



Change Management with PMWeb

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PROJECT MANAGEMENT SOLUTIONS THAT *SIMPLY WORK* SINCE 1989.

www.drmcnatty.com

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 “Vendor 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.
- You need to make your own judgments as to the application of our shared ideas in your own, unique environment.
- The slides contain default data and is not meant to solve user issues or be used for consulting purposes. This software is highly customizable and can be used from different Owner and General Contractor perspectives.

Products and Services






- Authorized Oracle Primavera, Asta Powerproject and PMWeb Software Sales
- Experienced Industry Implementation Specialists & Consultants
 - P6, Contract Management, Unifier, Asta Powerproject, and PMWeb
- Custom Integration, Analytics, Dashboards, Risk and Role-based User Access
- Program and Project System Support Services and Partnering
- Mentored and Supported Project Staffing Resources



- Cloud Based, Global Managed Hosting Services
- P6 and Asta Cloud Team Deployments Reduce the Risk of Critical Data Loss
- **Project Status**, Java-free Risk and Collaboration Using P6 Web Services
- Contract Management Interface (CMI) – Extend Your PCM Deployment

Tool Matrix

Business Process		 Asta Powerproject®	
Portfolio Management	P6, Unifier		Portfolios
Planning & Budgeting	Unifier	Powerproject	Planning
Estimating		BidCon	Estimating
CPM Scheduling	P6	Powerproject	Scheduling
Cost Management & Reporting	P6, Unifier	Powerproject	Cost Management
Document Management	Unifier		Doc. Management
Change Management	Unifier		Workflows
BIM/Engineering Forms	Unifier	Asta BIM	Engineering Forms
Risk Analysis	Risk Analysis	Asta Risk	Risk Register
Facility Management/Work Orders	Unifier		Facility Management
Claims Support & Analysis	P6	Powerproject	Scheduling Doc. Management

Abstract

Presentation title

Many Primavera Contract Management users are familiar with how Contract Management provide/allows users to organize documents and processes related to changes, including the ability to gather multiple pending changes into a single change document. The Contract Management Change Management process is used by many of our PCM clients and is certainly something that they want to be able to continue to do with whatever tool they may eventually replace PCM with in the future. DRMcNatty has researched the many available software options and has identified PMWeb as the best available solution when a client does not want to switch to Primavera Unifier. In this technical webinar Jon McNatty will demonstrate the use of PMWeb's Visual Workflow process to emulate the PCM Change Management Process.

Agenda

Change Management with PMWeb

- Overview Primavera Contract Management & PMWeb
- The 5 C's of Change Management
- Change Management in PMWeb
 - **Setup Workflow & Settings for Email**
 - **Create RFI**
 - **Create Change Event from RFI**
 - **Collect multiple Change Events into Change Order (Budgeted/Committed)**
 - **Approve Change Orders (Email)**
 - **Applications for Payment**
 - **Review Cost Worksheet**
- Questions




Change Management with PMWeb


Overview

- PCM 14.x support ends June 2016
 - Perpetual licenses are forever, but technology is not
- Unifier is Oracle's recommended replacement for PCM
 - Unifier may be more than needed for some environments
 - Oracle has also talked about "Prime" as a migration path for PCM
- Our clients need solutions today
 - We took a good look at the solutions available "today"
 - Requirements based on 30 years experience with PCM as well as 40+ years in the construction industry
- We reviewed all major applications and selected PMWeb





Change Management with PMWeb

Overview - Multi-project access

PMWeb   

- Program/Project Login -  **Engineering Forms > RFIs**

Drag a column header and drop it here to group by that column

Programs: *All* Projects: *All*    

Project #	Record #	Project Name	Description	Workflow Status	To	From
RVS0104	000002	Boston Medical Center	HSS Location at Window Jam	Approved	Hillcrest General Contractors - Mike M	Best Door and Window - Neil Younger
RVS0104	000003	Boston Medical Center	Questions over document 23	Approved	Wagner & Williams - Karen Watson	A+ Electric, Inc. - Tom Harker
RVS0104	000004	Boston Medical Center	Conflict	Submitted		PMWeb, Inc. - Matt Damon
RVS0104	000005	Boston Medical Center	Drawing A-500 Issues	Approved	Rockwell Architects - Janice Rockwe	Best Door and Window - Neil Younger
RVS0104	000006	Boston Medical Center	Purchase Order	Submitted		
RVS0104	000007	Boston Medical Center	HSS Location at Window Jam	Approved	Hillcrest General Contractors - Mike M	Best Door and Window - Neil Younger
RVS0104	000008	Boston Medical Center		Approved		
RVS0104	000009	Boston Medical Center		Submitted		
RVS0104	001A	Boston Medical Center	Dons RFI	Draft	DRMcNatty & Associates, Inc - Don M	DRMcNatty & Associates, Inc - Don M
RVS0104	000006	Boston Medical Center	Banner Pole Assemblies	Approved	Rockwell Architects - Ann Rockwell	Best Door and Window - Frank Jones
RVS0104	000007	Boston Medical Center	General Requirements for RF	Approved	Rockwell Architects - Cliff Rockwell	A+ Electric, Inc. - Carrol Nash
U-200	000001	HBS Baker Library	Dimensions at Architectural S	Submitted	Wagner & Williams - Karen Watson	Hillcrest General Contractors - Mike M
U-200	000002	HBS Baker Library	Dimensions at Stairs # 5 & #3	Submitted	Wagner & Williams - Karen Watson	Hillcrest General Contractors - Mike M
U-200	000003	HBS Baker Library	Dimensions of window #3	Draft	Wagner & Williams - Karen Watson	A+ Electric, Inc. - Tom Harker
U-200	000004	HBS Baker Library	Drawing Clarification	Submitted		
U-200	000005	HBS Baker Library	Dimensions at Architectural S	Draft	Wagner & Williams - Karen Watson	Hillcrest General Contractors - Mike M
MH-955	000001	Florida Perimeter Highway	Found buried abandoned tank	Submitted	Florida DOT - Michael Ritter	Blue Ridge Highway Contractors - Da
MH-955	000002	Florida Perimeter Highway	Rough Grade stakes are not	Draft	Florida DOT - Michael Ritter	Blue Ridge Highway Contractors - Sc
MH-955	000003	Florida Perimeter Highway	Missing plan details	Draft	Florida DOT - Bryn Fosburgh	Blue Ridge Highway Contractors - Sc
U-201	000001	Harvard Square Station	Bid Inquiry	Draft	Blue Ridge Highway Contractors - Sc	Best Door and Window - Frank Jones

Page Size: 20

Change Management with PMWeb

Overview - Full Cost Management

Project*

School Addition Automotive Center

Periods from

All*

 to

All*

Worksheet

General Contractor - Cost Worksheet

Details

Notes

Attachments

Drag a column header and drop it here to group by that column

Add

	Cost Code	Cost Code Description	Original Budget	Budget Changes-Pending	Budget Changes-Approved	Revised Budget	Original Commitments
>	02-02100-S	Excavation	\$75,000.00	\$0.00	\$1,000.00	\$76,000.00	\$5,000.00
>	02-02110-S	Site Remediation Supervision	\$26,000.00	\$0.00	\$0.00	\$26,000.00	\$0.00
>	02-02200-S	Site Preperation	\$48,000.00	\$0.00	\$0.00	\$48,000.00	\$0.00
>	02-02300-S	Earhwork & Landscaping	\$250,000.00	\$0.00	\$1,000.00	\$251,000.00	\$5,000.00
>	02-02500-S	Utility Services	\$105,000.00	\$0.00	\$0.00	\$105,000.00	\$0.00
>	02-02700-S	Bases and Paving	\$66,500.00	\$0.00	\$0.00	\$66,500.00	\$0.00
>	02-02950-D	Site Restoration & Rehabilitation	\$20,000.00	\$0.00	\$0.00	\$20,000.00	\$0.00
>	03-03300-S	Cast-in-Place Concrete	\$1,755,000.00	\$0.00	\$0.00	\$1,755,000.00	\$0.00
>	03-03400-V	Precast Concrete	\$35,000.00	\$0.00	\$0.00	\$35,000.00	\$0.00
>	04-04200-S	Masonry Units	\$835,000.00	\$0.00	\$0.00	\$835,000.00	\$0.00
>	05-05200-S	Metal Joists	\$55,000.00	\$0.00	\$0.00	\$55,000.00	\$0.00
>	05-05300-S	Metal Deck	\$95,000.00	\$0.00	\$0.00	\$95,000.00	\$0.00
>	05-05400-S	Cold-Formed Metal Framing	\$90,000.00	\$0.00	\$0.00	\$90,000.00	\$0.00
>	05-05500-S	Metal Fabrications	\$85,000.00	\$0.00	\$0.00	\$85,000.00	\$0.00
>	06-06100-S	Rough Carpentry	\$550,000.00	\$0.00	\$0.00	\$550,000.00	\$0.00
>	06-06400-S	Architectural Woodwork	\$295,000.00	\$0.00	\$0.00	\$295,000.00	\$0.00
>	07-07100-S	Bituminous Dampproofing	\$60,000.00	\$0.00	\$0.00	\$60,000.00	\$0.00
			10,000,000.00	0.00	2,200.00	10,002,200.00	1,830,000.00

Change Management with PMWeb

Overview Security – Standard Group Templates

Group* Project Managers		Description* Project Managers				
	Menu Item	Full Control	View	Create	Delete	Edit
▶	Planning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▶	Engineering Forms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▼	Cost Management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▶	Contracts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
▶	Requisitions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
▶	A/R Payments	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
▶	Online Change Requests	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
▶	A/R Payment Batches	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▶	Master Commitments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▼	Change Events	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
▶	Header					
▶	Details		<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>
▶	Adjustments		<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>
▶	Specifications		<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>
▶	Notes		<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>
▶	Attachments		<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>
▶	Notifications		<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>
▶	Checklists		<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>

Change Management with PMWeb

Overview - Dashboard

Controls

Dashboard

Project Center

Portfolio View

Map View

W8 Project

Asset

Infographic

Google Map

Harvard Map

Subway Ma

Harvard Baker Library Renovations

Create Project

Create From Template

Save

Print

Program

HBS

Project ID*

U-202

Name*

Harvard Baker Library Renovations

Location

DISTRICT 3 - Harvard Business

Project Status

In Negotiation

Project Type

Renovations

Category

-- Select --

Status

Draft

Currency

Dollar (United States of America)

Target Budget

\$1,500,000.00

Target Revenue

\$0.00

Target Duration

0

UOM

-- Sele

Target Start/Finish

Actual Start/Finish

Percent Complete

0.00%

Scope

Select multiple files to upload

Select

Planning

Engineering Forms

Record Type

Pending

Approved

Action Items

0

0

Correspondence

2

0

Daily Reports

3

0

Drawing Lists

1

0

Drawing Sets

0

0

Meeting Minutes

1

0

Online Submittals

0

0

Punch Lists

0

0

RFIs

3

0

Safety Forms

0

0

Submittal Sets

1

0

Submittal Items

0

0

Transmittals

5

0

Accident Investigation

0

0

Executive Summary

2

0

Cost Management

Record Type

Pending

Approved

A/P Payment Batches

0

0

A/P Payments

0

0

A/R Payment Batches

0

0

A/R Payments

0

0

Budget Requests

1

0

Budgets

1

0

Change Events

1

0

Commitment COs

3

0

Schedule

Target:

Projected:3/7/2010 - 6/20/2010

Budget

Target: \$1,500,000.00

Anticipated Cost: \$493,000.00

Custom Fields

Proj Spec

Regions Fields

Edit

Spec	UOM	Data
Project time	year	
Client		
Project Manager		
CP Number		
RFC Manager		

Change Management with PMWeb

The 5 C's of Change Management

- Contacts
- Cost Codes
- Contracts
- Changes (Change Management)
- Cost Worksheet

Change Management with PMWeb

The 5 C's of Change Management - Contacts

- PORTFOLIO/List/Companies
- Identify all companies working on the project
- List all the contacts & general information for each contact

The screenshot displays the PMWeb software interface. On the left is a navigation pane with a tree view containing 'Lists', 'Programs', 'Projects', 'Companies' (highlighted with a red box), 'Pay Types', 'Resources', 'Classifications Matrix', 'Items', 'Adjustments', 'Adjustment Groups', 'Periods', 'Close-Open Periods', and another 'Lists' section. Below this are buttons for 'Planning', 'Engineering Forms', 'Cost Management', 'Scheduling', 'Asset Management', and 'Workflow'. The main window shows a table of companies with columns: Record #, Company Name, Created By, Address 1, Zip, City, State, Phone, and Fax. The 'ACME' record is highlighted with a red box. Below the table, a detailed view for 'ACME General Contractors' is shown, including fields for Company ID*, Name*, Type, Abbreviation, Reference, PMWeb Account ID, Account #, Federal Tax ID, State Tax ID, Country, and Billing Terms. Below this is another table of contacts with columns: ID, First Name, Last Name, Address, Title, Cell, and Email. The 'CJONES' and 'SJOHNSON' records are highlighted with a red box.

Record #	Company Name	Created By	Address 1	Zip	City	State	Phone	Fax
PMWeb	PMWeb	Admin						
ACME	ACME General Contractors	Admin	15 Rockhill Road	19004	Bala Cynwyd	PA	610-555-2345	610-555-2222
PHILA	Philadelphia County							
DESIGN	Design Group							
DRM	DRMcNatty & Associates, Inc.							
MECH	Mechanical Contractors							
STDPAV	Standard Paving and Concrete, Inc.							
STESSON	Stesson Industrials							
A-1MANAG	A-1 Construction Management							
ACMEGC	ACME General Contractors							
ADVANCE	Advance Concrete Company							
ADVANTAG	Advantage Concrete							
ARMSTRNG	Armstrong Engineering							
BILLBND	Billard Bonds, Inc.							
CARSON	Carson Concrete Materials							
CONCRETE	Concrete Materials							
CIPIE	Concrete Pipe Company							
GELCO	Gelco Space							
GENERAL	General Equipment Rental							
INSURE	International Insurance Company							

ID	First Name	Last Name	Address	Title	Cell	Email
CJONES	Charlie	Jones	OFFICE	Construction Manager	610-555-2345	cjones@acmegc.com
SJOHNSON	Steve	Johnson	FIELD	Project Manager	215-555-6889	sjohnson@acmegc.com

Change Management with PMWeb

The 5 C's of Change Management - Cost Codes

- COST MANAGEMENT/Budgets/Cost Codes
- Customize Cost Code Values
- Use Microsoft Excel to Import/Export

The screenshot displays the PMWeb Cost Management interface. On the left, a navigation pane shows the 'Cost Codes' option highlighted under the 'Budgets' folder. The main window shows a table of Cost Codes for the 'School Addition Automotive Center' project. The table has columns for Level #, Description*, # of Characters, and Values. The first row, '001 CSI Division' with 2 characters, is highlighted with a red box. A red arrow points from this row to the 'Cost Level Values' dialog box. In this dialog, the 'Level #' is set to 1, the 'Description*' is 'CSI_Division', and the '# Characters' is 2. The dialog also has a table of values with columns for ID*, Description, and Text 1. The 'Paste From Excel' and 'Export To Excel' buttons are highlighted with a red box.

Level #	Description*	# of Characters	Values
001	CSI Division	2	
002	Specification Section	5	
003	Cost Category	1	

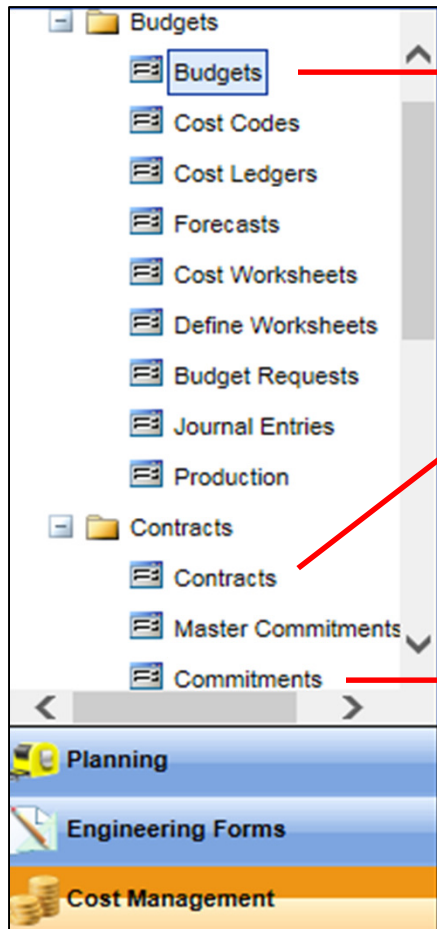
Inactive	Cost Code	Description
<input type="checkbox"/>	00-01100-D	Overhead & Profit
<input type="checkbox"/>	00-01100-O	Contingency
<input type="checkbox"/>	01-01100-O	Summary
<input type="checkbox"/>	01-01300-D	Administration Requirements
<input type="checkbox"/>	01-01300-O	Administration Requirements-Schedule

ID*	Description	Text 1
00	Pre-Construction Requirements	
01	General Construction Requirements	
02	Sitework	
03	Concrete	
04	Masonry	
05	Metals	

Change Management with PMWeb

The 5 C's of Change Management - Contracts

- COST MANAGEMENT/CONTRACTS – General Contractor Perspective

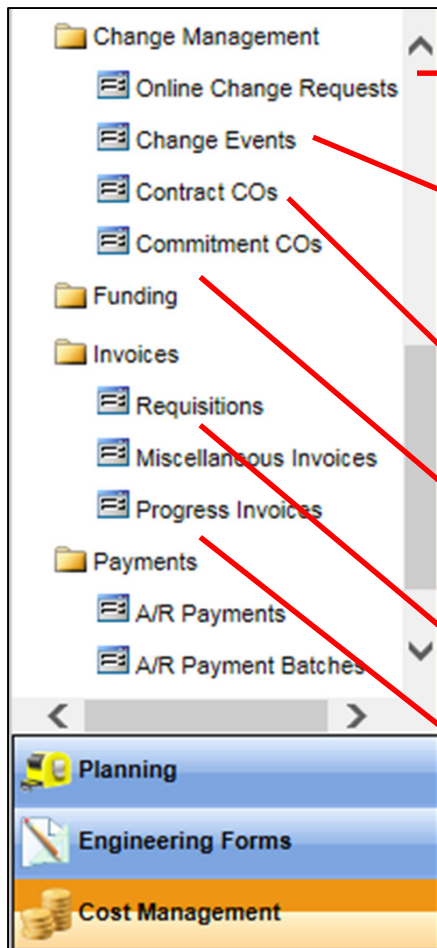


- Overall Project Budget – populates the Original Budget column in the Cost Worksheet
- Contract between the Owner and the General Contractor – populates the Original Income column in the Cost Worksheet
- Contract between the General Contractor and Subcontractors/Vendors – populates the Original Commitments column in the Cost Worksheet

Change Management with PMWeb

The 5 C's of Change Management - Changes (Change Management)

- COST MANAGEMENT/CHANGE MANAGEMENT – General Contractor Perspective



- Change Request against Committed Contract only, can collect multiple OCR into one Change Order
- Create Change Event (Potential Change) from an RFI, can be Budgeted or Committed, can collect multiple CE into one Change Order
- Change order to the Budgeted Contract, can collect OCR and CE into one Change Order
- Change order to the Committed Contract, can collect OCR and CE into one Change Order
- Create Application for Payment for the Budgeted Contract
- Create Application for Payment for the Committed Contract

Change Management with PMWeb

The 5 C's of Change Management - Cost Worksheet

- COST MANAGEMENT/BUDGETS

Project*	School Addition Automotive Center	Periods from	*All*	to	*All*		
Worksheet	General Contractor - Cost Worksheet						
<div>DetailsNotesAttachments</div> <div>Drag a column header and drop it here to group by that column</div> <div>+ Add</div>							
	Cost Code	Cost Code Description	Original Budget	Budget Changes-Pending	Budget Changes-Approved	Revised Budget	Original Commitments
>	02-02100-S	Excavation			\$1,000.00	\$76,000.00	\$5,000.00
>	02-02110-S	Site Remediation Supervision	\$26,000.00	\$0.00	\$0.00	\$26,000.00	\$0.00
>	02-02200-S	Site Preperation	\$48,000.00	\$0.00	\$0.00	\$48,000.00	\$0.00
>	02-02300-S	Earhwork & Landscaping	\$250,000.00	\$0.00	\$1,000.00	\$251,000.00	\$5,000.00
>	02-02500-S	Utility Services	\$105,000.00	\$0.00	\$0.00	\$105,000.00	\$0.00
>	02-02700-S	00-01100-D Overhead & Profit		\$0.00	\$0.00	\$200.00	\$0.00
>	02-02950-D	Site Restoration & Rehabilitation	\$20,000.00	\$0.00	\$0.00	\$20,000.00	\$0.00
>	03-03300-S	Cast-in-Place Concrete	\$1,755,000.00	\$0.00	\$0.00	\$1,755,000.00	\$0.00
>	03-03400-V	Precast Concrete	\$35,000.00	\$0.00	\$0.00	\$35,000.00	\$0.00
>	04-04200-S	Masonry Units	\$835,000.00	\$0.00	\$0.00	\$835,000.00	\$0.00
>	05-05200-S	Metal Joists	\$55,000.00	\$0.00	\$0.00	\$55,000.00	\$0.00
>	05-05300-S	Metal Deck	\$95,000.00	\$0.00	\$0.00	\$95,000.00	\$0.00
>	05-05400-S	Cold-Formed Metal Framing	\$90,000.00	\$0.00	\$0.00	\$90,000.00	\$0.00
>	05-05500-S	Metal Fabrications	\$85,000.00	\$0.00	\$0.00	\$85,000.00	\$0.00
>	06-06100-S	Rough Carpentry	\$550,000.00	\$0.00	\$0.00	\$550,000.00	\$0.00
>	06-06400-S	Architectural Woodwork			\$0.00	\$295,000.00	\$0.00
>	07-07100-S	Bituminous Dampproofing	\$60,000.00	\$0.00	\$0.00	\$60,000.00	\$0.00
Original Budget			10,000,000.00	0.00	2,200.00	10,002,200.00	1,830,000.00

Approved Change Order

Revised Budget Total

Subtotal all Approved Changes

Change Management with PMWeb

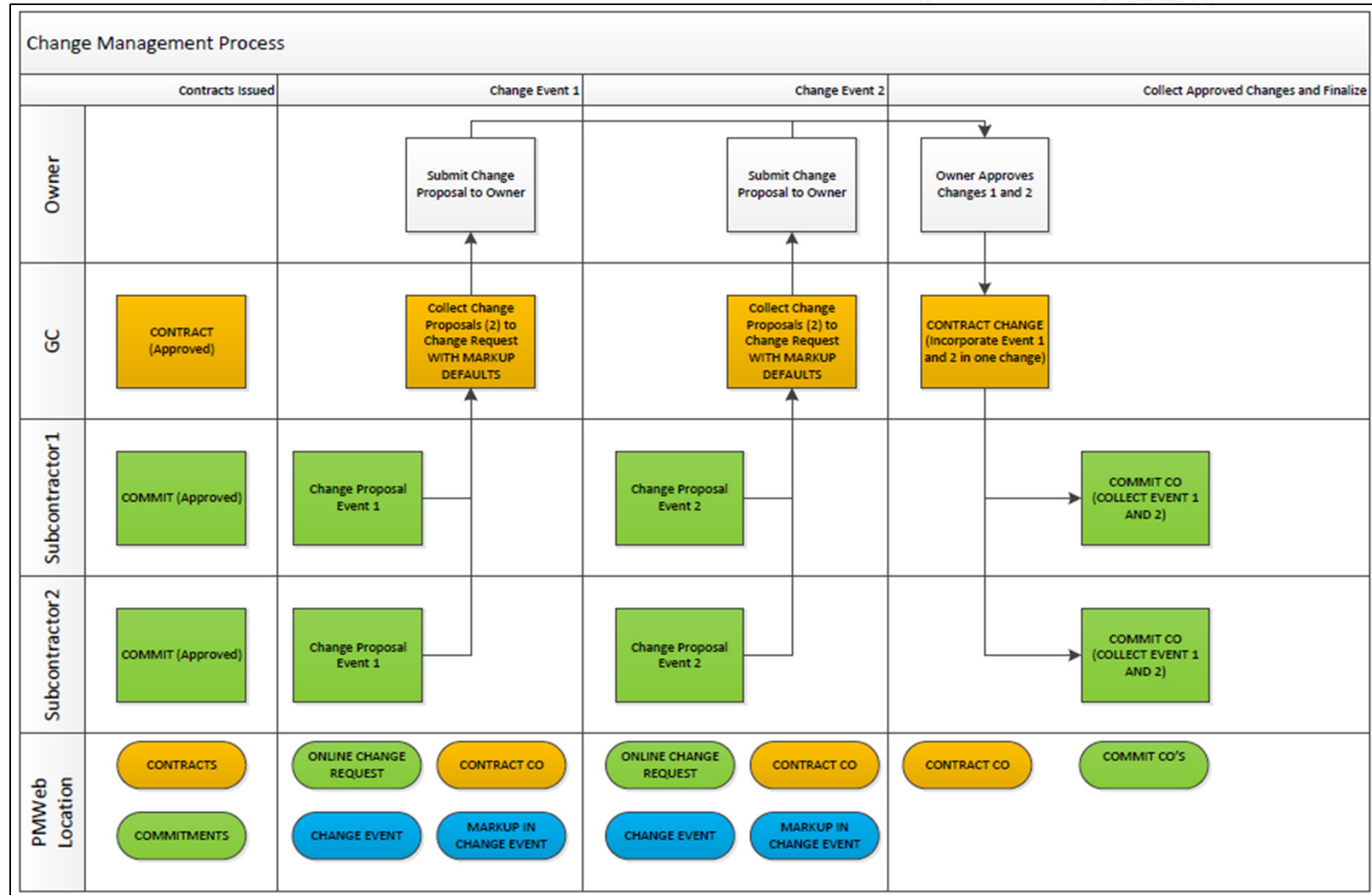
Cost and Change Management Documents

General Contractor Perspective

Default/UD	Document Type	Status	\$ Value Entered	Column in Cost Worksheet	Column in Cost Worksheet
Default	Budgets	Draft	Original Project Budget	Original Owner Budget Pending	Original Project Budget Pending
Default	Budgets	Approved	Original Project Budget	Original Owner Budget Approved	Original Project Budget Approved
Default	Contracts	Draft	Total Cost	Original Income - Pending	
Default	Contracts	Approved	Total Cost	Original Income - Approved	
Default	Commitments	Draft	Adjustment 1/UOM Cost	Original Commitments - Pending	
Default	Commitments	Approved	Adjustment 1/UOM Cost	Original Commitments - Approved	
User Defined	Variance	Auto Calc	Auto Calc	Variance Budgeted - Committed	
Default	Change Event	Draft	Ext. Cost	Commitment Changes - Pending	
Default	Change Event	Approved	Ext. Cost	Commitment Changes - Approved	
Default	Online Change Requests	Draft/Approved	Ext. Cost	None	
Default	Online Change Requests	Draft/Approved	Ext. Cost	None	
Default	Contracts/CO's	Draft	Owner Budget	Income Changes - Pending	
Default	Contracts/CO's	Approval	Owner Budget	Income Changes - Approved	
Default	Commitment CO's	Draft	Amount Requested	Commitment Changes - Pending	
Default	Commitment CO's	Approval	Amount Requested	Commitment Changes - Approved	
Default	Requisitions	Approved	% Complete/Current Invoice	Actual Income - Approved	
Default	Progress Invoices	Approved	% Complete/Current Invoice	Actual Costs - Commitment - Approved	

Change Management with PMWeb

Workflow – Standard Procedures Flow Chart



Change Management with PMWeb

Workflow

- WORKFLOW/Workflow
- Define Roles
- Create Roles and assign to a Users

Select Level: School Addition Automotive Center

Roles Business Processes (BPM) Defaults APM Rules

Save

Options

Allow users in multiple roles ☒

Allow roles to be used more than once in a workflow ☒

Users

Delegate / Replace User

Users

- Adam Baker (ABAKER)
- Admin (admin)
- Dan Beck (DBECK)
- Don McNatty (DMCNATTY)
- John Manning (PMWeb)
- Jonathan McNatty (JMCNATTY)
- Lim Tan (LTAN)
- Pam Powrie (PPOWRIE)
- Rudy Ising (RISING)
- Thomas Wagner (TWAGNER)

Role*	User*	Delegate
Architect	Jonathan McNatty(JMCNATTY)	
Owner	Jonathan McNatty(JMCNATTY)	
Project Manager	Jonathan McNatty(JMCNATTY)	
Subcontractor	Jonathan McNatty(JMCNATTY)	

Page Size 5

Document Manager*

User Admin (admin)

Notify On All:

- ☒ Submissions
- ☒ Approvals
- ☒ Branches
- ☒ Returns
- ☒ Rejects
- ☒ Withdrawals
- ☒ Final Approval
- ☒ Delegates
- ☒ Overdue Steps

Can:

- ☒ Edit Records
- ☒ Edit Workflow
- ☒ Edit Notes
- ☒ Edit Attachments

CC Jonathan McNatty (JMCNATTY)

Change Management with PMWeb

Workflow

- Define Workflow Templates with Visual Workflow Designer

The screenshot displays the PMWeb Visual Workflow Designer interface. At the top, a red box highlights the 'Select Template' dropdown menu, which is set to '2 - Change Order Approval Process'. Below this, the 'Template Id*' is '2' and the 'Template Name*' is 'Change Order Approval Process'. Other fields include 'Recalculate Due Dates On Actions' (unchecked), 'Single "All Must Approve" Email' (unchecked), and 'Associate With' set to 'Commitments'.

To the right, the 'BPM Managers' section shows a table with no records to display. The 'Overdue Alert' section has 'Alert Active' (unchecked), 'Days (+/-)' set to '0', 'Role(s)' set to '-- Overdue Approver --', 'Email' (unchecked), and 'Onscreen' (unchecked).

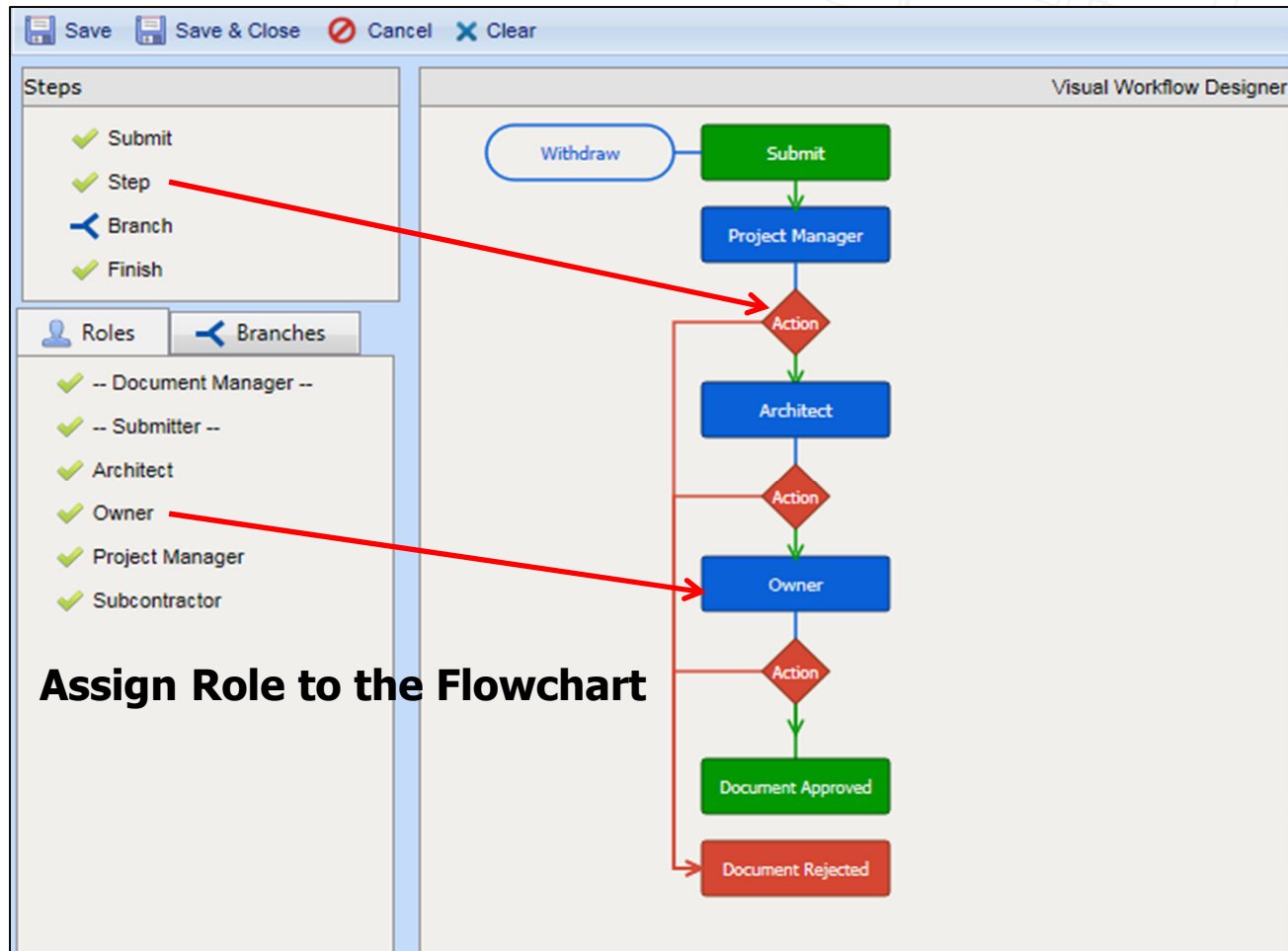
The 'Visual Workflow Designer' section is highlighted with a red box. It contains two tabs: 'Roles & APM Rules' and 'Branch Rules'. Under 'Roles & APM Rules', a list of roles is shown, including 'Document Manager --', 'Submitter --', 'Architect (JMCNATTY - Jonathan McNatty)', 'Owner (JMCNATTY - Jonathan McNatty)', 'Project Manager (JMCNATTY - Jonathan McNatty)', and 'Subcontractor (JMCNATTY - Jonathan McNatty)'. The 'Steps' table is also visible, showing three steps: 1. Project Manager (Next Step), 2. Architect (Next Step), and 3. Owner (Final Approve).

At the bottom, the 'Visual Workflow' section shows a flowchart. The flow starts with 'Submitter' (blue box), which leads to 'Withdrawal' (blue oval). From 'Submitter', the flow continues to 'Project Manager' (blue box), then to 'Architect' (blue box), then to 'Owner' (blue box), and finally to 'Final Approve' (green box). A red line indicates a rejection path from 'Project Manager', 'Architect', and 'Owner' to a 'Rejection' (red oval).

Change Management with PMWeb

Workflow – Visual Workflow Designer

- Drag & Drop



Change Management with PMWeb

Workflow

- Define Email Preferences

Visual Workflow Designer

Roles & APM Rules

Roles

- Document Manager --
- Submitter --
- Architect (JMCNATTY - Jonathan McNatty)
- Owner (JMCNATTY - Jonathan McNatty)
- Project Manager (JMCNATTY - Jonathan McNatty)
- Subcontractor (JMCNATTY - Jonathan McNatty)

Visual Workflow

Roles

Names

Submitter

Project Manager

Withdrawal

Define Role Step - Internet Explorer

http://drmcnatty.pmweb.com/PMWeb/WorkflowDefineRoleStep.aspx?FromTemplateImage=1&StepId=104&Type=Templat

Save Save & Exit Cancel

Step* 1

Approver(s)* Project Manager

Review Days* 5

CC

Manual CC

Event Type(s) ☒ Email ☒ Onscreen Message

Return To -- Submitter --

Resubmit To -- Returner --

RAM -- Select --

Instructions

Options

- ☐ All Must Approve
- ☒ Can Edit Record
- ☒ Can Edit Notes
- ☒ Can Edit Attachments
- ☐ Can Final Approve
- ☐ Require Comments
- ☐ Allow Delegating

Generate Records

Action	Generate
Approve	-- None --
Return	-- None --
Reject	-- None --
Withdraw	-- None --
Final Approve	-- None --
Delegate	-- None --

Notify On All

- ☐ Submissions
- ☐ Approvals
- ☐ Branches
- ☐ Returns
- ☐ Rejects
- ☐ Withdrawals
- ☐ Final Approval
- ☐ Delegates

☐ Submit if Workflow enabled

Change Management with PMWeb

Create RFI

- ENGINEERING FORMS/RFI's

Engineering Forms

- Safety Forms
- RFIs**
- Online Submittals
- Submittal Items
- Submittal Sets
- Meeting Minutes
- Drawing Lists
- Drawing Sets
- Daily Reports
- Punch Lists
- Transmittals
- Action Items
- Correspondence

Planning

Engineering Forms

Drag a column header and drop it here to group by that column

Programs Projects **+ Add** **X Delete**

Project Name	Project #	Record #	Description	Workflow Status
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
School Addition Automotive C	DEMO	000001	Additional Earthwork & Lands	Draft

Page Size 20

Change Management with PMWeb

Create RFI

- Assign RFI to a Project and fill out general information
- Create a Change Event from the RFI

School Addition Automotive Center

Project* School Addition Automotive Center

Phase -- Select --

WBS Select WBS...

RFI # 001

Description Additional Earthwork & Landscaping

Reference

Status Draft

Revision 0 Date 9/2/2015

RFI Date

From ACME Get Change Event

To DRMcNatty & Associates, Inc. - Jonathan McI

Trade -- Select --

CSI Code

Category -- Select --

Priority -- Select --

Transmittals

Date	To	Via
No records to display.		

Page Size 5

Details Specifications Notes Attachments

Question Date Required

Answer Date Answered

Font Name Real ... B I U abc

Additional Earthwork and Landscaping has been added to the contract.

Additional Excavation, Earthwork & Landscaping has been added in Area A. See plan drawing F-01.

Design HTML Preview

Effects: ☒ Scope of Work ☒ Cost ☒ Schedule

CE # 0

Change Management with PMWeb

Create Change Event (Potential Change)

- Change Event can have Budgeted and Committed Line Items
- Assign to Cost Codes in Line Item

1 - School Addition Automotive Center - Owner Request

Project*: School Addition Automotive Center
Record #: 1
Description: Owner Request Additional Scope Earthwork & Landscaping
Source Record: RFI: 002
Revision: 0 Date: 7/16/2015
Status: Submitted
Change Request: 001 - Additional Scope - Earthwork & Landscaping
Risk Analysis: Select Risk Analysis...
Effective Date:

Company: Select Company...
Cause: -- Select --
Requested: Select Company...
Category: -- Select --
Reference:
Change Request #: 1

Recap
Project Budget: \$2,000.00
Owner Budget: \$2,000.00
Ext. Cost: \$2,000.00
Days: 10.00

Details Adjustments Specifications Notes (3) Attachments

Budget

Drag a column header and drop it here to group by that column

Edit Selected Lines Add Items Add Delete Refresh Save Layout Load Default Layout Use Units

Line #	Status	Item	Description	UOM	Quantity	Unit Cost	Adjustment 1	Tax	Adjustment 2	Project Budget
001	Pending		Additional Excavation		1.00	\$1,000.00	\$0.00	\$0.00	\$0.00	\$1,000.00
002	Pending		Additional Earthwork & Landscaping		1.00	\$1,000.00	\$0.00	\$0.00	\$0.00	\$1,000.00
					2.00	\$2,000.00	\$0.00	\$0.00	\$0.00	\$2,000.00

Page Size 10

Cost

Drag a column header and drop it here to group by that column

Edit Selected Lines Link Change Request(s) Add Items Add Linked Add Delete Refresh Save Layout Load Default

Line #	Status	Linked Budget Line	Item	Description	Ext. Cost	Commitment	Cost Code
001	Pending			Additional Excavation	\$1,000.00	AA450-01000 - Standard P	02-02100-S
002	Pending			Additional Earthwork & Landscapi	\$1,000.00	AA450-01000 - Standard P	02-02300-S
					\$2,000.00		

Change Management with PMWeb

Collect Multiple Change Events into one Change Order - Budgeted

- Add Markup as a Line Item
- Click the Workflow Tab to start the Workflow Process

The screenshot displays the PMWeb Change Management interface. On the left is a navigation menu with options like Cost Worksheets, Define Worksheets, Budget Requests, Journal Entries, Production, Contracts, Master Commitments, Commitments, Change Management, Online Change Request, Change Events, and Contract COs. The main area shows a form for a Change Order titled '001 - School Addition Automotive Center - Additional Scope'. The form includes fields for Project, Contract, Company, Record #, Change Order Date, Description, Reference, Category, Revision, Date, Status, Days +/-, and Effective Date. A 'Recap' table is also visible, showing contract amounts and days. At the bottom, there is a table of line items with columns for Line #, Item, Description, Owner Budget, Adjustment 1, Adjustment 2, Tax, Total Price, Cost Type, and Cost Code. The 'Workflow' tab is highlighted in the top navigation bar, and the line item '003 Overhead & Profit' is highlighted in the table.

Line #	Item	Description	Owner Budget	Adjustment 1	Adjustment 2	Tax	Total Price	Cost Type	Cost Code
001		Additional Excavation	\$1,000.00	\$0.00	\$0.00	\$0.00	\$1,000.00		02-02100-S
002		Additional Earthwork & Landscaping	\$1,000.00	\$0.00	\$0.00	\$0.00	\$1,000.00		02-02300-S
003		Overhead & Profit	\$200.00	\$0.00	\$0.00	\$0.00	\$200.00		00-01100-D
			\$2,200.00	\$0.00	\$0.00	\$0.00	\$2,200.00		

Change Management with PMWeb

Workflow

- Select an Action and Save the Change Order
- Change Order will be emailed to next user in the workflow
- Type comments for next user in the workflow

The screenshot displays the PMWeb Workflow interface. At the top, there are tabs for Details, Adjustments, Specifications, Notes, Attachments, and Workflow. The 'Workflow' tab is selected. On the left, the 'Workflow Actions' panel is highlighted with a red box. It contains a list of actions: Approve (green circle), Return (orange circle), Reject (red circle), Withdraw (grey circle), Final Approve (green circle with checkmark), and Delegate (blue person icon). Below the actions are 'Save' and 'Cancel' buttons. The main area shows an 'Email Preview' section. The 'Subject' is 'PMWeb Approval Request: Commitment Change Orders 004'. The 'Email Body' contains the text: 'A document has been Submitted for approval by Admin .'. Below this is a 'Workflow Document Information' box with details: '- Document type: Commitment Change Orders' and '- Project Name: School Addition Automotive Center'. To the right of the email preview is a 'Comments' field, also highlighted with a red box, containing the text: 'Please review the change order for approval and forward to the Architect.'.

Change Management with PMWeb

Workflow

- Audit trail of the Workflow with Time and Date

☐ Business Process

	#	Type	All Must Approve	Due Date	Role	User	Delegate	Instructions
		✓	<input type="checkbox"/>		-- Submitter --			
	1	✓	<input type="checkbox"/>	12/20/2015	Project Manager	Rudy Ising		
	2	✓	<input type="checkbox"/>	12/25/2015	Architect	Jonathan McNatty		
	3	✓	<input type="checkbox"/>	12/30/2015	Owner	Jonathan McNatty		

☐ Workflow Log

Email	Generated	Step	Due Date	Role(User)	User	Action Date	Action Time	Action
				-- Submitter --	Admin (admin)	12/15/2015	02:03:18 PM	Submit

☐ Template

Change Order Approval

☒ Roles
☐ Names

→

Change Management with PMWeb

Email Notification

- Users with Final Approval can Approve/Reject from email
- Change Order will follow the rest of the Workflow

A [document](#) has been [Approved](#) by Project Manager.

Workflow Document Information:

- **Document type:** Commitment COs
- **Document Name:** School Addition Automotive Center
- **Document Description:** Additional Scope Earthwork & Landscaping
- **Action Date:** 12/14/2015
- **Due Date:** 12/19/2015
- **Database Name:** [PMWebDemo](#)
- **Comments:** Please review and Approve/Reject the Change Order

Click the Document hyperlink to open it for review.

Approve

Reject

PMWeb Workflow Administrator

Note: This email message was automatically generated. Please do not reply to this message.

Change Management with PMWeb

Change Order Approval – Budgeted/Committed Change Order

- Change Orders can be Approved manually in the Change Order document

001 - School Addition Automotive Center - Additionl Sc

Project*: School Addition Automotive Center
Contract*: School Addition Automotive Center - Philadelphi
Company: Philadelphia County
Record #: 001
Change Order Date:
Description: Additionl Scope Excavation & Earthwork
Reference:
Category: -- Select --
Revision: 0 Date: 7/16/2015
Status: Submitted
Days +/-:
Effective Date:

Recap

		Days
Original Contract Amount	\$10,000,000.00	0.00
Prior Approved Changes	\$0.00	0.00
Prior Revised Contract	\$10,000,000.00	0.00
Total of This Change	\$2,200.00	0.00
Contract to This Change	\$10,002,200.00	0.00

Details Adjustments Notes Attachments Workflow

Drag a column header to sort by that column

Link CE + Rejected Withdrawn Edit Delete Refresh Use Units Save Layout Load Default Layout

Line #	Item	Description	Owner Budget	Adjustment 1	Adjustment 2	Tax	Total Price	Cost Type	Cost Code
001		Additional Excavation	\$1,000.00	\$0.00	\$0.00	\$0.00	\$1,000.00		02-02100-S
002		Additional Earthwork & Landscaping	\$1,000.00	\$0.00	\$0.00	\$0.00	\$1,000.00		02-02300-S
003		Overhead & Profit	\$200.00	\$0.00	\$0.00	\$0.00	\$200.00		00-01100-D
			\$2,200.00	\$0.00	\$0.00	\$0.00	\$2,200.00		

Change Management with PMWeb

Requisitions

- Create a Payment Application for the Budget Contract

Drag a column header and drop it here to group by that column

Programs *All* Projects *All* **+ Add** X Delete Refresh Layouts

Project Name	Project #	Record #	Workflow Status	Contract	Description
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
School Addition Automotive	DEMO	000001	Approved	AA450-00012 - Summary	Application for Payment with

Page Size 20

Change Management with PMWeb

Requisitions

- Payment Application shows Contract Snapshot

Project*	School Addition Automotive Center	Invoice Date	
Contract*	AA450-00012 - Philadelphia County - Summar	Billing Terms	-- Select --
Company	Philadelphia County	Invoice Due	
Description	Application for Payment with Philadelphia County		
Invoice #	1	Create Next	
Record #*	001		
Reference			
Category	-- Select --		
Revision	0	Date	7/16/2015
Status	Approved		
Cost Period	-- Select --		
Paid In Full	<input type="checkbox"/>		

Contract Snapshot

Original Contract	\$10,000,000.00
Approved Change Orders	\$2,200.00
Revised Contract	\$10,002,200.00
Total Invoiced	\$106,870.00
Total Retained	\$0.00
Earned Less Retainage	\$106,870.00
Less Prior Invoices	\$0.00
Current Payment Due	\$106,870.00
Unapplied Payments Available	\$0.00
Payments Applied	\$0.00
Open Balance	\$106,870.00
Balance To Invoice	\$9,895,330.00

Change Management with PMWeb

Requisitions

- Change Orders can be brought in by Link Change Orders to include in payment

Details Adjustments Specifications Payments Notes Attachments												
Drag a column header and drop it here to group by that column												
+ Add Edit X Delete Delete Actual Costs Refresh Save Layout Load Default Layout Link Change Orders Production Add Actual Costs												
Line #	Description	Cost Code	Adjustment 1	Tax	Adjustment 2	Scheduled Value	Prior Stored Material	Current Stored Material	Total Stored Material	Prior Invoices	Current Invoice	
041		09-09680-S	\$0.00	\$0.00	\$0.00	\$55,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
042		09-09900-S	\$0.00	\$0.00	\$0.00	\$155,700.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
043		10-10100-V	\$0.00	\$0.00	\$0.00	\$67,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
044		10-10400-V	\$0.00	\$0.00	\$0.00	\$39,200.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
045		10-10500-V	\$0.00	\$0.00	\$0.00	\$69,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
046		10-10520-V	\$0.00	\$0.00	\$0.00	\$32,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
047		15-15100-S	\$0.00	\$0.00	\$0.00	\$240,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
048		15-15300-S	\$0.00	\$0.00	\$0.00	\$220,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
049		15-15400-S	\$0.00	\$0.00	\$0.00	\$640,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
050		15-15700-S	\$0.00	\$0.00	\$0.00	\$808,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
051		16-16100-S	\$0.00	\$0.00	\$0.00	\$143,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
052		16-16100-S	\$0.00	\$0.00	\$0.00	\$89,500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
053		00-01100-O	\$0.00	\$0.00	\$0.00	\$202,500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
054		00-01100-D	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
055	Additional Excavation	02-02100-S	\$0.00	\$0.00	\$0.00	\$1,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$100.00	
056	Additional Earthwork & Landsc	02-02300-S	\$0.00	\$0.00	\$0.00	\$1,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$100.00	
057	Overhead & Profit	00-01100-D	\$0.00	\$0.00	\$0.00	\$200.00	\$0.00	\$0.00	\$0.00	\$0.00	\$20.00	
			\$0.00	\$0.00	\$0.00	\$10,002,200.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$106,870.00

Change Management with PMWeb

Cost Worksheet

- Budgeted/Committed Costs
- Approved/Pending Change Orders
- Payment Applications Budged/Committed

Original Commitments	Commitment Changes-Pending	Commitment Changes-Approved	Revised Commitments	Project Variance	Actual Income - Approved	Actual Costs - Commitment - Approved
\$0.00	\$0.00	\$0.00	\$0.00	\$240,000.00	\$24,000.00	\$0.00
\$0.00	\$0.00	\$0.00	\$0.00	\$274,264.12	\$27,426.41	\$0.00
\$0.00	\$0.00	\$0.00	\$0.00	\$244,500.00	\$24,450.00	\$0.00
\$0.00	\$0.00	\$0.00	\$0.00	\$65,000.00	\$6,500.00	\$0.00
\$0.00	\$0.00	\$0.00	\$0.00	\$7,735.88	\$773.59	\$0.00
\$0.00	\$0.00	\$0.00	\$0.00	\$235,000.00	\$23,500.00	\$0.00
\$0.00	\$0.00	\$0.00	\$0.00	\$35,000.00	\$0.00	\$0.00
\$0.00	\$0.00	\$0.00	\$0.00	\$150,000.00	\$0.00	\$0.00
\$0.00	\$0.00	\$0.00	\$0.00	\$65,000.00	\$0.00	\$0.00
\$0.00	\$0.00	\$0.00	\$0.00	\$100,000.00	\$0.00	\$0.00
\$0.00	\$0.00	\$0.00	\$0.00	\$100,000.00	\$0.00	\$0.00
\$0.00	\$0.00	\$0.00	\$0.00	\$121,000.00	\$0.00	\$0.00
\$0.00	\$0.00	\$0.00	\$0.00	\$150,000.00	\$0.00	\$0.00
\$5,000.00	\$1,000.00	\$0.00	\$5,000.00	\$72,000.00	\$100.00	\$2,500.00
\$0.00	\$0.00	\$0.00	\$0.00	\$26,000.00	\$0.00	\$0.00
\$0.00	\$0.00	\$0.00	\$0.00	\$48,000.00	\$0.00	\$0.00
\$5,000.00	\$1,000.00	\$0.00	\$5,000.00	\$247,000.00	\$100.00	\$1,000.00

Change Management with PMWeb

Cost Worksheet

- Can be exported to Excel

Cost Code	Cost Code Description	Original Budget	Budget Changes-Pending	Budget Changes-Approved	Revised Budget	Original Commitments
01-01100-C	Summary	240000.00	0.00	0.00	240000.00	0.00
01-01300-D	Administration Requirements	274264.12	0.00	0.00	274264.12	0.00
01-01300-O	Schedule	244500.00	0.00	0.00	244500.00	0.00
01-01400-S	Quality Requirements-Testing	65000.00	0.00	0.00	65000.00	0.00
01-01400-V	Quality Requirements-Software	7735.88	0.00	0.00	7735.88	0.00
01-01500-O	Temporary Facilities and Controls	235000.00	0.00	0.00	235000.00	0.00
01-01500-S	Temporary Facilities and Controls	35000.00	0.00	0.00	35000.00	0.00
01-01700-D	Execution Safety Requirements	150000.00	0.00	0.00	150000.00	0.00
01-01700-O	Execution-Insurance & Taxes	65000.00	0.00	0.00	65000.00	0.00
01-01740-O	Execution Requirements-Permits	100000.00	0.00	0.00	100000.00	0.00
01-01750-O	Execution Requirements-Legal Fees	100000.00	0.00	0.00	100000.00	0.00
02-02050-D	Basic Site Materials	121000.00	0.00	0.00	121000.00	0.00
02-02100-D	Site Remediation	150000.00	0.00	0.00	150000.00	0.00
02-02100-S	Excavation	75000.00	0.00	1000.00	76000.00	5000.00
02-02110-S	Site Remediation Supervision	26000.00	0.00	0.00	26000.00	0.00
02-02200-S	Site Preparation	48000.00	0.00	0.00	48000.00	0.00
02-02300-S	Earthwork & Landscaping	250000.00	0.00	1000.00	251000.00	5000.00

Change Management with PMWeb

Cost Worksheet

- Multi Project Reporting using Custom Tabs

Controls

Dashboard

Project Center

Portfolio View

Map View

W8 Project

Asset

Infographic

Google Map

Harvard Map

Subway Map

Work Orders


Stacking

Multi Project

1 of 2

100%

Find | Next



DR McNatty

software • professional services • training

Budget Multiple Projects Details Worksheet

	A	B	C	D=B+C	E	F=E/D	G=D-E	H=A-D	I	J	K=D+J	L=A-K
Project	Current Budget	Base Contract Amount	Approved Changes	Total Commitments	Approved Payments	% Paid	Unpaid Balance	Current Budget Variance	Pending Commitments	Forecast Commitments	Anticipated Cost	Project Budget Variance
ADMI	\$260,000.00	\$92,000.00	\$5,000.00	\$97,000.00	\$8,000.00	8.25%	\$89,000.00	\$163,000.00	\$10,000.00	\$0.00	\$97,000.00	\$163,000.00
02 - Soft Costs	\$120,000.00	\$92,000.00	\$5,000.00	\$97,000.00	\$8,000.00	8.25%	\$89,000.00	\$23,000.00	\$10,000.00	\$0.00	\$97,000.00	\$23,000.00
03 - Hard Costs	\$40,000.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%	\$0.00	\$40,000.00	\$0.00	\$0.00	\$0.00	\$40,000.00
04 - FF & E	\$40,000.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%	\$0.00	\$40,000.00	\$0.00	\$0.00	\$0.00	\$40,000.00
05 - Contingency	\$60,000.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%	\$0.00	\$60,000.00	\$0.00	\$0.00	\$0.00	\$60,000.00
Atlanta Bank Branch	\$1,450,010.00	\$123,000.00	\$12,000.00	\$135,000.00	\$22,500.00	16.67%	\$112,500.00	\$1,315,010.00	\$0.00	\$0.00	\$135,000.00	\$1,315,010.00
01 - LAND	\$930,000.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%	\$0.00	\$930,000.00	\$0.00	\$0.00	\$0.00	\$930,000.00
02 - BUILDING COSTS	\$200,000.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%	\$0.00	\$200,000.00	\$0.00	\$0.00	\$0.00	\$200,000.00
03 - ARCH & ENGINEERING	\$320,000.00	\$60,000.00	\$7,000.00	\$67,000.00	\$22,500.00	33.58%	\$44,500.00	\$253,000.00	\$0.00	\$0.00	\$67,000.00	\$253,000.00
04 - BANK EQUIPMENT	\$10.00	\$63,000.00	\$5,000.00	\$68,000.00	\$0.00	0.00%	\$68,000.00	-\$67,990.00	\$0.00	\$0.00	\$68,000.00	-\$67,990.00
Birmingham Bank	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
01 - LAND	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
02 - BUILDING COSTS	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
03 - ARCH & ENGINEERING	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
04 - BANK EQUIPMENT	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
05 - FURNITURE	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
06 - MERCHANDISING	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
07 - SIGNAGE	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Change Management with PMWeb

Summary

- Primavera Contract Management users easy transition (terminology)
- Alerts, Inbox, Email communication and Customized Dashboards
- Import/Export with Microsoft Excel very useful
- Customized Workflow – Visual Workflow
- Customizable Folder Structure
- Drag and Drop features throughout software
- Customize Forms/Reports with MS Word (no report writer)
- BI Reporting very powerful
- Document Manger with customized folder structure(separate login)
- User defined Cost Worksheets
- Great technical support

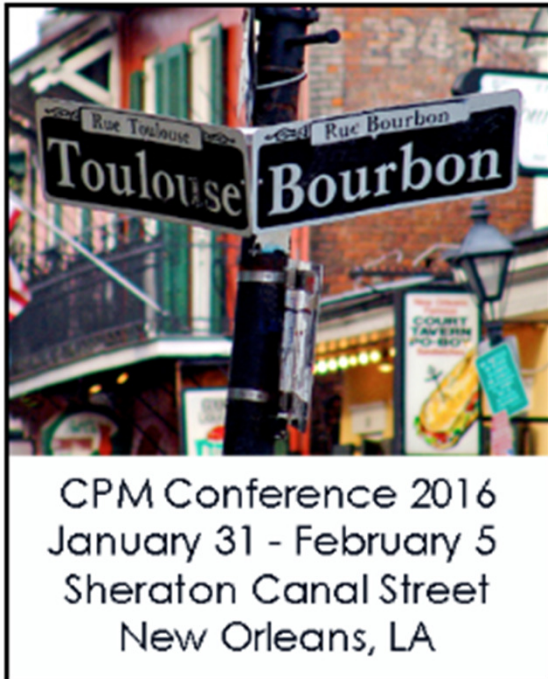
Questions & Comments

- 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 covered in this webinar.

Thank you for participating

Contact - contact@drmcnatty.com

Upcoming Events



*Save the Date*



AACE 3rd Annual Northeast
Total Cost Management Symposium
March 24 - March 25, 2016
DoubleTree Hotel Valley Forge, PA



Call for Abstracts
Seeking 45-Minute
Technical Presentations
Abstracts due December 31, 2015



Submit your abstracts to:
Jon McNatty-Symposium Committee Chair
jmcnatty@drmcnatty.com
Dan Beck- Symposium Committee Chair
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