

THU33 – PRIMAVERA CONTRACT MANAGEMENT LIVES!

Presented by: Don McNatty, PSP; Executive VP/COO; DRMcNatty & Associates, Inc.

Abstract: PCM has been around for almost 30 years and is still widely used on many projects. There's been uncertainty about the impact of Unifier on PCM. Oracle says Unifier is the future of their Contract and Document Management offering, but have committed to support PCM for the near future. PCM licenses are "perpetual", you can continue to it for as long as you need to. There's lots of third party support for PCM to help keep it running. This presentation discusses what you can do to extend the life of PCM deployments and when to consider moving to Unifier.

Overview: Primavera Contract Management (Expedition) has been around since the mid-80's. Originally developed in dBase, it was migrated to a 100% web browser based tool using Sybase as the database and Infomaker to produce standard forms and reports. PCM supports document control based on either creating an original document (record) in PCM or logging an incoming document created by someone else. PCM also covers Contract Management, Change Control and Cost Control. There is some built in integration with Primavera P6 as well as some un-developed integration possibilities based on every cost document supporting activity level reference on line items. Release 14 brought PCM fully into the Oracle realm with Infomaker replaced by BI Publisher.

PCM 13.1 is the last Infomaker based version. Additional 13.1 licenses can only be purchased to expand existing 13.1 deployments. 13.1 also adds support for Webservices and webservice licenses that support custom interfaces into PCM 13.1. While 13.1 does support document versioning it requires the addition of a document repository (JackRabbit, UCM or Sharepoint) to support version tracking. 13.1 is also the last release to support legacy (concurrent) licensing. Legacy licenses must be converted to named Oracle Application User licenses to migrate to PCM 14. Oracle is not developing 13.1 any further and Oracle support for 13.1 will end June 2015.

PCM 14 is the only version available for new purchases. PCM 14 replaces Infomaker with BI Publisher to support internal forms and reports. BI Publisher is totally invisible to PCM users but does require an additional server in the deployment. It's difficult to tell the difference between 13.1 and 14 just looking at the screens, but underneath, 14 is a more complex (and more expensive) deployment. 14 also requires a document repository (UCM or Sharepoint) to support document versioning. Migrating from 1.1 to 14 can be problematic if the JackRabbit repository was used. PCM 14 also includes support for Webservice licenses to support custom interfaces. It also requires Weblogic as the webservice, a more complex deployment than the Jboss included with 13.1.

PCM 14 has a bit more IT overhead and can run a little slower than 13.1 primarily due to Java dependability on the power of the local client. 14 support more and later versions of browsers. As with 13.1, Java issue on local client machines can cause issues.

PCM 14 is on Oracle's Road Map for future development to improve administration functions and at this time does not have a "sunset date" defined for Oracle Support.

Deployment Challenges - PCM is well known for issues related to Java versions causing problems in daily operation. PCM does not have a true document control capability that includes document versioning and audit trail. The PCM interface is not customizable despite the fact that you can add an unlimited number of custom fields to the database. This means that the input screens that users interact with are rarely



“role based”. The requirement for Java limits the application on tablet computers, especially the iPad. PCM does not have a very robust workflow capability that can be customized to organization specific standards (this is one of the primary reasons to go with Unifier). The deployment of PCM 14 is more complex than 13.1. 14 requires an additional server to support BI Publisher. For people used to working in Infomaker to support PCM forms and reports, BI Publisher is not an easy transition.

Deployment Solutions - Despite all the negative elements identified above, PCM still has a lot of life left in it. While Unifier has a published minimum license purchase of 25 users, PCM has not minimum purchases except for Webservice licenses (10). These webservice licenses cost about 25% of a full license and can be used to support role based “lite user” web interfaces. Additionally, the license cost of PCM at \$2,000 for a full license is quite a bit less than Unifier’s module based price of \$2,500 per module with at leaser modules needed to match the basic functionality of PCM. So, PCM will be substantially less expensive than Unifier from a licensing standpoint.

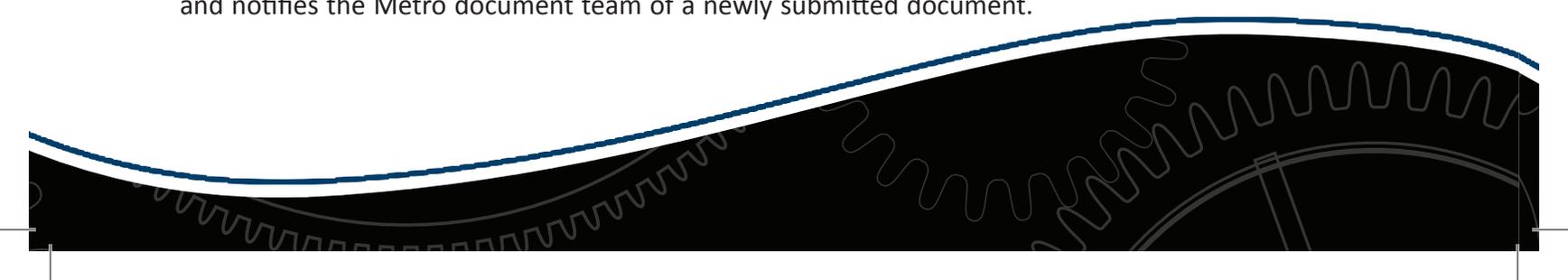
Document management can be improved by using a document repository (Sharepoint) to store PCM documents combined with webservice based custom interfaces to support data creation, capture, collaboration, review and approval.

Extending the life of PCM with Webservices - In our presentation we highlight a couple examples of how PCM 13.1/14 webservices are used to expand the functionality and technology of PCM by using webservices to create role based interfaces to support submitting data and documents into PCM without having to access the full PCM.

The following examples of webservices are provided on a SaaS basis to MLM Project Services clients and are specific examples of how webservices interfaces can be used to expand PCM functionality to support the latest technologies expected to be deployed on major programs and projects.

SDG&E – San Diego Gas & Electric – On a multi-million dollar transmission line project, SDG&E needed to support up to 200+ field inspectors for construction and environmental reporting. A key requirement was that the daily reports needed to be tied to schedule activities to support daily schedule updates and provide as well as supporting daily management reports by 10AM the following day! DRMcNatty developed custom screens and interfaces to support integration between PCM and P6 as well as a work process that supported daily review, approval and posting of data to support summary management reporting on a daily basis. This project specific development has now been deployed to support all active capital projects across specific Sempra business units.

LA Metro Rail – LA Metro, to manage the 40B Measure R Construction Program, enlisted DRMcNatty to host and implement their Project Management Information System (PMIS). This is a Primavera based deployment that supports both P6 and PCM. Started in 2009, the system was initially set up using P6 version 7.0 and Contract Management 13.1. One of Metro’s biggest issues is the security and confidentiality of internal data that would be exposed if contractors were given access to PCM to submit their documents. With potentially hundreds of contractors submitting documents this was potentially a very large problem. DRMcNatty provided a webservices interface “Contract Management Interface (CMI)” that allows contractors to submit documents into LA Metro’s PCM database without having to actually enter the PCM system. CMI provides role based screens for data input to standard as well as custom fields, it provides a notification and workflow process that sends the contractor a receipt email and notifies the Metro document team of a newly submitted document.



The interface also includes real time status reports so contractors can stay up to date on document status. The interface does not require Java or any other software on the local machines, is easy to use and runs on all types of computers including Pc's, Mac's and tablets. Additionally Metro has saved a significant amount on license costs because CMI only requires the PCM Webservice license.

Conclusion – PCM, specifically PCM 14, still has much to offer at a very reasonable cost. By using the webservices capabilities in PCM custom interfaces will support workflows, document management, insure security and provide role based data entry screens. The lower overall cost of PCM and additional cost savings of Webservices licenses can more than offset the development costs for these interfaces. CMI, which in use by hosted as well as non-hosted clients, is available on a SaaS basis that can help spread costs over the project life cycle.

About DRMcNatty & Associates, Inc. DRMcNatty & Associates (DRM) has been assisting clients with the implementation of Primavera software based program and project control systems for over 25 years. DRM is an Oracle Primavera Platinum Partner with offices and projects in California, Minnesota, New York and Australia providing system hosting, implementation, training, custom integration solutions and staffing services. The DRM team has many Oracle Primavera Certified Implementation and Training Consultants for Primavera P6, Contract Management and Unifier as well as other related Primavera and third party nitrated tools. Clients include Los Angeles Metro Rail, PG&E, SDG&E, Turner Construction, Minnesota DOT and hundreds of others over the past 25 years. DRM provides a free monthly technical webinar on Primavera and related products focused on helping clients to advance their knowledge and perspectives on the latest program and project controls tools.

Donald R McNatty, co-founder and Executive Vice President of DRM has over 40 years of experience in construction cost estimating, construction management, project controls and technology. He designed and implemented the "Project Managers Assistant" software in 1986, a precursor to Primavera Expedition and similar project delivery, document and change management tools. Don is a Certified trainer and Implementation Consultant on Primavera P6, Contract Management and Unifier.

For more information, contact DRMcNatty at (877) 367-7990, info@drmcnatty.com.



CONTRACT MANAGEMENT INTERFACE

Contract Management Interface (CMI) improves efficiency and allows customers to receive documents along with attachments, directly into their Oracle Primavera Contract Management (PCM) 13 or 14 database. Our customers have seen a substantial reduction in administrative work, and improved secured project documentation.

This 100% web-based (no Java runtime required) application resolves a common business problem for organizations that receive incoming documents and have to manually log them directly into PCM rather than provide the contractor full read/write access to the contract management database. With CMI, contractors have the ability to submit documents into PCM without direct access to the database using only a PCM 13 or 14 web service license.

KEY BENEFITS

Secure
Reduces Costs
Automated
Notifications
Runs on any
Browser/Device
-iPad
-Android
-PC
-Mac

With Contract Management Interface, contractors have the ability to submit documents into Primavera Contract Management without the need for extensive knowledge of the software.



FEATURES

- Browser-based, internet access to submit documents into Contract Management
- Simple to use, no need for expensive training, just requires an internet connection
- Eliminates the need for your staff to manually enter documents, saving you time and money!
- Allows Owners and Contractors the security of separate interfaces
- Run reports to check the status of submitted items
- Automatic email notification and receipt for all document types
- Allows Contractor "View Only Rights" to Owner's Contract Management database
- Save on license costs with the CM "light" web service license

SUBMIT

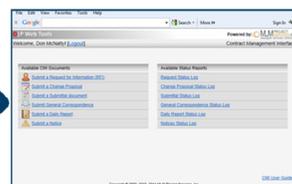
RFI
Change Proposal
Submittal Document
General Correspondance
Daily Reports

VIEW

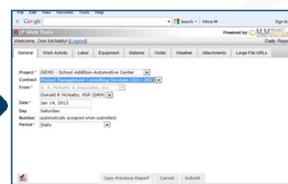
Request Status Log
Change Proposal Status Log
General Correspondance
Status Log
Daily Report Status Log



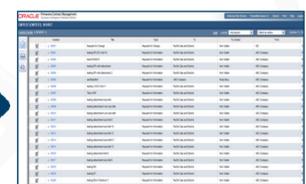
1. Log on



2. Select a document type



3. Fill in fields and submit



4. It is imported directly into Contract Management including all attachments less than 120MB

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