Questions from September 2013 Tech Webinar   **Presented by: Don McNatty & Lim Tan**

Title: Migrating from Contract Management to Unifier

#	Question	Answer
1	So if PCM line items uses the multiple cost codes then there is manipulation of the CSV file to combine line item amounts by cost code?	I would suggest detailing the line items to one cost code per line item. When you import to Unifier it will combine the line items by cost code. This way you have an audit trail by line items with the possibility of using a custom report writer to report a single line item with multiple cost codes.
2	Does unifier has built-in export template for different modules? If so, can it be modified to suite the need?	Only as part of a business processes. When a business process is developed there is the option to add in an Integration interface. This interface is used for both import and export of bp data. Import is via CSV or web services (XML) and export is web services only. The base product BPs have this integration interface already setup and can be modified if required.
3	If we're running PCM12 is the migration the same or do we need to upgrade to PCM13 or PCM14 first?	The migration process requires export and import via CSV or XML and would need to be adjusted for PCM data content prior to any migration of data. This should not require updating PCM12 to PCM14 to accomplish this. See also Question 5.
4	This has given me a vision of what the PCM migration path to Unifier might look like for my data, how does this affect webservices and other application and data interfaces? Are my current PCM13/PCM14 connections very portable to Unifier?	Essentially, the forms & workflows in Unifier may replace a webservice utility that was created for PCM. But, with some modification you could use PCM webservice integration interfaces with Unifier.
5	How does DRMcNatty engage a PCM to Unifier migration, is through a migration tool product or a services arrangement?	It would be a services arrangement including the use of the DRMcNatty PCM-Unifier migration scripts. Every migration project requires some customization to ensure all the correct data is migrated appropriately with the correct administration set up. The Unifier base product is usually not a perfect fit for clients.

6	How can I get my attachments from PCM into Unifier?	You could write a web service to create document-type business process records. From this BP you can upload the documents and store in appropriate folders/sub-folders in the Document Manager.
7	I saw from the demonstration that you can go into the design section of Unifier by going to Adminstration Mode. If I don't want my users to have access to this at all. How would you achieve this?	Unifer is completely permissions-based. In setting up your User groups you would unchcek all modules that you don't want these Users to access. This also applies to all functionality in User Mode as well.
8	Is it possible to use BI Publisher report layouts for printing the business process document?	Currently customized printing support of a business process record during it's workflow is either using either Word 2003/2007 leveraging the XML template support feature or using Adobe Live Cycle Designer ES2/ES3. BI report layouts are used in the Custom Reports functionality in Unifier.
9	Unifier Schedule view--is this a live/active view of the P6 schedule or just an imported schedule? Do I have to re-import my P6 schedule daily if I make changes daily?	To keep the linked project schedule sheet data current, you can either send the data on an ad-hoc basis or set up a P6 Project Schedule Service on a regular basis. When you view the schedule in Unifier you are accessing the data stored in Unifier, not an active view of P6.
10	So there are no automated conversion from PCM to Unifier supplied? What would the estimated budget be to do these conversions?	No
11	Cashflows--are these projected based on active P6 schedule or on some other means?	Cashflow curves can be set up by project, Summary Cost Code, Cost Code or at commitment level from the Project Cost Sheet. You can also create a cash flow from a cost-loaded Schedule Sheet with assigned roles and resources and Cost Codes to the activities. If a P6 project is linked with the correct data mappings to a Unifier schedule sheet then it should be possible to distribute cost data in the cashflow.

12	What if the business rules change from project to project? How simple is it to modify the workflows to allow these changes? What if the business rules change in the same project during the course of the project?	If the workflow of a BP has changed, assuming the BP has gone into production then you cannot change that workflow. You would need to copy that workflow in uDesigner, make the modifcations, test extensively in uStage and then publish to Production ensuring you have reconfigured the BP to use the new modified workflow. You can have BP's that apply only to specific projects, so you can accomodate multiple processes. Modifying business processes "on the fly" as projects progress is not good practice and should be discouraged, but technically possible by creating new processes and disabling the old process.
13	If I leave PCM in place for history, then don't I have to continue to maintain a server running PCM to do this? What if my data needs to be rolled into future reports? Should I then consider importing all PCM data?	If you have not printed PCM data to PDF or other portable media, then you would need to maintain the PCM system operating in order to access the historical data. That is an option. If you need information there for reporting in Unifier, then you may need to either import or populate the key information by manual input. One option would be to manually enter summary data into Unifier for inclusion in reports, and still use details in PCM as backup.
14	I've seen issues reported with BI--how confident are you with this working as my old Crystal Reports did?	Oracle has stated that BI will continue to be integrated into the Unifier package, similar to its insertion into PCM and P6. Early releases of these integrations were faced with issues that for the most part are resolved. We would expect a similar outcome here, though you may investigate other reporting solutions as well.
15	Is Oracle going to provide later a base conversion template for PCM data?	None that we are aware of. Oracle has previously stated no conversion tool is planned, that migration would be a service provided by Partners.

16	You showed a custom form and report, but I have a lot of customized CM forms that I use? How much work is this going to be to create for use in Unifier?	If you are want to use the existing workflow and form just have a customized print for the BP form then this would be similar to design effort in Infomaker except you would be using Adobe Live Cycle Designer ES2/ES3. If you wish to slightly change the workflow and the form from the base product BP then it should be relatively straighforward with some uDesigner knowledge. If you require more depth to your workflow or starting a brand new form then this will take more time. Remember that Unifier needs to be built with the data requirements first, then the actual "forms" and last the workflows. In summary, the customized print of a BP form (document) and configuring it is fairly straightforward, it's the level of modification to the actual BP that can vary greatly.
17	I read somewhere that Unifier didn't support multiple line items and complex pay applications. What if I have one line item with five different cost codes?	Unifier applies one CBS (cost breakdown schedule) code to each line item, but these codes support a complete tiered breakdown. A Pay application line item with multiple codes would be multiple lines in Unifier (one for each code).
18	Tracking Bid Estimates--does this provide me a comprehensive unit price bidding history? Can you compare to regular estimating software?	Not aware of this. Depending upon your requirements, it is possible that historical data could be collected; however, don't believe that it would replace a true estimating tool.