

CASE STUDY

PCM Migration (PCM 13.1 to 14.1) for a Major Implementation

DRMcNatty provides implementation support to migrate a major instance of PCM from the older legacy version (13.1) to the new version (14.1) utilizing BI Publisher for Reports and Forms.

PROJECT AT A GLANCE

ORGANIZATION



Major Transportation Agency

LOCATION

Western USA

SERVICES PROVIDED

Custom Report Design
Data Migration & Validation
Web Services Integration

HOSTING

MLM Hosted:
Primavera P6
Contract Management
Interface
Contract Management
EcoSys

TECHNOLOGIES USED

SharePoint

ORACLE
Contract Management
Business Intelligence

Overview

A major transportation entity utilized Primavera Contract Management 13.1, in conjunction with Primavera P6 and integrations to other applications, financial systems as well as custom applications developed to facilitate PCM data entry. Key documents and reports were printed from PCM and needed to be re-built in the new application version. There were multiple parties contributing to these systems including the client, contractors and consultants. With several hundred actual users and publicly accessible reporting, the smooth migration of their application was critical.

Challenges

There were several challenges presented by this migration: Re-building all custom forms and reports built in PCM with the new report writer (close to 80 total), making sure that all custom applications worked properly when connected to the new version, and assuring that all data integrations with other applications were working correctly. The custom forms and reports were a significant scope as these were highly customized and very detailed. In addition, because of IT restrictions on client computer workstations it was critical to coordinate the changes required by the new browser and Java (JRE) versions.

Solution

The migration process started by building a new environment with a preliminary data conversion that could be used to test and develop all new changes, while the older production system was still in use. Custom forms and reports were built

in this environment, with careful comparison to the original form designs in the older version. Many reports required major reworking of the syntax due to variations in the two report engines (Infomaker and Oracle BI). Using a preliminary data conversion allowed side by side comparisons of the output from the two products, assuring accuracy in the translation. There were close to 100 forms and reports that needed to be updated, between PCM forms and reports and custom application documents to print.

Second, custom applications in use in the older system needed to be tested and modified as necessary, including printed forms in those applications, and integrations to existing systems needed to be tested. In order to streamline the process, multiple DRMcNatty staff members were used to perform these various tasks, and managed through a thorough checklist process. Third, comprehensive testing was performed using a variety of browser and Java (JRE) versions, providing the client with recommended client-system configuration.

Testing was performed by DRMcNatty staff initially, including support staff familiar with the processes and documents, and then handed off to the client for thorough testing. A comprehensive User Acceptance and Testing (UAT) document was used to manage the testing results and comments. DRMcNatty and the client performed testing at all key locations to ensure the migration would be smooth. Once client testing was completed and any changes made, the actual migration was scheduled to take place over a weekend, during which both DRMcNatty staff and the client staff performed testing, including testing at the client site.

Results

The result was a smooth transition from the perspective of end users; almost seamless with very few issues encountered after migration. For the end user, they were in one system on Friday and the new system on Monday morning, with no loss of data, no loss of use or productivity. DRMcNatty also continued to provide ongoing support during the initial transition period; however, actual issues reported were mostly minor and resolved rapidly.

