elements/Activities

Resources

The Resources tab dictates how resources are mapped between InEight Estimate and P6.

Cost Item Roll Up

Login Options

Mapping Options

Resources

Expense Costs

Actuals

Tags

Activity Calendars

Update Primavera Resources from Estimate:

☐ Update all of this job's resources
 ☒ Update scheduled resources only
 ☐ Do not update Primavera resources

Map Resource Types to Primavera:

Labor: Resource

Construction Equipment: Resource

Rented Construction Equipment: Resource

Installed Material: Resource

Installed Equipment: Resource

Supplies: Resource

Unique: Resource

Update Primavera Budgeted Units when using Plug Days:

☒ Adjust Budgeted Units to match Plug Duration
 ☐ Maintain Budgeted Units to match (non-plug) Work Hours

Update Primavera Cost Accounts from Estimate Account Codes:

☐ Update Primavera Cost Accounts on Resource Assignments

Update Price / Unit on Primavera Resource Assignments:

☒ Labor
 ☒ Construction Equipment
 ☒ Rented Construction Equipment
 ☒ Installed Material
 ☒ Installed Equipment
 ☒ Supplies
 ☒ Unique

	Name	Description
1	Update Primavera Resources from Estimate	Provides options for sending InEight Estimate resources to Primavera. Typically, you would select the Update scheduled resources only option to send only resources that are employed on cost items. The Update all of this job's resources option updates Primavera with all the resources in your project's Resource Rate Register.
2	Map Resource Types to Primavera	Specify whether your resources import into Primavera as Resources or Roles.
3	Update Primavera Budgeted Units when using Plug Days	Allows you to specify how to handle Budgeted Units for items that use Plug Days.
4	Update Primavera Cost Accounts from Estimate Account Codes	Checking this box causes assigned account codes to import into Primavera as Cost Accounts.
5	Update Price/Unit on Primavera Resource Assignments	Checking the boxes in this section will cause the Charge Rate costs of your resources to import into Primavera along with your resources.

Expense Costs

The Expense Costs tab is useful for bringing costs in from InEight Estimate that are not connected to resources, for example, your plugged and/or quoted cost items. This tab is optional, and it is not required to make selections here.

Overview	Security	Cover Sheet	Cost Basis	Minority Setup	Fuel Cost	Job Tracking	Job Folder Tags	Competitors	Pricing	Schedule	Cash Flow
----------	----------	-------------	------------	----------------	-----------	--------------	-----------------	-------------	---------	----------	-----------

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

Schedule Currency:

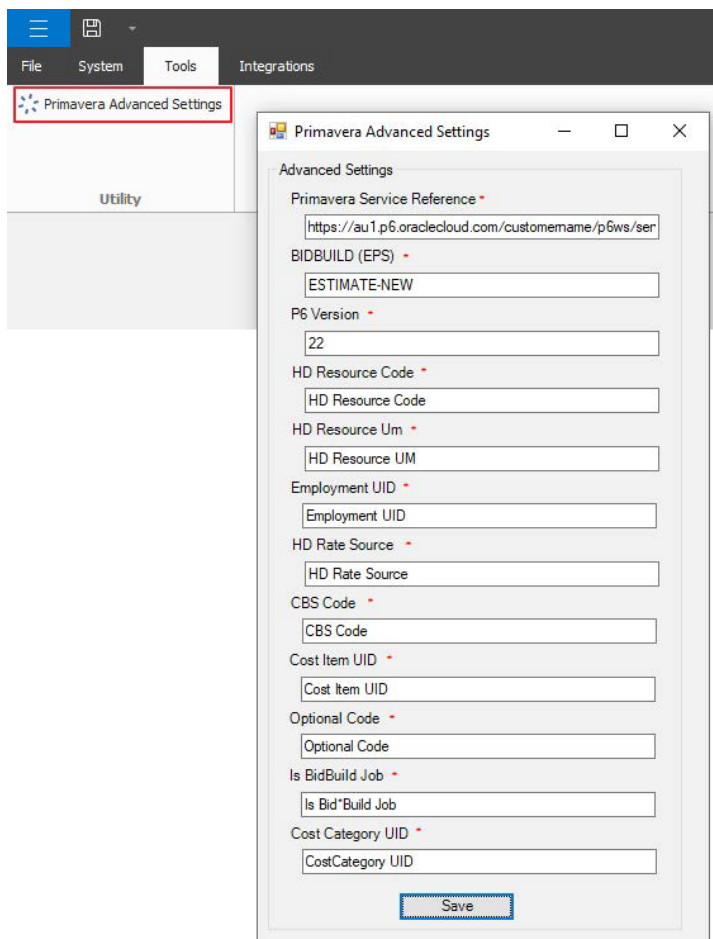
Cost Item Roll Up	Login Options	Mapping Options	Resources	Expense Costs	Actuals	Tags	Activity Calendars
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☒ Update Primavera Expense Costs from Estimate

Cost Category	Primavera Expense Category
Labor:	<input type="text" value="HD01 Labor"/>
Owned Equipment:	<input type="text" value="HD02 Owned Equipment"/>
Rented Equipment:	<input type="text" value="HD03 Rented Equipment"/>
Supplies:	<input type="text" value="HD04 Supplies"/>
Materials:	<input type="text" value="HD05 Materials"/>
Subcontract:	<input type="text" value="HD06 Subcontract"/>
Fees:	<input type="text" value="HD07 Fees"/>
Allowance:	<input type="text" value="HD08 Allowance"/>
Custom Category1:	<input type="text" value="HD09 Custom Category1"/>
Undefined:	<input type="text" value="HD10 Undefined"/>

Primavera Advanced Settings

In Estimate, you can configure advanced settings for Primavera in the Tools > **Primavera Advanced Settings**.



The screenshot shows the InEight software interface with the 'Tools' menu open and 'Primavera Advanced Settings' selected. The dialog box displays the following settings:

- Primavera Service Reference ***:
- BIDBUILD (EPS) ***:
- P6 Version ***:
- HD Resource Code ***:
- HD Resource Um ***:
- Employment UID ***:
- HD Rate Source ***:
- CBS Code ***:
- Cost Item UID ***:
- Optional Code ***:
- Is BidBuild Job ***:
- Cost Category UID ***:

A 'Save' button is located at the bottom of the dialog box.

Enter the following values:

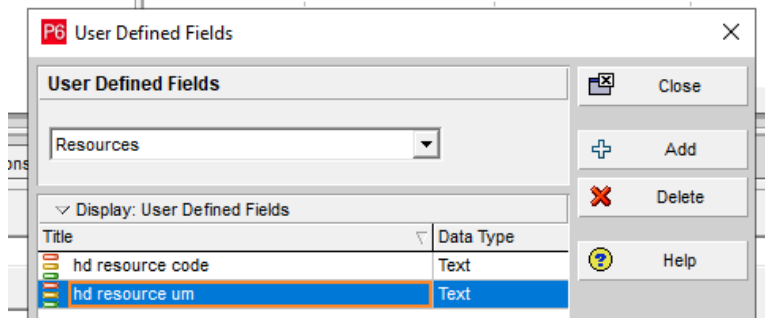
Primavera configuration related fields

- **Primavera Service Reference** - This is the webservice endpoint for your P6 environment. HTTPS is recommended for connecting over the internet.
For P6 Cloud, the URL address is <https://au1.p6.oraclecloud.com/customername/p6ws/services/>.
For self-hosted EPPM, the URL address is <https://p6serverurl.ineight.com/p6ws/services>.
- **BIDBUILD (EPS)** - The integration will create an EPS node by the name entered here. All projects will be created in this node. After the node is created, projects can be moved to any EPS node in P6 and the connection to Estimate will be maintained.
- **P6 Version** – Enter the major version of P6 that you are connecting to.

The following fields map to values in P6. You can map to existing UDFs in P6, or you can create UDFs with the defined names.

Resources related fields

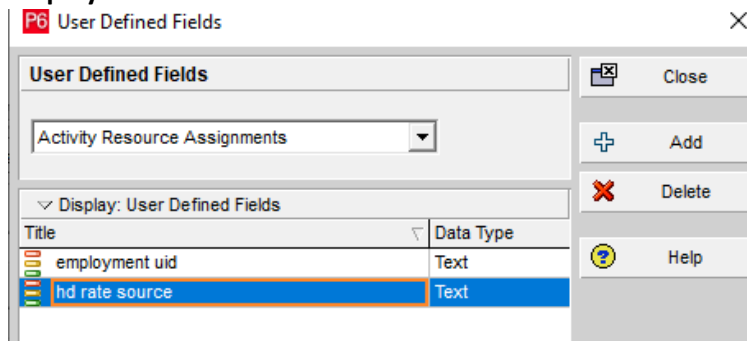
- **HD Resource Code and HD Resource Um**



Title	Data Type
hd resource code	Text
hd resource um	Text

Activity Resource Assignments

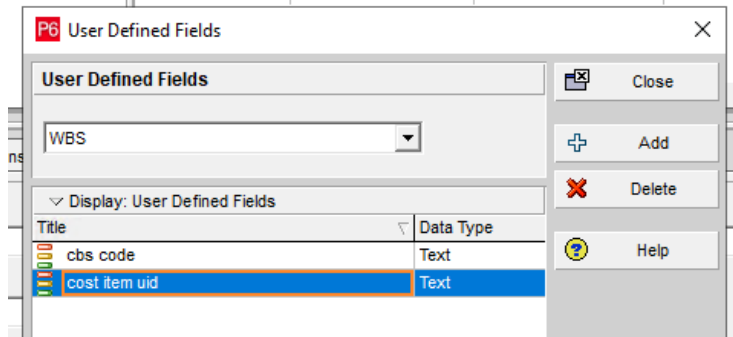
- **Employment UID and HD Rate Source**



Title	Data Type
employment uid	Text
hd rate source	Text

WBS

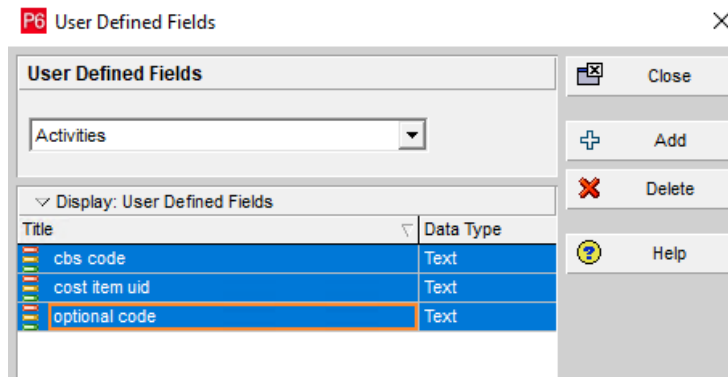
- **CBS Code and Cost Item UID**



Title	Data Type
cbs code	Text
cost item uid	Text

Activities

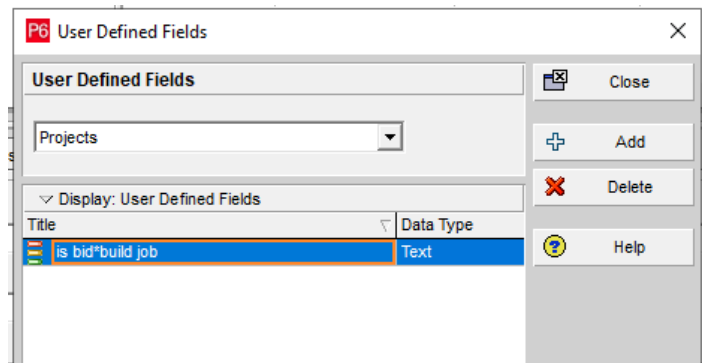
- **CBS Code, Cost Item UID, and Optional Code**



Title	Data Type
cbs code	Text
cost item uid	Text
optional code	Text

Projects

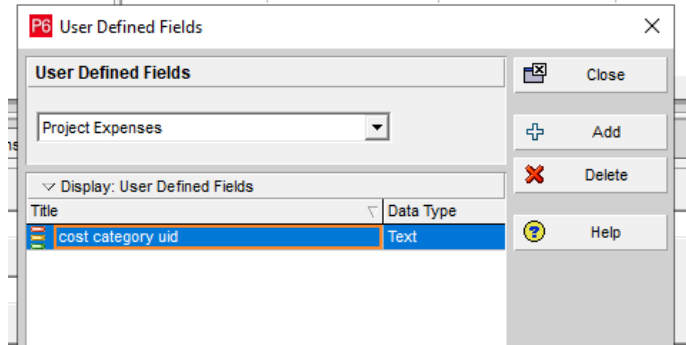
- **Is BidBuild Job**



Title	Data Type
is bid*build job	Text

Project Expenses

- **Cost Category UID**



Schedule cost items in Estimate

Before you integrate with Primavera, 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 

Plug Days

The Schedule Plug Days column lets you define the duration in the schedule separate from the duration defined for your cost items on the Production tab.

For example, your 10" PVC Pipe activity may have extra days in the schedule due to the delivery date of the pipe material, but you do not want those extra days to drive the costs in your estimate, since your crews will not be working on the activity on those extra days.

When your Days (Duration driven) column in the CBS shows 4.65 days, and your Plug Days show 7 days, selecting Schedule Plug Days lets you maintain 4.65 days in Estimate and 7 days in the schedule.

CBS Position Code	Description	Days (Duration driven)	Schedule Plug Days	Plug Days
6	36 Inch RCP Culvert Class III	18.66	<input checked="" type="checkbox"/>	26.01
+ 6.1	Furnish RCP Materials	0.00	<input checked="" type="checkbox"/>	5.00
+ 6.2	Excavate RCP Trench	4.65	<input checked="" type="checkbox"/>	7.00
+ 6.3	Install RCP Pipe	4.10	<input type="checkbox"/>	4.10
+ 6.4	Backfill RCP Pipe	9.92	<input type="checkbox"/>	9.92

NOTE: All superior cost items are hard coded to use Schedule Plug Days.

Schedule and Roll Up Schedule

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	<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	SITework & ROADWAY	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	107.00
→	2	WATER & SEWER	<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	STRUCTURAL CONCRETE & BRIDGES	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	147.46
+	4	INDUSTRIAL & REMEDIATION	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	58.54
+	5	COMMERCIAL	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	20.00
+	6	GUARDRAIL & SIGNING	<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 check box for each cost item 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 Primavera the next time you select to add a new schedule from Estimate in Primavera.

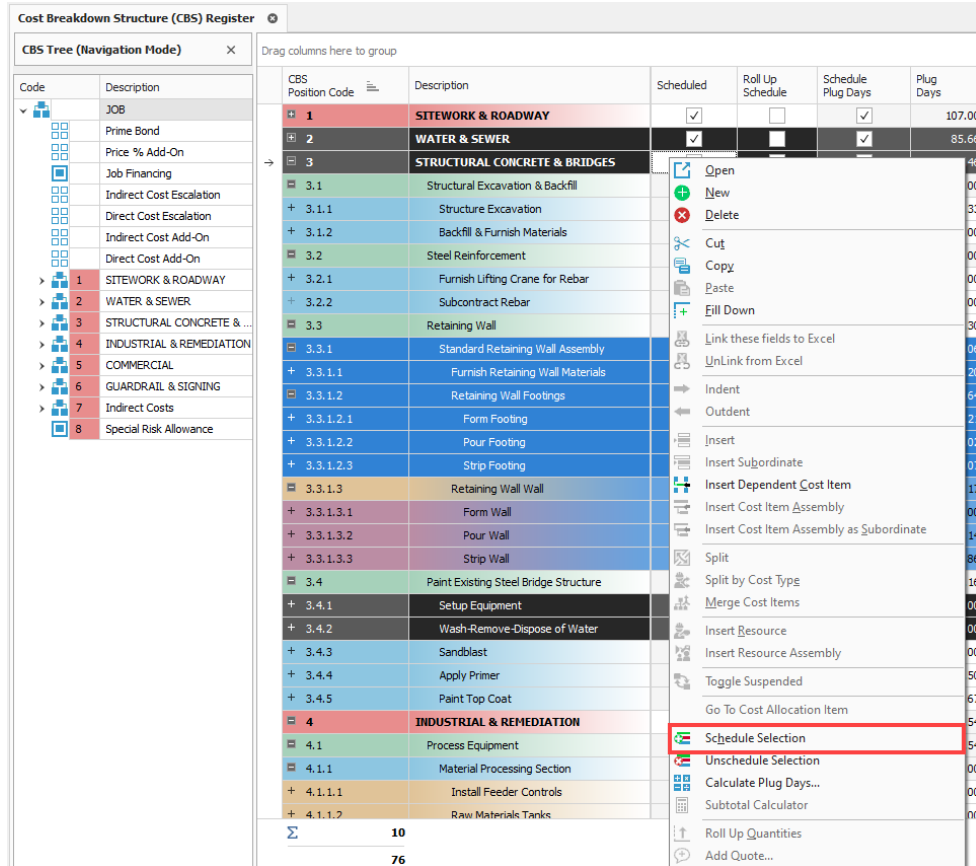
In the image below, you can see that all the cost items are scheduled, but the subordinates for *WATER & SEWER* will be rolled up to the superior level.

CBS Position Code	Description	Scheduled	Roll Up Schedule
+ 1	SITEWORK & ROADWAY	<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"/>

Step-by-step – 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** or **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**.



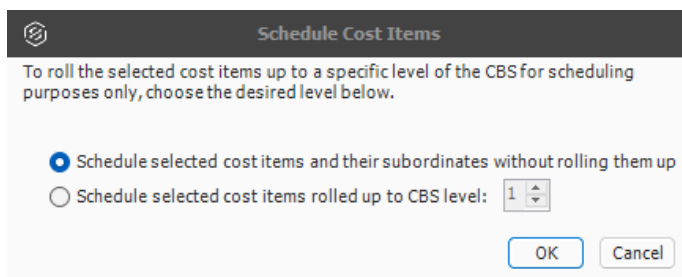
Cost Breakdown Structure (CBS) Register

CBS Tree (Navigation Mode)

- JOB
 - Prime Bond
 - Price % Add-On
 - Job Financing
 - Indirect Cost Escalation
 - Direct Cost Escalation
 - Indirect Cost Add-On
 - Direct Cost Add-On
- 1 SITEWORK & ROADWAY
- 2 WATER & SEWER
- 3 STRUCTURAL CONCRETE & BRIDGES
- 4 INDUSTRIAL & REMEDIATION
- 5 COMMERCIAL
- 6 GUARDRAIL & SIGNING
- 7 Indirect Costs
- 8 Special Risk Allowance

CBS Position Code	Description	Scheduled	Roll Up Schedule	Schedule Plug Days	Plug Days
1	SITEWORK & ROADWAY	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	107.00
2	WATER & SEWER	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	85.66
3	STRUCTURAL CONCRETE & BRIDGES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	46
3.1	Structural Excavation & Backfill	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	00
3.1.1	Structure Excavation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	33
3.1.2	Backfill & Furnish Materials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	00
3.2	Steel Reinforcement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	00
3.2.1	Furnish Lifting Crane for Rebar	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	00
3.2.2	Subcontract Rebar	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	00
3.3	Retaining Wall	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	30
3.3.1	Standard Retaining Wall Assembly	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	06
3.3.1.1	Furnish Retaining Wall Materials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	20
3.3.1.2	Retaining Wall Footings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	64
3.3.1.2.1	Form Footing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	21
3.3.1.2.2	Pour Footing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	02
3.3.1.2.3	Strip Footing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	07
3.3.1.3	Retaining Wall Wall	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	17
3.3.1.3.1	Form Wall	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	00
3.3.1.3.2	Pour Wall	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	14
3.3.1.3.3	Strip Wall	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	86
3.4	Paint Existing Steel Bridge Structure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	16
3.4.1	Setup Equipment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	00
3.4.2	Wash-Remove-Dispose of Water	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	00
3.4.3	Sandblast	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	50
3.4.4	Apply Primer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	67
3.4.5	Paint Top Coat	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	54
4	INDUSTRIAL & REMEDIATION	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	54
4.1	Process Equipment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	54
4.1.1	Material Processing Section	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	00
4.1.1.1	Install Feeder Controls	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	00
4.1.1.2	Raw Materials Tanks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	00
Σ	10				76

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



Schedule Cost Items

To roll the selected cost items up to a specific level of the CBS for scheduling purposes only, choose the desired level below.

☒ Schedule selected cost items and their subordinates without rolling them up
☐ Schedule selected cost items rolled up to CBS level:

OK Cancel

The next time you select to add a new schedule from Estimate in the Primavera application, your scheduled cost items sync and create a new project in Primavera.

Update Primavera from Estimate

After you set up your Primavera options in Job Properties and schedule your cost items in the CBS, you can then send your project information to Primavera.

When you first update Primavera from InEight Estimate, Primavera automatically creates a new project with the following information from InEight Estimate:

Data Type	InEight Estimate	Primavera
Project Data	Job Code	Project ID
	Job Description	Project Name
Activity Data	CBS Position Code/Schedule ID	WBS Code/Activity ID
	Description	WBS Element/Activity Name
	Hours	Planned Duration (Hours)
	Shift and Rate Rules	Activity Calendar
	Cost Item Tags and UDFs	Activity Codes or UDFs
	Cost Category Total Cost	Cost Category (custom text columns)
Resource Data	Resource Code	Resource ID
	Resource Description	Resource Name
Cost Data	Resource Cost/Unit	Resource Price/Unit

NOTE:

Tags, resource data, and cost data update in Primavera when selected in the Job Properties > **Schedule settings** only.

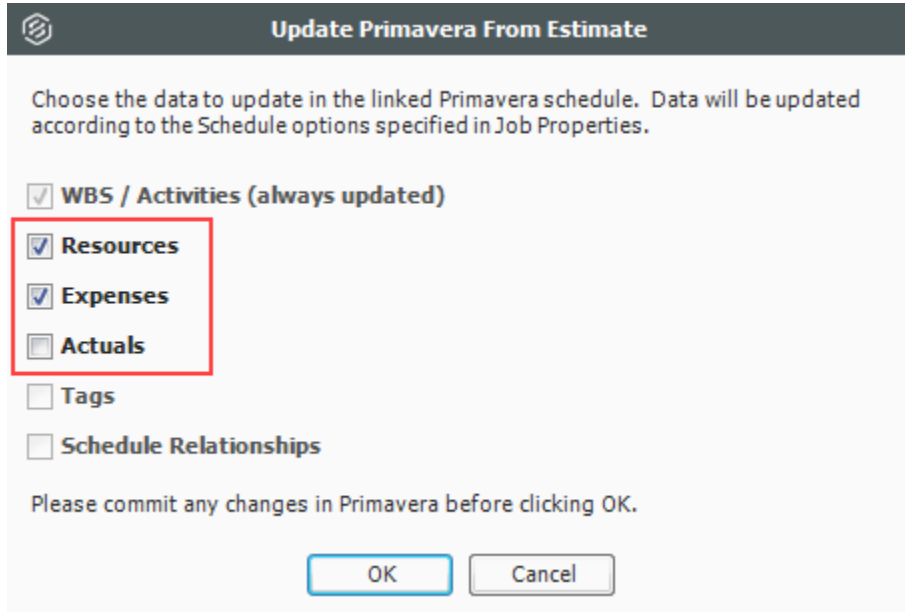
Step-by-step - Update Primavera from Estimate

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

The screenshot shows the InEight software interface with the 'Estimate' tab selected. The 'Schedule' button is highlighted, and a dropdown menu is open, showing the option 'Update Primavera from Estimate' which is also highlighted. Below the menu, a table displays the 'Cost Breakdown Structure (CBS) Register' with columns for CBS Position Code, Description, Scheduled, Roll Up Schedule, and WBS Element.

CBS Position Code	Description	Scheduled	Roll Up Schedule	WBS Element
+ 1	Mobilization	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
+ 2	Clearing & Grubbing	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- 3	Unclassified Excavation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
+ 3.1	Excavation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
+ 3.2	Embankment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- 4	Aggregate Base	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
+ 4.1	Furnish & Haul Base Material	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
+ 4.2	Finegrade Subgrade	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- 4.3	Install Aggregate Base	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

2. In the **Update Primavera From Estimate** dialog box, you can select which data to update in Primavera. Select **Resources**, **Expenses** and deselect **Actuals** (For Job Tracking purposes) if auto selected, and then click **OK**.



Update Primavera From Estimate

Choose the data to update in the linked Primavera schedule. Data will be updated according to the Schedule options specified in Job Properties.

☒ WBS / Activities (always updated)

☒ **Resources**

☒ **Expenses**

☐ **Actuals**

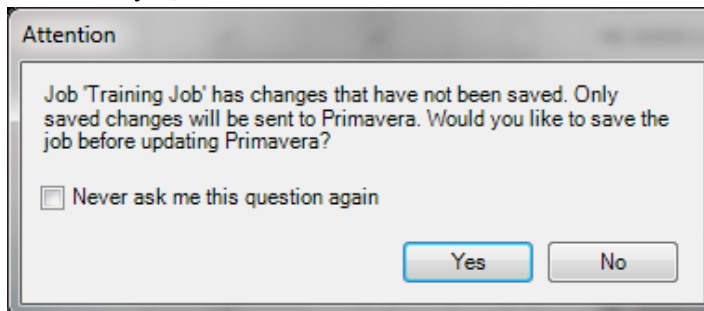
☐ Tags

☐ Schedule Relationships

Please commit any changes in Primavera before clicking OK.

OK **Cancel**

3. In the Attention dialog box, click **Yes** to save the job before updating Primavera. A window shows the progress of the data sync between InEight Estimate and Primavera. Depending on the size of the job, this can take several minutes.



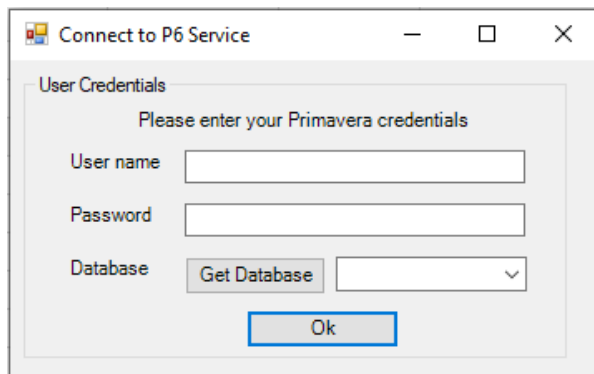
Attention

Job 'Training Job' has changes that have not been saved. Only saved changes will be sent to Primavera. Would you like to save the job before updating Primavera?

☐ Never ask me this question again

Yes **No**

4. Log in to Primavera, using the Username and Password entered on the Schedule > **Login Options** tab in InEight Estimate **Job Properties**.



Connect to P6 Service

User Credentials

Please enter your Primavera credentials

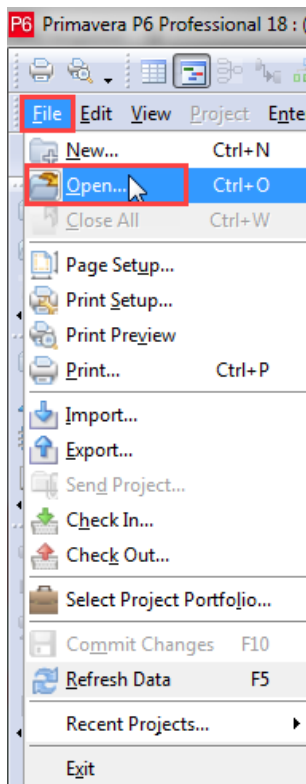
User name

Password

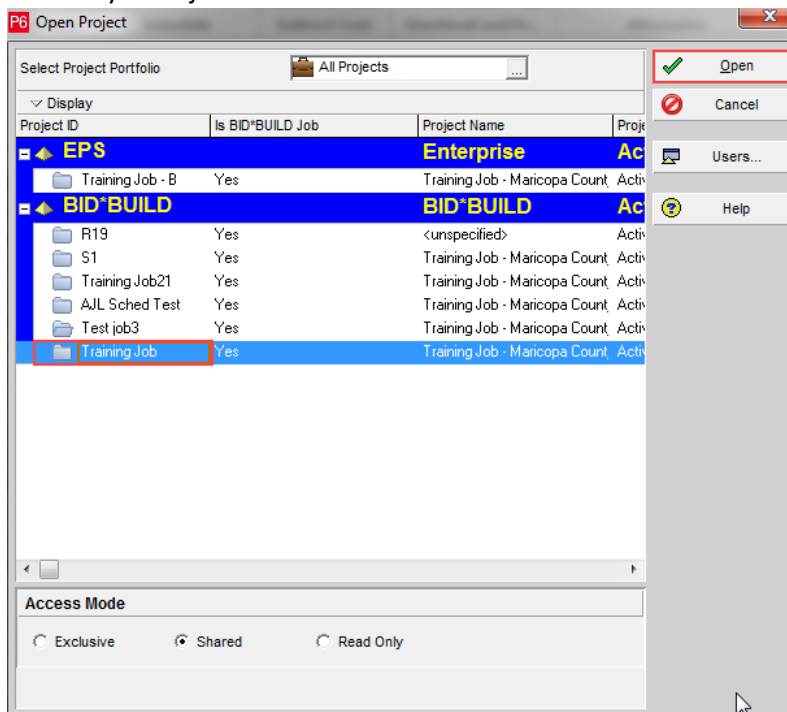
Database

Ok

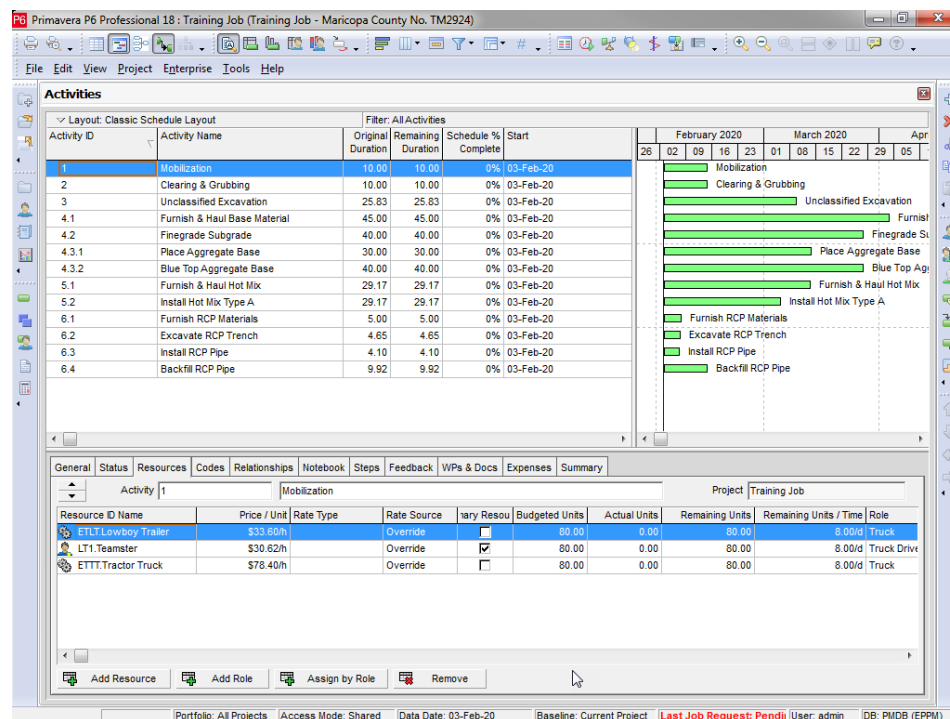
5. In Primavera, open the project.



6. In the Open Project dialog, expand the database instance folder. The available projects are sorted by their job names.



7. Select the applicable job so that it is highlighted, and then select **Open**.
 - The WBS Layout shows for the project. You can see the breakdown structure imported from InEight Estimate with durations, rolled up as specified by the Roll Up Schedule option in InEight Estimate.
 - Initially, the start date for your activities is the start date defined on the Job Properties > **Cover Sheet** tab (these will change as activity relationships are defined).
 - Select the **Resources** tab to see the resources that imported for each activity, with their associated costs.



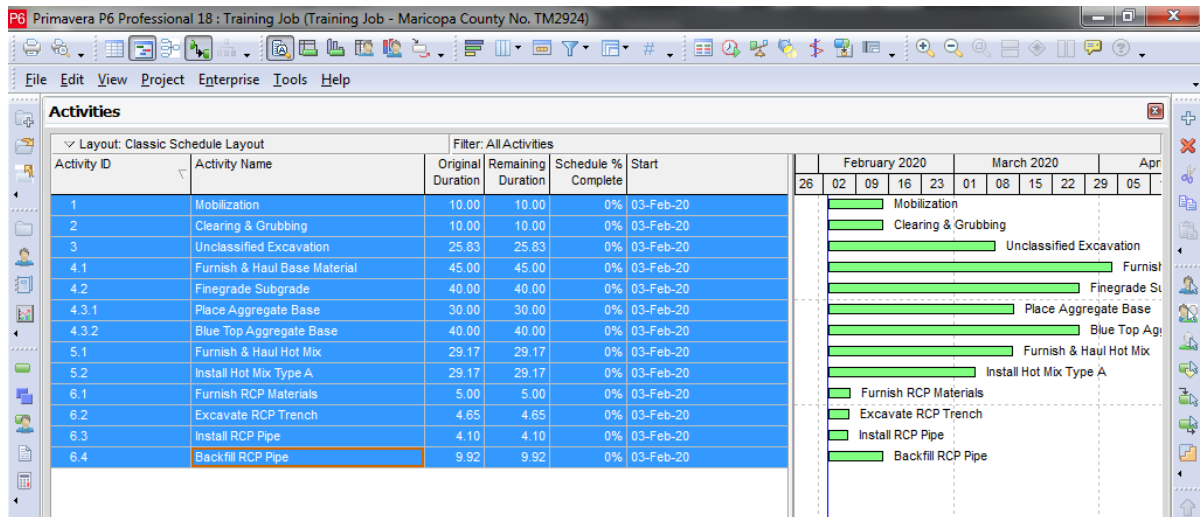
Update Estimate from Primavera

You can also sync information from Primavera to Estimate. The following table shows the field data sent from Primavera to Estimate:

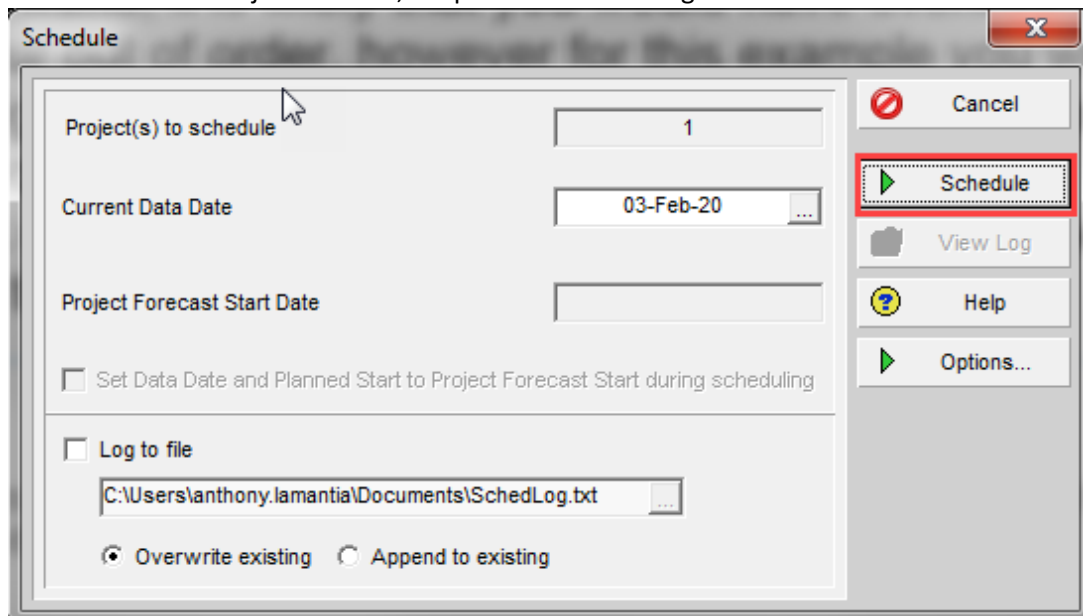
Data type	Primavera	Estimate
Data Type	Primavera	InEight Estimate
Activity Data	Start Dates	Start Dates
TableText	Finish Dates	Finish Dates
TableText	Relationships	Schedule Relationships
TableText	Hours	Plugged Days

Step-by-step - Update Estimate from Primavera

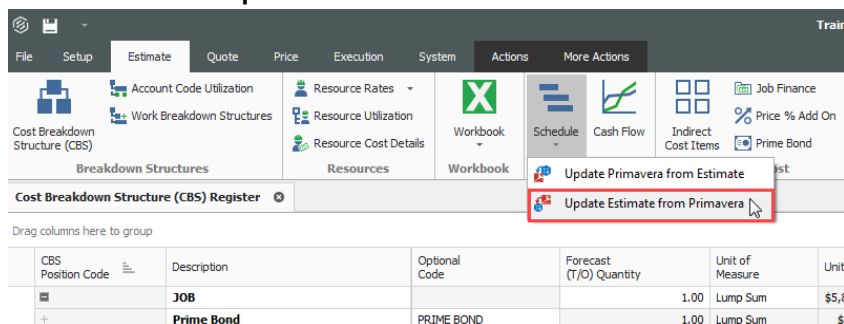
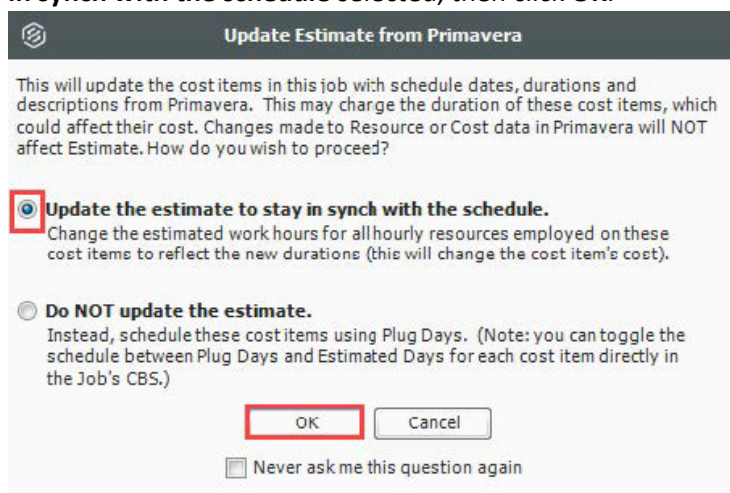
1. Open your project in Primavera.
2. Select all the activities you want to update to Estimate.



3. Right-click a selected row, and then select **Link Selected Activities** to create the Finish to Start relationship. You may have to select the Relationship Lines button to show the linked activities in the graph on the right side of the screen.
4. To schedule this new relationship, select the **Schedule** button (or press the **F9** key).
5. On the Schedule Project window, keep the default settings and select the **Schedule** button.



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

7. Select Schedule > **Update Estimate from Primavera.**8. On the Update Estimate from Primavera prompt, keep the default **Update the estimate to stay in synch with the schedule** selected, then click **OK**.

9. On the Schedule Setup View, you can see the start and finish dates updated from Primavera.

CBS Position Code	Description	Start	Finish	Early Start	Early Finish	Late Start	Late Finish
	JOB	2/3/2020	2/23/2021	2/3/2020	2/23/2021	2/3/2020	2/23/2021
+	Prime Bond						
+	Price % Add-On						
+	Job Financing						
+	Indirect Cost Escalation						
+	Direct Cost Escalation						
+	Indirect Cost Add-On						
+	Job Management & Equipment						
+	General Expense						
+	Direct Cost Add-On						
+ 1	Mobilization	2/3/2020	2/14/2020	2/3/2020	2/14/2020	2/3/2020	2/14/2020
+ 2	Clearing & Grubbing	2/17/2020	2/28/2020	2/17/2020	2/28/2020	2/17/2020	2/28/2020
+ 3	Unclassified Excavation	3/2/2020	4/6/2020	3/2/2020	4/6/2020	3/2/2020	4/6/2020
+ 3.1	Excavation	3/2/2020	4/6/2020	3/2/2020	4/6/2020	3/2/2020	4/6/2020
+ 3.2	Embankment	3/2/2020	4/6/2020	3/2/2020	4/6/2020	3/2/2020	4/6/2020
+ 4	Aggregate Base	4/6/2020	11/9/2020	4/6/2020	11/9/2020	4/6/2020	11/9/2020
+ 4.1	Furnish & Haul Base Material	4/6/2020	6/8/2020	4/6/2020	6/8/2020	4/6/2020	6/8/2020
+ 4.2	Finegrade Subgrade	6/8/2020	8/3/2020	6/8/2020	8/3/2020	6/8/2020	8/3/2020
+ 4.3	Install Aggregate Base	8/3/2020	11/9/2020	8/3/2020	11/9/2020	8/3/2020	11/9/2020
+ 4.3.1	Place Aggregate Base	8/3/2020	9/14/2020	8/3/2020	9/14/2020	8/3/2020	9/14/2020

Manage changes between Estimate and Primavera

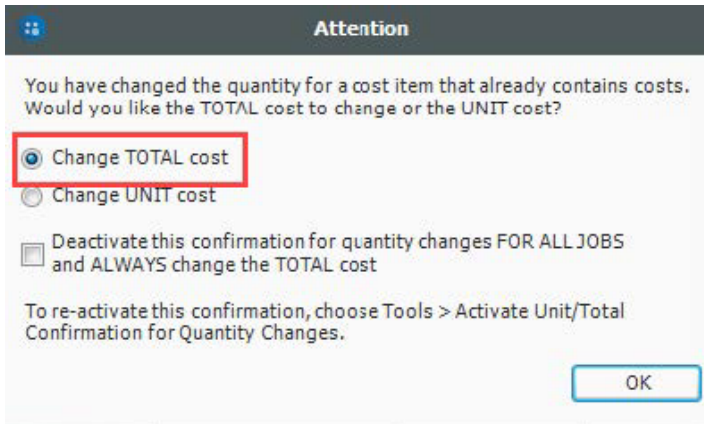
As changes to scope, resources, and costs come up in your estimate, and changes to relationships and dates occur in the schedule, you can continue updating your estimate and schedule as needed.

Update Primavera with Estimate changes

You can make scope changes to your estimate and sync schedule changes to Primavera.

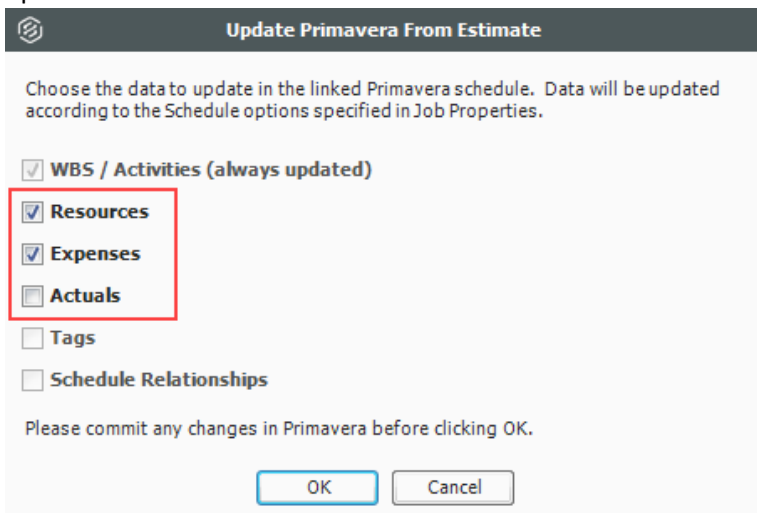
Step-by-step - Update quantities in Estimate and sync to Primavera

1. In your CBS, change the quantity in the Forecast (T/O) Quantity field for a quantity driven item. Your duration days in the Days (Duration driven) column is automatically updated and the Attention dialog box shows for you to select to change total cost or unit cost.



The dialog box is titled "Attention" and contains the following text: "You have changed the quantity for a cost item that already contains costs. Would you like the TOTAL cost to change or the UNIT cost?". There are two radio button options: "Change TOTAL cost" (which is selected and highlighted with a red box) and "Change UNIT cost". Below these options is a checkbox labeled "Deactivate this confirmation for quantity changes FOR ALL JOBS and ALWAYS change the TOTAL cost". At the bottom, there is a note: "To re-activate this confirmation, choose Tools > Activate Unit/Total Confirmation for Quantity Changes." and an "OK" button.

2. Select **Change Total cost**. The unit costs stay intact.
3. Select Schedule > **Update Primavera from InEight Estimate** to sync the changed hours to Primavera. The Update Primavera From Estimate dialog box shows to select which data to update to Primavera.



The dialog box is titled "Update Primavera From Estimate" and contains the following text: "Choose the data to update in the linked Primavera schedule. Data will be updated according to the Schedule options specified in Job Properties." There are several checkboxes: "WBS / Activities (always updated)" (checked), "Resources" (checked and highlighted with a red box), "Expenses" (checked and highlighted with a red box), "Actuals" (unchecked and highlighted with a red box), "Tags" (unchecked), and "Schedule Relationships" (unchecked). At the bottom, there is a note: "Please commit any changes in Primavera before clicking OK." and two buttons: "OK" and "Cancel".

4. Select **Resources** and **Expenses**, and then click **Ok**.
A status window shows the progress of the sync. Depending on the size of the job, this can take a few minutes. When the update has completed, the status window disappears.
5. Open your project in Primavera, and on the Activities tab, validate the duration value to Estimate's Days (Duration driven) value.
6. To schedule the change to Primavera, select the **Schedule** button (or press the **F9** key), and then select the **Schedule** button on the Schedule Project window. Your start and finish dates are updated.
7. In Estimate, from the Estimate tab, select Schedule > **Update InEight Estimate from Primavera** to update Estimate with the new dates.