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software • professional services • hosting

ORACLE Platinum Partner

Specialized

Primavera P6 EPPM

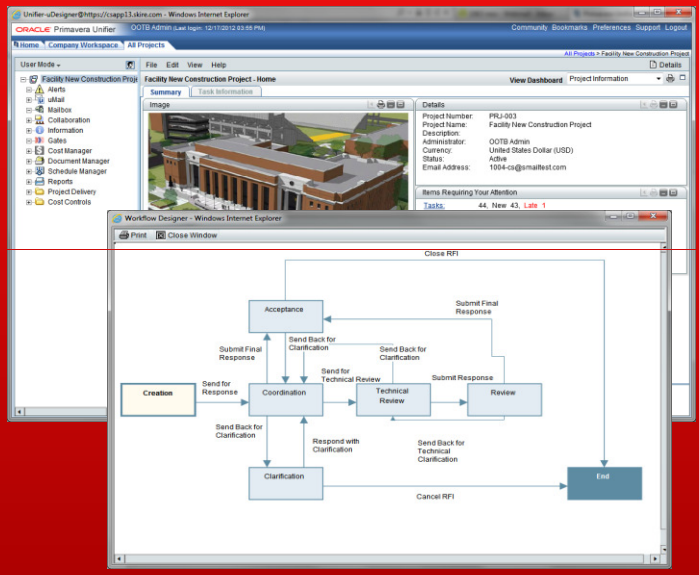
Primavera Contract Management

Overview of Primavera Unifier & Contract Management

Don McNatty, PSP

Jonathan McNatty, PSP

August 28, 2013



2013 Technical Webinar Series

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.

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.

Twenty-five + years experience with Primavera

ORACLE Platinum Partner

Specialized

Primavera P6 EPPM
Primavera Contract Management

- Oracle Primavera Software
- Oracle Certified Training
- Oracle Certified Implementation Support
- Project Support Services – administrators, schedulers, estimators
- **Managed Hosting Services through MLM Project Services**
  - Primavera P6 EPPM, P6 Pro, Unifier, Contract Management, BI Publisher, UCM/Sharepoint Documents, P6 Risk and Analytics
  - Hard Dollar, Acumen Fuse, Ecosys, Prism G2, US Cost…
- **Subscription (SaaS) based Oracle|Primavera solutions**

Agenda

- Unifier Compared to Contract Management
- Unifier Standardized Base Offering (templates)
- Advantages – Unifier
- Advantages – Contract Management
- Demonstration – Oracle Primavera Unifier
- Which is Best for You?
- Upcoming Events
- Questions

Unifier Compared to Contract Management

Both have unique characteristics

- Contract Management
  - Established cloud product with many trained users
  - Base product has built in functionality for a quick deployment
  - Limited customizability except through Web Services
  - Future development may be limited
- Unifier
  - Almost complete customizability with more built in functionality
  - Work flows and custom input screens (forms)
  - Base product Business Processes can be implemented quickly
  - Integration with P6, Content Repository, ERP systems
  - Product (Platform) of the future

Contract Manager 14.1 (Planned CY2014)

Email communication from Oracle – June 4, 2013

We want to first take the time to thank all of our customers who have made Primavera Contract Management such a success over the years. While we are proud of all of our products, we know it is your loyalty that keeps them front and center in the market.

Many of you know that we have acquired Skire Unifier and added that to our solution offering. This addition brings many new and exciting capabilities to the Primavera product suite. There are many Contract Management customers who are interested in incorporating Unifier's capabilities into their organization in the future but for right now, Contract Management is still the right fit for many of them. Whatever the path may be for your company, please know that we are working hard to deliver the best in class products and your investment in Contract Management is safe and secure.

In CY2014 we plan to release Contract Management 14.1, a long anticipated enhancement to our 14x platform. CM 14.1 will include the following planned enhancements:

Usability

- "Find" feature in item tables
- "Search" ability in Submittal Packages
- Ability for Admin to assign layouts to users
- Ability to clear BIC
- Assign and clear proxy for Actions

Drawings and Submittals

- Ability to create a submittal from a drawing
- Allow updates of rev no.'s/custom fields in Drawing revision
- Allow multiple submittal coordinators
- Enhance collaborative process of submittals

Technology and Content Repository

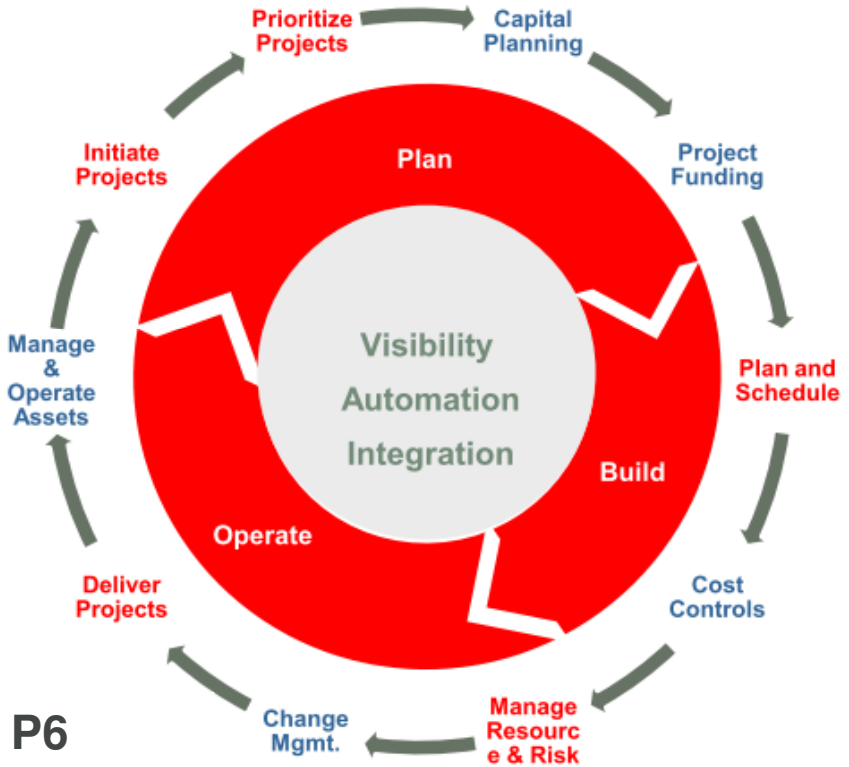
- Certification of MS SQL 2010
- Web Service Improvements to Invoices and Trends
- Updates to SharePoint/UCM for creating file libraries

This information is intended to outline our general product direction. It is intended for information purposes only, and may not be incorporated into any contract. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decision. The development, release, and timing of any features or functionality described for Oracle's products remains at the sole discretion of Oracle.

PCM Enhancements available NOW with Unifier

Frequently Requested Enhancements	
Cash flow	Email updates
Workflow	Mobile access
Computable cost worksheet	Integration to Portfolio capabilities
Customizable alerts	Granular security
Ability to modify UI	Multi-currency
Program level hierarchy	Multiple types of contracts

Oracle Primavera P6 + Primavera Unifier



= P6

= Unifier

Control Across the Entire Lifecycle

- Complete governance over all project phases from planning and building to operations and maintenance

Automated Processes with Workflows

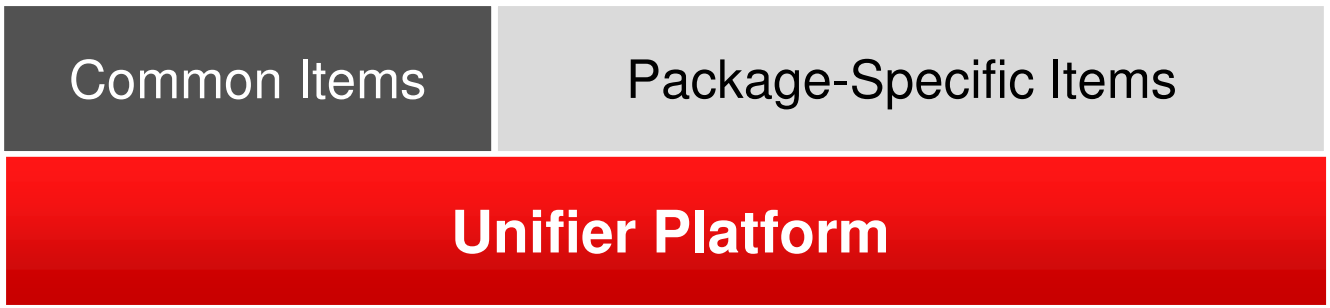
- Developed by industry veterans with focus on ease of use

Integrated with Analytics and ERP

- Easily monitor, visualize and adjust plans according to actual financial forecasts

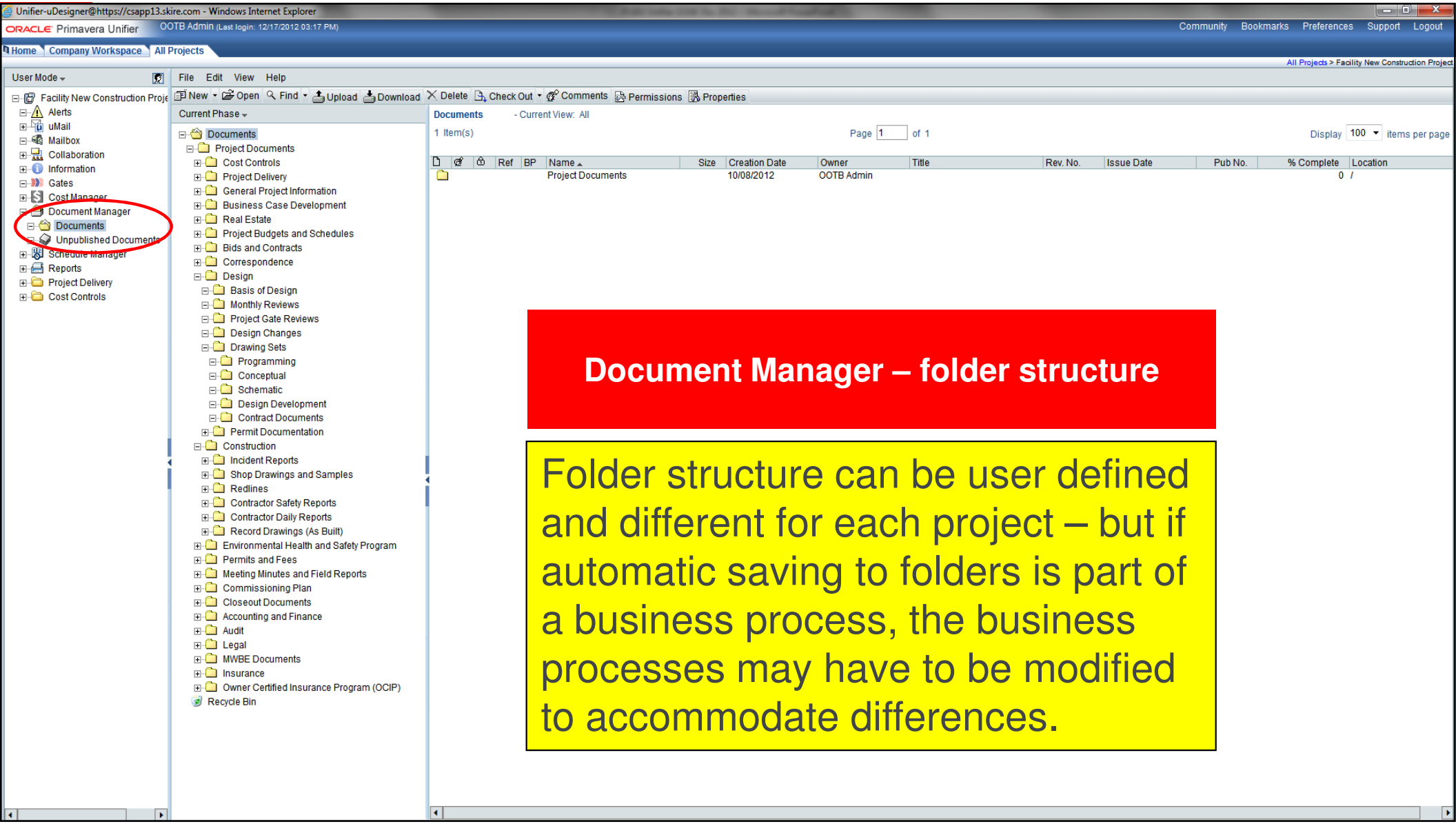
No need for a third party cost system

Common Components for All Packages



Common Items

- User/Shell Administration – users, groups, projects
- Templates – permissions, user preferences
- System Reports – administrative; usage reports
- Alerts – set up trigger and notification thresholds
- Unifier Mail – light collaboration within system
- Mailbox – inbound destination for emails from outside the system
- Collaboration – personal tasks, messages, drafts
- Information – project attributes and user directory
- Gates – enforce project phases, deliverables
- Document Manager – folders, rev ctrl, commenting, view/markup
- Reports – User-Defined Reports module



Document Manager – folder structure

Folder structure can be user defined and different for each project – but if automatic saving to folders is part of a business process, the business processes may have to be modified to accommodate differences.

General Out-of-the-Box Philosophy

Faster deployment

- Predefined business processes
- Predefined document folder structures
- Simple set of roles (groups) and users, with permissions
- Predefined reports

- All items are modifiable by customer through admin mode/uDesigner

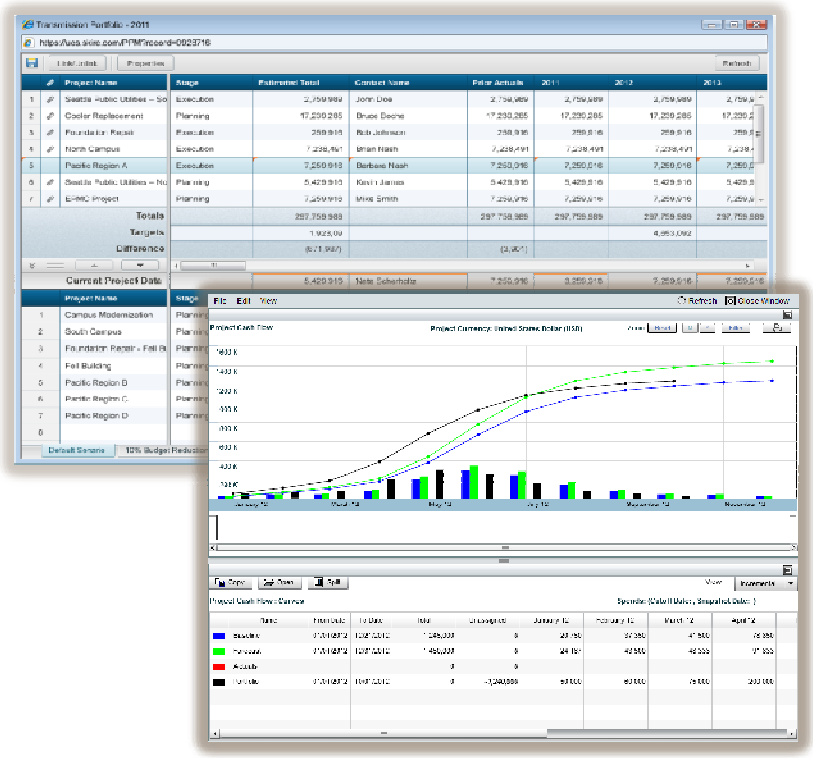
Available Pre-Configured Packages

R9.13 – Posted on eDelivery on 2 Aug 2013

- Capital Project & Program Management (CPPM) packages
  - Primavera Unifier Capital Planning
  - Primavera Unifier Cost Controls
  - Primavera Unifier Project Delivery Management

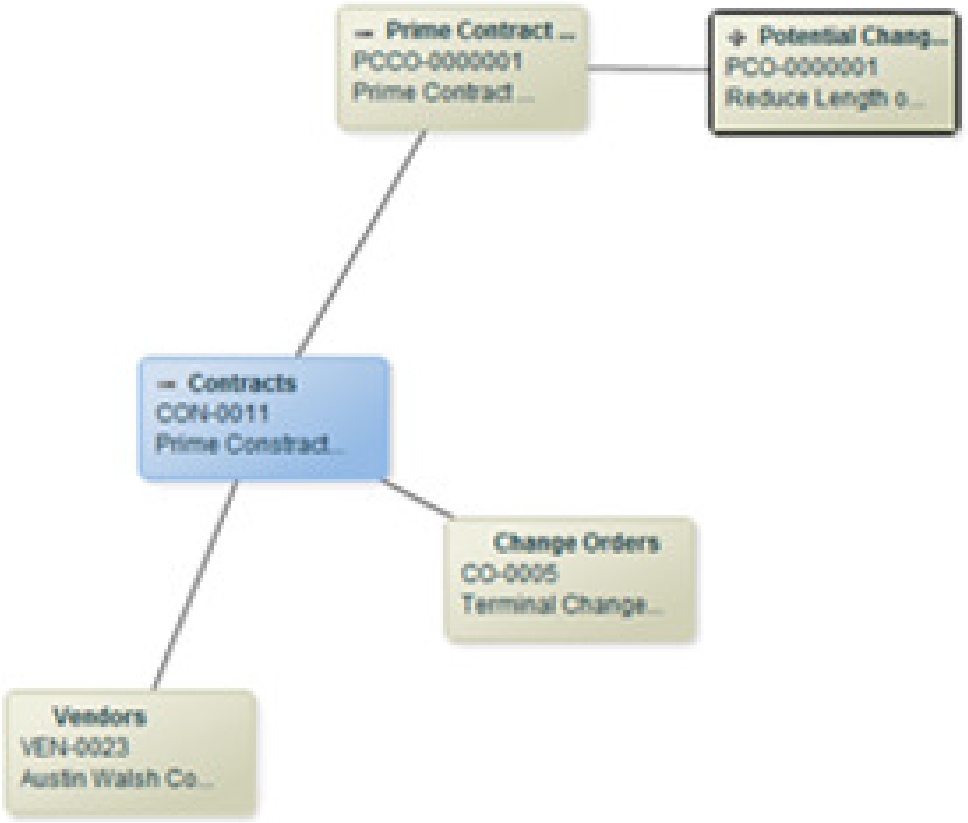
Capital Planning

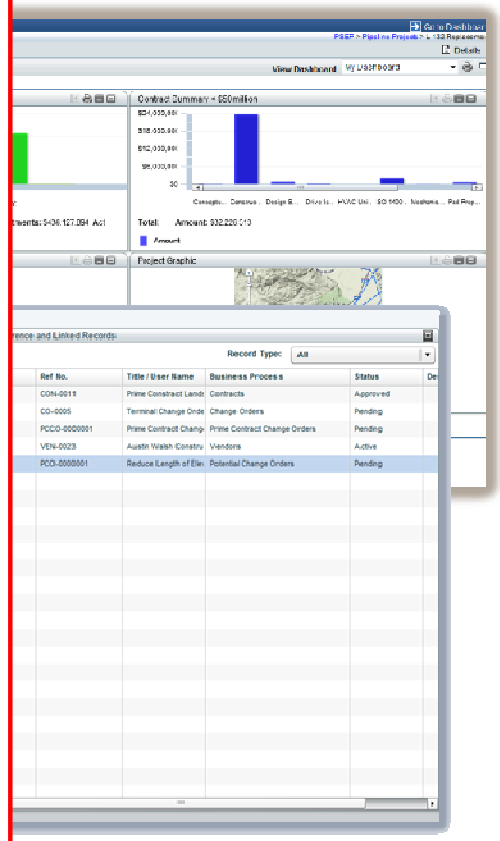
- Plan/Manage budgets, forecasts, spending guidance – Planned/Active projects
- Multiple Portfolio Scenarios – Share/Approve
- Business Processes and WF for Project Initiation, Checklists and Approvals
- Real-time Updates to/from Cost, Cash Flow and Project metadata
- Collaboration - Portfolio Planners & Project Managers



Project Delivery Management

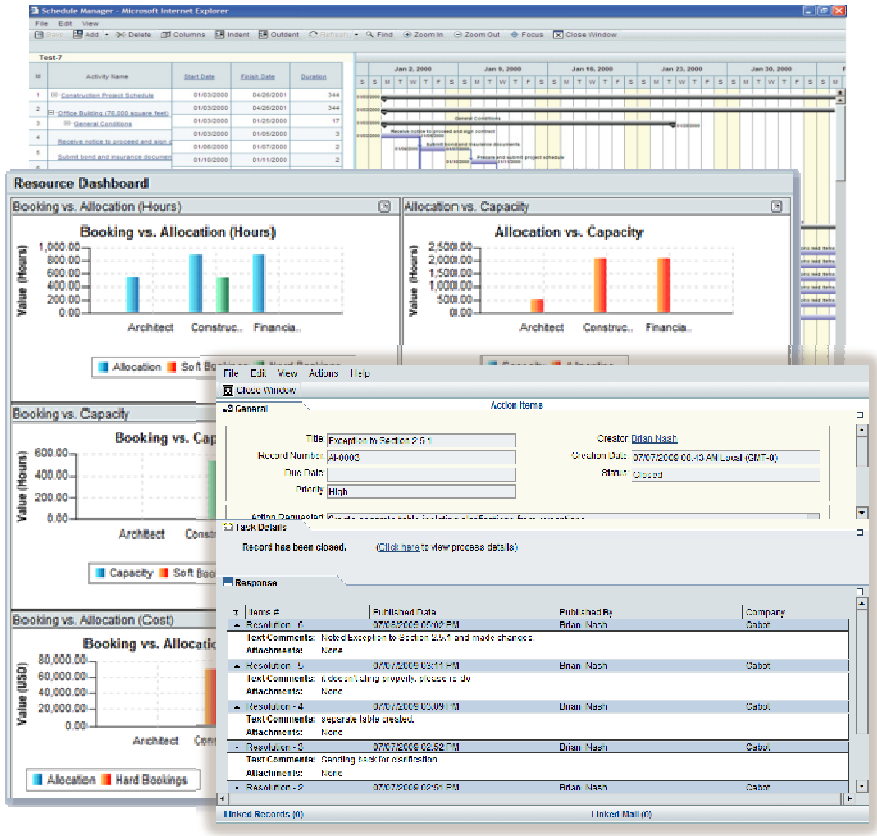
- Business P
  collaboratio
  Submittals,
  Items, Daily
  Manageme
- Comprehe
  Visibility – u
  processes
- Mobile - su
- Related Do
  but availab

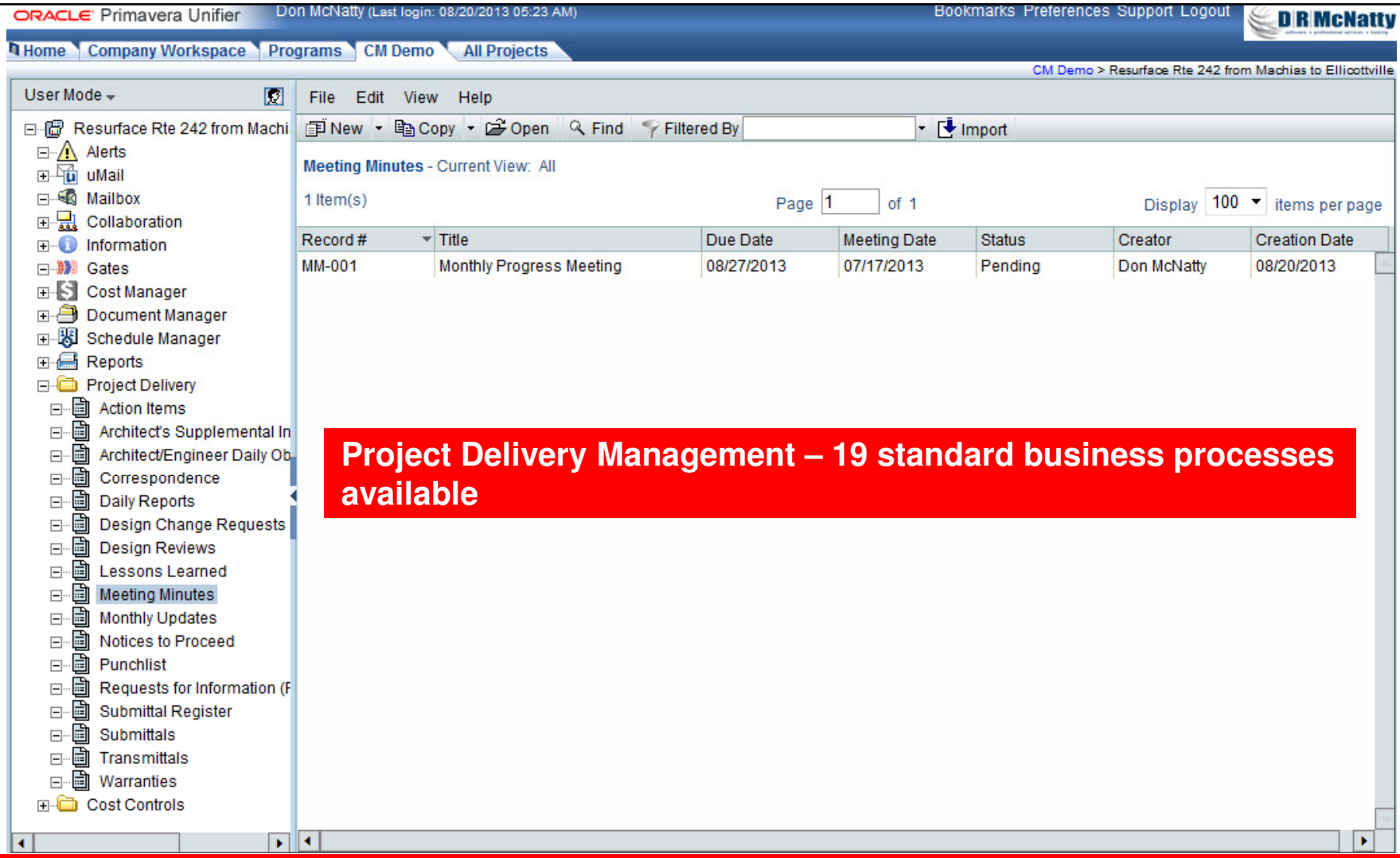


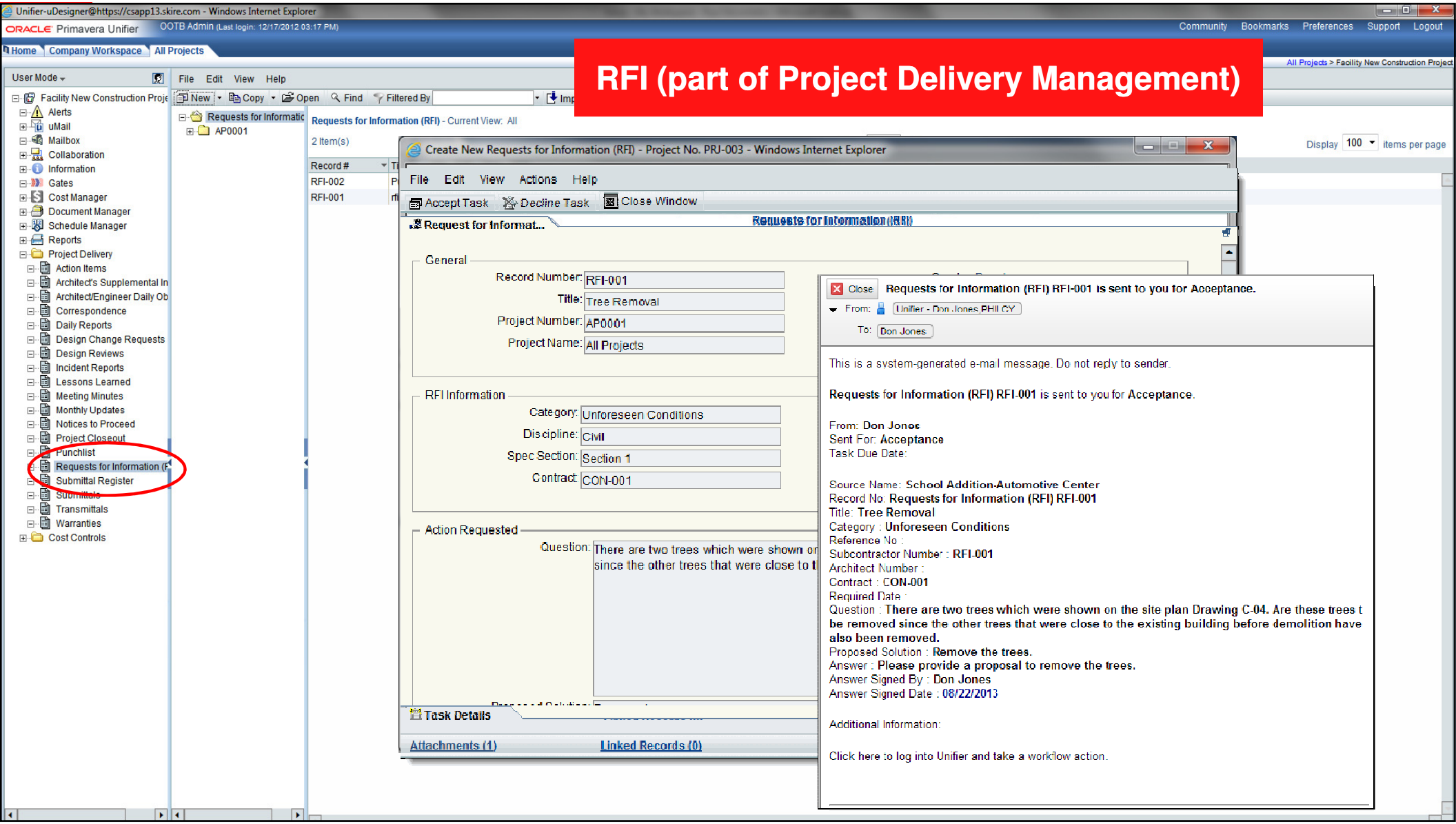


Project Delivery Management

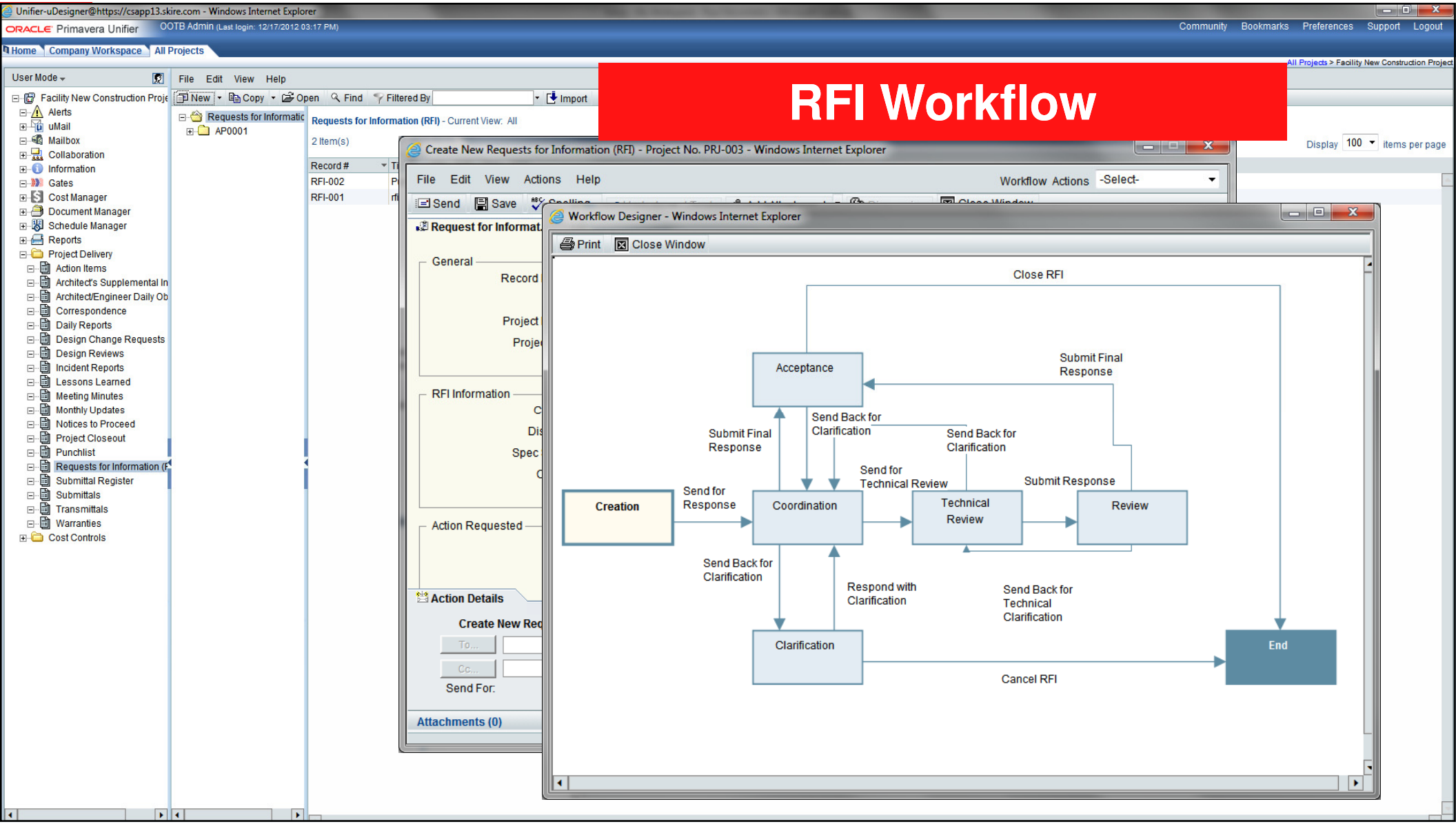
- Online Bidding, Procurement & Contracts Solution
- Schedule Management with Gantt chart visualization and CPM
- Resource Management - roles, resources, skills, rates, assignments
- Easy to use, yet extremely powerful enterprise-class System Administration



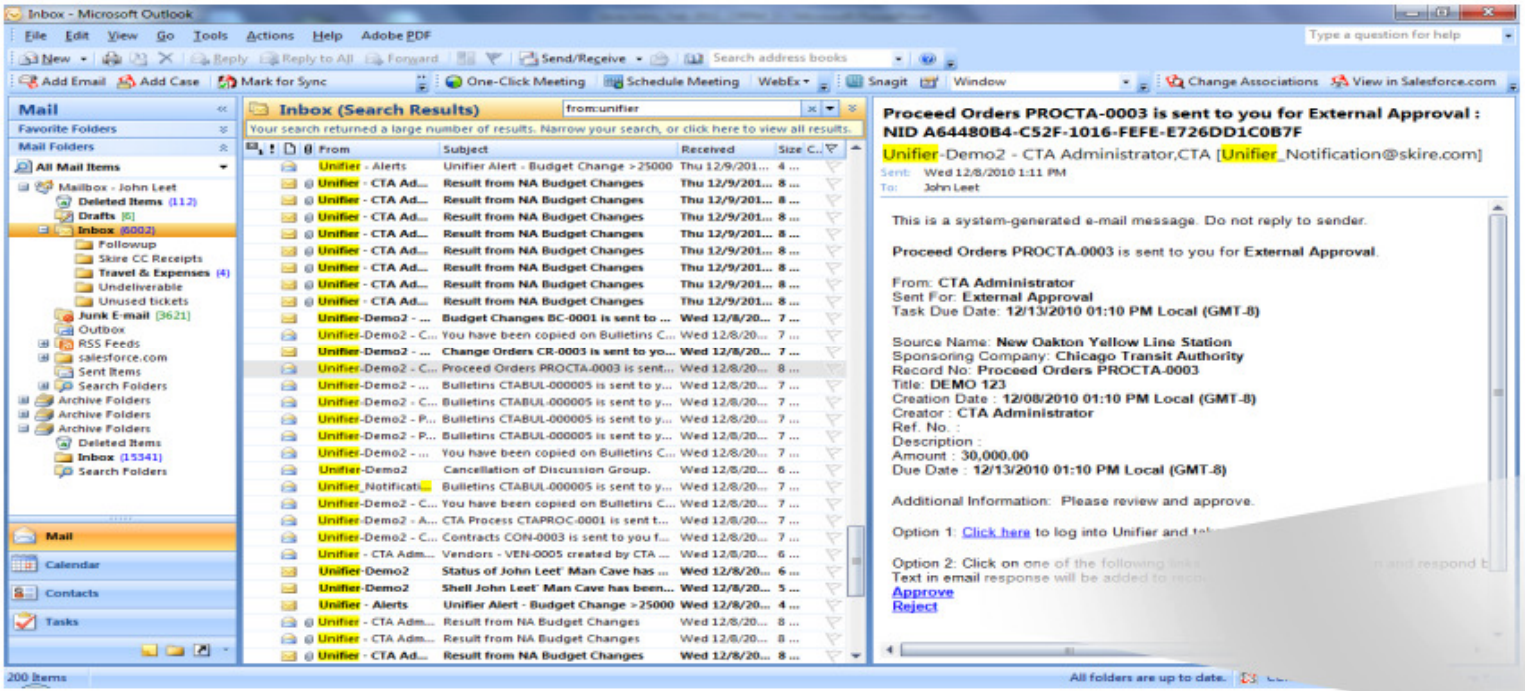

ORACLE Primavera Unifier
Don McNatty (Last login: 08/20/2013 05:23 AM)
Bookmarks Preferences Support Logout
D R McNatty
Home
Company Workspace
Programs
CM Demo
All Projects
CM Demo > Resurface Rte 242 from Machias to Ellicottville
User Mode
Resurface Rte 242 from Machi
Alerts
uMail
Mailbox
Collaboration
Information
Gates
Cost Manager
Document Manager
Schedule Manager
Reports
Project Delivery
Action Items
Architect's Supplemental In
Architect/Engineer Daily Ob
Correspondence
Daily Reports
Design Change Requests
Design Reviews
Lessons Learned
Meeting Minutes
Monthly Updates
Notices to Proceed
Punchlist
Requests for Information (F
Submittal Register
Submittals
Transmittals
Warranties
Cost Controls
File Edit View Help
New Copy Open Find Filtered By Import
Meeting Minutes - Current View: All
1 Item(s)
Page 1 of 1
Display 100 items per page
Record # Title Due Date Meeting Date Status Creator Creation Date
MM-001 Monthly Progress Meeting 08/27/2013 07/17/2013 Pending Don McNatty 08/20/2013
Project Delivery Management – 19 standard business processes available


RFI (part of Project Delivery Management)
Unifier-uDesigner@https://csapp13.skire.com - Windows Internet Explorer
ORACLE Primavera Unifier
OOTB Admin (Last login: 12/17/2012 03:17 PM)
Community
Bookmarks
Preferences
Support
Logout
Home
Company Workspace
All Projects
All Projects > Facility New Construction Project
User Mode
File Edit View Help
New Copy Open Find Filtered By
Facility New Construction Proje
Alerts
uMail
Mailbox
Collaboration
Information
Gates
Cost Manager
Document Manager
Schedule Manager
Reports
Project Delivery
Action Items
Architect's Supplemental In
Architect/Engineer Daily Ob
Correspondence
Daily Reports
Design Change Requests
Design Reviews
Incident Reports
Lessons Learned
Meeting Minutes
Monthly Updates
Notices to Proceed
Project Closeout
Punchlist
Requests for Information (F
Submittal Register
Transmittals
Warranties
Cost Controls
Requests for Informatic
AP0001
Requests for Information (RFI) - Current View: All
2 Item(s)
Display 100 items per page
Record #
RFI-002
RFI-001
Create New Requests for Information (RFI) - Project No. PRJ-003 - Windows Internet Explorer
File Edit View Actions Help
Accept Task
Decline Task
Close Window
Request for Informat...
Requests for Information (RFI)
General
Record Number: RFI-001
Title: Tree Removal
Project Number: AP0001
Project Name: All Projects
RFI Information
Category: Unforeseen Conditions
Discipline: Civil
Spec Section: Section 1
Contract: CON-001
Action Requested
Question: There are two trees which were shown or
since the other trees that were close to t
Task Details
Attachments (1)
Linked Records (0)
Close
Requests for Information (RFI) RFI-001 is sent to you for Acceptance.
From: Unifier - Don Jones PHI CY
To: Don Jones
This is a system-generated e-mail message. Do not reply to sender.
Requests for Information (RFI) RFI-001 is sent to you for Acceptance.
From: Don Jones
Sent For: Acceptance
Task Due Date:
Source Name: School Addition-Automotive Center
Record No: Requests for Information (RFI) RFI-001
Title: Tree Removal
Category : Unforeseen Conditions
Reference No :
Subcontractor Number : RFI-001
Architect Number :
Contract : CON-001
Required Date :
Question : There are two trees which were shown on the site plan Drawing C-04. Are these trees t
be removed since the other trees that were close to the existing building before demolition have
also been removed.
Proposed Solution : Remove the trees.
Answer : Please provide a proposal to remove the trees.
Answer Signed By : Don Jones
Answer Signed Date : 08/22/2013
Additional Information:
Click here to log into Unifier and take a workflow action.

RFI Workflow



Email Approvals

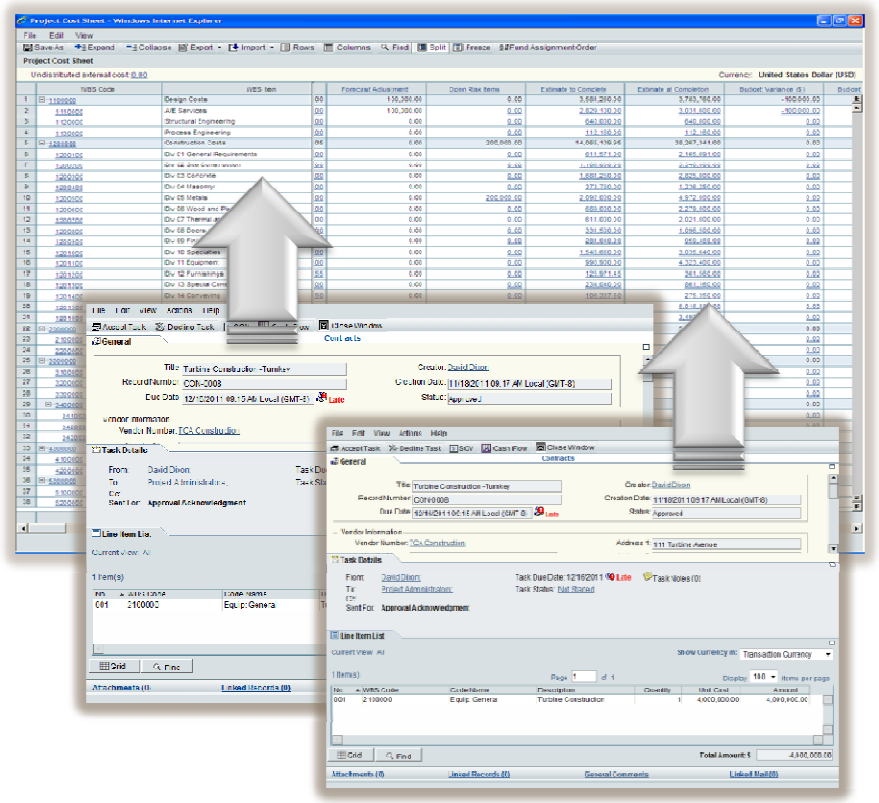


Approve

Reject

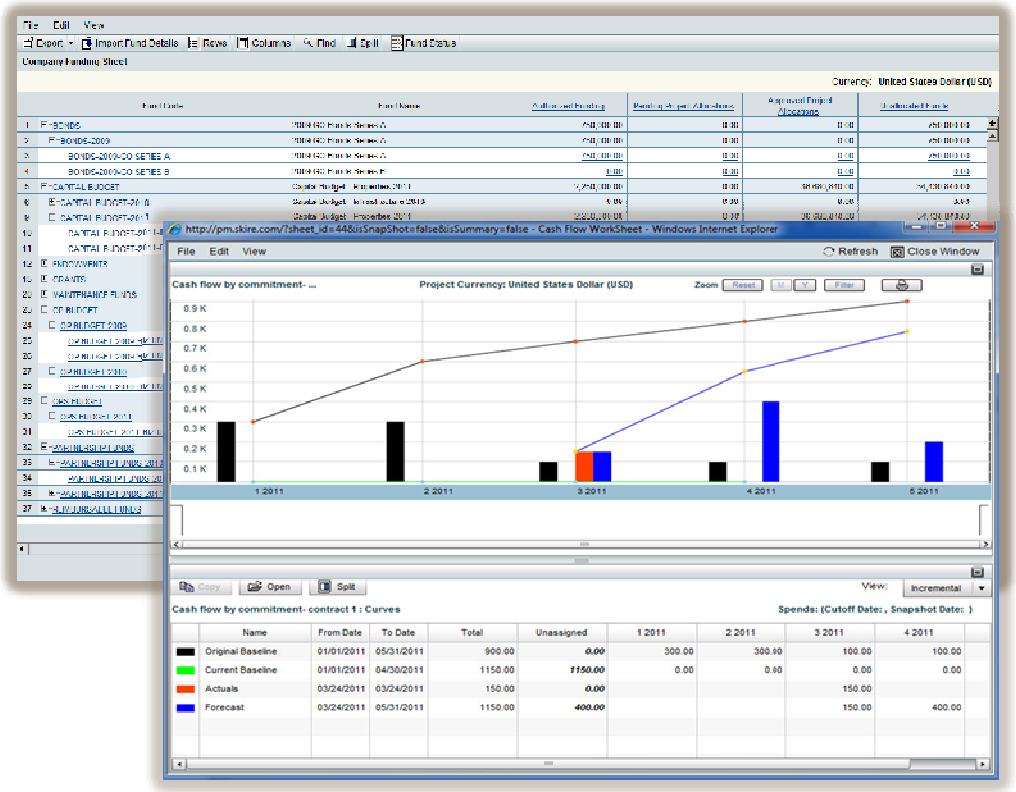
Cost Controls

- Real-time Cost Worksheets - Budgets, Forecast, Commits, Changes, Spends
- Comprehensive Workflow based Contracts, Change Management, SOV, Invoices and Payment Applications
- Configurable Cost Management - support unique processes, cost codes
- Integrated with Cost Business Processes to route, revise and approve

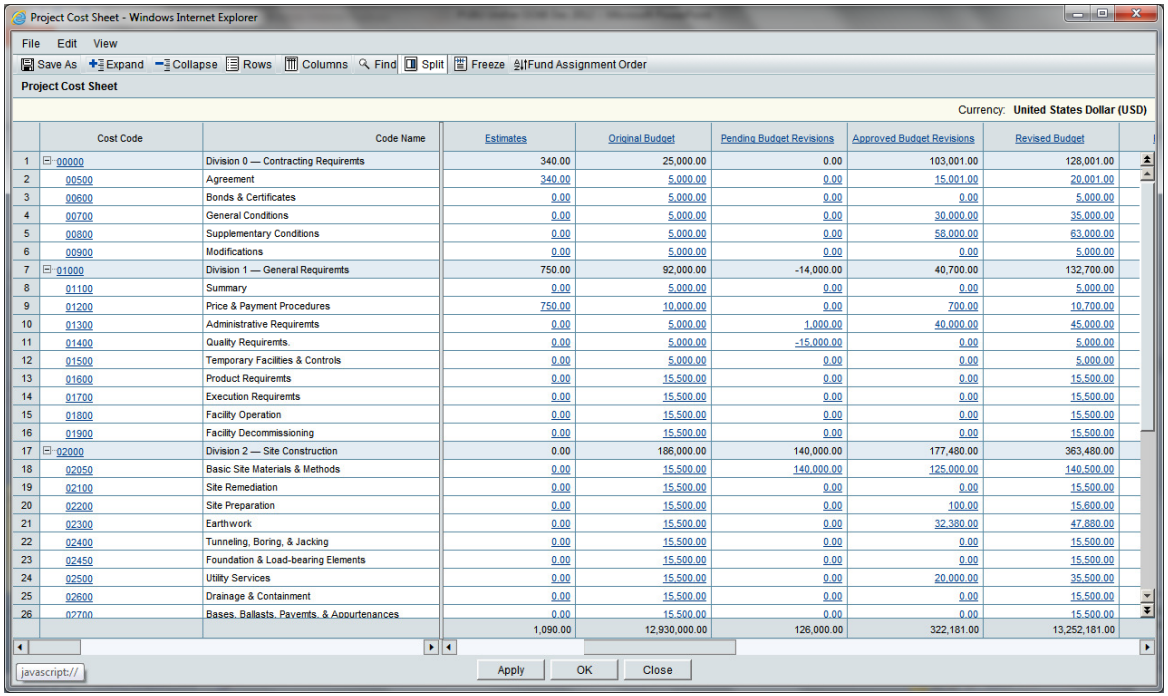


Cost Controls

- Advanced Cash Flow and Earned Value Management
- Funding Management at Company, Project and Contract levels
- Multi-currency support with ability to Peg, Float and Hedge at the project level
- Powerful Rules Engine to enforce cost and funding controls.

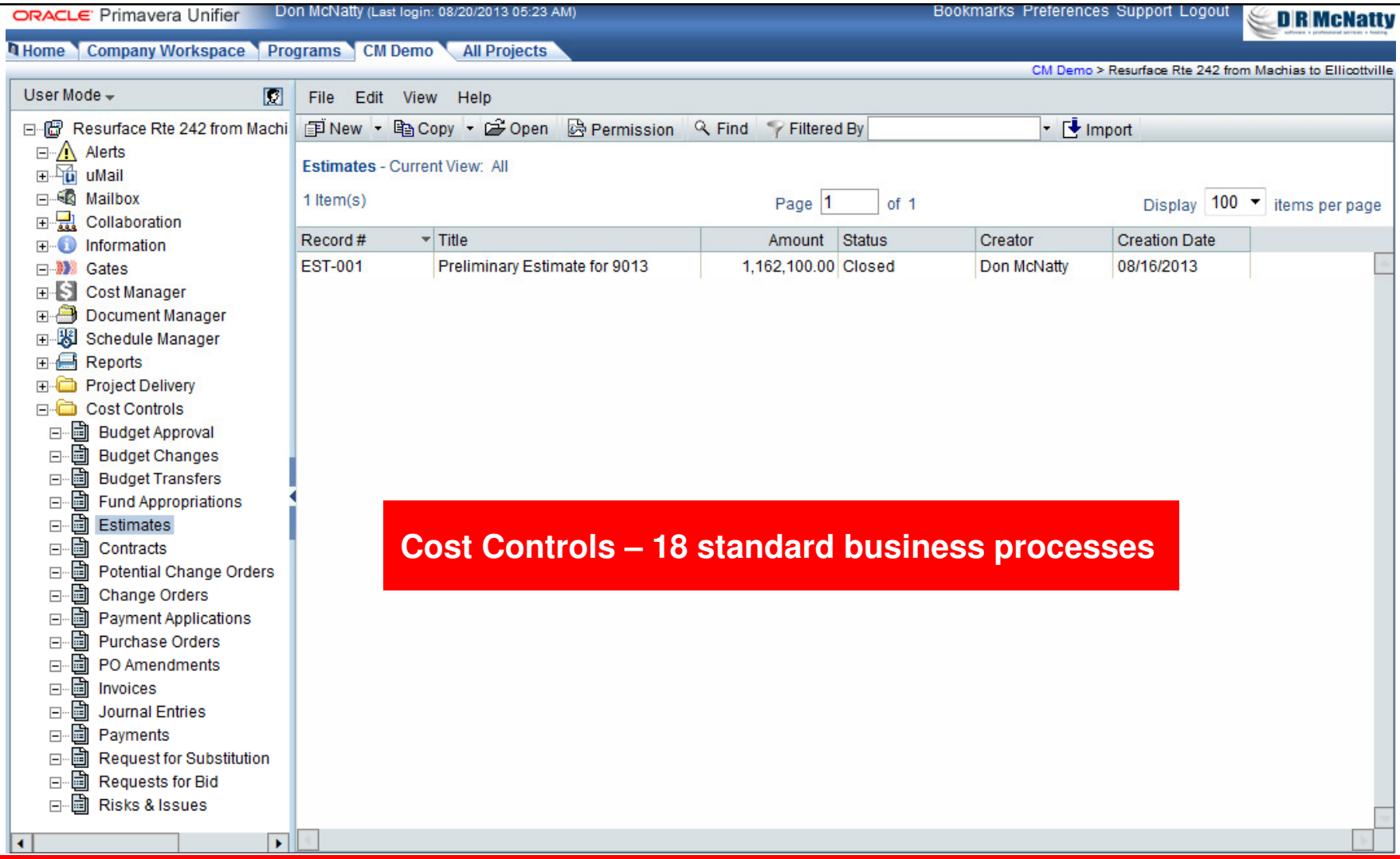


Cost Sheet – Standard Columns



	Cost Code	Code Name	Estimates	Original Budget	Pending Budget Revisions	Approved Budget Revisions	Revised Budget
1	00000	Division 0 — Contracting Requirements	340.00	25,000.00	0.00	103,001.00	128,001.00
2	00500	Agreement	340.00	5,000.00	0.00	15,001.00	20,001.00
3	00600	Bonds & Certificates	0.00	5,000.00	0.00	0.00	5,000.00
4	00700	General Conditions	0.00	5,000.00	0.00	30,000.00	35,000.00
5	00800	Supplementary Conditions	0.00	5,000.00	0.00	58,000.00	63,000.00
6	00900	Modifications	0.00	5,000.00	0.00	0.00	5,000.00
7	01000	Division 1 — General Requiremts	750.00	92,000.00	-14,000.00	40,700.00	132,700.00
8	01100	Summary	0.00	5,000.00	0.00	0.00	5,000.00
9	01200	Price & Payment Procedures	750.00	10,000.00	0.00	700.00	10,700.00
10	01300	Administrative Requiremts	0.00	5,000.00	1,000.00	40,000.00	45,000.00
11	01400	Quality Requiremts.	0.00	5,000.00	-15,000.00	0.00	5,000.00
12	01500	Temporary Facilities & Controls	0.00	5,000.00	0.00	0.00	5,000.00
13	01600	Product Requiremts	0.00	15,500.00	0.00	0.00	15,500.00
14	01700	Execution Requiremts	0.00	15,500.00	0.00	0.00	15,500.00
15	01800	Facility Operation	0.00	15,500.00	0.00	0.00	15,500.00
16	01900	Facility Decommissioning	0.00	15,500.00	0.00	0.00	15,500.00
17	02000	Division 2 — Site Construction	0.00	186,000.00	140,000.00	177,480.00	363,480.00
18	02050	Basic Site Materials & Methods	0.00	15,500.00	140,000.00	125,000.00	140,500.00
19	02100	Site Remediation	0.00	15,500.00	0.00	0.00	15,500.00
20	02200	Site Preparation	0.00	15,500.00	0.00	100.00	15,600.00
21	02300	Earthwork	0.00	15,500.00	0.00	32,380.00	47,880.00
22	02400	Tunneling, Boring, & Jacking	0.00	15,500.00	0.00	0.00	15,500.00
23	02450	Foundation & Load-bearing Elements	0.00	15,500.00	0.00	0.00	15,500.00
24	02500	Utility Services	0.00	15,500.00	0.00	20,000.00	35,500.00
25	02600	Drainage & Containment	0.00	15,500.00	0.00	0.00	15,500.00
26	02700	Bases, Ballasts, Pavemts, & Appurtenances	0.00	15,500.00	0.00	0.00	15,500.00
			1,090.00	12,930,000.00	126,000.00	322,181.00	13,252,181.00

- Estimates
- Original Budget
- Pending Budget Revisions
- Approved Budget Revisions
- Revised Budget
- Risks & Issues
- Original Commitments
- Pending Commitments
- Approved Commitment Changes
- Revised Commitments
- Actuals
- Etc

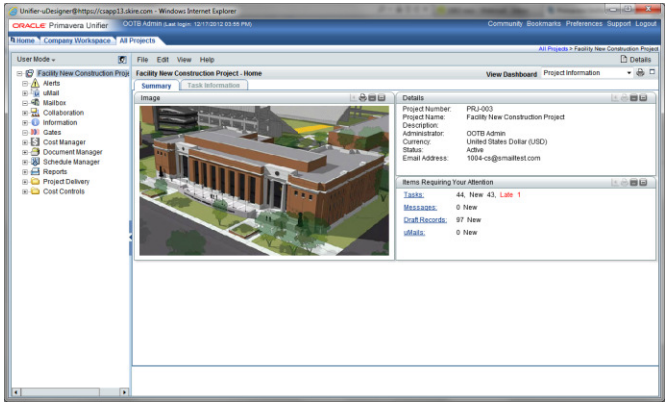

ORACLE Primavera Unifier
Don McNatty (Last login: 08/20/2013 05:23 AM)
Bookmarks Preferences Support Logout
D R McNatty
Home
Company Workspace
Programs
CM Demo
All Projects
CM Demo > Resurface Rte 242 from Machias to Ellicottville
User Mode
Resurface Rte 242 from Machi
Alerts
uMail
Mailbox
Collaboration
Information
Gates
Cost Manager
Document Manager
Schedule Manager
Reports
Project Delivery
Cost Controls
Budget Approval
Budget Changes
Budget Transfers
Fund Appropriations
Estimates
Contracts
Potential Change Orders
Change Orders
Payment Applications
Purchase Orders
PO Amendments
Invoices
Journal Entries
Payments
Request for Substitution
Requests for Bid
Risks & Issues
File Edit View Help
New Copy Open Permission Find Filtered By Import
Estimates - Current View: All
1 Item(s)
Page 1 of 1
Display 100 items per page
Record # Title Amount Status Creator Creation Date
EST-001 Preliminary Estimate for 9013 1,162,100.00 Closed Don McNatty 08/16/2013
Cost Controls – 18 standard business processes

Unifier Dashboards and User-Defined Reports

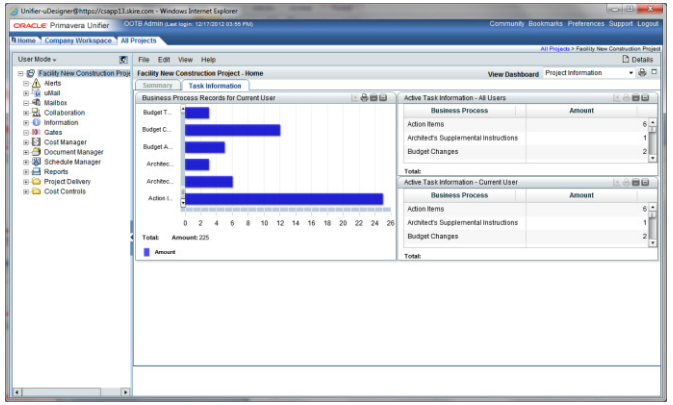
- Two common dashboards (Project Summary and Tasks)
- One dashboard for Project Delivery
- One dashboard for Cost Controls
- Additional dashboards can be created, personalized by user

- 44 preconfigured User-Defined Reports (UDRs) for PD and CC
- Modify these or create additional reports

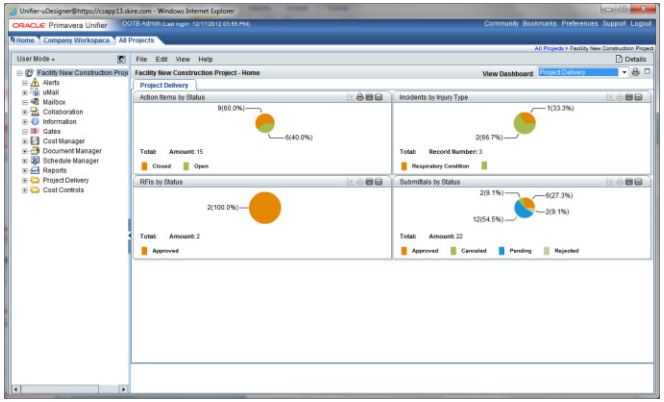
Project Summary Dashboard



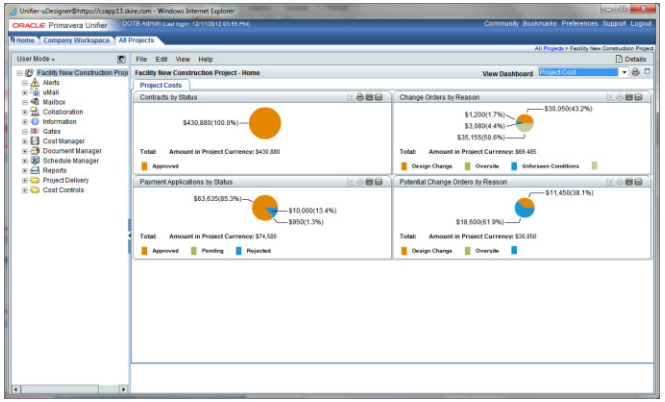
Task Information Dashboard

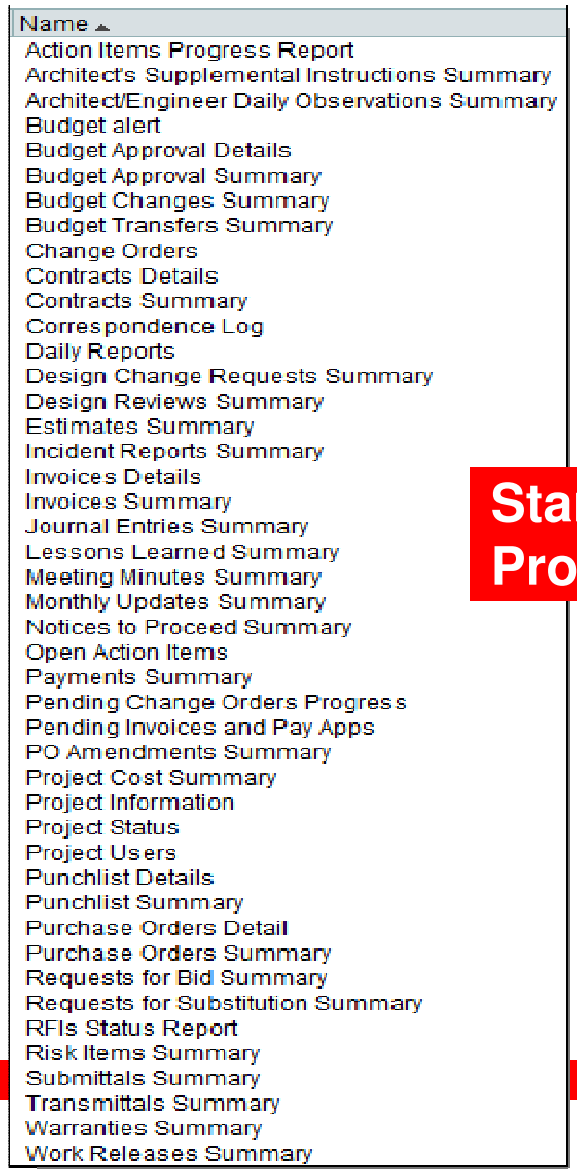


Project Delivery Dashboard



Cost Controls Dashboard





- UDR – User Defined Reports
- Can be modified
- Work within Unifier – do not require BI Publisher

Standard reports – Cost Controls and Project Delivery Mgmt

- Additional custom reporting available through BI Publisher

Additional Configuration

Unifier continues to have best-in-class configurability

- All Base Product processes are modifiable
- Can create new:
  - Business processes
  - Reports
  - Folder structures
  - Project hierarchies (shells – region, campus, business unit, etc)
  - Users
  - Groups
  - Etc

Advantages - Unifier

Primavera Unifier is focused on larger organizations and long duration programs and projects

- Automated business processes increase efficiency and reduce costs
- Role based input forms provide data security with no Java issues!
- Most needed business processes are provided in Base Product
- Comprehensive cost management environment eliminates need for any other cost management tool
- Development platform for future of Primavera products and integration
- Cloud solution available in SaaS or traditional model
- Includes Asset Management and Real Estate Management modules

Advantages – Contract Management

Primavera Contract Management is focused on shorter duration programs with limited budgets

- Lower cost of entry – no minimum license purchase
- Existing 13.1 users can still buy additional licenses
- Easier deployments due to larger trained workforce
- Role based and secure data input through third party utilities such as MLM's Contract Management Interface (CMI)
- 13.1 support committed to June 2015, no end date yet for 14.x
- Integrated reporting solutions combine output with P6

Demonstration - Unifier

Jon McNatty accessing MLM Hosted Unifier 9.13

- Company Workspace (Administrator Mode)
  - Show where Users were set up
  - Show how Vendors are set up
- Philadelphia School Project (DEMO)
  - Show how Contract Commitment was created
  - Add an RFI
  - Add a Submittal
  - Add a Change Order
  - Run a Report

Summary of Demo

PCM DEMO project data entered into Unifier as an example of how Unifier handles the same information.

- Pre-created Partner Users, Vendors and a Contract
- Added an RFI, Submittal & CO using built-in Process & Forms
- Some interesting observations
  - Drafts saved in Collaboration Folder until Business Process initiated
  - Getting used to terminology and rules can take time
  - Email notifications and Task Acceptance/execution required for next step
  - IE 9 appears to be the best browser - some browsers not supported
  - Did not experience any Java version related issues
  - Base product Business Processes can be set up to create a final PDF document saved automatically to correct Document Folder

Which is best for you?

Which tool to select now and which for the future?

Select Contract Management

- You have an existing PCM deployment that is meeting your needs
- The size, duration or budget of your project may not justify a Unifier Implementation
- Need immediate support for multiple languages

Select Primavera Unifier

- You want workflows and more functionality than PCM offers
- You want full and integrated cost management functionality
- Your capital project environment is long term and involves managing the completed assets

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

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UPCOMING EVENTS

The DRM/MLM team is participating in and will have a booth at these upcoming events.

Get updates on the latest news,
events and upcoming webinars.
Sign up for our newsletter on our website www.drmcnatty.com

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