



Is Primavera Contract Management (PCM) Still Alive?

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ORACLE® Platinum
Partner



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***2014 Technical
Webinar Series***



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Thank you for joining today's technical webinar

- Mute – all call in phones are automatically muted in order to preserve the quality of the audio for all attendees.
- Questions – during the session, questions can be submitted through the Questions Box on the right side of the screen . We will try to address your questions at the end of the presentation, time permitting.
- Follow up – all registrants will receive an Excel file listing all questions and responses along with a link to the recorded webinar.



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Safe Harbor

- The statements made in this technical presentation are based on our current knowledge of the tools.
- Our statements should not be construed to be an official “Oracle perspective”, but are intended to be the sharing of technical and user knowledge gained as we explore new paths and technologies, usually in advance of our clients.
- Our statements should not be construed as in conflict with any Oracle statement, as the Oracle statement is likely made based on more current knowledge than is available to us.



- Oracle Primavera Software, **Authorized Cloud Distributor**
- Oracle Primavera Certified Implementation Specialists
- Custom Integration, Analytics and Dashboard Utilities
- Project Support Services and Partnering



- Global, dedicated environment hosting services
- Primavera OPPM, P6 EPPM, P6 Pro, Primavera Unifier, Contract Management, BI Publisher, UCM/Sharepoint, P6 Risk, AutoVue and Analytics
- Hard Dollar, HCSS, Acumen Fuse, Ecosys, Prism G2, US Cost, Microsoft...
- Global Data Centers in USA, London, Singapore and Brisbane





Abstract – Is Primavera Contract Management (PCM) Still Alive?

- Many clients using Contract Management are asking that question. Too much conflicting information has been causing confusion and many people are not clear on what their options are. When you put all the facts into proper perspective, PCM is still very much alive and still a great investment for some projects. In this presentation, Don will outline the facts from our perspective as a 20+ year supporter of PCM as well as from the perspective of many of our clients who continue to get a positive return on their PCM investment. We will help answer the question "is PCM still a good choice for you or not?". If you are considering abandoning PCM for another product or have been told by someone that it's no longer a viable product for a new project, you need to get the facts so you can make an informed decision about what's best for you and your projects...



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Is Primavera Contract Management (PCM) Still Alive?

Agenda

- The Facts
- PCM Positioning
- Migrating to 14.1
- Expanding PCM Functionality
- Comparing Costs to other Options
- Benefits of Contract Management 14
- How to Decide What's Right for Your Project?
- Questions



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The Facts

Both 13 and 14 support Web Services

- 13.1 is the latest version of the Infomaker based PCM.
 - Legacy licenses (concurrent) can still migrate as far as 13.1.
 - 13.1 licenses are no longer available for purchase.
 - Oracle support for 13.1 ends June 2015.
- 14.1 is the latest version of PCM (August 2014).
 - Uses BI Publisher in place of Infomaker for forms and reports.
 - Oracle has committed to continued enhancements.
 - Oracle considering future migration options including Primavera Prime.



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Version 14.1

Released July, 2014

- Update custom fields in Drawing Revisions
- Search by Package Number in Submittals
- Exclude Actions and Alerts for Closed or Rejected projects
- Ability to search Line Item and Description fields
- Specify SharePoint or WebCenter site per project rather than globally
- Certified on MS SQL 2012
- Version 14.2 roadmap defined



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PCM Positioning

PCM focus is the “document”, Unifier is on the business process

- Designed to track project specific information.
 - Documents, Contracts, Costs, Changes, Drawings, Communications
- Database tracks progress, the “Document” is an attachment.
- Properly set up it can support all phases of a project.
- Database is searchable, reportable and easy to integrate.
- Not “SaaS” but you can use Oracle Leasing for monthly payments over the life of a project.
- Web services supports integration, workflows and role based screens.



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Migrating to 14.1

Most previous versions can be migrated to 14.1

- Concurrent licenses usually migrate on a 2:1 license swap.
- Custom Infomaker forms and reports must be recreated in BI Publisher.
- BI Publisher is invisible to users, few changes from Infomaker.
- “Perpetual” licenses (13 or 14) can be used indefinitely.
- Data migration is fairly simple, test for concatenation for older db’s.
- Web services is almost identical to 13 so custom integration and apps migrate to 14 with very little change – but must be tested!



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Expanding PCM Functionality

Web services provide a solid foundation for customization

- Workflows, role base screens, multi-project “documents”, integration.
- SharePoint repository provides a transportable record of “documents”.
- Role-based input screens have distinct benefits
 - Logging incoming doc’s, use web service licenses to keep PCM database secure
- Web services based workflows can work and report across projects.
- Web services based input screens can provide intelligent integration that is invisible to the user and promotes system adoption.
- Web services screens avoid Java issues and run on mobile devices.



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Web Service Solutions

Web Services provide a solid foundation for customization

- San Diego Gas & Electric (Sunrise Powerlink, \$1B+)
 - Needed to support remote entry of Daily Construction and Environmental Reports, aligned with the P6 schedule, closed and reported to management by 10am the following day for 200+ users.
- Los Angeles Metro Rail (Measure R, \$40B)
 - Need to facilitate contractor document submittal in an easy to support environment while insuring the security of the PCM database. Support for multi-project agreements, changes and automated workflows as well as significant cost savings in licenses.



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Example: Role based screen

[Log Out](#) **CONTRACT MANAGER INTERFACE - Daily Report** Jun 10, 2011

Daily Report

Project * Report Type

From * Report Category

Period * Link *

Number * Section *

Report Date* Segment

Work Activity

Additional Comments

FSA Onsite (Y/N) *

If YES, List

- Custom fields and labels placed where logical to you!
- Drop down lists can be customized by project.



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Same project – different role

Mitigation Measure Reporting

Primary Company [Dropdown] **Description** [Text Box]
Remarks [Text Area: Comments about Measure Issues.] **Mitigation Measure *** [Dropdown: B-1c]
 MM A? **MM in Compliance? (Y/N)** **Problem Area? (Y/N)**
MM C (Loc UTM/Lat-Long) [Text Box: 32-44-55] **MM B (Category)** [Dropdown: Birds]
MM E (Issue Number) [Text Box: 1] **MM B (Species Code)** [Dropdown: Blue Grosbeak]
MM G (Comment) [Text Box] **MM D (Cause of Death/Injury)** [Dropdown: Natural Causes]
 MM F (Action Taken) [Dropdown: Notified Link Lead]
MM H (Nearest Location/Feature) * [Text Box: EP277]

Primary Company	Description	Remarks	MM Measure	MM Comply (Yes/No)	Problem Area? (Yes/No)	MM A (Yes/No)	MM B (Category)	MM B (Species Code)	MM C (Location UTM)	MM D (Cause of Death/Injury)	MM E (Issue)	MM F (Action Taken)	MM G (Comment)	MM H (Nearest Location/Feature)

Prev Next

- Environmental Monitors submit reports DAILY with information on all mitigation measures that are reportable to CPUC.
- Reports are reviewed and approved DAILY and submitted to CPUC weekly.



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Integrate with P6 for Schedule Updates

Schedule Update

1 **Construction Type** Foundation & Erection **2 Activity** Conventional Foundation **3 Location** Tower CP18-1 (4A)

Activity Name Link 5/Sec 4A/Install Foundation - CP18-1 (Conventional) **Activity ID** L5CN04A-2560

Activity Steps

1 <input checked="" type="checkbox"/> Air Drill	7 <input type="checkbox"/> Pour
2 <input checked="" type="checkbox"/> Start	8 <input type="checkbox"/> Finish
3 <input checked="" type="checkbox"/> Drill	9 <input type="checkbox"/> Remove Form / Clear Site
4 <input checked="" type="checkbox"/> Rebar	10 <input type="checkbox"/> BMP Maintenance
5 <input type="checkbox"/> Form/Angle	11 <input type="checkbox"/> Work Area Completely Disturb
6 <input type="checkbox"/> Ground Wire Attached	12

Issues

Remarks

Spellcheck Sched
Add Sched

Construction Type	Activity	Location	Issues	Remarks	Step 1	Step 2	Step 3	Step 4	Step 5	Step 6	Step 7	Step 8	Step 9	Step 10	Step 11	Step 12	
Foundation & Erection	Conventional Foundation	Tower CP10 (4A)			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Delete

Prev Next

This screen finds the correct activity and then lists the "Steps".

- Tracks multiple activities in one report.

SDG&E Summary

\$1B+, 3 year transmission line project

- Approximately 250 monitors and inspectors in field.
- Approximately 90+ daily reports submitted EVERY DAY.
 - 500+ daily reports submitted PER WEEK.
- Estimated time to complete each daily report by monitor/inspector—15 to 20 minutes.
 - Old way, another 20-30 minutes per report for data entry.
 - Old way cost \$15k to \$25k per week.
 - New way costs \$10k to \$15k per week .
 - Savings = \$5k to \$10k per week = up to \$500,000 per year.
 - BONUS: Reports to CPUC are automated and available 2-3 days earlier.



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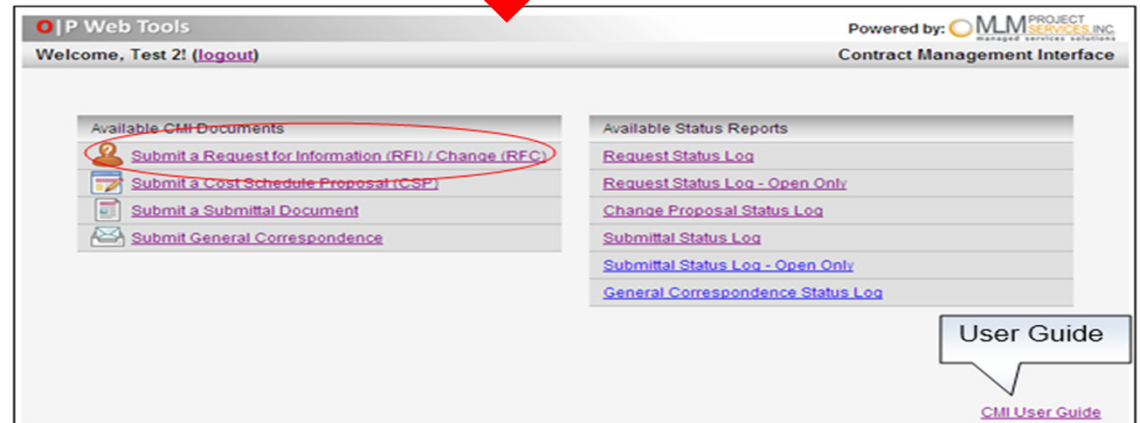
Los Angeles Metro Rail

Simple logon. No Java required.

Application Menu includes real time status reports and online User Guide.

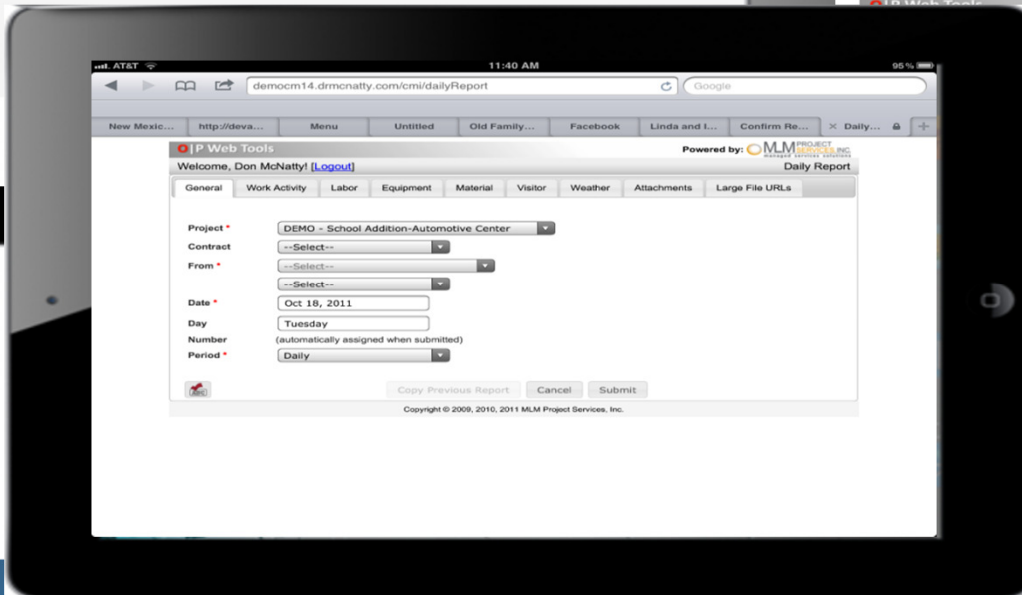
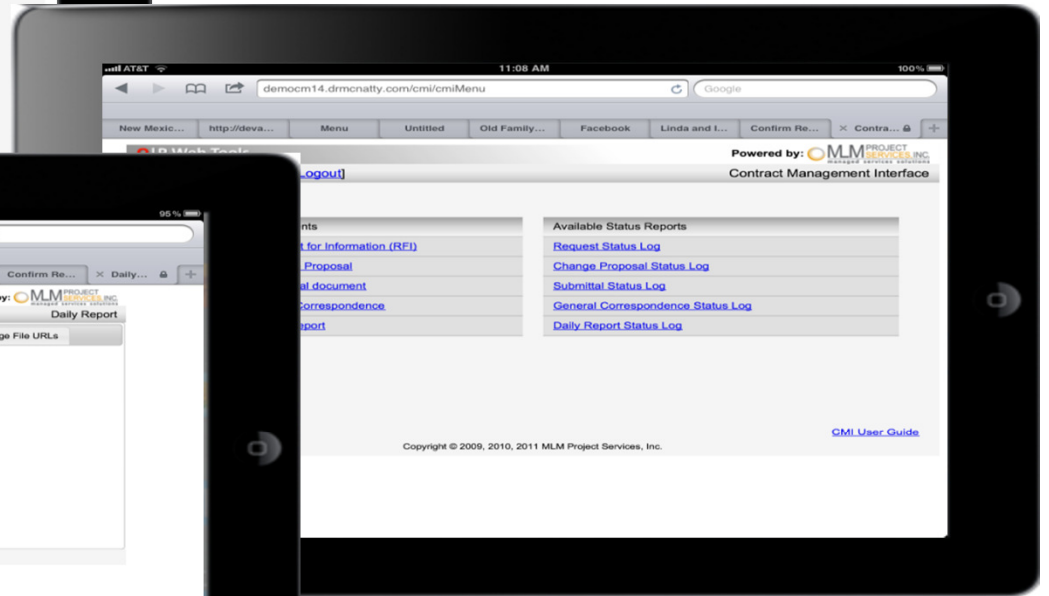
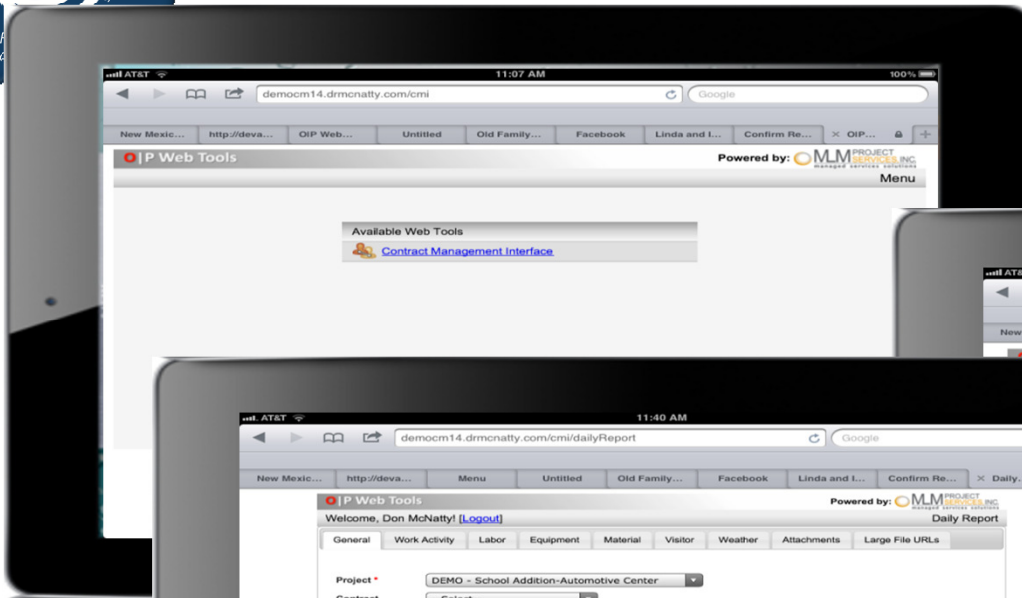
Status reports can be output to PDF, Excel, CSV and RTF for contractor use.

This interface allows the contractor to submit original documents and run reports about their current status without having to provide access to the PCM database. The required Web Services License is 25% of the cost of a full PCM license.



Web Services apps can run on any mobile device

- Uses iPad browser (not an app)
- Modules can be customized



- Application auto-fills most fields



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LA Metro Change Management Workflow

- Web services app follows flow of legacy procedure.
- Captures each step in PCM database.
- Supports Master Agreements across multiple projects.

P Web Tools Change Management Workflow Application Welcome Rudy Ising [Logout]

Master Contract	CM #	CM Title	CM Phase	Status
C0974	10023	Load SCG Hazardous Soils into SCG	Final	Open

← Topics

Details **Projects / Costs** Doc Details Actions & Attachments

General
Scope
Justification
Issues
Chronology
BIC

Who (Owner) James S. Gleig, P.E., Director, Construction Management
[Expand](#)

Scope of Work Provide material, labor and equipment to load Southern California Gas (SCG) hazardous soils onto SCG trucks and sweep the site and streets affected by the work.
CONTRACT PRICE AND CONTRACT TIME:
CURRENT CONTRACT VALUE: \$74,655,289.20
[Expand](#)

Location of Work West side of Building 1
[Expand](#)

Period of Performance The estimated period of performance is from November 2012 to approximately March 2013.
[Expand](#)



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LA Metro Change Management Workflow

- Changes to a Master Agreement are allocated to multiple projects.

OP Web Tools Change Management Workflow Application Welcome Rudy Ising [\[Logout\]](#)

Master Contract	CM #	CM Title	CM Phase	Status
C0974	10023	Load SCG Hazardous Soils into SCG	Final	Open

[← Topics](#)

[Details](#) [Projects / Costs](#) [Doc Details](#) [Actions & Attachments](#)

[+ Add Project](#)

	Project #	Contract #	Doc #	RFC #	Total	
Edit Cost	202001	C0974	00051		\$76,996.00	Delete
Edit Cost	202320	C0974	00051		\$5,000.00	Delete



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LA Metro Change Management Workflow

- Workflow screens organize data based on Metro business process.

O | P Web Tools Change Management Workflow Application Welcome Rudy Ising [Logout](#)

Master Contract	CM #	CM Title	CM Phase	Status
C0974	10023	Load SCG Hazardous Soils into SCG	Final	Open

← Topics

Details Projects / Costs Doc Details Actions & Attachments

Approved By: McCarthy Building Companies, Inc. (MCCART00)
Khatchig Tchapidarian (KT)

Approved Date: yyyy-mm-dd

Approved By 2: LA Metropolitan Transportation Auth. (METRO)
James S. Gleig, P.E. (JG1)

Approved Date 2: yyyy-mm-dd

Approved By 3: LA Metropolitan Transportation Auth. (METRO)
James S. Gleig, P.E. (JG1)

Approved Date 3: yyyy-mm-dd

Save Approve Cancel

Print Generate Transmittal

Attach File Attach URL

Attachment	Subject	File Size	Date Attached	Attached By
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Benefits of web services apps

Web services lets you expand PCM functionality

- Preserves security of PCM database by keeping the contractors in their own separate interface.
- Document submitter does the data entry, saved directly into PCM – saves cost of logging incoming document.
- Reduces license costs - web services licenses are 25% the cost of a full PCM license.
- The “real time” status reports provided in CMI reduce requests to PCM administrators to provide reports to contractors.
- Web service applications can run in most any environment.



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Comparing Costs to Other Options

A variety of SaaS, self deployed and on-site options available...

- Based on capital construction project of 3 years with 25 Owner or CM team users and 50 external users submitting documents.
- Oracle Unifier SaaS model (Full Project Controls w/email interaction)
 - Comparable modules to CM14 = \$400,000 + setup, workflows & training
- Typical SaaS competitor (not as much functionality as Unifier)
 - Comparable modules to CM14 = \$325,000 + setup, workflows & training
- PCM 14BI
 - CM14BI, w/SharePoint, hosted model with MLM CMI = \$200,000 + setup & training.
 - PCM and CMI are pre-configured and require significantly less setup time.



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Benefits of Contract Management 14

Still a viable product with future enhancements promised

- Lower cost of entry, no minimum license requirements.
- Hosting makes deployment fast and easy on your IT staff.
- 80-90% of what most people need is already set up in the basic product along with hundreds of standard forms and reports.
- Web services can enhance the functionality with a “light” license cost, provide role based input screens, enhanced security and portability.
- Oracle Financing - spread costs over the life of your project.
- Access to your “documents” after the project is complete via Repository.



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How to Decide What's Right for Your Project?

Decision driver is usually the life span of your requirements

Select Contract Management

- You have an existing PCM deployment that is meeting your needs.
- The size and duration of your program or project limits available budget.
- You receive many documents from external project participants.

Select Primavera Unifier

- You want integrated workflows, team email interaction and full audit trail.
- You want full cost & fund management with integration with P6.
- Your capital project environment is long term or continuous, and involves managing the full project lifecycle.



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Questions

All questions are gathered into a master sheet, answered and distributed to all registrants as well as posted on our website.

Answers are based on our own experiences using the various software products related to your questions.

Thank you for participating

Contact – contact@drmcnatty.com



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UPCOMING EVENTS

We participate in and support many local and national events.

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**SEPTEMBER 28, 2014-OCTOBER 2, 2014
SAN FRANCISCO, CA**



www.oracle.com/openworld

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NATIONAL CONFERENCE
& TRADE SHOW**

**OCTOBER 19-21, 2014
SAN FRANCISCO, CA**



<http://cmaanet.org/cmaa-national-conference-trade-show-2014>



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NOVEMBER 7-9, 2014
HILTON SAN DIEGO BAYFRONT**



<https://sites.google.com/site/aacesocal/symposium>

Hope to see you there!



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UPCOMING EVENTS – January 2015



- Will include AACE Education event, user meeting for Synchro
- First USA Conference for Planning Planet



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