



IMPLEMENTATION HANDBOOK

PDM 3.0

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PDM PRO IMPLEMENTATION HANDBOOK OVERVIEW

The PDM Pro Implementation Handbook is a guide for certified PDM implementers designed to provide a detailed structure of how to implement a PDM Pro system.

The handbook outlines the phases, steps and tasks of the implementation process. It provides the necessary tools for you to fill out for the various steps and tasks required. The tools include checklists, meeting templates, information gathering forms, documentation for the customer, and detailed descriptions of the steps and tasks.

As you implement the PDM Pro system for your customer, follow the handbook closely. It will walk you through the process and help you gather all of the necessary information and will instruct you how to perform the installation. The processes in this handbook are a culmination of numerous implementations and contain the best practices.

THE PDM SEVEN-PHASE IMPLEMENTATION METHODOLOGY

To implement the system correctly, use the PDM Seven-Phase Implementation Methodology to get the maximum results for your customer's complete satisfaction and full technology adoption.

Many people will be involved in the PDM implementation and it requires full coordination and dedication of the resources. Representatives from PDM Service Providers, PDM Resellers, McGraw-Hill Construction, your customer, and Adenium Systems will be involved in the execution of the plan.

PDM Implementation Team will manage the implementation process and guide the customer every step of the way to build a solid foundation for successful projects.

The PDM Seven-Phase Implementation Methodology consists of these phases:

Phase 1 – Readiness Assessment

Phase 2 – Design

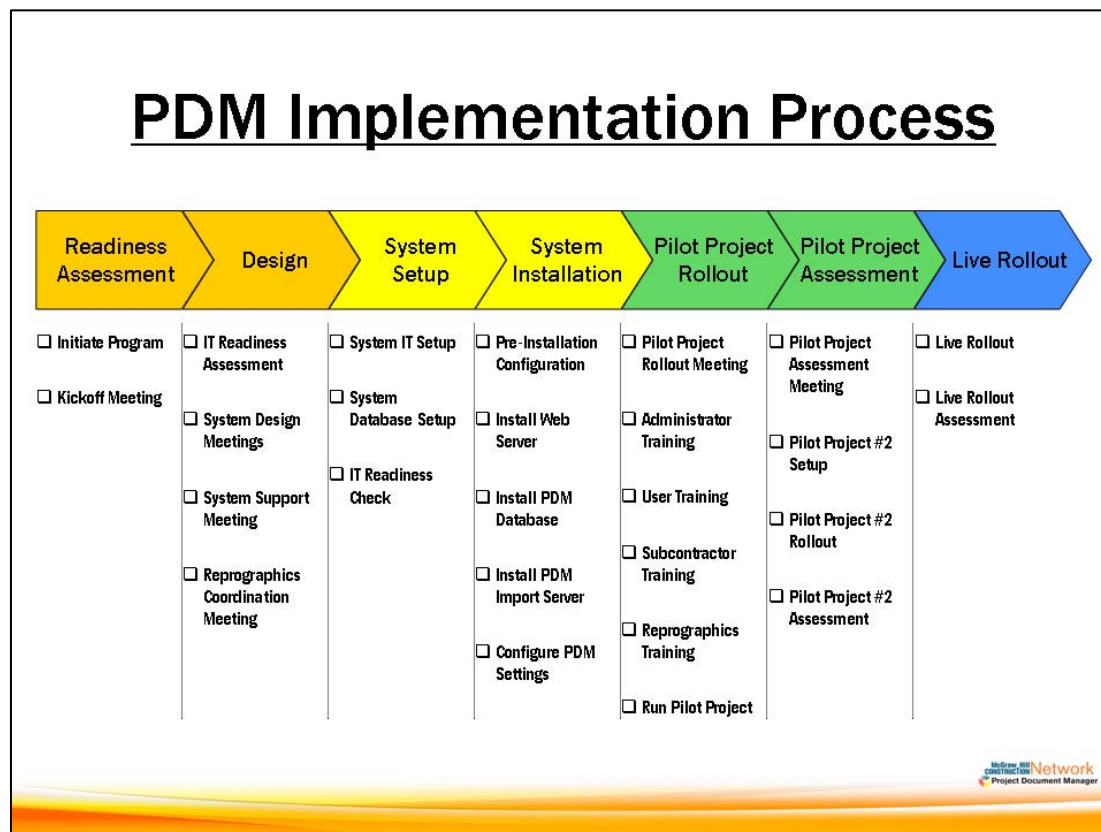
Phase 3 – System Setup

Phase 4 – System Installation

Phase 5 – Pilot Project Rollout

Phase 6 – Assess Pilot Project Results

Phase 7 – Live Rollout



Phase 1 – Readiness Assessment

The PDM implementation begins after the contract is signed by the customer to purchase the system. Ideally, a person from the implementation team should be involved in the sales process so they can help the customer understand the system.

The readiness assessment will put in place the people necessary from the customer, reseller, and implementation team. The reseller and the implementation team may be the same or separate companies. It is important to identify the key personnel.

A meeting will be held with the key personnel to do a readiness assessment. The assessment will confirm the customer's expectations and goals with the PDM system. During the meeting, you will outline everyone's responsibilities and obtain their commitment. You will also discuss a project schedule with dates for upcoming training, meetings, and actions.

Phase 2 – Design

In the Design phase of the implementation process, you will need to gather all information necessary from the customer so that you can properly configure the systems. This will be accomplished through a series of meetings.

You will hold an IT Readiness Assessment meeting to instruct the customer what is needed for IT infrastructure. This will allow them to know the IT requirements and begin acquiring necessary hardware and software as needed.

In this phase, you will also hold System Design meetings to gather information about the users and administrators of the system and gather their subcontractor database.

You will also hold a System Support meeting to identify and define the support procedures.

A Reprographics Coordination meeting will also be held to setup and prepare the scan and print locations.

Phase 3 – System Setup

The third phase is the System Setup phase. During the System Setup phase, the implementation team will configure the PDM system to run according to the goals previously defined. They will use the information gathered during the Design phase meetings to setup the PDM database and vault. They will setup licenses, the email capabilities, fax capabilities. They will also import the subcontractor database and other users into the system. They will setup the security architecture and configure all lists, logos, portals, and more.

An IT Readiness Check meeting will also be held to verify the setup of the IT infrastructure that is necessary.

Phase 4 – System Installation

During the System Installation phase, the installation team will install the PDM components such as the servers, database, vault, and everything else that needs installing and configuring. The installer will need to be aided by the database administrator at the customer site.

Phase 5 – Pilot Project Rollout

Once the system is installed, we will prepare to rollout the system for a pilot project. Training will be provided for the administrators, users, subcontractors, and print and scan locations. After training is complete, the pilot rollout will begin. We will monitor performance of the rollout plan and spot-check users to ensure the project management processes are functioning as intended.

Phase 6 – Assess Pilot Project Results

After the pilot projects are completed, a detailed assessment of the operation and functionality of the setup will be evaluated. We will review the IT infrastructure, the support plan, the system design, the training effectiveness, and the usage effectiveness. Changes to will be made to these areas based on what is learned.

Phase 7 – Live Rollout

The live rollout will occur after the successful pilot projects are completed, assessed, the system optimized, and people are trained. Continuous direction, training, support, and troubleshooting will be available.



Initiate Program

Readiness Assessment Phase

1.1 INITIATE PROGRAM

The Initiate Program step is necessary to make sure that everything is setup properly so the program can move forward. This includes the customer signing the contract and getting them setup with the proper accounts in internal systems. A PDM license will need to be generated. One of the more important steps is to identify all of the key players who will be involved in the implementation of the system, on the customer side, the sales side, and the implementation side.

Use the **PDM Implementation Program Key Personnel Form** below to record the necessary information. Distribute the form to all personnel involved in the program.

1.1.1 Sign Contract for PDM System

Everything begins with the customer signing the contract to purchase the PDM system. This occurs after all of the demonstrations have been performed and the customer is ready to purchase the system. Verify that the contract was signed by the customer before proceeding.

1.1.2 Set Up Account and Pricing in Billing Systems

To ensure proper billing and tracking, an account needs to be setup in the pricing and billing systems of the reseller, implementation team, Adenium Systems, and McGraw-Hill Construction. Send information about the customer to all companies involved in the sale and implementation so that they can enter it into their internal systems that they may have.

1.1.3 Create PDM Licenses

PDM licenses need to be generated by McGraw-Hill Construction in order for the system to be installed. The process is initiated when a signed contract is submitted to McGraw-Hill Construction. McGraw-Hill Construction sends an email Adenium Systems containing the customer name, reseller name, and license number. Adenium enters this into their server tracking system. Doing so, will allow you to create and license the PDM database during the installation. The process is initiated when a signed contract is submitted to McGraw-Hill Construction. Once MHC creates the licenses, they will be sent to the implementation and sales teams.

Verify that the license generation process has begun because you will need to enter this information during the installation process.

1.1.4 Identify Management Sponsor

The Management Sponsor is someone from the customer who is not involved in the day to day activities of the program and who will receive periodic updates from the Project Manager on the status of the implementation. Identify and record who will be the Management Sponsor on the **PDM Implementation Program Key Personnel Form**.

1.1.5 Identify Program Manager

The Program Manager is the person who will oversee and coordinate the overall program for the customer. They will manage the project for the customer and make sure the project stays

on task. They will need to be involved in every meeting and provide important customer sign-offs. They are the key point of contact at the customer for the implementer. Identify and record who will be the Program Manager on the **PDM Implementation Program Key Personnel Form**.

1.1.6 Identify IT Manager

The IT Manager is a person who works for the customer in a decision making role for their IT department. This person is important to the program because they are responsible for getting the IT infrastructure ready to host the system. This includes things like acquiring and preparing servers, preparing the database environment, setting up email accounts, and more. They will be heavily involved in the IT Readiness Assessment and IT Readiness Check steps that come later in the implementation process. Identify and record who will be the IT Manager on the **PDM Implementation Program Key Personnel Form**.

1.1.7 Identify PDM Administrators

The PDM Administrators are the people who will be using PDM every day in an administrative capacity. Typically they are construction project managers for the customer in a particular region. They will be the primary persons responsible for making decisions that will optimize the system for their company, users, and subcontractors. Identify and record who will be the PDM Administrators on the **PDM Implementation Program Key Personnel Form**.

1.1.8 Identify Reseller Sponsor or Account Manager

The Reseller Sponsor is the person who works for the PDM reseller and has keen interest in the success of the implementation and full adoption by the customer. This can be the account manager or a project manager. They will be involved in some meetings and will be aware of the progress of the implementation and adaptation of PDM. They may also provide a consulting role for the customer as to the best use of PDM in the pilot stages and the full rollout. They may also help identify suitable pilot projects. In short, they will oversee that their customer is more than satisfied with their PDM system and that the project stays on task. Identify and record who will be the Reseller Sponsor on the **PDM Implementation Program Key Personnel Form**.

1.1.9 Identify Implementation Team

The Implementation Team contains the key people who work for the PDM Service Provider, Reseller, and/or Adenium Systems. Typically this includes the implementer, the installer, and the trainer. In some cases one person may perform more than one of these operations. The implementer is the person who consults with the customer and explains the system's capabilities and helps design the system. The installer is the person who sets up the PDM database and vault and installs the system on the customer's servers. The trainer is the person who will train the administrators and users. The implementation team should also include a backup support person from Adenium Systems. Identify and record who will be the core Implementation Team members on the **PDM Implementation Program Key Personnel Form**.

1.1.10 Schedule Kickoff Meeting

A Kickoff Meeting needs to be held with all of the key players identified. In this meeting, the customer expectations, requirements, goals, and objectives need to be identified and agreed upon, recorded, and signed-off. The various responsibilities of the reseller and the customer will be laid out. In this meeting, pilot projects will be identified, project milestones will be established, and all of the necessary meetings will be scheduled. All parties will need to be involved in the decision making process and sign off on the agreed upon terms, responsibilities, and schedules.

1.1.11 Provide the Account Manager with Pre-Kickoff Meeting Worksheet

The first meeting in the implementation process will be to hold the Kickoff Meeting. Before the meeting, you will need to get some information about the customer, such as the customer's expectations and goals. Obtain this information from the salesperson who sold them the system. This person is usually the reseller sponsor or the Account Manager. Provide the reseller sponsor and/or Account Manager with the **Pre-Kickoff Meeting Worksheet** at the end of this section to help get proper information.

Important note: The reseller sponsor should fill out the worksheet. *It should not be sent to the customer!* They will not have the full context to answer the questions in the detail needed. Obtaining this information prior to the meeting will help you to be prepared to discuss the topics on the agenda.

1.1.12 Send Invitation to Kickoff Meeting Attendees

Send email invitations to all of the people who need to attend the Kickoff Meeting. Inform them of the date, time, and location of the meeting and provide them with the **Kickoff Meeting Agenda**. An agenda can be found at the end of the "Kickoff Meeting" section of this guide.

PDM Implementation Program Key Personnel Form			
Customer			
Reselling Company			
Implementing Company			
Customer Personnel	Name	Email	Phone
Management Sponsor			
Program Manager			
IT Manager			
PDM Administrator			
PDM Administrator			
Reseller and Service Provider Personnel	Name	Email	Phone
Reseller Sponsor			
Implementer			
Installer			
Trainer			
Adenium Support Person			
Date and Time of Kickoff Meeting			

Pre-Kickoff Meeting Worksheet

Customer: _____

Implementer: _____

Sales Person: _____

Kickoff Meeting Date: _____

To prepare for the upcoming Kickoff Meeting, please answer the questions below and return it to the PDM implementer. Please do not send this to your customer and ask them to fill it out.

1. What are the customer's expectations of the product's capabilities and the services that will be provided? What do they want to use the system for?

2. What are the specific customer's goals for implementing and adopting PDM into their business?

3. What are the specific functional capabilities of PDM that your customers require?

4. What upcoming projects would your customer consider as possible pilot projects?

5. When does your customer hope to start using the product in production?



Kickoff Meeting

Readiness Assessment Phase

1.2 KICKOFF MEETING

The Kickoff Meeting needs to be held with all of the key members involved in the implementation. This includes all of the members identified in the Initiate Program step: the management sponsor, program manager, IT manager, PDM administrators, reseller sponsor, system implementer, installer, and trainer all should be involved.

The purpose of this meeting is to set and agree upon everyone's expectations and responsibilities throughout the implementation cycle. You will make sure that everyone is on the same page and knows the project plan. In this meeting, you will set expectations, outline everyone's responsibilities, identify pilot projects, establish milestones, schedule upcoming meetings and dates, and signoff on the project plan.

Prior to this meeting, you should have sent the **Pre-Kickoff Meeting Worksheet** (located at the end of the "Initiate Program" section) to the salesperson who made the sale. You should have also sent the **Kickoff Meeting Agenda** (located at the end of this section) attached to the invitation to all of the participants. Use the Kickoff Meeting Agenda as a template for recording the meeting minutes, action items, and agreements.

1.2.1 Hold Kickoff Meeting with Implementation Team and Customer Management Team

Before the meeting, have the sales person or reseller sponsor use the **Pre-Kickoff Meeting Worksheet** (located at the end of the "Initiate Program" section) to record their customer's:

- Expectations of the product's capabilities and the services that will be provided
- Requirements of the functionality of the system and the amount and quality of the services provided, that when met, will have them more than satisfied
- Goals for implementing and adopting the product into their workflows
- Objectives
- Possible pilot projects
- Dates in which they hope to start using the product in production

Successful kickoff meetings will have a quality moderator to moderate the discussions and keep them on task. Someone also needs to be designated as the meeting recorder to take the meeting minutes. Experience has shown that successful meetings are done in person and the customer expectations, customer responsibilities, and reseller/implementation team responsibilities are displayed where everyone can see them. For instance, have three flipcharts, and label one "Customer Expectations", another "Customer Responsibilities", and the third "Reseller/Implementation Team Responsibilities". Use them to record the appropriate information that is discussed and decided upon.

1.2.2 Re-Affirm Customer Expectations, Requirements, Goals, and Objectives

The customer, as a result of sales process and product demonstrations, has a set of expectations. It is vital to learn what their expectations are and record them during the meeting. The Kickoff Meeting Worksheet should have been filled out by the sales representative or the reseller sponsor. Bring that worksheet to the meeting and review the

information with the customer. Ask questions such as “We understand your expectations to be <insert the information on the worksheet>. Are we accurate?”

There may be times when their expectations are too lofty, too minimal, or otherwise inaccurate and you will need to inform them of the product’s capabilities and consult with them to properly redefine what they expect from the product and services.

The customer also will have requirements, goals, objectives, and dates in mind as they enter the meeting. You will need to learn what they are and record them. Find out what will it take for them to be more than satisfied with the product and services that you will be providing.

Display everything discussed so that everyone in the room can see them, such as on a flip chart or white board. Record everything that is decided upon on the **Kickoff Meeting Agenda** (located at the end of this section).

1.2.3 Record Expectations, Requirements, Goals, and Objectives

Record everything that is decided upon on the **Kickoff Meeting Agenda**.

1.2.4 Outline Reseller Responsibilities

Once the expectations are set, it is important to clearly define the responsibilities of the implementation team and the reseller. Detail the services that you will be providing as well as the personnel that will be involved. Find out if there are any responsibilities that your customer would like you to take on that you may not have mentioned.

Display everything discussed so that everyone in the room can see them, such as on a flip chart or white board. Record everything that is decided upon on the **Kickoff Meeting Agenda**.

1.2.5 Outline Customer Responsibilities

You will also need to clearly define the responsibilities of the customer and their personnel. Be sure to inform them of the resources that will be needed from their company. This includes the time of their personnel, access to their systems, signoffs that will be needed, and physical facilities that will be needed such as meeting and training rooms.

Display everything discussed so that everyone in the room can see them, such as on a flip chart or white board. Record everything that is decided upon on the **Kickoff Meeting Agenda**.

1.2.6 Setup Customer on PDM Demo System

In order to familiarize the customer with the PDM system, you need to provide access to a demo system that they can begin to use and test. This will allow them to practice setting up bid packages, adding documents, sending notifications, working with contacts, and so forth. This will also help them to be prepared to answer questions that you will need to ask them during the system design meetings that will be held at a later date.

To do so, provide them with access to a reseller-hosted, web-deployed PDM demo system. You will need to create licensed users with permissions, and then provide the customer with their user names and passwords. Also provide a project for them to use and the deployment URL.

1.2.7 Provide Customer with PDM User Guide

You will need to provide the customer with the PDM User Guide. This will give the customer instructions on how to carry out the basic tasks in PDM so that they can begin to get familiar with the system. Provide them both a hard and electronic copy of the guide. As a supplement or alternative, you can schedule online, remote training sessions to train them on the system.

1.2.8 Identify 2-4 Pilot Projects

Before you go live with the system, you will need to run PDM with at least two pilot projects. Always start with one pilot project, assess the results, and then make necessary changes. Do the same for a second pilot project. And then you can go live with a full rollout once all of the kinks have been worked out. Identify the pilot projects with which you will test the system and workflows.

1.2.9 Identify Pilot User Representatives

The Pilot User Representatives are those who work for the customer and will be day to day users of PDM for the pilot projects. These should be people who are technically capable of using PDM and understanding its workflows. Typically the PDM Administrators will nominate specific people or a general group of people. Identify and record who will be the Pilot User Representatives.

1.2.10 Determine Where the System Will Be Hosted

The PDM system can be hosted by the customer in the customer's environment, or by your company, the service provider. Depending on the customer's capabilities and needs, decide who will host the system.

1.2.11 Schedule IT Readiness Assessment Meeting

An IT Readiness Assessment Meeting needs to be held with the IT Manager and necessary staff, Program Manager, the implementation team, and possibly the Management or Reseller Sponsors. In this meeting, you will explain hardware and software requirements and discuss and plan all of the tasks that will need to be performed on the IT side of the program implementation. All parties will need to be involved in the decision making process and sign off on the agreed upon terms, responsibilities, and schedules.

Schedule the meeting for the earliest possible time. This meeting is the next necessary meeting in a series of upcoming design meeting.

1.2.12 Schedule System Design Meeting

A series of System Configuration Meetings will need to be held with the Operations Manager, System Administrators, Program Manager, and Implementers. In this meeting, you will make decisions necessary to properly setup the system so that the workflow will be optimized to your customer's procedures or desired procedures. In these meetings, you will need to consult with your customer extensively. All parties will need to be involved in the decision making process and sign off on the agreed upon terms, responsibilities, and schedules.

Schedule the System Configuration Meetings for the earliest possible time.

1.2.13 Schedule Support Planning Meeting

A Support Planning Meeting needs to be held with the Program Manager, System Administrators, IT Manager, the implementation team, and any one else that you see fit. In this meeting, you will identify and define crucial support procedures and instruct the customer on the many support tools available. All parties will need to be involved in the decision making process and sign off on the agreed upon terms, responsibilities, and schedules.

Schedule the Support Planning Meeting.

1.2.14 Schedule Reprographics Coordination Meeting

A Reprographics Coordination Meeting needs to be held with the Program Manager, System Administrators, and the reprographics company. In this meeting, you will work with the reprographer to instruct them on the PDM solution and give an overview of the printing and scanning procedures. You will also schedule the reprographics training in this meeting.

Schedule the Reprographics Coordination Meeting.

1.2.15 Schedule Tentative Installation Date

As part of the project plan, set tentative dates on when the PDM system can be installed. These tentative dates may need to be changed as you get closer to the pilot rollout.

1.2.16 Schedule Tentative Training Dates

As part of the project plan, set tentative dates on when the administrator, user, reprographic, and subcontractor training can take place. Also determine the location of the training. You may want to discuss who will be in the training. Reinforce who will perform the training. These tentative dates may need to be changed as you get closer to the pilot rollout.

1.2.17 Schedule Tentative Pilot Project Rollout Date

As part of the project plan, set tentative dates to rollout the first pilot project on PDM. These tentative dates may need to be changed based on the progress of the installation.

1.2.18 Create Statement of Work / Timeline / Project Plan

A statement of work, and/or timeline, and/or project plan should be created as a result of this meeting. This should be the official source of timelines, dates, and milestones.

1.2.19 Obtain Sign-Off From All Parties

Everyone who is involved in the decision making should sign off on the agreements that were made in the meeting. This includes action items, responsibilities, decisions made, timelines, and resources required.

1.2.20 Send Meeting Minutes to All Parties Involved

After the meeting, send the meeting minutes that contain notes, agreed upon decisions, and action items to those who attended the meeting. Also send all checklists, worksheets, and signoff forms that were created as a result of the meeting. Be sure the Management Sponsor, Reseller Sponsor, and Program Manager all receive a copy even if they were not in attendance.

1.2.21 Send Invitations to Attendees for All Scheduled Meetings

Send meeting invitations for the upcoming meeting to all those who are supposed to attend. This includes the IT Readiness Assessment Meeting, System Design Meetings, Support Planning Meeting, and the Reprographics Coordination Meeting. Include an explanation of the purpose of the meetings and the meeting agenda.

Kickoff Meeting Agenda

PDM Pro Implementation

1/11/2010

Customer:

People in attendance:

1. Customer Expectations, Requirements, Goals, and Objectives

2. Reseller Responsibilities

3. Customer Responsibilities

4. Setup Customer on PDM Demo System

5. Provide Customer with PDM User Guide

6. Possible Pilot Projects

7. Pilot Users

8. Where the System Will Be Hosted

9. Schedule Meetings

IT Readiness Assessment Meeting	
Date	
Time	
Location	
Invitees	

System Design Meeting	
Date	
Time	
Location	
Invitees	

System Support Meeting	
Date	
Time	
Location	
Invitees	

Reprographics Coordination Meeting	
Date	
Time	
Location	
Invitees	

Tentative Installation Date	
Date	
Time	
Location	(Pick One) At Customer Location Remote
Hosted?	(Pick One) Yes No
Performed By	

10. Schedule Tentative Training Dates

PDM Administrator Training	
Date	
Time	
Location	
Invitees	

PDM User Training	
Date	
Time	
Location	
Invitees	

Reprographics Training	
Date	
Time	
Location	
Invitees	

Subcontractor Training will be determined at a later date.

11. Tentative Pilot Project Rollout Date

Date: _____

12. Create Statement of Work / Timeline / Project Plan

Action Items

Sign-Off From All Parties



IT Readiness Assessment

Design Phase

2.1 IT READINESS ASSESSMENT

The IT Readiness Assessment is necessary to ensure that the proper technical infrastructure is put in place prior to the PDM installation. It is imperative that the proper hardware and software environment is ready prior to the installation. This will require you to hold a detailed meeting with your customer explaining and discussing the requirements necessary.

During the assessment, you will need to meet with your customer's IT staff and clearly explain the requirements necessary for a proper installation and the information that will need to be documented. You will need to gather a significant amount of information from the IT personnel and record it. Use the "*PDM Installation Addendum*" document to record the necessary information that you will discuss during the meeting.

Two important documents are available to provide to your customer and to use as a guide in this meeting. The first is the "*PDM Hardware and Software Requirements*" guide which contains the minimum requirements for their server and network environment to properly run PDM. Provide this guide to the meeting participants and review it in detail during the meeting.

The other, as mentioned above, is the "*PDM Installation Addendum*" document. This document is a form that will need to be completed between the IT Readiness Assessment Meeting and the IT Readiness Check Meeting. You can use this form as a guide throughout the meeting. This is a critical document to the overall success of the installation and will be used in numerous ways. First, it contains a list of the necessary information needed to ensure the proper IT environment is set up. Secondly, it will be used by the installer during the installation process because it will contain necessary information to properly install and configure the system. Thirdly, it will be a valuable reference document after the installation for IT and support personnel. The information in this handbook maps to the information in the "*PDM Installation Addendum*" and contains explanations and definitions of each item.

A third document may also be helpful during this meeting. The "*PDM System Capacity Planning Guide*" is a document aimed at helping a customer plan for storage and bandwidth needs. You can elect to go by the guidelines stated in the "*PDM Hardware and Software Requirements*" guide; however, there may be a need to examine the needs more closely. When that occurs, provide a copy of the "*PDM System Capacity Planning Guide*" to the meeting attendees and go through the exercises. The result of doing so will be a storage and bandwidth requirement for this specific customer. Please note that it is not a requirement to go through this capacity planning during this meeting. It can be done at a later date. If you do not use the document in this meeting, it is a good idea to give a copy of the document to the IT staff for future reference.

2.1.1: Hold IT Readiness Assessment Meeting

Hold an IT Readiness Assessment Meeting with the IT manager, IT staff, Management Sponsor, Program Manager, and the Implementation Team. The purpose of the meeting is to inform the customer about the IT requirements and gather the necessary information to lay the technical foundation for the PDM system. Once the IT staff has been informed on the requirements the customer needs, they can provide the necessary information to you.

Select someone to record the meeting minutes. Use the "*IT Readiness Assessment Meeting Agenda*" provided at the end of this section to structure the meeting, record the minutes, and obtain the sign-offs.

2.1.2: Provide PDM Hardware and Software Requirements Guide

At the beginning of the meeting, provide the meeting attendees with a copy of the “*PDM Hardware and Software Requirements*” guide. You can also send it to them prior to the meeting. The guide details what hardware and software is needed to run PDM. You will refer to the guide throughout the meeting. You can obtain the “*PDM Hardware and Software Requirements*” guide from the PDM documentation site.

2.1.3: Provide PDM Installation Addendum Document

Prior to or at the beginning of the meeting, provide the meeting attendees with a copy of the “*PDM Installation Addendum*” document. This is the document that will be used to record the IT environment that is put in place prior to the installation. You will explain each item in this document throughout the meeting and leave a copy with the customer’s IT staff. They will need to setup their IT infrastructure according to the requirements discussed in this meeting and then record the setup in this document. You can obtain the “*PDM Installation Addendum*” from the PDM documentation site.

2.1.4 Explain DNS Configuration

Once the proper documents have been distributed, begin by going through the “*PDM Installation Addendum*”. Explain the options beginning with the DNS Configuration section.

A valid DNS name should be created and mapped to the web server (or load balancer if one is used).

A valid DNS name is required because PDM is an internet based application. It communicates with the database over a remote internet connection. The DNS name allows PDM to know the location of the system it is trying to communicate with.

IP addresses used in place of DNS names are *not* recommended because if the customer or host needs to change the IP address, it will require configuration changes in PDM. The web server and all other servers as well as any other computer on the internet should be able to access the web server using this DNS name.

Record the DNS Configuration information in the “*PDM Installation Addendum*”.

2.1.5 Explain Database Server Configuration

Review and explain the Database Server requirements that are in the “*PDM Hardware and Software Requirements*” guide.

Record the Database Server Configuration information in the “*PDM Installation Addendum*”.

2.1.5.1 Explain Database Engine Requirements

PDM Database Server is compatible with both SQL Server 2005 and SQL Server 2008. The database engines must be installed or configured to run as “Mixed Mode”.

2.1.5.2 Explain SQL User with dbCreator Privileges

A SQL server user will need to be created that has SQL dbCreator privileges. Once the databases are installed, this user will be defined as the owner of those databases. The PDM web application and windows application and services will log on to the database using this SQL user.

2.1.6 Explain Web Server Configuration

Review and explain the Web Server requirements that are in the “*PDM Hardware and Software Requirements*” guide.

Record the necessary Web Server Configuration information in the “*PDM Installation Addendum*”.

2.1.6.1 Explain Load Balancing Options

The customer has the option to load balance their web servers. Load balancing web servers allows work to be evenly distributed across two or more servers. This will allow a server to accept additional processing and traffic while another server is busy. Load balancing can also increase reliability of a solution.

2.1.6.2 Explain SSL Requirements

Many customers require extra security safeguards and will require information passed over HTTP to be SSL secured. Since PDM can contain secure information, such as construction drawings and contact information, a Secure Socket Layer (SSL) certificate is required to be registered to the web server for the registered DNS name. SSL certificates are cryptographic protocols used for securing information that is communicated over the internet. When PDM is launched, communications will occur over the https:// connection.

An SSL Security Certificate for the Registered DNS Name is required for PDM.

A portion of this information is also located in the “*PDM Hardware and Software Requirements*” guide.

2.1.7 Explain Import Server Configuration

Review and explain the Import Server requirements that are in the “*PDM Hardware and Software Requirements*” guide.

Record the necessary Import Server Configuration information in the “*PDM Installation Addendum*”.

2.1.8 Explain File Vault Configuration

The file vault contains all files that are put into the system; this includes documents, attachments, and graphics. No document is ever deleted out of the vault in order to preserve the document history integrity. Because of this, the vault will continue to grow in size and should be planned for. You will need to plan for the capability to add storage to accommodate growth. Also note that the PDM system has the ability to define multiple file vaults.

The file vault will be in the form of a Windows Network Share. (\\Server\Share\). It can be stored on a network attached storage device or a physical server. Any storage device is acceptable, provided a Windows Network Share can be created from it.

A domain user will require read-write access to this share. This account is referenced below.

The Web Server and Import Server all need Windows File Sharing Read-Write access to the File Vault over a minimum 1Gb network connection.

Review and explain the PDM File Vault requirements that are in the “*PDM Hardware and Software Requirements*” guide. (If a more detailed analysis is needed, you have an option to provide a copy of the “*PDM System Capacity Planning Guide*” to the participants and go through the exercises contained within it to get a more accurate idea of vault storage needs.)

Record the necessary File Vault Configuration information in the “*PDM Installation Addendum*”.

2.1.8.1 Explain PDM System Capacity Planning Guide

If a more detailed analysis is needed, you have an option to provide a copy of the “*PDM System Capacity Planning Guide*” to the participants and go through the exercises contained within it to get a more accurate idea of vault storage needs.

The “*PDM System Capacity Planning Guide*” is a document aimed at helping a customer plan for storage and bandwidth needs. You can elect to go by the guidelines stated in the “*PDM Hardware and Software Requirements*” guide; however, there may be a need to examine the needs more closely. When that occurs, provide a copy of the “*PDM System Capacity Planning Guide*” to the meeting attendees and go through the exercises. The result of doing so will be a storage and bandwidth requirement for this specific customer. Please note that it is not a requirement to go through this capacity planning during this meeting. It can be done at a later date. If you do not use the document in this meeting, it is a good idea to give a copy of the document to the IT staff for future reference.

2.1.9 Explain SMTP Configuration

PDM requires a valid SMTP provider to be able to send email notifications, such as forgotten passwords, user notifications, and invitations to bid. The SMTP provider can be in the form of an IP address or DNS name and should allow local email relays from the various PDM servers. You will also need to supply a SMTP user name and password if it is required for the SMTP server. PDM supports SMTP authentication as well as secure SMTP.

A valid email address will need to be created and allowed to send email through the specified SMTP server. This will be the “Send As” address for PDM when it is sending notifications. A typical address would be pdm@xyzconstruction.com. It is best to set this email up as an actual account on the SMTP server so any responses sent back to it can be monitored and responded to when necessary.

A portion of this information is also located in the “*PDM Hardware and Software Requirements*” guide.

Record the necessary SMTP Configuration information in the “*PDM Installation Addendum*”.

2.1.10 Explain Domain User Requirements

A domain user will need to be created that contains “Full Control” permissions to the file vault share. This user will also need the “Log On as Batch Job” permission since it will also be used to run various windows services. IIS.ASP.net will also run under this user account.

Record the Domain User information in the “*PDM Installation Addendum*”.

2.1.11 Explain PDM Configuration

A base directory and installation directory need to be determined. The base directory is the location where you will put all of the .msi and other files needed for the installation. The installation directory is the location where you will install the applications. The default installation directory is C:/Program Files/Adenium Systems.

Record the PDM Configuration information in the “*PDM Installation Addendum*”.

2.1.11.1 Explain “Send As” and “Reply To” Email Addresses

PDM can send automatic and manual notifications via email. Because of this, PDM must be configured with “Send As” and “Reply To” email addresses.

The “Send As” email address is an email address that is allowed to send email through the hosting provider or customer’s SMTP servers. People will receive their notifications from this address.

The “Reply To” email address is the address that will be used when someone replies to an email notification that they receive from PDM. It is required because PDM will be sending notification emails on behalf of the “Send As” address and not the actual person who initiated the notification.

Record the “Send As” and “Reply To” Email Addresses in the “*PDM Installation Addendum*”.

2.1.11.2 Explain Aurigma License Requirements

PDM requires that users provide an Aurigma license for the uploading and downloading controls included on the PDM Portal Web Application. These licenses are required for each domain that will be used for hosting PDM systems. Once the licenses have been purchased, they can be installed during the installation process. They can be purchased at www.aurigma.com.

Review and explain the Aurigma requirements that are in the “*PDM Hardware and Software Requirements*” guide.

Record the Aurigma License information in the “*PDM Installation Addendum*”.

2.1.11.3 Explain Faxing Requirements

Notifications can be sent via email and fax. Therefore, the customer must set up a faxing account with one of the approved PDM faxing services. PDM supports three internet-based faxing providers: eFax, Easylink, and GreenFax. Information can be found at their respective websites about costs and features.

Once a faxing provider has been established, it will be entered into PDM during the installation.

Record the Faxing Service information in the “*PDM Installation Addendum*”.

2.1.22.4 Explain Report Server URL

The report server URL is typically the same as the web server URL. However, you can create a separate access point for reports so they operate separately from the PDMHost virtual directory.

This is beneficial because report generation can be a memory intensive process. Separating reports into their own application pool segments the report generation into its own separate area that will not interfere with other processes happening on the server.

Record the Report Server URL information in the “*PDM Installation Addendum*”.

2.1.22.5 Explain Import Server URL

The import server URL is typically installed on the web server. It can, however, be separated to allow for better load balancing.

This is beneficial because the processing of image files can be a memory intensive process; often enough to cause interference with other server processes.

Record the Import Server URL information in the “*PDM Installation Addendum*”.

2.1.12 Explain PDM SQL Configuration

The PDM database resides in the Microsoft SQL Server database engine. Several key SQL Server configuration options need to be set.

The SQL Server engine must be configured as Mixed-Mode SQL/Windows authentication. The PDM server applications communicate with the PDM database using SQL authentication.

A SQL account will need to be present for PDM. The PDM SQL account is the account that PDM applications will use to access the database. When creating the PDM SQL Account, set the “Enforce Password Policy” to off.

The PDM database also requires a database user be created that will allow the PDM server application to log in. This user should have a minimum of “dbCreator” privileges.

The PDM SQL database should be named: “PDM_<Insert Customer Name>”. The PDM Import Server database should be named: “PDMImportServer”.

If using SQL session state, you will need to record the username and password for the ASPState20 database.

The data files (.mdf) and log files (.ldf) can be stored anywhere and their location recorded. Be sure to record their location.

Record all of the PDM SQL Configuration information in the “*PDM Installation Addendum*”.

2.1.13 Explain PDM Service Accounts

PDM has several applications that run as services on the PDM servers. These services perform background tasks in PDM such as sending notifications, processing print orders,

transferring files to and from synched PDM systems, and processing documents (if the Import Server is configured to run as a service).

Each service requires a user account that has read-write access to the file vault share. The usernames and passwords for the PDM services should be the same as the Domain User information listed in the Domain User Requirements section.

Record the PDM Service Account information in the “*PDM Installation Addendum*”.

2.1.14 Explain .NET Session State Configuration

If a load balanced web server solution is to be used, the web server(s) must be configured to use SQL server session state. SQL session state is necessary because a user session on a web application may be switch to an alternate server while they are trying to perform work. If this is done without a session state database, information will be lost.

SQL server session state consists of two items. First, a SQL session state database must be configured in SQL server. Second, the PDM web applications must be configured to use the SQL session state database. The exact steps are documented in an appendix in the “*PDM Installation Guide*”.

If using .NET Session State, record the information in the “*PDM Installation Addendum*”.

2.1.15 Explain Licensing Information

The licensing information is the information that is sent to the implementation team and Adenium Systems from McGraw-Hill Construction after the sales agreement. It contains the McGraw-Hill License Number and the License Admin Email Address. The License Admin Password is sent from Adenium Systems to the implementation team. This information will be needed during the installation. Record the information in the “*PDM Installation Addendum*”.

2.1.16 Explain Backup Requirements

The PDM *database* should be backed up at least nightly using a full backup. A full backup is required to capture all changed information. Enterprise users may decide to perform hourly database backups due to the criticality of the data. Record the database backup plan in the “*PDM Installation Addendum*”, for example “Daily Full, Hourly Incremental”, or other.

The PDM *File Vault* should be backed up at least nightly using an incremental backup. Incremental backups are permissible because no existing data will ever be changed in the vault. Only new items will be added to the vault. Also the size of the vault will become very large and full backups will be impractical. Record the vault backup plan in the “*PDM Installation Addendum*”, for example “Daily Incremental”, or other.

After installation or any upgrade, a full disk image should be captured for the web server and import server as a backup plan. This will allow for quick restore of an entire system in the event of a hardware failure. Record the software solution plan for your full server images in the “*PDM Installation Addendum*”, for example “Acronis”, “True Image”, or other.

All backups should be stored off the server and secondarily offsite. Also, a detailed disaster recovery plan should be in place to periodically test all backups.

2.1.17 Explain Web Deployment and Code Signing Certificate

The web deployment is how the PDM application gets deployed from their server to the client machines. It uses Microsoft ClickOnce Deployment technology. The user will access a URL and the PDM client will automatically download and install on the user's machine. If there are any updates performed on the server, a new client will be downloaded and installed the next time the user logs in.

A Code Signing Certificate is required for the PDM ClickOnce Web Deployment. Review and explain the Code Signing Certificate requirements that are in the "*PDM Hardware and Software Requirements*" guide.

2.1.18 Obtain Remote Access for the Implementer

PDM installations can be performed by the implementer or by an IT professional at the customer. If the PDM implementer will be performing the installation, and the system will be hosted by the customer, the implementer will need remote access to the servers. This can be a remote desktop connection, an online meeting session, VNC, or any other method.

If the IT professional at the customer is performing the installation, it is recommended that remote access still be given to the PDM implementer so that they can monitor the progress of the installation as it is taking place. Some companies may not allow outside people to obtain remote access to their servers. If so, alternative plans will need to be made.

2.1.19 Schedule IT Readiness Check Meeting

A follow up meeting will be held later in the implementation process to verify that the IT infrastructure was setup and configured according to the information and agreements covered in this meeting. Set a date, time, and location for this meeting and record the information. Be sure to allow enough time for the tasks to be accomplished between meetings. The "*PDM Installation Addendum*" needs to be fully completed between now and the IT Readiness Check Meeting.

2.1.20 Obtain Sign-Off From All Parties

Everyone who is involved in the decision making should sign off on the agreements that were made in the meeting. This includes action items, responsibilities, decisions made, timelines, and resources required.

2.1.21 Send Meeting Minutes and Documents to All Parties Involved

After the meeting, send the meeting minutes that contain notes, agreed upon decisions, and action items to those who attended the meeting. Also send all checklists, worksheets, and forms that were created as a result of the meeting. Be sure the Management Sponsor, Reseller Sponsor, and Program Manager all receive a copy even if they were not in attendance.

2.1.22 Send Invitations for IT Readiness Check Meeting

After the IT Readiness Meeting, send the invitations to the IT Readiness Check Meeting to all of the participants.

IT Readiness Assessment Meeting Agenda

PDM Pro Implementation

1/11/2010

Customer:

People in attendance:

1. Meeting Objective:

2. Review “*PDM Installation Addendum*”

3. Review items in “*PDM Hardware and Software Requirements*”

4. Schedule IT Readiness Check Meeting

IT Readiness Check Meeting	
Date	
Time	
Location	
Invitees	

Action Items

Sign-Off From All Parties

<i>Role</i>	<i>Name</i>	<i>Signature</i>
Project Manager Signoff		
Implementer Signoff		
IT Manager Signoff		
IT Staff Signoff		
Management Sponsor Signoff		
Other Signoff		
Other Signoff		



System Design Meetings

Design Phase

2.2 SYSTEM DESIGN MEETINGS

The system design meetings are one or more meetings in which you will explain and instruct the customer on certain of the aspects of PDM. In particular, you will discuss some of the details of PDM's capabilities and options for setting things up so that the system operates according to their business practices. You will want to know the best practices and encourage them to implement them.

Many pieces of information will need to be gathered. **Record all of the decisions made in Section 3.0 of the *PDM Installation Addendum*.** This information will be needed to properly configure PDM after the installation.

2.2.1 Hold System Design Meetings

Hold the System Design Meetings with the Program Manager, System Administrators, Account Manager, the Implementation Team, and any other pertinent personnel in order to define the ways in which the system will be setup. During these meetings, you will need to instruct the customer on many things in the PDM system and ask detailed questions in order to define the various information you need to gather in the following steps.

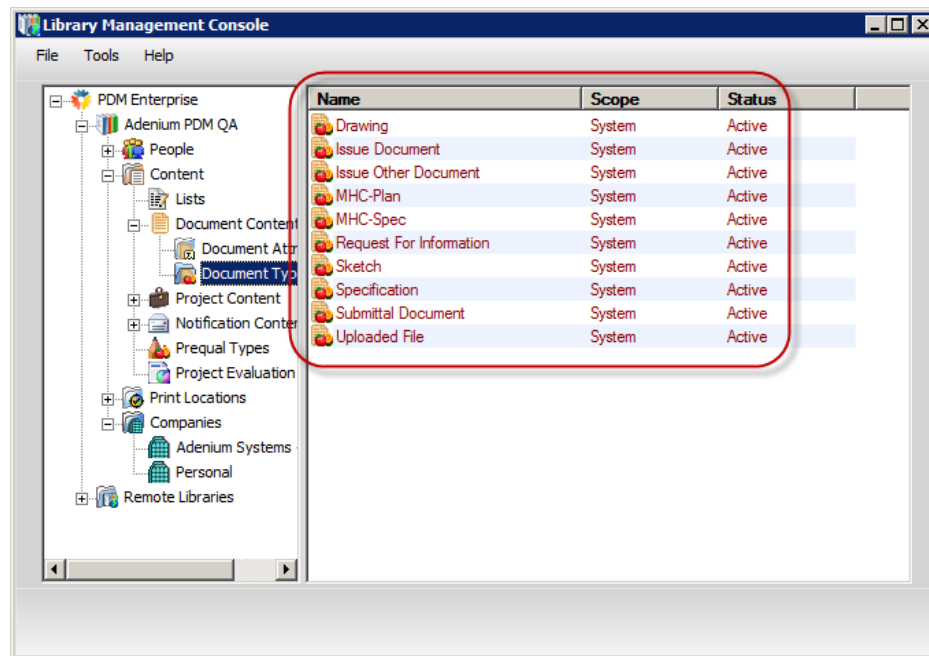
Select someone to keep meeting minutes. Make sure all decisions are recorded in the *PDM Installation Addendum*.

2.2.2 Explain Document Types

Document Types in PDM are groups of documents that contain their own unique attributes. For instance, "Drawings" have attributes such as "Discipline", "Issue", etc. whereas "Specifications" have attributes such as "Division" and "Section".

PDM contains predefined, system document types and attributes. The system document types are **Drawing**, **Issue Document**, **Issue Other Document**, **MHC-Plan**, **MHC-Spec**, **Request For Information**, **Sketch**, **Specification**, **Submittal Document**, **Uploaded File**. Each type contains predefined attributes.

See the tables below for detailed information about the system document types.



With PDM, you can create custom document types and/or attributes. Document Types should be considered carefully. In most cases, the predefined PDM system document types will handle most of the customer needs. Try to steer the customer away from "over classifying" their information and creating a complicated document management system. Many times, adding one or two *attributes* to the system document *types* will suffice.

Explain Document Types and Document Attributes to your customer and determine whether the predefined, system types and attributes will work for them. Consult with them on their current practices and suggest ways to best implement this feature in PDM. Record the custom attributes or types that the customer needs (if any) in section 3.1 of the *PDM Installation Addendum*.

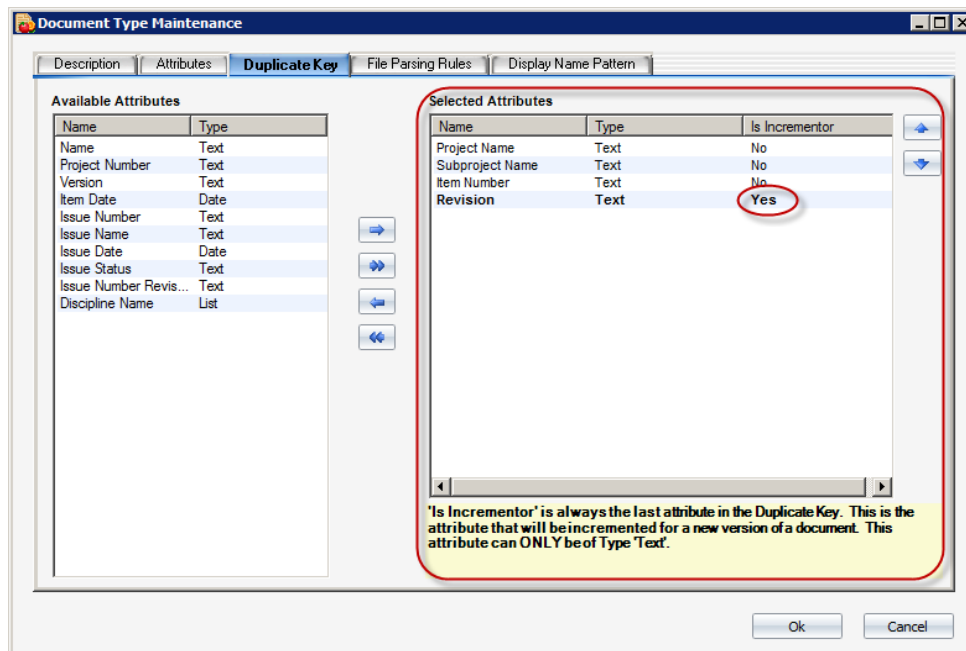
Remember, it is not recommended to create additional document types unless absolutely needed. Rather, it is recommended to add attributes to the existing document types to tailor the system to the customer needs. But again, it is not recommended to add a lot of attributes. Doing so will complicate and bog down the indexing process.

2.2.2.1 Explain Duplicate Keys

Document Types contain **Duplicate Keys**. When in place, files will not be allowed to be imported if their duplicate key attribute values match duplicate key attribute values on an item already stored in PDM.

The last attribute in any duplicate key is always considered the **Incrementer** attribute. Incrementer attributes will in most cases advanced one value when the document is revised, provided the previous value is numeric. If a document is being imported and the duplicate key is indicating that it cannot be imported, check the incrementer attribute and advance it one value (from 01 to 02 or from a to b). The document will then be considered a version of the existing document in PDM.

Usually 2-4 attributes comprise a duplicate key, such as: **Item Number**, **Subproject Name**, **Project Name**, and **Revision**. In this example, **Revision** would be considered the incrementer attribute.



Explain the Duplicate Key and Incrementer to your customer and determine what should be the duplicate key attributes and which attribute should be the incrementer. Consult with them on their current practices and suggest ways to best implement this feature in PDM. Record the customer specific duplicate keys in section 3.1 of the *PDM Installation Addendum*.

2.2.2.2 Explain the File Parsing Rule

Document Types also contain a **File Parsing Rule**. When in place, files that are named correctly will automatically parse the attribute values into the correct attributes when dropped into PDM. The files are parsed using a **Delimiter**.

For example, suppose you have 3 attributes named **Number**, **Name**, and **Revision**. If those 3 attributes are defined as the file parsing rule with a **+** as the delimiter and a file named **A101+First Floor Plan+00.pdf** is dropped into PDM, the result would be **Number = A101**, **Name = First Floor Plan** and **Revision = 00**.

If the customer specifies a file parsing rule and every party submitting documents into PDM follows those rules, then the indexing and entering of documents will be very quick and accurate. If the customer decides *not* to specify file parsing rules and maintains an "Anybody can drop anything" rule, then the quality of indexed document data in PDM will quickly become very poor. The tradeoff is forcing a party to adopt new methods of file naming versus allowing them to operate in the manner that they are accustomed to.

Explain the File Parsing Rule to your customer and determine how they would like to set up their file parsing. Consult with them on their current practices and suggest ways to best implement this feature in PDM. Record the customer specific file parsing rules in section 3.1 of the *PDM Installation Addendum*.

The screenshot shows the 'Document Type Maintenance' dialog box with the 'File Parsing Rules' tab selected. The dialog has several tabs: 'Description', 'Attributes', 'Duplicate Key', 'File Parsing Rules', and 'Display Name Pattern'. The 'File Parsing Rules' tab contains two main sections: 'Available Attributes' and 'Selected Attributes'. The 'Available Attributes' section lists various attributes and their types. The 'Selected Attributes' section shows a list of attributes with their positions. A red box highlights the 'Selected Attributes' section. At the bottom, there is a 'Delimiter' field with a '+' symbol. 'Ok' and 'Cancel' buttons are at the bottom right.

Attribute	Type
Project Name	Text
Subproject Name	Text
Project Number	Text
Version	Text
Item Date	Date
Issue Number	Text
Issue Name	Text
Issue Date	Date
Issue Status	Text
Issue Number Revision	Text
Discipline Name	List

Attribute	Position
Item Number	1
Revision	2
Name	3

Delimiter: +

Ok Cancel

2.2.2.3 Explain Display Name Pattern

Document Types also contain a **Display Name Pattern**. When in place, a display name for the document will be automatically built from the selected attributes. Display name attributes are separated using a **Delimiter**.

For example, suppose you have indexed a document and the display name pattern is set to “-” (minus the quotes). The values of the attributes are **Number = A101**, **Name = First Floor Plan**, and **Revision = 00**. The resulting display name in PDM would be **A101 - First Floor Plan - 00**.

Display name patterns require no more input from a person indexing documents other than entering correct attribute data. If used in conjunction with a file parsing rule, very clean looking documents can be brought into the system.

Explain the Display Name Pattern to your customer and determine how they would like their document names displayed in the system. Consult with them on their current practices and suggest what you think would be the best practice for them. Record the customer specific display name patterns in section 3.1 of the *PDM Installation Addendum*.

The screenshot shows the 'Document Type Maintenance' window with the 'Display Name Pattern' tab selected. The window is divided into two main sections: 'Available Attributes' on the left and 'Selected Attributes' on the right. The 'Available Attributes' section contains a table with the following data:

Attribute	Type
Project Name	Text
Name	Text
Item Number	Text
Subproject Name	Text
Project Number	Text
Version	Text
Revision	Text
Item Date	Date
Issue Number	Text
Issue Name	Text
Issue Date	Date
Issue Status	Text
Issue Number Revision	Text
Discipline Name	List

Below the 'Available Attributes' table is a 'Delimiter' field with a dropdown menu showing a hyphen (-). The 'Selected Attributes' section on the right contains a list of attributes that have been moved from the 'Available Attributes' section. The selected attributes are: Item Number, Revision, Name, Issue Name, Issue Status, and Issue Date. The 'Display Name Pattern' tab is highlighted in the top navigation bar. The window has 'Ok' and 'Cancel' buttons at the bottom right.

2.2.2.4 System Document Types and Attributes

This table contains the predefined, system attributes that come with PDM.

System Document Type	Attributes	Attribute Type	Attribute Required
Drawing	<ul style="list-style-type: none"> • Project Name • Project Number • Subproject Name • Name • Item Number • Discipline Name • Issue Number • Issue Name • Issue Date • Issue Status • Issue Number Revision • Version • Revision 	Text Text Text Text Text List (Disciplines) Text Text Date Text Text Text Text Text	No No No No No No No No No No No No No No
Issue Document	<ul style="list-style-type: none"> • Project Name • Project Number • Subproject Name • Name • Item Number • Version • Revision • Issue Number • Issue Name • Issue Date • Issue Status • Issue Number Revision 	Text Text Text Text Text Text Text Text Text Text Text Text Text	No No No No No No No No No No No No No
Issue Other Document	<ul style="list-style-type: none"> • Project Name • Project Number • Subproject Name • Name • Item Number • Version • Revision • Issue Number • Issue Name • Issue Date • Issue Status • Issue Number Revision 	Text Text Text Text Text Text Text Text Text Text Text Text Text	No No No No No No No No No No No No No

MHC-Plan	<ul style="list-style-type: none"> • Project Name • Project Number • Subproject Name • Name • Item Number • Version • Revision • Volume • Discipline • Issue • Issue Date • Scale • DR# 	Text Text Text Text Text Text Text Text Combo Combo Date Text Text	Yes No No No No No No No Yes Yes No No Yes
MHC-Spec	<ul style="list-style-type: none"> • Project Name • Project Number • Subproject Name • Name • Item Number • Version • Revision • Division 	Text Text Text Text Text Text Text Text	No No No No No No No No
Request For Information	<ul style="list-style-type: none"> • Project Name • Project Number • Subproject Name • Name • Item Number • Version • Revision • Number • Subject • Is Official • Is Closed • Date Created • Date Required • Date Responded • Importance • Discipline • Category • Author Entity Id • Author Company • Author Display Name • Author RFI Number • Answer Entity Id 	Text Text Text Text Text Text Text Text Text Text Integer Integer Date Date Date Combo List List Text Text Text Text Text	No No No No No No No No No No No No Yes No No No No No No No No No No

	<ul style="list-style-type: none"> • Answer Company • Answer Display Name • Co-Respondent • Question • Suggestion • Answer • Comments • Sketches • Spec Section • Last Modified 	Text Text Text Text Text Text Text Text Text Date	No No No No No No No No No No
Sketch	<ul style="list-style-type: none"> • Project Name • Project Number • Subproject Name • Name • Item Number • Discipline Name • Issue Number • Issue Name • Issue Date • Issue Status • Issue Number Revision • Reference Drawing Number • Reference Drawing Revision • Sequential Sketch Number for Drawing • Version • Revision 	Text Text Text Text Text List (Disciplines) Text Text Date Text Text Text Text Integer Text Text	No No No No No No No No No No No No No No No No
Specification	<ul style="list-style-type: none"> • Project Name • Project Number • Subproject Name • Name • Item Number • Issue Number • Issue Name • Issue Date • Issue Status • Issue Number Revision • Revision • Version 	Text Text Text Text Text Text Text Date Text Text Text Text Text	No No No No No No No No No No No No No

Submittal Document	• Project Name	Text	No
	• Project Number	Text	No
	• Subproject Name	Text	No
	• Name	Text	No
	• Item Number	Text	No
	• Version	Text	No
	• Revision	Text	No
	• Reason	Combo	No
	• Submittal Number	Text	No
Uploaded File	• Project Name	Text	No
	• Project Number	Text	No
	• Subproject Name	Text	No
	• Name	Text	No
	• Item Number	Text	No
	• Version	Text	No
	• Revision	Text	No

2.2.2.5 System Duplicate Keys, File Parsing Rules, and Display Names

The table below indicates the system document types and their duplicate keys, file parsing rules, and display name patterns that come with a default PDM installation.

System Document Type	Duplicate Key	File Parsing Rule	Display Name
Drawing	<ul style="list-style-type: none"> • Project Name • Subproject Name • Item Number • Revision (Incrementer) 	<ul style="list-style-type: none"> • Item Number • Revision • Name • Delimiter: "+" 	<ul style="list-style-type: none"> • Item Number • Revision • Name • Issue Name • Issue Status • Issue Date • Delimiter: " - "
Issue Document	<ul style="list-style-type: none"> • Project Name • Subproject Name • Item Number • Revision (Incrementer) 	<None>	<None>
Issue Other Document	<None>	<None>	<None>
MHC-Plan	<None>	<None>	<None>
MHC-Spec	<None>	<None>	<None>
Request for Information	<None>	<None>	<None>
Sketch	<ul style="list-style-type: none"> • Project Name • Subproject Name • Item Number • Revision (Incrementer) 	<ul style="list-style-type: none"> • Item Number • Revision • Name • Delimiter: "+" 	<ul style="list-style-type: none"> • Item Number • Revision • Name • Issue Name • Issue Status • Issue Date • Delimiter: " - "
Specification	<ul style="list-style-type: none"> • Project Name • Subproject Name • Item Number • Revision (Incrementer) 	<ul style="list-style-type: none"> • Item Number • Revision • Name • Delimiter: "+" 	<ul style="list-style-type: none"> • Item Number • Revision • Name • Issue Name • Issue Status • Issue Date • Delimiter: " - "
Submittal Document	<ul style="list-style-type: none"> • Project Name • Subproject Name • Item Number • Revision (Incrementer) 	<None>	<None>
Uploaded File	<None>	<None>	<None>

2.2.3 Explain Notification Types

A PDM notification is a communication sent from PDM to a person or group to present and/or gather information. Notification Types in PDM are HTML-based templates that contain variable field data that can be auto-filled at the time of sending. Some typical notification types are "Invitation to Bid", "Project Correspondence", and "Document Notification".

PDM comes installed with 11 notification types. They are: **Addenda (Bid Package Specific)**, **Addenda (Folder Specific)**, **Document Notification**, **Folder Notification**, **Issue Notification**, **ITB Notification**, **New Project Contact**, **Prequalification**, **Project Correspondence**, **Submittal Ball-in-court Notification**, **Submittal Notification**. See the detailed information in the table below.

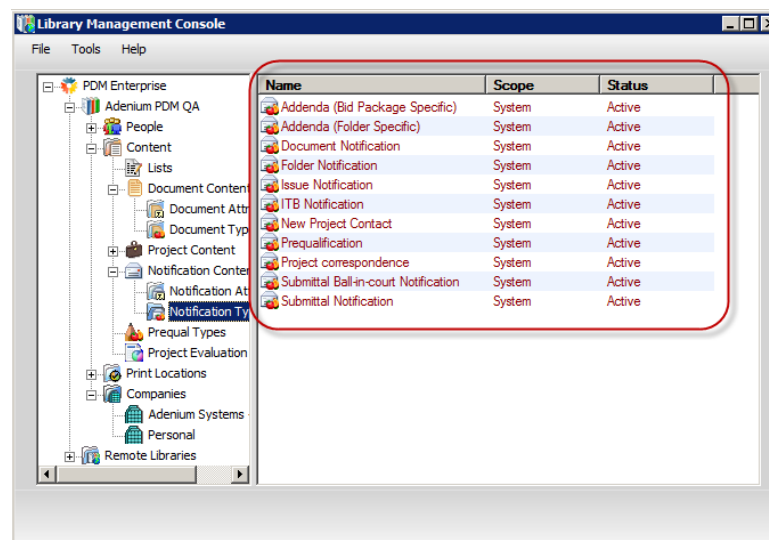
It is possible to create custom notifications. However, be aware that PDM Pro systems limit the number of allowed notification types to eleven and eleven standard notifications come with the system by default. Therefore, you cannot add more notifications unless you are working with a PDM Enterprise system. PDM Enterprise is required to have the ability to add custom notifications.

It is important to let your customer know that different notifications are meant to be sent from specific objects in the system. For example, you would not send a submittal notification from a bid package, as the notification would have no context to determine any of the submittal information.

In most cases, the existing PDM system Notification Types will suffice for the customer's needs. Some modification may be needed to add the customer's logo as well as customer specific verbiage.

If a Notification Type needs to be designed from scratch, you should consult the Custom Notification Guide for instructions on how to design them.

Explain the PDM Notifications and Notification Types to your customer and determine if the current, predefined notification types will work for them. Consult with them on their current practices and make suggestions as needed. Record the customer specific notification types in section 3.2 of the *PDM Installation Addendum*.



2.2.3.1 System Notification Types

The table below indicates the system notification types and their definition that come with a default PDM installation.

System Notification Types	Definition
Addenda (Bid Package Specific)	This should be used when an addendum to a bid package is issued and the general contractor or owner needs to notify sub contractors or other users of the addenda. This should be sent by right clicking on a bid package and selecting Send Bid Package Via→Notification .
Addenda (Folder Specific)	This should be used when an addendum to an issue or folder is issued and the general contractor or owner needs to notify sub contractors or other users of the addenda. This should be sent by right clicking on a folder and selecting Send Folder Via→Notification .
Document Notification	This should be used when a general contractor or owner needs to notify subcontractors or other users of a specific document. The hyperlink in the notification will direct the recipient to the portal and directly to the document. This should be sent by right click on a document and selecting Send Document Via→Notification .
Folder Notification	This should be used when a general contractor or owner needs to notify subcontractors or other users of a specific folder which contains documents. The hyperlink in the notification will direct the recipient to the portal and directly to the project and folder. This should be sent by right click on a folder and selecting Send Folder Via→Notification .
Issue Notification	This should be used when a general contractor or owner needs to notify subcontractors or other users of an issue which contains documents. The hyperlink in the notification will direct the recipient to the portal and directly to the project and issue. This should be sent by right click on an issue and selecting Send Issue Via→Notification .
ITB Notification	This should be used when a Bid Package is ready to accept invitees for bidding. This should be sent by right clicking on a Bid Package and selecting Send Bid Package Via→Notification . This can also be sent by right clicking on the invitees in a bid package and selecting Send Bid Package Notification . This can also be sent from the notifications tab of a bid package by right clicking and selecting New Notification .
New Project Contact	This should be used when new users are added to a project and they need to be informed of how to access the project and login. This should be sent by right clicking on the contacts that need to be notified (from within a project) and selecting Send Notification to Contacts...

Prequalification	This should be used when subcontractors that need to be prequalified need to be informed on how to access the prequalification submission form. This should be sent by right clicking on the contacts that need to be notified and selecting Send Notification to Contacts...
Project Correspondence	This should be used when a general contractor or owner needs to inform subcontractors or other users of any general information regarding the project. This should be sent by right clicking on the contacts that need to be notified and selecting Send Notification to Contacts...
Submittal Ball-in-court Notification	This notification is automatically sent from a submittal when the ball-in-court is changed. The notification will be sent to the ball-in-court people of a submittal. This notification should not be manually sent.
Submittal Notification	This notification should be used when a general contractor or owner needs to send information regarding a submittal to subcontractors or other users. The hyperlink in the notification will direct the recipient to the portal and directly to the submittal in question. This should be sent by right clicking on a submittal and selecting send submittal via → Notification.

2.2.4 Define Lists

A list in PDM is a list of items that can be used for quick attribute entry or quick selection. They are lists of values that can be used when certain drop down boxes are available. For example, when adding documents to the system, it is helpful if the "Discipline" attribute is a list box containing values to pick from.

Lists to be defined are certain system lists as well as any custom lists that need to be used in the implementation. The following lists need to be defined:

- Construction Codes (CSI Codes)
- Shipping Options (Available methods of shipment for hard-copy document orders)
- Disciplines (Drawing disciplines)
- Offices (All the offices available at the organization where PDM is installed. This is used during prequalification so the sub contractor can select "Which office are you most closely affiliated with?")

Many other system lists exist. Their content, however, typically does not need to be modified.

Explain the PDM Lists to your customer and define the list values that they want from the four lists. Record the customer specific lists in section 3.3 of the *PDM Installation Addendum*.

2.2.4.1 System Lists

The table below displays the system lists that should be modified and their values that come with a default PDM installation.

System Lists	Values
CSI Codes	CSI Master Format 1995 CSI Codes (16 Construction Sections) Not listed for brevity.
Shipping Options	<ul style="list-style-type: none">• FED EX - Ground• FED EX - Saturday Delivery• FED EX - Overnight Delivery• FED EX - 2 Day Delivery• FED EX - 3 Day Delivery
Disciplines	<ul style="list-style-type: none">• Civil• Architectural• Structural• Mechanical• Electrical• Plumbing• Fire Protection• Landscape• Datacom
Offices	<ul style="list-style-type: none">• Office 1• Office 2• Office 3

2.2.5 Define Project Template

A Project Template is a pre-established, standard folder structure and default behavior that can be used for all new projects created in PDM. By creating a standard, each project will be organized and operated in the same manner from the start. While most projects operate differently during construction, it is still recommended to start with a standard template.

Emphasize to the customer the advantage of using a standardized folder structure as well as defaults for a project. It will save time and present fewer problems trying to manage projects and document if all the projects are presented in the same way.

Once the folder structure is defined, it can be incorporated into a Project Template that can be selected every time a new project is created.

PDM comes installed with two standard project templates, they are: **PDM Project Template**, and **Blank Template**.

Explain the Project Templates and folder structures to your customer and determine the structure that they should implement. Consult with them on their current practices and make suggestions as needed. Record the customer specific folder structures in section 3.4 of the *PDM Installation Addendum*.

2.2.5.1 Recommended Folder Structure

The PDM Project Template that is installed with the system is listed below:

<i>Folder Structure</i>	<i>Folder Options</i>
Project Folders	System Folder, cannot be edited.
Current Construction Documents	Regular Folder, Current Version.
Current Construction Drawings	Regular Folder, Current Version.
Current Construction Specifications	Regular Folder, Current Version.
Current Construction Sketches	Regular Folder, Current Version.
Design Documents	Regular Folder, Current Version.
Design Drawings	Regular Folder, Current Version.
Design Specifications	Regular Folder, Current Version.
Design Sketches	Regular Folder, Current Version.

2.2.6 Explain Folder Defaults

When adding documents to the system, there are many behaviors that can be configured to optimize the user experience and capture all the necessary information about the document as it comes into the system. For example, you may want a folder to only accept a particular document extension, such as TIFFs, PDFs, MPEGs, or other. Also, you may only want a specific role of people to be able to edit or upload documents to a folder. Options like these and others can be set with folder defaults.

PDM will be preconfigured with the most common options set. During the pilot project, we will review these options and make any necessary changes to match the desired document entry behavior. Folder defaults can be set on project templates and will be carried over to projects when they are created.

Explain Folder Defaults in the table below to your customer. Determine if any defaults should be applied to the standard folder structure of the project template. Record the customer specific defaults in section 3.5 of the *PDM Installation Addendum*.

There are no specific recommendations for folder defaults that should be set in the Project Template. This does not mean, however, that none will be required. There are several questions that should be asked of the customer in order to determine the best folder defaults to set. The questions below are a guide. Ask further leading questions to get further information.

- Are there groups of people that should be and should not be allowed to edit, modify, or delete folders?
- Are there specific file types that should be and should not be allowed to be entered into the system?
- What resolution, file size, PDF options would you prefer that the viewable formats have?
- What status would you like the documents to have as they are imported?
- Do specific folders require specific Document Types to be entered?
- Are there groups of people that should be and should not be allowed to copy (to another folder), remove, or revise documents?
- Are there groups of people that should be or should not be allowed to edit documents once they are in the system?

2.2.6.1 System Defaults

Below is a listing of defaults available in PDM and their functions.

<i>PDM Defaults</i>	<i>Definition</i>
AllowAllItemVersions	Allows users to view any version of a document from the properties dialog, even if those versions are not in any folders.
AllowEdit	Enables editing documents with design formats.
AllowFolderCreate	Enables the user to create new subfolders.

AllowFolderDelete	Enables changing a folders status to Deleted.
AllowFolderEdit	Enables the user to edit folder name, status, and content change style.
AllowFolderRename	Enables folder renaming.
AllowItemCopy	Allows users to drag and drop documents into other folders.
AllowItemRemove	Enables removing a document from a folder (without changing the document status).
AllowItemRevise	Enables the user to select (from his local machine) a file to become the next version of the document. In this case, filenames do not have to match.
AllowStatusChange	Enables the user to change the status of a document.
AllowUploadByExtension	Only files of these types will be uploaded by PDM. Off by default. If set, it will only allow items into the folder with extensions that are specified.
BlockUploadByExtension	Files of these types will not be uploaded by PDM. Off by default. If set, it will block items with the extensions specified.
DocumentType	Forces a folder to use a specific document type for new documents. Off by default. If on, specify a document type.
EnterAttributes	Determines if the user is prompted for document attributes. Options are ALWAYS, NEVER, WHENREQUIRED. WHENREQUIRED will prompt for attributes if at least one attribute is required. ALWAYS is the default.
Status	Lets you force the status for new documents. The user will not see or be able to change the status of new documents. Options are ACTIVE, DRAFT, INACTIVE, DELETED. DRAFT is default.
SubmittalDueDateInterval	The number of days after the "Release for Submission Date" to set the "Due Date" to. Specified in the contract.
SubmittalReturnDateInterval	The number of days after the "Release for Review Date" to set the "Scheduled Return Date" to. Specified in the contract.
SupportAllStatusOptions	Enables the user to see Projects, Folders, and Items of any Status. Must be set at the Library level.

Import Server Defaults	Definition
ElectronicCreate	Create an electronic format for the document. "True" = Create, "False" = Do not create, Default if not set = "True"

ElectronicCreateAsPdf	Create the electronic format for the document as a PDF. "True" = Create as PDF, "False" = Create as original file, Default if not set = "True"
ElectronicPdfAccessSupport	Allow content access for the visually impaired. "True" = Enable, "False" = Disable, Default if not set = "True"
ElectronicPdfAssembleDocument	Allow document assembly. "True" = Enable, "False" = Disable, Default if not set = "True"
ElectronicPdfChangeSecurity	Allow changes to the electronic document's security settings. "True" = Enable, "False" = Disable, Default if not set = "True"
ElectronicPdfExtractContent	Allow content extraction of the electronic document. "True" = Enable, "False" = Disable, Default if not set = "True"
ElectronicPdfFillForms	Allow changes to fill in forms. "True" = Enable, "False" = Disable, Default if not set = "True"
ElectronicPdfLinearization	Rearrange electronic document for fast web viewing. "True" = Enable, "False" = Disable, Default if not set = "True"
ElectronicPdfModifyAnnotations	Allow modifications to annotations of the electronic document. "True" = Enable, "False" = Disable, Default if not set = "True"
ElectronicPdfModifyContent	Allow edits to the electronic document more than adding or modifying text notes. "True" = Enable, "False" = Disable, Default if not set = "True"
ElectronicPdfOpenDocument	Allow opening and decrypting of the electronic document. "True" = Enable, "False" = Disable, Default if not set = "True"
ElectronicPdfOwnerPassword	PDF protected by password for operations that should be restricted even when the document is decrypted. "<STRING>" = Enabled, "" = Disabled, Default if not set = Disabled
ElectronicPdfPrint	Allow printing of the electronic document. "True" = Enable, "False" = Disable, Default if not set = "True"
ElectronicPdfPrintHighResolution	Allow high resolution printing of the electronic document. "True" = Enable, "False" = Disable, Default if not set = "True"
ElectronicPdfUserPassword	PDF protected from opening by password. "<STRING>" = Enable, "" = Disable, Default if not set = Disabled
HalfSizeCreate	Create an half size format for the document. "True" = Enable, "False" = Disable, Default if not set = "True"
TakeOffCreate	Create a take off format for the document. "True" = Enable, "False" = Disable, Default if not set = "True"
TakeOffPdfSourceToTiff	If the source file is one page, >9x10 inches, and a PDF, then convert the file to a tiff for the take off format.

TakeOffResolution	Resolution of the take off document. "<INTEGER>" = Resolution in dots per inch, Default if not set = "200"
ViewableCreate	Create a viewable format for the document. "True" = Enable, "False" = Disable, Default if not set = "True"
ViewableCreateAsPdf	Create the viewable format for the document as a PDF. "True" = Enable, "False" = Create as original file, Default if not set = "True"
ViewableMaxSizeBytes	Maximum size (bytes) of the viewable format. "<INTEGER>" = Maximum size in bytes, Default if not set = "1048576"
ViewableMaxSizeHeightInches	Maximum height (inches) of the viewable document. "<NUMBER>" = Maximum height in inches, Default if not set = No maximum height
ViewableMaxSizeWidthInches	Maximum width (inches) of the viewable document. "<NUMBER>" = Maximum width in inches, Default if not set = No maximum width
ViewablePdfAccessSupport	Allow content access for the visually impaired. "True" = Enable, "False" = Disable, Default if not set = "True"
ViewablePdfAssembleDocument	Allow document assembly. "True" = Enable, "False" = Disable, Default if not set = "True"
ViewablePdfChangeSecurity	Allow change the viewable document's security settings. "True" = Enable, "False" = Disable, Default if not set = "True"
ViewablePdfExtractContent	Allow content extraction of the viewable document. "True" = Enable, "False" = Disable, Default if not set = "True"
ViewablePdfFillForms	Allow changes to fill in forms. "True" = Enable, "False" = Disable, Default if not set = "True"
ViewablePdfLinearization	Rearranges the viewable document for fast web viewing. "True" = Enable, "False" = Disable, Default if not set = "True"
ViewablePdfModifyAnnotations	Allow modifications to annotations of the viewable document. "True" = Enable, "False" = Disable, Default if not set = "True"
ViewablePdfModifyContent	Allow edits to the document more than adding or modifying text notes. "True" = Enable, "False" = Disable, Default if not set = "True"
ViewablePdfOpenDocument	Allow opening and decrypting of the viewable document. "True" = Enable, "False" = Disable, Default if not set = "True"
ViewablePdfOwnerPassword	PDF protected by password for operations that should be restricted even when the viewable document is decrypted. "<STRING>" = Enable, "" = Disable, Default if not set = Disabled
ViewablePdfPrint	Allow printing of the document. "True" = Enable, "False" = Disable, Default if not set = "True"

ViewablePdfPrintHighResolution	Allow high resolution printing of the viewable document. "True" = Enable, "False" = Disable, Default if not set = "True"
ViewablePdfUserPassword	PDF protected from opening by password. "<STRING>" = Enabled, "" = Disabled, Default if not set = Disabled
ViewableResolution	Resolution of the viewable document. "<INTEGER>" = Resolution in dots per inch, Default if not set = "400"

2.2.7 Define Seat Licenses (Licensed PDM Users vs. Planroom Users)

Anyone who needs to use the PDM system in an administrative or collaborative role needs to have an appropriate seat license assigned. Anyone who uses the system not in an administrative or collaborative role is considered a planroom user and does not need a seat license.

Licensing of the system is determined during the sales phase. The licenses will automatically be installed from the Adenium Licensing Server when the system is installed.

Explain the seat license types to your customer and determine the number of licenses needed and see if it matches what they purchased. Record the licensing in section 3.6 of the *PDM Installation Addendum*.

2.2.8 Define Security Architecture

PDM contains security groups called “Roles”. A role is a “container” or “group” of users who have a common set of permissions. Using roles allows you to set permissions for groups of users one time rather than individually.

Security in PDM is very similar to security in Windows in that you have individual or group based permissions that explicitly allow or deny users access and edit rights to objects.

The default roles are **SysAdmin**, **Prequal Admin**, **Everyone**, and **Project Eval Admin**.

2.2.8.1 PDM Security Rules

Security can be set on either individual users or roles. Neither takes precedence over the other. There are three security permissions that can be set.

- **Unset:** Users and roles are inherently not set to any security. By default, leaving security unset will not allow users access or edit to the object in question.
- **Allow:** Allow means that a user is explicitly allowed to the object in question.
- **Deny:** Deny means that a user is explicitly denied to the object in question. Deny always takes precedence over Allow permissions, set either individually, or in a role.

In addition, there are three security options to which the above permissions can be set.

- **Access:** The Access security option refers to accessing the object in question when setting the permission. Users are *Allowed*, *Denied*, or *Unset* “Access” rights to objects.
- **Edit:** The Edit security option refers to editing the object in question when setting the permission. Users are *Allowed*, *Denied*, or *Unset* “Edit” rights to objects.
- **Admin:** Admin is a special security option that allows the user access to higher level functions in PDM, such as setting security on projects, and viewing plan holders.

Refer to the following table for object specific options:

<i>PDM Security Types</i>			
<i>Object</i>	<i>Access</i>	<i>Edit</i>	<i>Admin</i>
Company	Allow, Unset, Deny	Allow, Unset, Deny	
Owner	Allow, Unset, Deny	Allow, Unset, Deny	
Portal	Allow, Unset, Deny	Allow, Unset, Deny	
Project	Allow, Unset, Deny	Allow, Unset, Deny	Allow, Unset, Deny
Folder	Allow, Unset, Deny	Allow, Unset, Deny	

2.2.8.2 PDM Security Recommendations

When setting security, it is recommended you adhere to the following guidelines.

- When possible, use roles to set security instead of individual permissions. It is much easier to manage a common set of permissions rather than permissions on any number of people.
- Only use individual permissions when you want to explicitly deny a user access to a certain object. Denying users access to object is rarer than allowing access.
- Keep the security architecture as simple as possible.

2.2.8.3 PDM Default Security Architecture

PDM is installed with several roles by default:

<i>PDM Default Security Roles</i>	
<i>Role</i>	<i>Definition</i>
Everyone	This is a system role to which every person added to PDM is added. No security is set in this role. This role should not be modified.
SysAdmin	This is a system role. People added to this role will have the ability to manage all objects within PDM, unless denied elsewhere.
Prequal Admin	This is a system role. People added to this role will have the ability to review all financial data within a prequalification. They also have the ability to approve prequalifications.
Project Eval Admin	This is a system role. People added to this role will have the ability to modify and create the project evaluation types.

Explain the PDM security architecture to your customer and determine if any specific roles are needed. Record the customer specific roles in section 3.7 of the *PDM Installation Addendum*.

2.2.9 Obtain List of All Internal Users

All of the internal users of PDM will need to be created or imported into the system so that they can be added as licensed users in PDM. If the customer needs to bring in hundreds of users, a contact import will be the easiest method to create the contacts.

Obtain a list of all internal users from your customer. You will also need to identify which users are going to be SysAdmins, Eval Admins, Prequal Admins, and Users of the system. Each of these user types are defined below. Doing so will help create the security architecture and assign them to the proper roles.

Record the information in section 3.8 of the *PDM Installation Addendum*.

2.2.9.1 Identify Which Internal Users Are System Administrators

Of the internal users that are entered into the system, you will need to identify which are system administrators. A system administrator is someone who has complete control over PDM and can perform any function, including configuration.

These users should be assigned to the **SysAdmin** role. Record the information in section 3.8 of the *PDM Installation Addendum*.

2.2.9.2 Identify Which Internal Users Are Users

Of the internal users that are entered into the system, you will need to identify which are users. A user is someone who uses the system, but does not need administrative access to projects or configuration. Examples of these users would be people who need to add documents, review contacts, and so forth.

These users should be added to a newly created role called **<CompanyName> Users**. Record the information in section 3.8 of the *PDM Installation Addendum*.

2.2.9.3 Identify the Prequalification Administrators

Of the internal users that are entered into the system, you will need to identify which are prequalification administrators. A prequalification administrator is someone who can review and approve prequalifications. Prequalifications are of a sensitive nature as they contain financial information, so these users should be determined carefully.

These users should be assigned to the **Prequal Admin** role. Record the information in section 3.8 of the *PDM Installation Addendum*.

2.2.9.4 Identify the Project Evaluators

Of the internal users that are entered into the system, you will need to identify which are project evaluators. A project evaluator is someone who can review and perform evaluations on work performed by subcontractors.

These users should be added to the **Project Eval Admin** role. Record the information in section 3.8 of the *PDM Installation Addendum*.

2.2.10 Obtain the Subcontractor Database

A database of all of your customer's subcontractors and other outside users of the system will need to be created or imported into the system so that they can use the system. Typically, the general contractor will have a listing of subcontractors that are exportable from one of their contact management systems. The information needed about the subcontractors is: name, company, email addresses, phone numbers, fax numbers, mailing addresses, and construction codes.

That database will need to be received, cleaned, added to the PDM Contact Import Template, and then imported into PDM. You will clean and format the database during the System Setup phase and import it into the system during the System Installation.

Obtain a subcontractor database from your customer. Record the information in section 3.9 of the *PDM Installation Addendum*.

2.2.11 Identify Print and Scan Locations (Reprographers)

A reprographer needs to be selected, to fulfill hard copy orders and to index and import documents into PDM. You will need to determine from the general contractor who will be performing their reprographic work. Reprographic work can consist of the following items:

- Indexing into PDM (Will require collaboration license).
- Processing Hard Copy Orders (Will require ReproMAX affiliate using Remote Order Manager).

Identify the reprographers who will be performing the work. They will need to be created as a print location and person during the installation.

Record the print and scan location information in section 3.10 of the *PDM Installation Addendum*. These same firms will need to be involved in the Reprographics Coordination Meeting (scheduled during the Kickoff Meeting). Verify that the meeting has been scheduled and that they received their meeting invitation and positively responded.

2.2.12 Explain Subcontractor Portal

The subcontractor portal is a web based interface to PDM. It is used primarily by subcontractors to be able to review bids, issues, and submittals. From the portal, users can also download and order hard copy documents.

The portal also allows subcontractors to synchronize projects from the GC PDM system into their own PDM.

The subcontractor portal has several items that need to be configured. A brief description is included here. More detailed descriptions are in the sections following:

- Portal Header: This is the graphic that displays across the top of the portal. It needs to be a jpg or png file and should be 955 pixels by 68 pixels.
- EULA: This is the legal agreement users need to accept before they can enter the portal. A default EULA is installed with the system. However, if your customer has specific EULA

needs, they will need to get an approved EULA from their legal department and provide it to you and the installer.

- **Help File:** The PDM portal contains a customizable “Help” page that displays when a user clicks the “Help” button. The Help page can contain any information necessary, such as phone numbers, links to www.pdmcommunity.com, email addresses, instructions, and more. This page is usually written in HTML and references documentation as well as an email address and phone number the portal user should call in case there is a problem. You will determine the contents of the Help page in the System Support Meeting.

2.2.13 Obtain Company Logos and Official Color Scheme

Your customer can brand their PDM applications with their company logos and colors. Custom logos can be applied to the PDM application, the subcontractor portal, notifications, and the prequalification portal. Obtain from the customer their official graphics and color scheme and indicate so in section 3.11 of the *PDM Installation Addendum*. All graphics and logos will be applied during the installation. Many more details on the logos are available in the PDM Training Series tutorials and in the “PDM Server and Client Installation Guide”.

2.2.13.1 Determine Subcontractor Portal Logo

The PDM subcontractor portal can be branded using the customer's logo. The portal header runs across the web page of the portal. Find out what they would like to have as their portal header. The logo should be 955 x 70 pixels in dimensions and formatted as a JPEG or PNG. Typically, you will create this logo from the company logo that you receive from the customer.

Determine what the customer wants on the subcontractor portal and indicate so in section 3.11 of the *PDM Installation Addendum*. You will create the logos during the System Setup Phase. The logo will be applied during the system installation.

A detailed explanation and demonstration is available in the “**Applying Graphics to a Subcontractor Portal**” tutorial of the PDM Training Series. Instructions are also found in the “PDM Server and Client Installation Guide”.

2.2.13.2 Determine Notification Logo

PDM notifications can be configured with the customer's logos. These logos will appear on notification web pages and notification faxes. Logos should not be included on notification emails due to many email clients blocking graphics. Typically, you will create this logo from the company logo that you receive from the customer.

The logo can be any dimension as long as it fits at the top of an 8.5 x 11 page and in JPEG or PNG format. Determine what the customer wants on their notifications and indicate it in section 3.11 of the *PDM Installation Addendum*. You will create the logos during the System Setup Phase. The logo will be applied during the system installation.

A detailed explanation and demonstration is available in the “**Adding Custom Graphics to the Notifications**” tutorial of the PDM Training Series. Instructions are also found in the “PDM Server and Client Installation Guide”.

2.2.13.3 Determine Prequalification Portal Logos

The PDM prequalification portal can be branded using the customer's logo. Two logos are needed, each having different dimensions. The first should be 955 x 68 pixels and the second logo should be 750 x 64 pixels. Both logos should be a JPEG or PNG. Typically, you will create this logo from the company logo that you receive from the customer.

Determine what the customer wants on their prequalification portal and indicate it in section 3.11 of the *PDM Installation Addendum*. You will create the logos during the System Setup Phase. The logo will be applied during the system installation.

A detailed explanation and demonstration is available in the “**Adding Custom Graphics to a Prequalification Portal**” tutorial of the PDM Training Series. Instructions are also found in the “*PDM Server and Client Installation Guide*”.

2.2.13.4 Determine PDM Application Logos

The PDM Application can be branded with graphics. Each tab can contain two logos, one on the right and one on the left. Determine what the customer wants on the notifications and indicate it in section 3.11 of the *PDM Installation Addendum*. You will create the logos during the System Setup Phase and apply them during the installation.

A detailed explanation and demonstration is available in the “**Adding Custom Graphics to the PDM Application**” tutorial of the PDM Training Series. Instructions are also found in the “*PDM Server and Client Installation Guide*”.

2.2.14 Obtain End User License Agreement

An End User License Agreement (EULA) is needed for the PDM web portal. This is the legal agreement users need to accept before they can enter the portal. A default EULA is installed with the system. However, if your customer has specific EULA needs, they will need to get an approved EULA from their legal department and provide it to you and the installer.

Determine if the customer wants to use the default EULA or use their own. If they want to use their own, obtain a copy from them. Record their decision in section 3.11 of the *PDM Installation Addendum*

2.2.15 Obtain Sign-Off From All Parties

Everyone who is involved in the decision making should sign off on the agreements that were made in the meeting. This includes action items, responsibilities, decisions made, timelines, and resources required.

2.2.16 Send Meeting Minutes to All Parties Involved

After the meeting, send the meeting minutes that contain notes, agreed upon decisions, and action items to those who attended the meeting. Also send all checklists, worksheets, and forms that were created as a result of the meeting. Be sure the Management Sponsor, Reseller Sponsor, and Program Manager all receive a copy even if they were not in attendance.

System Design Meeting Agenda

PDM Pro Implementation

Date: 1/11/2010

Company: _____

People in attendance: _____

Meeting Objective:

To instruct on the capabilities and options available with PDM and define the ways in which the system will be setup so that it will operate according to the desired business processes.

Many pieces of information will need to be gathered. **Record all of the decisions made in Section 3.0 of the PDM Installation Addendum.** This information will be needed to properly configure PDM after the installation. Select someone to keep meeting minutes.

Topics to Discuss:

1. Document Types

- Duplicate Keys
- Parsing Algorithm
- Display Name Pattern

2. Notification Types

3. Lists (Construction Codes, Shipping Options, Disciplines, Offices)

4. Project Templates

5. Folder Defaults

6. Seat Licenses (Licensed PDM Users vs. Planroom Users)

7. Security Architecture

8. List of All Internal Users

- Identify Which Internal Users Are System Administrators
- Identify Which Internal Users Are Project Administrators
- Identify Which Internal Users Are Users
- Identify the Prequalification Administrators
- Identify the Prequalification Evaluators

9. Subcontractor Database

10. Identify Print and Scan Locations (Reprographers)

11. Subcontractor Portal

12. Company Logos and Official Color Scheme

- Subcontractor Portal Logo
- Notification Logo
- Prequalification Portal Logo

13. End User License Agreement

Action Items

Sign-Off From All Parties

<i>Role</i>	<i>Name</i>	<i>Signature</i>

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System Support Meeting

Design Phase

2.3 SYSTEM SUPPORT MEETING

The System Support Meeting is a meeting needed to discuss and plan the support processes that will be implemented. The meeting should have been scheduled during the Kickoff Meeting and invitations sent out to all parties. Be sure to use the “*System Support Meeting Agenda*” located at the end of this section during the meeting.

2.3.1 Hold the System Support Meeting

Hold the meeting with the implementation team, the program manager, the PDM administrators, and the IT manager. Invite any one else that you see fit.

In this meeting, you will be defining the entire support program, which includes levels one, two, and three. You will also explain and get people set up with all of the other support tools available. This includes PDM Community, OnTime, and the PDM documentation site. It is also necessary to identify the project that will be used for the pilot and the dates for rolling out the PDM pilot. All training necessary for the pilot to run smoothly will need to be scheduled during the meeting.

To help you in the meeting, a “*System Support Meeting Agenda*” is available at the end of this section. This will serve as a guide to walk through the steps that need to be accomplished in the meeting. Use this as a tool to structure the meeting, to record meeting minutes, and record all dates and decisions made.

2.3.2 Define Support Program

It is necessary to define and implement a detailed support process and train your customers how it works. The purpose for doing so will clarify who will help the administrators and users of PDM applications when a question arises or a problem occurs. Defining a support program is often overlooked in PDM implementations, yet it is a critical step to define this. Skipping this step will lead to frustrated customers and cause unnecessary delays in addressing issues.

There are numerous support tools available for PDM users, including PDM Community, PDM documentation, help pages on the portal, and defect and feature tracking.

2.3.3 Identify and Define First Level Support Personnel

First level support is the first place a user turns to when they encounter a problem or question. A best practice that has proven effective is the following. The customer can have a section on their website that contains links to PDM documentation and PDM Community. If the user is using the PDM subcontractor portal, they should click on the Help page which would contain the same links to PDM documentation and PDM Community. It can also contain a link to the PDM section of the customer's website.

The section on the customer's website can also contain a phone number and email address for them to contact the second level support if they cannot solve their problem with the documentation and PDM Community.

Record the decisions in the “*System Support Meeting Agenda*”.

2.3.4 Identify and Define Second Level Support Personnel

Second level support is the second line of contact when a user encounters a problem. This should be person who can address their question via phone or email.

A best practice is to have the customer provide the second level support. This should be one or more people very knowledgeable on PDM. It can be PDM administrators or a more full time role of a help desk person. This will cost time and resources for the customer to provide support on a project, but it is critical to the successful operation of PDM on a project.

If the customer is unwilling or unable to provide the second level support, the PDM service provider can fill the role as a paid, contractual service.

Record the decisions in the “*System Support Meeting Agenda*”.

2.3.5 Identify and Define Third Level Support Personnel

The third support level is the personnel who will address issues when the first and second levels fail to solve the issue. There are a couple options for the third level support. It can be provided by the PDM service provider or Adenium Systems. If the customer is providing the second level support, the service provider can provide the third level support. If the service provider is providing the second level support, then Adenium Systems would be the third level support.

The third level support is required when the system is displaying errors or a suspected defect is found. When this occurs, Adenium Systems should be contacted and may require them to remotely access the customer’s system to fix a problem or to view and confirm the defect.

Record the decisions in the “*System Support Meeting Agenda*”.

2.3.6 Explain and Identify Help Information for Portal

The PDM portal contains a customizable “Help” page that displays when a user clicks the “Help” button. The Help page can contain any information necessary, such as phone numbers, links to www.pdmcommunity.com, email addresses, instructions, and more. Determine the help procedures and the information that should be on the Help page on the portal. Typically, this will be the first level support procedures.

Determine the contents of the Help page and create the page for your customer in HTML. Indicate so in section 3.11 of the *PDM Installation Addendum*.

2.3.7 Explain PDM Community and Advantages

PDM Community is a website that contains many useful tools for anyone associated with PDM. At www.pdmcommunity.com , you will find:

- **Knowledge Base:** A question and answer area encompassing how to's, walk-throughs, explanations of settings and more.
- **User Discussions:** A user and support community of questions answered both by your peers and PDM support personnel.

- **Help Desk Ticketing:** If you cannot find what you need in the community, then contacting support may be the route to take. To ensure that your issue is tracked from start to end we have employed a ticketing system.
- **Remote Assistance:** When remote assistance is needed, obtain a support code from the helpdesk and dial in.

Take the time during the meeting to train your customer on PDM Community. Show them how to join the site, subscribe to discussions, and access the Knowledge Base and User Discussion. Instructions for joining and subscribing are on the home page of PDM Community. Every person involved in PDM in any role should register and actively use PDM Community.



2.3.8 Register Support Meeting Personnel for PDM Community

While everyone is at the meeting and you are training them on using PDM Community, take time register them all for PDM Community. They will each need a sign in name and password. Once they sign up, they will need to be approved by the administrators of PDM Community. They will receive an approval email within 24 hours after joining.

Register and Join our Community

It only takes a few minutes to join. Please fill in the information below to create your account.

Sign in name, email, and password (required)

Sign in name:

Choose Password:

Re-enter Password:

Email Address:

Re-enter Email Address:

Timezone:

(your email address is not published)

(GMT -05:00) Eastern Time (US & Canada)

Join Now! »

2.3.9 Inform Company Users About PDM Community

Everyone at your customer who will be involved in PDM in any way, as a user, administrator, IT support, project manager, or in any other role, needs to sign up for PDM Community. Inform them about the Knowledge Base and User Discussions, the benefits, how to use the site, and how to sign up and subscribe. This can be done through an email, meeting, or any other training method that works best.

2.3.10 Create Accounts in Adenium Defect and Feature System (OnTime)

Adenium System uses OnTime as the defect, feature, and support ticket tracking system for PDM. Accounts need to be created in OnTime in order to use the system. Accounts for OnTime need to be created for the second level support representatives and anyone at the customer who needs to submit and track defects, features, and support tickets.

To create the accounts, send a request email to Adenium Systems at helpdesk@adeniumsystems.com with the names and email addresses of people who need access. Adenium will create the accounts and notify the users via email and provide instructions on how to access the system.


2.3.11 Instruct Program Manager How to Submit and Review Defects, Features, Help Tickets

Take time during this meeting to show the participants how to submit defects, features, and support tickets. Show them how they can review the status of any item that they have submitted.

OnTime can be accessed by going to <http://ontime.adeniumsystems.com/ontimeportal> or by clicking on the **"Request Support"** tab on PDM Community. From there, the user will be able to login using their email address and their password.




Once in OnTime, a user can search to find public defects (submitted by other users), search to find their own defects and support tickets, and edit their defects and support tickets.




Defect Id	Name	Status	Priority
2563	Remove the Plan room tabs in PDMSubTheme	Scheduled	02 - High
2562	construction.com SSO integration	Scheduled	02 - High
2561	Notification Login Info and Password Verbage is...	Scheduled	02 - High
2559	Edit Email template in Report Manager does no...	Scheduled	03 - Medium
2558	Add updated FAX Key templates to the patch sc...	Scheduled	01 - Very High
2557	Add the Check boxes for View, Print and Downl...	Scheduled	02 - High
2556	When clicking on a folder that has subfolders, i...	Scheduled	02 - High
2547	References to external files are not including th...	Released	01 - Very High
2546	"State of Corporation" drop down is blank	Scheduled	01 - Very High
2545	Checking "Mailing Address" = "Same as Street...	Released	03 - Medium

They can also submit new items.



Report New Defect

Name:

Date Found: 

Defect Type:

Product:

Build Found:

Channel Priority:

Description:

Stamp >>

Replication Procedures:

Stamp >>

☐ Notify me of changes to this Defect

2.3.12 Create Account for Users for PDM Documentation Site

Documentation for PDM can be obtained from the Adenium Systems documentation site. To access it, you will need to send a request email to Adenium Systems at helpdesk@adeniumsystems.com with the names and email addresses of people who need access. Adenium will create the accounts and notify the users via email and provide instructions on how to access the system.

Also, the user will need to go to www.adeniumsystems.com/dfm to download the PDM client application. Documents can also be accessed on the “**Documentation**” tab of PDM Community.

2.3.13 Instruct How To Access Documentation

Explain to the meeting participants how – once they have their user account – they can access the PDM documentation. Demonstrate how to select the documentation project and where to find the folders for technical and user documentation and videos.

2.3.14 Explain PDM Patch and Upgrade Procedures

Adenium typically provides two releases per calendar year. One release will be considered a *major* release including new functionality as well as defect fixes. The other release will be considered a *minor* release containing some enhancements and many defect fixes.

In addition to these two releases, patches will be issued on an as-needed basis. If a patch is determined to be needed, it will be scheduled and all pertinent issues will be rolled into it. Adenium will not issue “one-off” patches for customers, since these patches take the development out of the design cycle.

Specific instructions as to how to upgrade from one version to the next will be provided in a separate *Upgrade* instructions guide issued with the release or patch. Installation files will be located in the Product Installation Files\Project Folders\3.x\PDM\3.x.x.x (Current Version) folder of the documentation site.

2.3.15 Identify Support Procedures for Reprographers

The reprographers that the customer will be working with will need a list of people to call or email in case they have a question about an order or some documents. Identify who should be contacted and record their email addresses and phone numbers so that you can provide the list to the reprographers during the Reprographics Coordination Meeting. You will also want this information when new reprographers are used.

2.3.16 Schedule Rollout of Pilot Project

In the Kickoff Meeting, you scheduled a tentative date to roll out a pilot project in PDM. During this Support Meeting, finalize which project will be used as a pilot and the date of the pilot project rollout.

2.3.17 Schedule Dates for Administrator, User, Subcontractor, and Reprographics Training

In the Kickoff Meeting, you scheduled a tentative dates for all of the training that needs to be performed. Those dates should be documented in the “*Kickoff Meeting Agenda*”. Now that the pilot project rollout is scheduled, it is necessary to firm up the schedule.

Review the tentative dates on the “*Kickoff Meeting Agenda*” and firmly schedule the dates for the Administrator, User, Subcontractor, and Reprographics Training. This training needs to occur before the pilot project goes live. You will need to send out invitations and make all arrangements for the training. Record the dates in the “*System Support Meeting Agenda*”.

2.3.18 Obtain Sign-Off From All Parties

Everyone who is involved should sign off on the agreements that were made in the meeting.

2.3.19 Send Meeting Minutes to All Parties Involved

After the meeting, send the meeting minutes that contain notes, agreed upon decisions, and action items to those who attended the meeting. Be sure the Management Sponsor, Reseller Sponsor, and Program Manager all receive a copy even if they were not in attendance.

2.3.20 Make Arrangements for All Scheduled Training

Send invitations for all of the training dates that were scheduled and make all other arrangements to hold the training.

System Support Meeting Agenda

PDM Pro Implementation

Date: 1/11/2010

Company: _____

People in attendance: _____

1. Meeting Objective:

- Define the support program, including levels one, two, and three
- Support tools available: including PDM Community, OnTime, and PDM documentation site
- Identify the pilot project and pilot rollout dates
- Schedule all training.

2. Define Support Levels

Level <u>One</u> PDM Support	
Defined Process (Record the process that will be implemented for first level support.)	
Personnel Involved (Identify the personnel that will be needed to implement.)	
Steps Needed to Implement (Identify the actions that need to be taken to get the process in place.)	

Level Two PDM Support	
Defined Process (Record the process that will be implemented for first level support.)	
Personnel Involved (Identify the personnel that will be needed to implement.)	
Steps Needed to Implement (Identify the actions that need to be taken to get the process in place.)	

Level Three PDM Support	
Defined Process (Record the process that will be implemented for first level support.)	
Personnel Involved (Identify the personnel that will be needed to implement.)	
Steps Needed to Implement (Identify the actions that need to be taken to get the process in place.)	

3. Identify Help Information for Subcontractor Portal

PDM Subcontractor Portal Help Page	
Information To Be Displayed n the Help Page	
Steps Needed to Implement (Identify the actions that need to be taken to get the process in place.)	

4. PDM Community

- ☐ What is PDM Community?
- ☐ Register for PDM Community

5. Defect, Feature, and Support Ticket System (OnTime)

- ☐ What is OnTime?
- ☐ How to submit defects, features, and support tickets
- ☐ Create accounts for OnTime

6. PDM Documentation Site

- ☐ How to access PDM Documentation Site
- ☐ Create accounts

7. Overview of PDM Patch and Upgrade Procedures

8. Define Reprographic Support Procedures

9. Identify Pilot Project and Rollout Dates

PDM Pilot Project	
Project	
Project Start Date	
PDM Rollout Date	

10. Schedule Training

PDM Administrator Training	
Date	
Time	
Location	
Invitees	

PDM User Training	
Date	
Time	
Location	
Invitees	

Subcontractor Training	
Date	
Time	
Location	
Invitees	

Reprographics Training	
Date	
Time	
Location	
Invitees	

Action Items

Sign-Off From All Parties

<i>Role</i>	<i>Name</i>	<i>Signature</i>



Reprographics Coordination Meeting

Design Phase

2.4 REPROGRAPHICS COORDINATION MEETING

The Reprographics Coordination Meeting is necessary to bring the selected reprographics company into contact with the PDM customer. Usually the ReproMAX reprographics company is already deeply connected with the customer because they were involved in the sale of the system and also based on previous business. Often they are primary sales contact and will be the ones hosting and implementing the system. This meeting is needed, however, to define the reprographics services to be performed.

2.4.1 Hold Reprographics Coordination Meeting

Hold a meeting with the ReproMAX reprographer, implementation team, customer, and management sponsor.

2.4.2 Introduce All Parties Involved

Start the meeting by introducing everyone and explaining their roles in the PDM program.

2.4.3 Explain Purpose of Meeting

A reprographer will need to be selected to be the primary print and scan company that the customer will work with. The reprographer will need to be trained on how to operate the system, such as importing documents and fulfilling orders.

2.4.4 Obtain List of Print and Scan Locations

Once a reprographer is selected, the implementer will need a list of all of the locations where they print and scan. The implementer will also need the names and contact information of those people who are performing the work at the reprographer. The locations will be entered into PDM so that when a customer order prints from the subcontractor portal, they can select the shipping or pickup location.

2.4.5 Explain Reprographic Services and Procedures

In general, the ReproMAX firm may perform the following tasks:

1. Scanning and indexing documents into PDM projects. This may be done with the traditional method of using *DFS Index* or in 3.0 the reprographer can be given a collaboration license to use the PDM tools to perform the indexing.
2. Hardcopy order fulfillment. The reprographer will need to print and ship all documents that are ordered hard-copy either from the PDM application or the subcontractor portal. This is done using the *DFS Remote Order Manager* tool.
3. Project closeout. The reprographer will perform a project closeout at the end of the project lifecycle. Since the reprographer is the one performing most of the document management, it is recommended that they handle the closeout.

2.4.6 Explain Reprographic Support Procedures

A decision will need to be made on who the reprographer calls when either they have a question about the work being performed, or the application is not working as expected. Decide on who will be the reprographer's first line of support.

The following is a recommendation:

- For issues concerning the project being worked on, how to import something, or any other non-software related issue, a contact at the customer should be assigned as the reprographer's support channel. Many times this could be the project manager or a PDM administrator.
- For issues concerning the PDM application, errors with it, or how to do something with the reprographics tools, an admin at the reprographics shop should be considered first line support. Issues that cannot be resolved should be sent to helpdesk@adeniumsystems.com.

2.4.7 Schedule Reprographic Training

Once the decisions have been made as to the reprographics company's role in the PDM implementation, training will need to be scheduled.

Training should be broken down into four parts:

- General PDM document management: This will give the reprographer general knowledge as to how the PDM application operates with regards to document management. The customer should also give the reprographer the information as to how most of their projects will be managed in PDM.
- Document management: This part of the training should focus on getting the customer familiar with the procedures for managing documents in PDM. Use of PDM or DFS Index will occur during this training.
- Order management: This part of the training should focus on hard-copy order management. Use of DFS Remote Order Manager will occur during this training.
- Closeout training: This part of the training will familiarize the reprographer with the e-closeout application and how to perform closeouts of the customer's projects. Use of PDM will occur during this training.

Most ReproMAX members are well trained on these procedures already. If this is the case, perform refresher courses as needed. Also perform specific process training that will be needed for this customer.

2.4.8 Obtain Sign-Off From All Parties

Everyone who is involved should sign off on the agreements that were made in the meeting.

2.4.9 Send Meeting Minutes to All Parties Involved

After the meeting, send the meeting minutes that contain notes, agreed upon decisions, and action items to those who attended the meeting. Be sure the Management Sponsor, Reseller Sponsor, and Program Manager all receive a copy even if they were not in attendance.



System IT and Database Setup

System Setup Phase

3.1 SYSTEM IT AND DATABASE SETUP

Prior to the installation, the implementation team needs to perform some important tasks to prepare for the installation. It involves getting licenses, databases, logos, and custom notifications and reports ready.

3.1.1 Obtain PDM License Admin Email Address

A PDM License Admin Email Address is an email address that will be used to create a default account in PDM during installation.

This account is needed so that the implementer or installer has a login into the PDM system in order to perform the configuration.

The PDM License Admin Email Address is determined at the time of the sale. McGraw-Hill will issue a PDM license to Adenium Systems who will in turn enter the information into their server tracking database. Once this is done, the license admin will receive an email indicating the system is ready for installation. The email will look similar to this:

```
This license is setup and ready for installation.  
License Admin: <email address>  
License Pass: <password>  
Installation Files and Documentation available here:  
DFM File Sharing Folder Link  
Project: Product Installation Files  
Folder: Project Folders\3.0\PDM\3.0.8.5
```

3.1.2 Obtain McGraw-Hill PDM License Number from MHC Horizon

A McGraw-Hill PDM License Number is a number that uniquely identifies the PDM system.

Your PDM License Number will be automatically generated from McGraw-Hill's Horizon tracking system and sent to Adenium Systems who will in turn enter the information into their server tracking database. Once this is done, the license admin will receive an email indicating the system is ready for installation. This email will contain the PDM License Number. The McGraw-Hill PDM License Number must be provided at installation time. Once it is received, enter that information in section 2.6 of the "*PDM Installation Addendum*".

3.1.3 Clean Subcontractor Database to Conform With PDM Contact Import Template

Most PDM installations will contain a subcontractor database that needs to be imported after the installation is complete. This list, usually in a CSV or Microsoft Excel format, must be cleaned and conform to the format used by PDM during contact imports.

The PDM contact import template is available in the PDM documentation server in the *Adenium Documentation - Released* project in the *PDM Technical Documentation* → *Example Files and Templates* folder.

Add the customer's subcontractor information into this files as clean as possible. A general rule is that the better quality the data is up front, the less issues need to be addressed later.

Some guidelines to follow:

- Try to have as many email addresses as possible. Email address will become the contact's login name.
- If there are no email addresses, then the fax number *must* be supplied. In this case, the contact's login name would be LastName+FaxNumber.
- Use the pipe "|" character to separate multiple values in the *Construction Codes* and *Service Areas* fields.
- Format all fields as *text*.
- Backup the database before any large contact import or update.
- Test the contact import on a PDM test or demo system.

3.1.4 Clean User Database to Conform With PDM Contact Import Template

Clean the User Database in the same manner as you did with the subcontractor database.

3.1.5 Create Custom Graphics to Correct Dimensions

The subcontractor portal, prequalification portal, PDM application, and notifications contain logos that will display across the top as a header. These logos need to be designed and created so that they meet the correct dimensions. Create them based off of the company's logos and colors that you obtained from them. See the "PDM Installation Guide" (specifically sections 8.8 – 8.11 and Appendix 3) and the PDM Training Tutorials on applying custom graphics for more detailed information.

Create the logos to the following standards:

- Need to be .png or .jpg files.
- The notification logo should be no wider than 8 inches so that it fits on a single page if printed. Therefore, it should be 576x72 pixels.
- The subcontractor portal logo should be 955x68 pixels.
- The prequalification portal should be 955 pixels by 68 pixels and the second logo should be 750 pixels by 64 pixels.

3.1.6 Design and Create Any Custom Notification Templates

Custom notifications may need to be configured for the PDM customer. Be aware that PDM Pro systems limit the number of allowed notification types to eleven and eleven standard notifications come with the system by default. Therefore, you cannot add more notifications unless you are working with a PDM Enterprise system. PDM Enterprise is required to have the ability to add custom notifications.

For information on how to create custom notifications, please see the documentation found here: *Adenium Documentation - Working→PDM Technical Documentation→Operations Guides→Notifications Training*.

3.1.7 Design and Create Any Custom Reports

Custom reports may need to be configured for the PDM customer. In most cases, the customer will not know what custom reports are needed until after they have used the system consistently for a period of time. The implementer should be prepared and understand how to create the reports when necessary.

For information on how to create custom reports, access the documentation found at *Adenium Documentation - Working* → *PDM Technical Documentation* → *Operations Guides* → *DFS Reports*.

3.1.8 Verify and Sign-Off Checklist

Verify that everything was performed correctly and have the implementation team and program managers sign off on the actions.



IT Readiness Check

System Setup Phase

3.2 IT READINESS CHECK

The IT Readiness Check is a follow up to the IT Readiness Assessment. Between the two meetings, all items in the “*PDM Installation Addendum*” should have performed and recorded in accordance with the requirements found in the “*PDM Hardware and Software Requirements Guide*”. Hold a meeting and go through the addendum to verify everything.

3.2.1 Hold Meeting IT Readiness Check Meeting

The IT Readiness Check Meeting is needed verify that all IT related infrastructure is in place and is operational. All items in the “*PDM Installation Addendum*” should be performed and recorded in accordance with the requirements found in the “*PDM Hardware and Software Requirements Guide*”. Make sure to have both of those documents in the meeting and that the addendum is filled out before-hand.

Hold the meeting with the implementation team, the program manager, the PDM administrators, and the IT manager. Invite anyone else that you see fit. In this meeting, test the IT infrastructure to make sure that it is ready for the installation. You cannot perform the installation until everything is in place and operational.

3.2.2 Verify Remote Access for the Implementer If Allowed

If the IT department has allowed it, verify that you have access to the servers to perform a remote installation. See section 2.4 in the “*PDM Installation Addendum*”. Some typical methods of remote access are:

- Log Me In Rescue
- Go To Assist
- Remote Desktop (Terminal Services)
- Citrix
- VNC

If the IT department has not allowed remote access or access will be provided via a web meeting client (such as Got Meeting, WebEx, or Live Meeting), then this step can be skipped.

3.2.3 Verify Proper Hardware Configuration

The server hardware will need to be verified. Verify the following items meet the requirements in the “*PDM Hardware and Software Requirements Guide*”.

- Database Server is in place and functional. See section 1.2 in the “*PDM Installation Addendum*”.
- Web Server is in place and functional. See section 1.3 in the “*PDM Installation Addendum*”. This includes the SSL Certificate and Code Signing Certificate.
- Import Server is in place and functional. See section 1.4 in the “*PDM Installation Addendum*”.
- Vault Server is in place and functional. See section 1.5 in the “*PDM Installation Addendum*”.

3.2.4 Verify Vault Share Exists With Proper Permissions

The vault share will need to be verified. The vault will be tested again automatically during the system installation. This information is recorded in section 1.5 of the “*PDM Installation Addendum*” Use the following procedure to verify the vault share:

1. From a different server, try to access the vault share from the **Start→Run**: Enter "`\\ServerName\ShareName`".
2. If correct, the vault should appear in Windows Explorer.
3. If a Windows Username and Password form appears, then the authentication and permissions are incorrect.
4. Drop a file into the vault folder.
5. If the file successfully copies to the folder, then the permissions have been setup correctly.

3.2.5 Verify DNS URL is Accessible on Local Network, Web Server, and Internet

The DNS URL must be accessible from both inside and outside the customer's network. Checking to see if the URL is working from the actual server or from the internet is an often overlooked step in the installation of a PDM system.

Perform the following test:

- From the actual web server, access the URL through a web browser. You should get the default Under Construction page.
- From the customer's network, but not the web server, access the URL through a web browser. You should get the default Under Construction page.
- From the internet (completely off the customer's network), access the URL through a web browser. You should get the default Under Construction page.

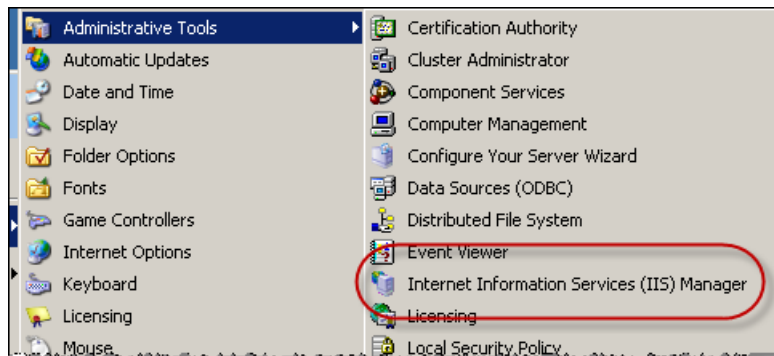
3.2.6 Verify SMTP Server By Running Email Test

The SMTP Server setup should be verified according to section 1.6 in the “*PDM Installation Addendum*”. It is difficult to send a test email since the PDM system without an email client in place. So the SMTP server will be verified during installation using the PDM System Setup Wizard.

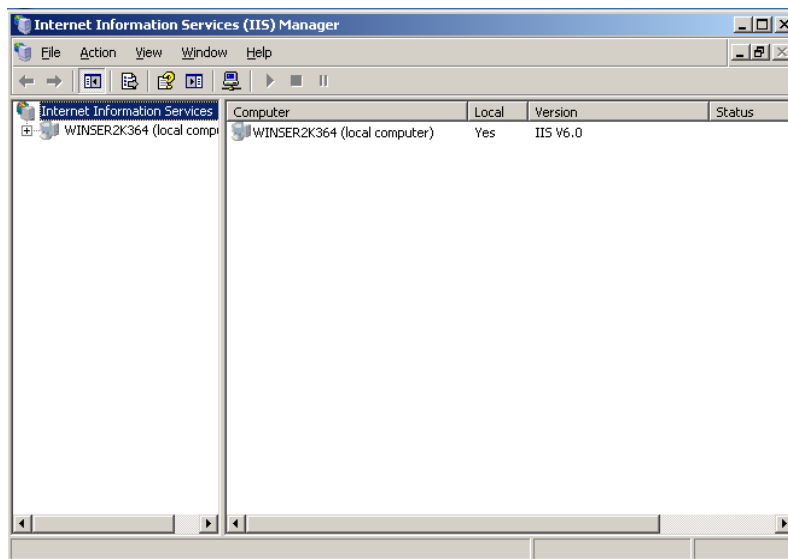
3.2.7 Verify IIS and .Net Framework 3.5 Installed

IIS and the .NET Framework must be installed on the web server. Use the following procedure to verify the software is installed properly.

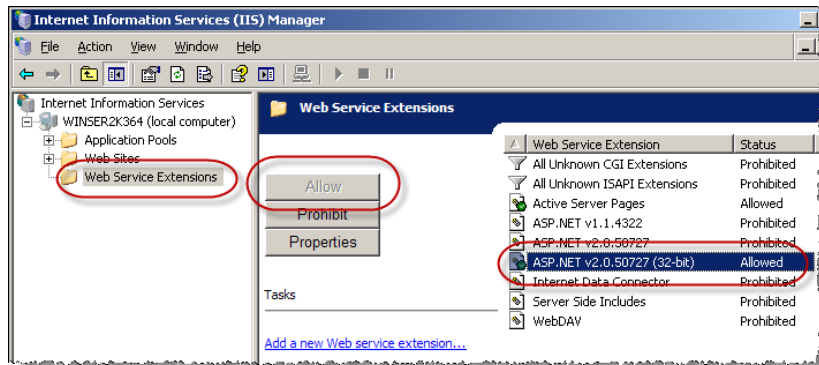
1. Launch IIS by going to **Start→Control Panel→Administrative Tools→Internet Information Services (IIS) Manager**.



2. IIS will launch.



3. Expand the server folder and select the **Web Service Extensions** folder.
4. **ASP.NET v2.0.50727** should be listed as a Web Service Extension. If it is not, reinstall or install Microsoft .NET Framework 3.5. (.NET 3.5 is the correct version to reinstall, as it contains the .NET 2.0 Framework).
5. Make sure the **Status** for the **ASP.NET v2.0.50727** is set to **Allowed**. If it is not, select it and click the **Allow** button.



3.2.8 Verify SQL Data Source

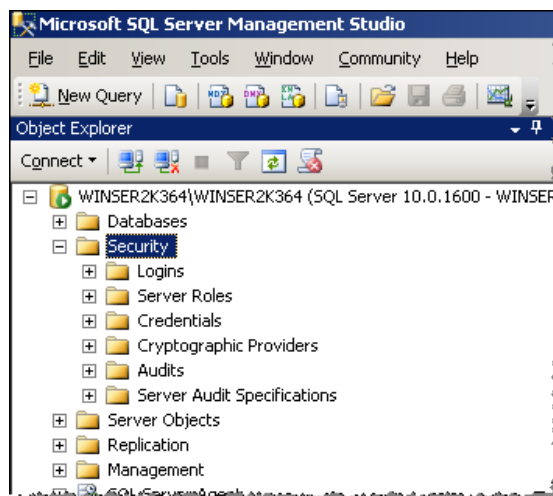
The SQL Server Data Source should be verified according to sections 1.2 and 2.2 in the “PDM Installation Addendum”. It can be difficult to verify a SQL source without the PDM client in place. Verify as much as possible now and the full test of the SQL data source will be verified during installation.

3.2.9 Verify SQL User With dbCreator Privileges

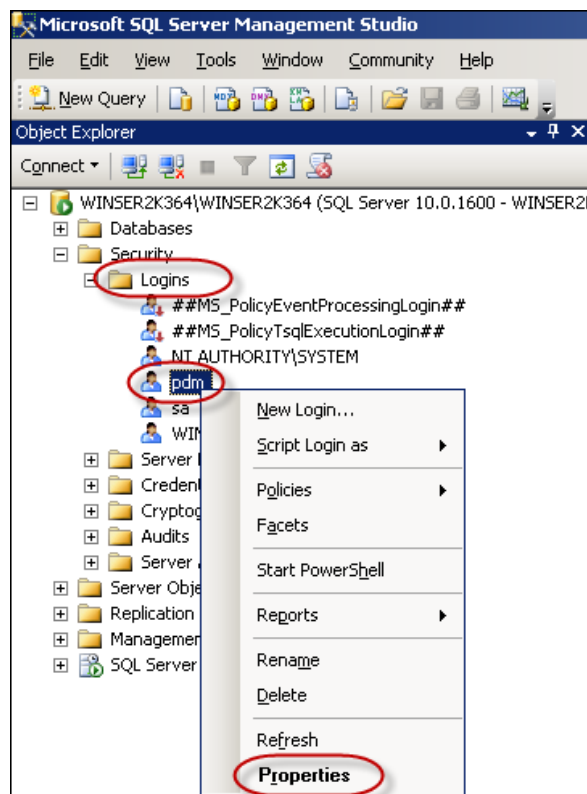
A SQL Server user should be created for the PDM application. This is the user that PDM client applications will use to login and connect to the PDM database in SQL Server. See section 2.2 of the “*PDM Installation Addendum*”.

Use the following procedure to verify the SQL Server user:

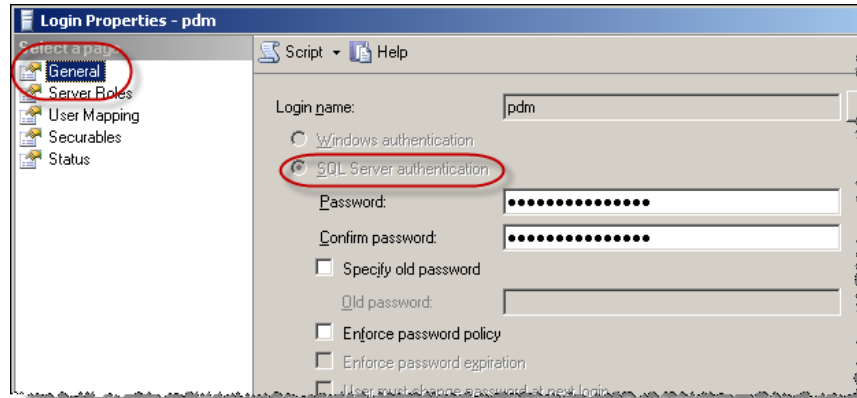
1. In SQL Management Studio, expand **Security**.



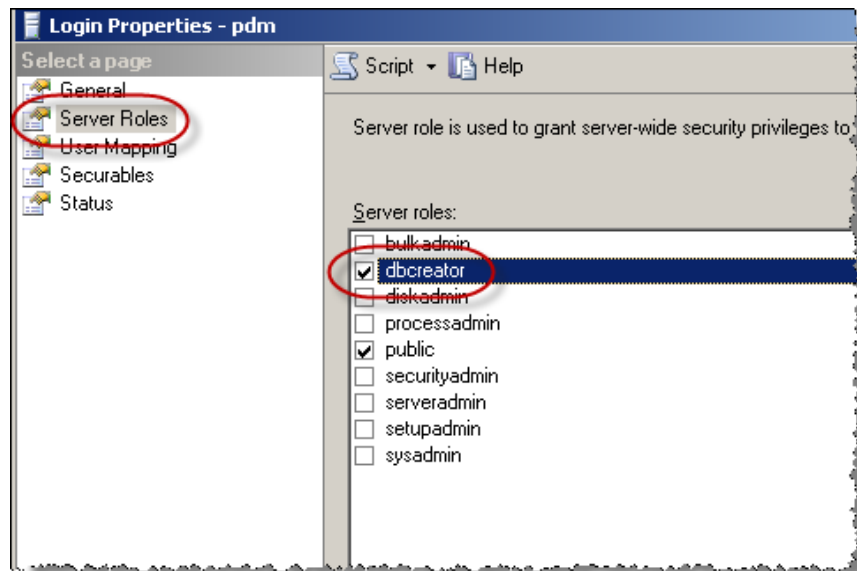
2. Expand **Logins**.
3. Right click on the intended user and select **Properties**.



4. In the **General** tab, verify **SQL Server Authentication** is checked. If not, the user will need to be re-created.



5. Click on the **Server Roles** section.
6. Verify that **dbcreator** is checked.



7. Click **Ok**.

3.2.10 Verify Domain User With Write Access to Vault Share

A domain user with write access to the vault share should be created. This user is needed to run the PDM Windows services. The domain user information is in section 1.7 of the “*PDM Installation Addendum*”.

Use the following procedure to verify the domain user has been created:

1. Remotely connect to any of the servers which do not contain the file vault.
2. Login into that server using the domain account that has been created.
3. Try to access the file vault over the network by selecting **Start→Run**: Enter "`\\ServerName\ShareName`".
4. The vault should appear in Windows Explorer.
5. Drop a file into the vault. It should allow the file to be dropped with no permissions issues.

3.2.12 Verify Import Server Running on Network

The PDM Import Server should be powered on and available over the network to the Web Server as well as the Vault Server.

Use the following procedure to verify it has the correct network access.

1. Remotely connect to either the web or the vault server.
2. Login into that server using the domain account that has been created.
3. Try to access the file import server over the network by selecting **Start→Run**: Enter "`\\ServerName\c$`".
4. The "c" drive of the import server should appear in Windows Explorer.
5. Drop a file onto the "c" drive. It should allow the file to be dropped with no permissions issues.

3.2.13 Review Backup Plan Document

The PDM backup plan should be reviewed. This backup plan should have been documented in the "*PDM Installation Addendum*" section 2.7. As the implementer, you will need to review this plan with the IT department and make sure it is acceptable with the needs defined in the IT Readiness Assessment.

3.2.14 Schedule Installation Date

Once all previous items have been cleared, the installation date should be scheduled.

If complete access to the servers is available and all parts of the IT readiness check have been completed, an install with all configurations should take no longer than one day to complete.

3.2.15 Obtain Sign-Off From All Parties

Everyone involved needs to sign off on the work performed indicating that it was performed correctly and to the satisfaction of the customer, implementation team, reseller, and service provider. Do not proceed with the installation until the IT infrastructure is completely setup, confirmed, and signed off.

3.2.16 Send Meeting Minutes and Checklist to All Parties Involved

After the signoff is completed, the meeting minutes from the IT readiness check should be sent to all parties involved.



PDM Installation

System Installation Phase

4.0 SYSTEM INSTALLATION

The next phase is the System Installation Phase. This phase consists of the following steps:

1. Pre-Installation Configuration
2. Install the PDM Web Server
3. Install the PDM Database
4. Install the PDM Import Server
5. Configure the PDM Settings

See the *"PDM Server and Client Installation Guide"* for step by step instructions for installing and configuring the PDM system.



Pilot Project Rollout

Pilot Project Rollout Phase

5.1 PILOT PROJECT ROLLOUT MEETING

5.1.1 Hold the Pilot Project Rollout Meeting

A meeting should be held with the Operations Manager, Administrators, Trainers, and the Program Manager. The purpose of this meeting is to coordinate the rollout of the pilot project.

The following tasks should be accomplished at the pilot project rollout meeting.

5.1.2 Schedule Administrator Training for Pilot Project

The first group of users who should be trained for the pilot project are the PDM administrators. Administrators include any users who will use PDM day-to-day and will need access to configuration settings.

5.1.3 Schedule User Training for Pilot Project

The second group of users who should be trained for the pilot project are the PDM users. Users include any users who will use PDM day-to-day for managing contacts, creating projects, uploading documents, sending bids, etc.

5.1.4 Determine Method of Training Subcontractors for Pilot Project

Since the subcontractor user-base can potentially be large, an effective method of training should be determined. Subcontractors are primarily portal users and should be trained on how to use the subcontractor portal. Effective training methods may include written instructions, quick start guides, online training, classroom training, webinars, video training, or some other method. Choose the method that is most feasible and effective.

5.1.5 Schedule the Delivery of Subcontractor Training for Pilot Project

Once the method of training for the subcontractors has been determined, it should be scheduled, invitations sent out, developed, and delivered.

5.1.6 Establish Method to Record Desired Changes for Next Project

A feedback system should be determined and put in place to accept information back from the users for the pilot project. Determine the feedback system that should be used.

5.2 PILOT PROJECT TRAINING

5.2.1 Train the Administrators

Now you can train the people who will be PDM administrators during the pilot project. Be sure to use an effective PDM trainer and give them formal training. You may need to tailor the existing training program to meet their specific needs, rather than just using the pre-defined training program.

It is effective to train the administrators on a demo database. You can also train them on the production database. If you do, be sure you have the databases and vault backed up beforehand. Then you can train them and roll back to the base system. Then, once you are back to the base system, have them setup the actual pilot project in the system. That way you know that it is set up properly and they know how to do it. You can also then train the users on the actual project. Be sure that you back up the system with the project created before performing the user training.

5.2.2 Train the Users Using the Pilot Project Database

Those who will be the users for the pilot project now can be trained. It is effective to train them using the actual pilot project database that the administrators created. Just be sure that it is backed up prior to the training.

Train them on their processes and how to use the system. When the training is complete, roll back the databases and vault to where it was before the training.

5.2.3 Train the Subcontractors Training for Pilot Project

Train the subcontractors that will be on the pilot project using the previously defined method. The method may be online training, webinars, video training, documentation, quick start guide, or whatever method that seems most effective.

5.2.4 Train the Reprographics Companies

The reprographics training that you scheduled during the Reprographics Coordination Meeting should be held during this step. Perform the training with the Reprographers and Project Administrators. They need to know how to perform all of the tasks to fulfill hard copy orders, index documents, and perform closeouts.

5.3 RUN PILOT PROJECT

5.3.1 Run Pilot Project as Trained

Now that everything has been setup and everyone trained, the pilot project can be run with the users performing their duties as trained. The support team should be ready to help whenever needed.

5.3.2 Record Desired Changes in Workflow and Setup

As your customer goes through the project, it is inevitable that some things may need to be changed. It could be a setting in the system, additional attributes may be needed, tweaks to a notification, new reports are needed, different methods of training identified, a change to the project template or folder structure, a different behavior for folder defaults, support procedures modified, and so on.

Record all of the changes that need to be made. If they cannot be made immediately, you will make the changes after the pilot project and during the pilot project assessment.

5.3.3 Hold Bi-Weekly Status Update Conference Call

Status meetings need to be held with the Program Manager, Administrators, and Implementers. These meetings can be conference calls to discuss how the pilot project is progressing, what works, what does not work, and to coordinate everything. You will want to see how satisfied your customer is and make any changes where needed.

It is a good idea to have the meetings twice a week, especially at the beginning of the project. This will help you to stay on top of everything and respond quickly to issues.



Assess Pilot Project Results

Assess Pilot Project Results Phase

6.1 PILOT PROJECT ASSESSMENT

6.1.1 Hold Pilot Project Assessment Meeting

Hold a meeting with everyone who was involved in the Kickoff Meeting. This includes the Customer Team, Sales Team, and Implementation Team. Invite any one else as necessary. This meeting will be focused on evaluating how the pilot project worked its effectiveness. Decisions will be made on how to address all of the issues and what changes need to be made. Every aspect of the previous implementation procedures, decisions, and setup will be evaluated.

6.1.2 Review Pilot Project Successes, Issues, and Needed Improvements

Evaluate and list the successes and issues with the pilot project. What is the culmination of all the Bi-Weekly Status Update meetings? Identify and record the needed improvements. Evaluate each item that is listed below.

6.1.3 Review IT Readiness

Closely examine the IT infrastructure. Look at the decisions made in the IT Readiness Assessment Meeting and measure their effectiveness and execution. Ask questions such as:

- Was it satisfactory?
- What issues were there, if any?
- How was the performance?
- Is everything getting backed up properly?
- What changes need to be made?

6.1.4 Review Support Plan

Examine how the support plan worked. Look at the decisions made in the IT Readiness Assessment Meeting and measure their effectiveness and execution. Ask questions such as:

- Was it executed properly?
- Were people's issues resolved quickly and in an orderly fashion?
- Was there any confusion?
- Was the subcontractor portal Help page useful?
- Are people using PDM Community actively?
- How can you get them to use PDM Community more?
- Was the first level of support satisfactory?
- Were the second and third levels of support effective?

6.1.5 Review System Design

Examine how the system was designed and setup. Go through the items and decisions made in the system design meetings and measure their effectiveness. Look closely at:

- Document types and attributes

- Notifications
- Lists
- Folder organization
- Folder behavior and defaults
- The amount of seat licenses
- The security architecture and roles
- Reprographics effectiveness

6.1.6 Review Training Effectiveness

Examine how the administrators, users, subcontractors, and reprographers performed. Look for areas of knowledge gaps. Look at the amount of support issues and the discussions in PDM Community. Are there areas that need to be addressed? Are there improvements and changes that need to be made with the training as this is rolled out to more users and projects?

6.1.7 Review Usage Effectiveness

Examine how the product was used. Was it used effectively? Was it used as it was designed? Was it used as it was trained? Did it solve the customer's inefficiencies as they were expecting? Did it meet or exceed the customer's expectations? Where can there be improvements?

6.1.8 Review Method of Recording Issues and Enhancements

Examine how issues were reported and enhancements were requested. Examine the mechanism that was selected in the Pilot Project Rollout Meeting (section 5.1) to "Establish a Method to Record Desired Changes for the Next Project". Was it effective? Was everything reported correctly? Was everything recorded correctly? Is it easy for the users to provide feedback?

6.1.9 Schedule Additional Training If Needed

If it determined that additional training is needed for the next project, schedule it now, send out invitations, and make all necessary arrangements.

6.1.10 Schedule Pilot Project #2 Rollout

Determine which project will be used as a second pilot and schedule a date for its rollout. This needs to occur after the changes are made to the system in the Pilot Project #2 Setup step and after the additional training.

6.1.11 Create Checklist of All Changes to be Made to PDM System

As a result of this meeting, make a checklist of all the items that need to be changed to the PDM system, support plan, training plan, and IT infrastructure. This checklist will be used,

and the changes made, in the upcoming “Make Changes to System According to Assessment Checklist” step.

6.1.12 Obtain Sign-Off From All Parties

Make sure everyone agrees to the decisions and changes that need to be made and obtain the formal sign-off.

6.1.13 Send Meeting Minutes and Checklist to All Parties Involved

Send the meeting minutes, decisions, and the checklist of changes to everyone involved in the implementation.

6.2 PILOT PROJECT #2 SETUP

6.2.1 Make Changes to System According to Assessment Checklist

Use the checklist that was the result of the Pilot Project Assessment Meeting to make all of the necessary changes to the system and other processes.

6.2.2 Setup Pilot Project #2

Add pilot project #2 to PDM, add any new users that are involved, and setup anything else that is needed for the project to run effectively.

6.2.3 Backup Database and Vault

Backup the databases and vault according to the backup procedures and guidelines after all of the changes have been made and the project is setup. This will give you a roll-back point if it is needed.

6.2.4 Perform Training As Needed

Perform the training that was deemed necessary in the Assessment Meeting.

6.3 PILOT PROJECT #2 ROLLOUT

6.3.1 Run Pilot Project #2 as Trained

Now that everything has been evaluated and the changes made based on feedback from the first project, the second project can go live. All users should perform their duties as they were trained. And as before, the support team should be ready to help whenever needed.

6.3.2 Record Desired Changes in Workflow and Setup

Have the users provide feedback on the system, including issues, suggestions, and enhancement requests. Record all of the changes that need to be made. If they cannot be made immediately, you will make the changes after the pilot project and during the pilot project assessment.

6.3.3 Hold Bi-Weekly Status Update Conference Calls

Just as you did in the first pilot project, status meetings need to be held with the Program Manager, Administrators, and Implementers. These meetings can be conference calls to discuss how the pilot project is progressing, what works, what does not work, and to coordinate everything. You will want to see how satisfied your customer is and make any changes where needed. Hold these meetings twice a week, especially at the beginning of the project. This will help you to stay on top of everything and respond quickly to issues.

6.4 PILOT PROJECT #2 ASSESSMENT

6.4.1 Hold Pilot Project #2 Assessment Meeting

When the second pilot project is complete, you can hold a meeting to assess the results of its execution. As you did after the first pilot project, hold the meeting with everyone who was involved in the Kickoff Meeting. This includes the Customer Team, Sales Team, and Implementation Team. Invite any one else as necessary. This meeting will be focused on evaluating how the pilot project worked its effectiveness. Decisions will be made on how to address all of the issues and what changes need to be made.

You will basically repeat the same procedure as you did in the first pilot project assessment meeting. Every aspect of the previous implementation procedures, decisions, and setup will be evaluated.

6.4.2 Review Pilot Project #2 Successes, Issues, and Needed Improvements

Evaluate and list the successes and issues with the pilot project. What is the culmination of all the Bi-Weekly Status Update meetings? Identify and record the needed improvements. Evaluate each item that is listed below.

6.4.3 Review IT Readiness

Closely examine the IT infrastructure. Look at the decisions made in the IT Readiness Assessment Meeting and measure their effectiveness and execution. Ask questions such as:

- Was it satisfactory?
- What issues were there, if any?
- How was the performance?
- Is everything getting backed up properly?
- What changes need to be made?

6.4.4 Review Support Plan

Examine how the support plan worked. Look at the decisions made in the IT Readiness Assessment Meeting and measure their effectiveness and execution. Ask questions such as:

- Was it executed properly?
- Were people's issues resolved quickly and in an orderly fashion?
- Was there any confusion?
- Was the subcontractor portal Help page useful?
- Are people using PDM Community actively?
- How can you get them to use PDM Community more?
- Was the first level of support satisfactory?
- Were the second and third levels of support effective?

6.4.5 Review System Design

Examine how the system was designed and setup. Go through the items and decisions made in the system design meetings and measure their effectiveness. Look closely at:

- Document types and attributes
- Notifications
- Lists
- Folder organization
- Folder behavior and defaults
- The amount of seat licenses
- The security architecture and roles
- Reprographics effectiveness

6.4.6 Review Training Effectiveness

Examine how the administrators, users, subcontractors, and reprographers performed. Look for areas of knowledge gaps. Look at the amount of support issues and the discussions in PDM Community. Are there areas that need to be addressed? Are there improvements and changes that need to be made with the training as this is rolled out to more users and projects?

6.4.7 Review Usage Effectiveness

Examine how the product was used. Was it used effectively? Was it used as it was designed? Was it used as it was trained? Did it solve the customer's inefficiencies as they were expecting? Did it meet or exceed the customer's expectations? Where can there be improvements?

6.4.8 Review Method of Recording Issues and Enhancements

Examine how issues were reported and enhancements were requested. Examine the mechanism that was selected in the Pilot Project Rollout Meeting (section 5.1) to "Establish a Method to Record Desired Changes for the Next Project". Was it effective? Was everything reported correctly? Was everything recorded correctly? Is it easy for the users to provide feedback?

6.4.9 Schedule Additional Training If Needed

If it determined that additional training is needed for the next project, schedule it now, send out invitations, and make all necessary arrangements.

6.4.10 Schedule the Go Live Date

Determine which project will be used as a second pilot and schedule a date for its rollout. This needs to occur after the changes are made to the system in the Pilot Project #2 Setup step and after the additional training.

6.4.11 Create Checklist of All Changes to be Made to PDM System

As a result of this meeting, make a checklist of all the items that need to be changed to the PDM system, support plan, training plan, and IT infrastructure. This checklist will be used, and the changes made, in the upcoming “Make Changes to System According to Assessment Checklist” step.

6.4.12 Obtain Sign-Off From All Parties

Make sure everyone agrees to the decisions and changes that need to be made and obtain the formal sign-off.

6.4.13 Send Meeting Minutes and Checklist to All Parties Involved

Send the meeting minutes, decisions, and the checklist of changes to everyone involved in the implementation.



Go Live

Live Rollout Phase

7.1 LIVE ROLLOUT

7.1.1 Make Changes to System According to Pilot Project Assessment Checklist

Use the checklist that was the result of the Pilot Project Assessment Meeting to make all of the necessary changes to the system and other processes.

7.1.2 Backup Database and Vault

Backup the databases and vault according to the backup procedures and guidelines after all of the changes have been made and the project is setup. This will give you a roll-back point if it is needed.

7.1.3 Perform Training As Needed

Perform the training that was deemed necessary in the Assessment Meeting.

7.1.4 Go Live

It is now time to roll the system out to the entire company. Add all of the new projects to the system and roll it out to all users.

7.2 LIVE ROLLOUT ASSESSMENT

7.2.1 Hold Rollout Assessment Meeting

Periodically, you should hold assessment meetings to review the live rollout. Hold the meeting with the Customer Team, Sales Team, and Implementation Team. Invite any one else as necessary. This meeting will be focused on evaluating how the pilot project worked its effectiveness. Decisions will be made on how to address all of the issues and what changes need to be made.

You will basically repeat the same procedure as you did in the first pilot project assessment meeting. Every aspect of the previous implementation procedures, decisions, and setup will be evaluated.

7.2.2 Review Live Rollout Successes, Issues, and Needed Improvements

Evaluate and list the successes and issues with the pilot project. What is the culmination of all the Status Update meetings? Identify and record the needed improvements.

7.2.3 Create Checklist of All Changes to be Made

As a result of this meeting, make a checklist of all the items that need to be changed to the PDM system, support plan, training plan, and IT infrastructure.

7.2.4 Make Changes According to Assessment Checklist

Use the checklist to make all of the necessary changes to the system and other processes.

7.2.5 Obtain Sign-Off From All Parties

Make sure everyone agrees to the decisions and changes that need to be made and obtain the formal sign-off.

7.2.6 Send Meeting Minutes to All Parties Involved

Send the meeting minutes, decisions, and the checklist of changes to everyone involved in the implementation.

PDM IMPLEMENTATION PROCESS CHECKLIST

✓	#	Phase - Step - Task
	1.0.0	Readiness Assessment Phase
	1.1	Initiate Program
	1.1.1	Sign Contract for System
	1.1.2	Set Up Account and Pricing in Billing System
	1.1.3	Create PDM Server and Client Licenses
	1.1.4	Identify Management Sponsor
	1.1.5	Identify Program Manager
	1.1.6	Identify IT Manager
	1.1.7	Identify PDM Administrators
	1.1.8	Identify Reseller Sponsor or Account Manager
	1.1.9	Identify Implementation Team
	1.1.10	Schedule Kickoff Meeting
	1.1.11	Provide the Account Manager with Kickoff Meeting Worksheet
	1.1.12	Send Invitation to Kickoff Meeting Attendees
	Form	PDM Implementation Program Key Personnel Form
	Form	Pre-Kickoff Meeting Worksheet
	1.2	Kickoff Meeting
	1.2.1	Hold Meeting with Implementation Team and Customer Management Team
	1.2.2	Re-Affirm Customer Expectations, Requirements, Goals, and Objectives
	1.2.3	Record Expectations, Requirements, Goals, and Objectives
	1.2.4	Outline Reseller Responsibilities
	1.2.5	Outline Customer Responsibilities
	1.2.6	Setup Customer on PDM Demo System
	1.2.7	Provide Customer with Demo System Training Guide
	1.2.8	Identify 2-4 Pilot Projects
	1.2.9	Identify Pilot User Representatives
	1.2.10	Determine Where the System Will Be Hosted
	1.2.11	Schedule IT Readiness Assessment Meeting
	1.2.12	Schedule System Design Meetings
	1.2.13	Schedule System Support Meeting
	1.2.14	Schedule Reprographics Coordination Meeting
	1.2.15	Schedule Tentative Installation Date
	1.2.16	Schedule Tentative Training Dates
	1.2.17	Schedule Tentative Pilot Project Rollout Date
	1.2.18	Create Statement of Work / Timeline / Project Plan
	1.2.19	Obtain Sign-Off From All Parties
	1.2.20	Send Meeting Minutes and Checklist to All Parties Involved
	1.2.21	Send Invitations to Attendees for All Scheduled Meetings
	Form	Kickoff Meeting Agenda

	2.0.0	Design Phase
	2.1	IT Readiness Assessment
	2.1.1	Hold IT Readiness Assessment Meeting
	2.1.2	Provide Hardware and Software Requirements Guide
	2.1.3	Provide PDM Installation Addendum Document
	2.1.4	Explain DNS Configuration
	2.1.5	Explain Database Server Configuration
	2.1.5.1	Explain Database Engine Requirements
	2.1.5.2	Explain SQL user with dbCreator Privilege
	2.1.6	Explain Web Server Configuration
	2.1.6.1	Explain Load Balancing Options
	2.1.6.2	Explain SSL Requirements
	2.1.7	Explain Import Server Configuration
	2.1.8	Explain File Vault Configuration
	2.1.8.1	Explain PDM System Capacity Planning Guide
	2.1.9	Explain SMTP Configuration
	2.1.10	Explain Domain User Requirements
	2.1.11	Explain PDM Configuration
	2.1.11.1	Explain "Send As" and "Reply To" Email Addresses
	2.1.11.2	Explain Aurigma License Requirements
	2.1.11.3	Explain Faxing Requirements
	2.1.11.4	Explain Report Server URL
	2.1.11.5	Explain Import Server URL
	2.1.12	Explain PDM SQL Configuration
	2.1.13	Explain PDM Service Accounts
	2.1.14	Explain .NET Session State Configuration
	2.1.15	Explain Licensing Information
	2.1.16	Explain Backup Requirements
	2.1.17	Explain Web Deployment and Code Signing Certificate
	2.1.18	Obtain Remote Access for the Implementer If Allowed
	2.1.19	Schedule IT Readiness Check Meeting
	2.1.20	Obtain Sign-Off From All Parties
	2.1.21	Send Meeting Minutes and Documents to All Parties Involved
	2.1.22	Send Invitations for IT Readiness Check Meeting
	Form	IT Readiness Assessment Meeting Agenda
	2.2	System Design Meetings
	2.2.1	Hold System Design Meetings
	2.2.2	Explain Document Types
	2.2.2.1	Explain Duplicate Keys
	2.2.2.2	Explain File Parsing Rule
	2.2.2.3	Explain Display Name Pattern
	2.2.3	Define Notification Types
	2.2.4	Define Lists
	2.2.5	Define Project Templates
	2.2.6	Explain Folder Defaults
	2.2.7	Define Seat Licenses (Licensed PDM Users vs. Planroom Users)

	2.2.8	Define Security Architecture
	2.2.9	Obtain List of All Internal Users
	2.2.9.1	Identify Which Internal Users Are System Administrators
	2.2.9.2	Identify Which Internal Users Are Users
	2.2.9.3	Identify the Prequalification Administrators
	2.2.9.4	Identify Which Internal Users Are Project Evaluators
	2.2.10	Obtain the Subcontractor Database
	2.2.11	Identify Print and Scan Locations (Reprographers)
	2.2.12	Explain Subcontractor Portal
	2.2.13	Obtain Company Logos and Official Color Scheme
	2.2.13.1	Determine Subcontractor Portal Logo
	2.2.13.2	Determine Notification Logo
	2.2.13.3	Determine Prequalification Portal Logos
	2.2.13.4	Determine PDM Application Logos
	2.2.14	Obtain End User License Agreement
	2.2.15	Obtain Sign-Off From All Parties
	2.2.16	Send Meeting Minutes and Checklist to All Parties Involved
	Form	System Design Meeting Agenda
	2.3	System Support Meeting
	2.3.1	Hold Meeting With Implementers, Program Manager, IT Manager, etc.
	2.3.2	Define Support Program
	2.3.3	Identify and Define First Level Support Personnel
	2.3.4	Identify and Define Second Level Support Personnel
	2.3.5	Identify and Define Third Level Support Personnel
	2.3.6	Explain and Identify Help Information for Portal
	2.3.7	Explain PDM Community and Advantages
	2.3.8	Register Support Meeting Personnel for PDM Community
	2.3.9	Inform Company Users About PDM Community
	2.3.10	Create Account for Program Manager in Adenium Defect and Feature System (OnTime)
	2.3.11	Instruct Program Manager How To Submit and Review Defects, Features, Help Tickets
	2.3.12	Create Account for Users for the Adenium Documentation Site
	2.3.13	Instruct How To Access Documentation
	2.3.14	Explain PDM Patch and Upgrade Procedures
	2.3.15	Identify Support Procedures for Reprographers
	2.3.16	Schedule Rollout of Pilot Project
	2.3.17	Schedule Dates for Administrator, User, Subcontractor, and Reprographics Training
	2.3.18	Obtain Sign-Off From All Parties
	2.3.19	Send Meeting Minutes and Checklist to All Parties Involved
	2.3.20	Make Arrangements for All Scheduled Training
	Form	System Support Meeting Agenda
	2.4	Reprographics Coordination Meeting
	2.4.1	Hold Meeting or Conference Call
	2.4.2	Introduce All Parties Involved
	2.4.3	Explain Meeting Purpose
	2.4.4	Obtain / Verify List of Print and Scan Locations
	2.4.5	Explain Reprographic Services and Procedures
	2.4.6	Explain Reprographic Support Procedures

	2.4.7	Schedule Reprographic Training
	2.4.8	Obtain Sign-Off From All Parties
	2.4.9	Send Meeting Minutes to All Parties Involved
	3.0.0	System Setup Phase
	3.1	System IT and Database Setup
	3.1.1	Obtain PDM License Admin Email Address
	3.1.2	Obtain McGraw-Hill PDM License Number from MHC Horizon
	3.1.3	Clean Subcontractor Database to Conform With PDM Contact Import Template
	3.1.4	Clean User Database to Conform With PDM Contact Import Template
	3.1.5	Create Subcontractor Portal Logo and Notification Logo to Correct Dimensions
	3.1.6	Design and Create Any Custom Notification Templates
	3.1.7	Design and Create Any Custom Reports
	3.1.8	Verify and Sign-Off Checklist
	3.2	IT Readiness Check
	3.2.1	Hold Meeting with IT Staff, Program Manager, and Implementer
	3.2.2	Verify Remote Access for the Implementer If Allowed
	3.2.3	Verify Proper Hardware Configuration
	3.2.4	Verify Vault Share Exists With Proper Permissions As Defined
	3.2.5	Verify DNS (URL) is Accessible on the Local Network, on the Web Server, and Internet
	3.2.6	Verify SMTP Server By Running Email Test
	3.2.7	Verify IIS and .Net Framework 3.5 Installed on Web Server
	3.2.8	Verify SQL Data Source
	3.2.9	Verify Domain User With Write Access to Vault Share
	3.2.10	Verify SQL User With dbCreator Privileges
	3.2.11	Verify Code Signing Certificate Exists
	3.2.12	Verify Import Server Running On Network
	3.2.13	Review Backup Plan Document (Draft)
	3.2.14	Schedule Installation Date
	3.2.15	Obtain Sign-Off From All Parties
	3.2.16	Send Meeting Minutes and Checklist to All Parties Involved
	4.0.0	System Installation Phase
	4.1	Pre-Installation Configuration
	4.1.1	Create PDM Folder Structure
	4.1.2	Download Installation Files
	4.1.3	Create PDM Vault Share
	4.1.4	Install PDM PreInstaller on All Servers
	4.2	PDM Web Server Installation
	4.2.1	Install PDM Host
	4.2.2	Configure PDM Host Machine Name
	4.2.3	Install PDM Sub Theme
	4.2.4	Configure PDM Sub Theme TempUpload Permissions
	4.2.5	Install ASPAJAXExtSetup.msi
	4.2.6	Install PDM Deployment Server

4.2.7	Setup ClickOnce Web Deployment
4.2.8	Configure PDM.exe.config
4.2.9	Setup PDM Client Web Deployment
4.2.10	Verify the Installation
4.3	Install the PDM Database
4.3.1	Install PDM Server
4.3.2	Configure DFSWindowsServiceSettings.xml
4.3.3	Run PDM Server Setup Wizard
4.3.4	Enter McGraw-Hill License and License Email Address
4.3.5	Enter SQL Database Server Information
4.3.6	Enter PDM Administrator Account Password
4.3.7	Enter PDM Vault Information
4.3.8	Enter Internet Settings
4.3.9	Enter SMTP Information
4.3.10	Enter Fax Provider Information
4.3.11	Enter Company Branding Information
4.3.12	Complete PDM Server Setup Wizard
4.3.13	Start PDM Windows Services
4.4	Install PDM Import Server
4.4.1	Create Database
4.4.2	Install PDM Import Server
4.4.3	Install PDM Import Server Web Host
4.5	Configure PDM Settings
4.5.1	Verify PDM License Administrator Account
4.5.2	Configure and Enable Generic Prequalification
4.5.3	Register PDM Library
4.5.4	Configure Aurigma File Download and Upload Licenses
4.5.5	Enter List Values
4.5.6	Assign End User License Agreement to Subcontractor Portal
4.5.7	Configure the Help Page on Subcontractor Portal
4.5.8	Apply Graphics to PDM
4.5.9	Apply Logo to Subcontractor Portal
4.5.10	Apply Logos to Prequalification Portal
4.5.11	Apply Logos to Notifications
4.5.12	Install Any Custom Notifications
4.5.13	Install Any Custom Reports
4.5.14	Create Security Architecture (Roles)
4.5.15	Import the Internal Users and Assign to Roles
4.5.16	License the Internal Users to User PDM
4.5.17	Import the Subcontractor Database and Assign to Roles
4.5.18	Enter Print Locations and Reprographics Users
4.5.19	Create Project Template and Folder Defaults
4.5.20	Backup PDM Server, Import Server, and Vault
4.5.21	Configure PDM Import Server to Run as a Service
4.5.22	Configure PDM Web Applications to Run With SQL Server Session State
4.5.23	Configure PDM to Use PDF Exchange for Markups

	5.0.0	Pilot Project Rollout Phase
	5.1	Pilot Project Rollout Meeting
	5.1.1	Hold Rollout Meeting
	5.1.2	Schedule Administrator Training for Pilot Project
	5.1.3	Schedule User Training for Pilot Project
	5.1.4	Determine Method of Training Subcontractors for Pilot Project
	5.1.5	Schedule the Delivery of Subcontractor Training for Pilot Project
	5.1.6	Establish Method to Record Desired Changes for Next Project #2
	5.2	Pilot Project Training
	5.2.1	Train Administrators
	5.2.2	Train Users Using the Pilot Project Database
	5.2.3	Train Subcontractors Training for Pilot Project
	5.2.4	Train Reprographics Companies
	5.3	Run Pilot Project
	5.3.1	Run Pilot Project as Trained
	5.3.2	Record Desired Changes in Workflow and Setup
	5.3.3	Hold Bi-Weekly Status Update Conference Call
	6.0.0	Pilot Project Assessment Phase
	6.1	Pilot Project Assessment
	6.1.1	Hold Assessment Meeting with Customer Team and Implementation Team
	6.1.2	Review Pilot Project #1 Successes, Issues, and Needed Improvements
	6.1.3	Review IT Readiness
	6.1.4	Review Support Plan
	6.1.5	Review System Design
	6.1.6	Review Training Effectiveness
	6.1.7	Review Usage Effectiveness
	6.1.8	Review Method of Recording Issues and Enhancements
	6.1.9	Schedule Additional Training If Needed
	6.1.10	Schedule Pilot Project #2 Rollout
	6.1.11	Create Checklist of All Changes to be Made to PDM System
	6.1.12	Obtain Sign-Off From All Parties
	6.1.13	Send Meeting Minutes and Checklist to All Parties Involved
	6.2	Pilot Project #2 Setup
	6.2.1	Make Changes to System According to Assessment Checklist
	6.2.2	Setup Pilot Project #2
	6.2.3	Backup Database and Vault
	6.2.4	Perform Training As Needed
	6.3	Pilot Project #2 Rollout
	6.3.1	Run Pilot Project #2 as Trained
	6.3.2	Record Desired Changes in Workflow and Setup
	6.3.3	Hold Bi-Weekly Status Update Conference Call

	6.4	Pilot Project #2 Assessment
	6.4.1	Hold Assessment Meeting with Customer Team and Implementation Team
	6.4.2	Review Pilot Project #2 Successes, Issues, and Needed Improvements
	6.4.3	Review IT Readiness
	6.4.4	Review Support Plan
	6.4.5	Review System Design
	6.4.6	Review Training Effectiveness
	6.4.7	Review Usage Effectiveness
	6.4.8	Review Method of Recording Issues and Enhancements
	6.4.9	Schedule Additional Training If Needed
	6.4.10	Schedule Go Live Date
	6.4.11	Create Checklist of All Changes to be Made to PDM System
	6.4.12	Obtain Sign-Off From All Parties
	6.4.13	Send Meeting Minutes and Checklist to All Parties Involved
	7.0.0	Live Rollout Phase
	7.1	Live Rollout
	7.1.1	Make Changes to System According to Pilot Project Assessment Checklist
	7.1.2	Backup Database and Vault
	7.1.3	Perform Training As Needed
	7.1.4	Go Live
	7.2	Live Rollout Assessment
	7.2.1	Hold Rollout Assessment Meeting with Customer Team and Implementation Team
	7.2.2	Review Live Rollout Successes, Issues, and Needed Improvements
	7.2.3	Create Checklist of All Changes to be Made
	7.2.4	Make Changes According to Assessment Checklist
	7.2.5	Obtain Sign-Off From All Parties
	7.2.6	Send Meeting Minutes and Checklist to All Parties Involved



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