CASE STUDY

Primavera Contract Management Closeout Programming Solution

DRMcNatty developed a solution to extract data from Primavera Contract Management to provide a PDF archive

Overview

A major utility client used Primavera Contract Management (PCM) for one of their multi-phase, multi-year transmission line projects. At the completion of the project, they needed to convert all the PCM information into portable PDF format to upload into their internal data archival system. This needed to include not only record information stored in PCM but also all attachments. The project had close to 200,000 individual records, each with potentially multiple file attachments.

Challenges

At the outset, the utility planned to have document control staff manually print out PCM data, retrieve file attachments and then assemble these into one PDF document for each record. All of these 200,000 plus records needed to be moved within a short two month timeframe. Manually prepared, it was estimated that this process would have required close to 8,000 manhours to accomplish, and they would have been unable to meet their required deadline for data transfer.

Solution

DRMcNatty was contracted to provide a programmed solution, which printed the default data from PCM to PDF, named the file by document number and title for easy reference, and appended linked attachments to this same PDF. These files were logically organized by the project phases and the types of records (RFI, Submittal, etc.) and delivered to the client for upload into their system. An exception list was provided where certain attachments could not be programmatically converted to PDF so that the client could process those manually, but this was a very small set of records.

Results

This solution resulted in meeting the deadline required from the client, which would have been nearly impossible if records were processed manually. In addition, the programmed solution eliminated the costs that would have been incurred in document control staff utilization, resulting in an overall lower cost to complete this task. With this complete, the client now has searchable PDF records of the project files that can be archived and the PCM program can be retired now that the project is complete.