58th Annual

WESTERN WINTER WORKSHOP

How to Prepare Organizations for a Unifier Implementation

Pam Powrie and Mahesh Gupta

Intro - Pam Powrie

For those of you who don't me……

Go Tigers!

Intro – Mahesh Gupta

- Love to be with Nature

Software

- Out of the box versus customizable

Product Comparison

Criteria	Evaluation Criteria	Product 1	Product 2	Product 3	Product 4	Product 5	Product 6	Product 7	Product 8	Product 9	Comments
Deploy	Self-hosted										Preferred to come in house at some point. Could start SAAS to initial implementation. Multi-tenant not preferred as too restrictive model for system integration
	SaaS-Single										
	SaaS-Multi										
Mobile	Browser										PMIS does not require mobile technologies yet. Eventually preferred as implementation expands in to other construction management process areas for inspection, quality assurance, and safety
	Offline										
	IOS App										
	Android										
Forms	Add New Forms										Flexibility in reporting is important and ability to create new forms and custom workflows as occasion arises or business process changes. Field level security and audit capability are equally important
	Custom Workflow										
	Field Level Security										
	Auditing										
Doc Mgmt	In Application Manager										Full document management search capabilities are preferred for engineering and construction project management. Must have ability for view/redline and full text search
	Metadata										
	View / Redline										
	Full Text Search										
Cost Mgmt	Cost Mgmt										Robust cost management and cash flow are required for Oracle accounting, timekeeping, budget, and commitment integration. Earned value capability is preferred.
	Flexible Worksheet										
	Cash Flow										
	Earned Value										
Sched Mgmt	Internal Scheduler										Full integration to Oracle Primavera P6 through multiple system modules for date tracking, cash flow management, and earned value integration is an absolute requirement.
	MS Project										
	P6 Integration										
Dashboards	Portfolio										Full robust functionality that is customizable for all dashboards at multiple agency levels is desired for portfolio, program, and project levels.
	Program										
	Project										
	Customizable										
License Model	Named User										Named user licenses is the industry standard. Web service licenses or lite licenses are a plus for casual users
	Concurrent										
	Project / Enterprise										
LoE	Implementation										Generally understood that more complicated cost management and workflow based systems require more time intensive system implementation costs
	Administration										
Risk	Sustainable vendor/ invests in product development										Publicly held firms are preferred to support decades long capital program. Lengthy asset life required for capital investment. R&D long term investment desired.

- Still deciding?
- What's important to you for comparison
- Benefits versus cost
- Sustainability of the product

Before you Open the Box

- Understand what you need
- Understand what you are getting
- Limitations of the technology
- Time it will take from opening the box to actual roll-out

Assessment

System

Organization

Integration/Migration

Assessment - System

Current system(s)?

Manual processes?

Functionality wanted?

Standard processes?

Assessment - Organization

- Organization structure - operational
- Roles and Responsibilities
- Company Culture
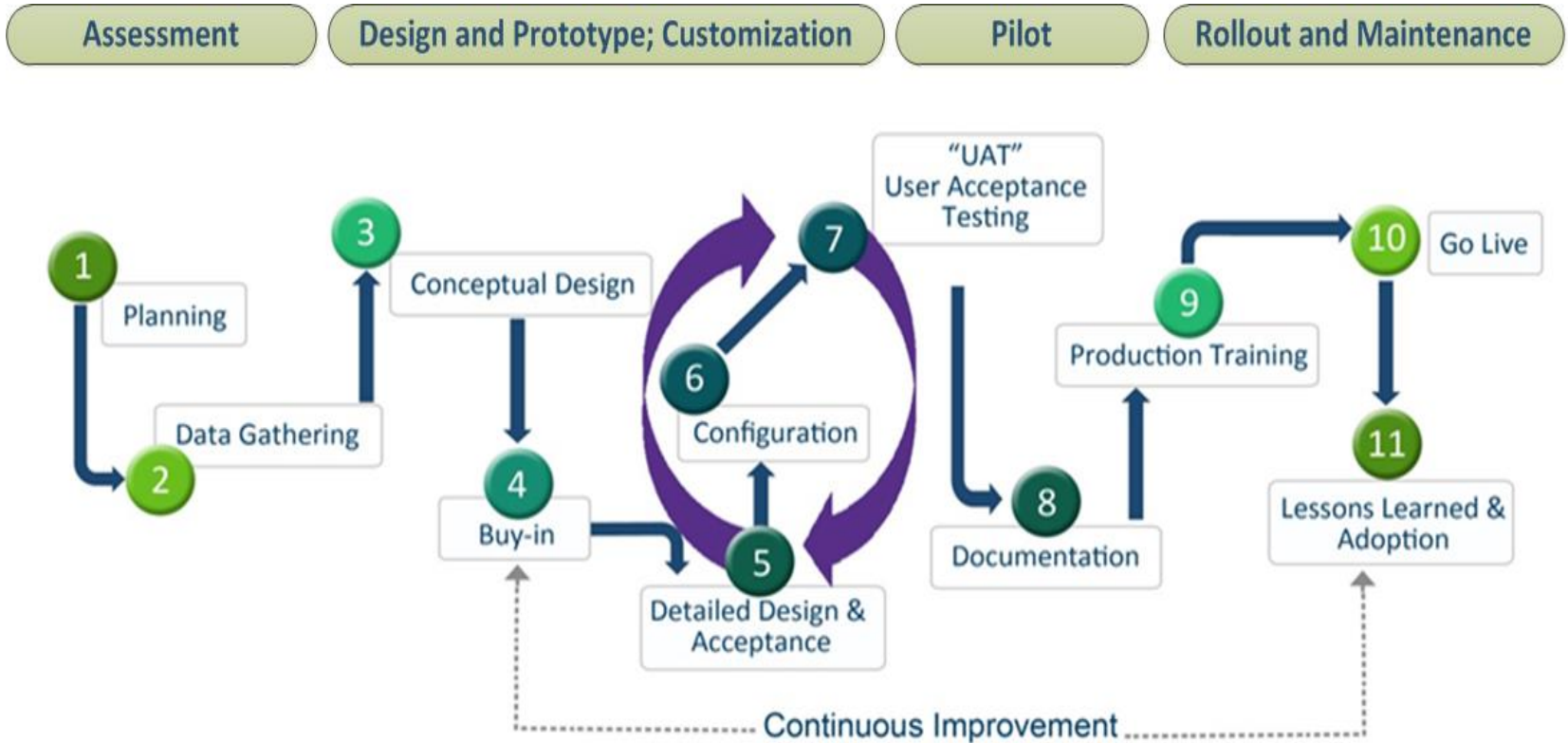- How hip are you to technology

Assessment – Integration/Migration

Legacy Data

Migrating or Keep Existing System

System Integrations

Implementation - Timeline

Acceptance

- Executive Endorsement
- Champions
- Outreach
- Dealing with Change

Implementation Methodology

- How soon the system is needed?

- Is there a possibility of phasing the implementation

- Are the requirements well defined?

Business Processes Defined

- Which processes are defined
- Are processes standard for **all** projects
- Workflow and flushing out inconsistencies
- How to prepare for potentially a different way of thinking
- Is change to your process possible?
- If haven't used a workflow system before, set expectation as this will be a big change

Implementation Process

- Assembling Team
- Design Document
- Unifier Environment Setup
- Designing/Configuring Unifier

Implementation Team

- Design Lead
- Configuration resource(s)
- Data Migration/Integration Engineer(s)

Design Document

	A	B	C	D
1	**BP General Tab**			
2	**ID**	uxccc		
3	**Name**	Vendors		
4	**Description**	Company vendor directory.		
5	**Type**	Line Item		
6	**Sub Type**	Generic		
7	**BP Level**	Company		
8	**Workflow**	No		
9	**Record**	Multiple		
10				
11	**BP General - Status Tab**			
12	**BP Statuses**			
13	**Name**	Default	Published	
14	Active		No	
15	Inactive		No	
16				
17	**BP Line Item Status**			
18	**Name**	Default	Published	
19	Closed		No	
20	Open		No	
21				
22	**BP General - Options Tab**			
23				
24	**Settings**			
25	**display_amount**			
26	**master_vendor**	Yes		
27	**Enable Map View Feature**			
28	**Enable for Mobile/Handheld**	Yes		
29	**Notify User**			
30	**Record Editor - Edit Form**			

BP Property / Upper Forms / Detail Forms / Query Items / Item Log / Workflows / Log / Reference Process / Integration / AutoCreation

	A	B	
1	**Upper Form - General Tab**		
2			
3	**ID**	form.0	
4	**Name**	AF 01-Initiate Request	
5	**Description**		
6	**Type**	Action Form	
7			
8	**Upper Form - Options Tab**		
9			
10	**Add attachments to record**	Yes	
11	**Remove attachments from record**	Yes	
12	**Allow Line adding Line item**	Yes	
13	**Allow line item attachment**	Yes	
14	**Allow Modifying Line Item**	Yes	
15	**removeitem**	Yes	
16	**Source for Record and Line item Attachments: Document Manager**	Yes	
17	**Source for Record and Line item Attachments: My Computer**	Yes	
18	**Allow linking uMail**	Yes	
19			
20	**Upper Form- Options Tab -Line Item Section**		
21			
22	**Office Addresses**		
23		**Add/Remove/Copy ine items**	Yes
24		**Allow attachments to line items**	Yes
25		**Allow Modification of line item**	Yes
26		**Remove line item**	Yes
27			
28	**Contacts**		
29			
30			

BP Property / **Upper Forms** / Detail Forms / Query Items / Item Log / Workflows / Log / Reference Process / Inte

Design Document

Blocks

Block Name	Label	Description	Columns	Rows	Show Label	Width(px)	Alignment	Notes	Hidden	Border
Vendor Details	Vendor Details		2	6	true		left		No	Yes
Vendor Address	Vendor Address		2	7	true		left		No	Yes
Electronic Bidding Information	Electronic Bidding Information		2	2	true		left		No	Yes
Certificate of Insurance	Certificate of Insurance		2	2	true		left		No	Yes
Businesss Classification	Businesss Classification		2	3	true		left		No	Yes
Remarks	Remarks		1	1	true		left		No	Yes
general	General		2	3	true		left		No	Yes
Hidden	Hidden		1	1	false		left		Yes	No
DM Publication	Hidden		1	3	true		left		Yes	Yes

Form Fields

Block Name	Element Label	Element name	Position(X)	Position(Y)	Editable/ReadOnly	Hidden	DD Name	DD Type	DD Input Type
Vendor Details									
	License No	uveLicenseNoTB16	1	1	Editable	No			
	Reference ID	uveReferenceIdTB16	1	2	Editable	No			
	Tax ID	uveTaxIDTB16	1	0	Editable	No			
	Vendor ID	uveVendorIDTB16	0	0	Editable(Required)	No			
	Vendor Name	uveVendorNameTB50	0	1	Editable(Required)	No			
	Vendor Type	uveVendorTypePD	0	2	Editable	No			
	Discipline	ugenDiscipline	0	3	Editable	No			
	Issuer's WebSite/URL	upermitIssuerURL	1	3	Editable	No			
	FIS Vendor Number	FIS_Vendor	0	4	Editable	No			
	FIS Vendor Name	FIS_VendorName	0	5	Editable	No			
Vendor Address									
	Address 1	ugenAddress1TXT120	1	0	Editable	No			
	Address 2	ugenAddress2TXT120	1	1	Editable	No			

Tabs: BP Property | Upper Forms | Detail Forms | Query Items | Item Log | Workflows | Log | Reference Process | Integration | AutoCreation
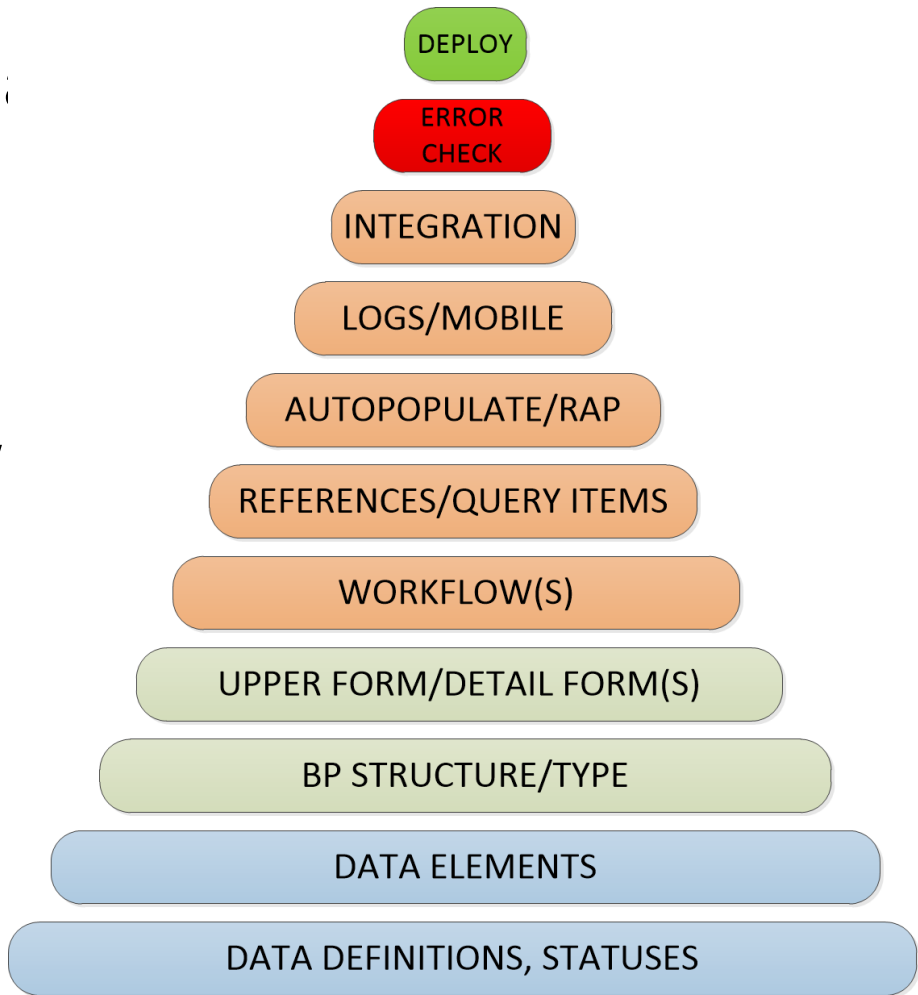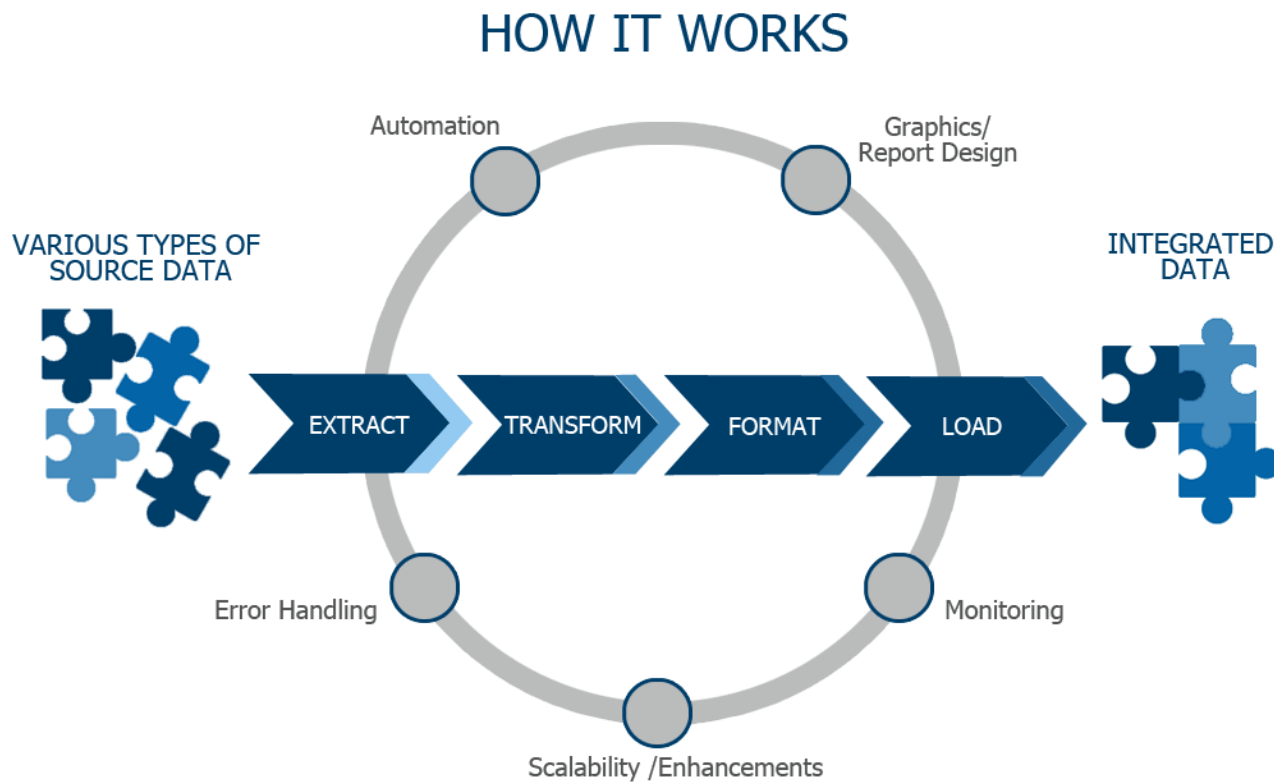
Unifier Environment Setup

- Dev
- Test
- Production

Designing/Configuring Unifier

- Net result of what they asking for
- How BP's would work together
- Complexity of workflow
- Configuration
- Reports

DEPLOY

ERROR CHECK

INTEGRATION

LOGS/MOBILE

AUTOPOPULATE/RAP

REFERENCES/QUERY ITEMS

WORKFLOW(S)

UPPER FORM/DETAIL FORM(S)

BP STRUCTURE/TYPE

DATA ELEMENTS

DATA DEFINITIONS, STATUSES

Data Migration and/or Integration

Dealing with Design Changes

- Keep to the plan

- Cooperation during design

- Committed decisions

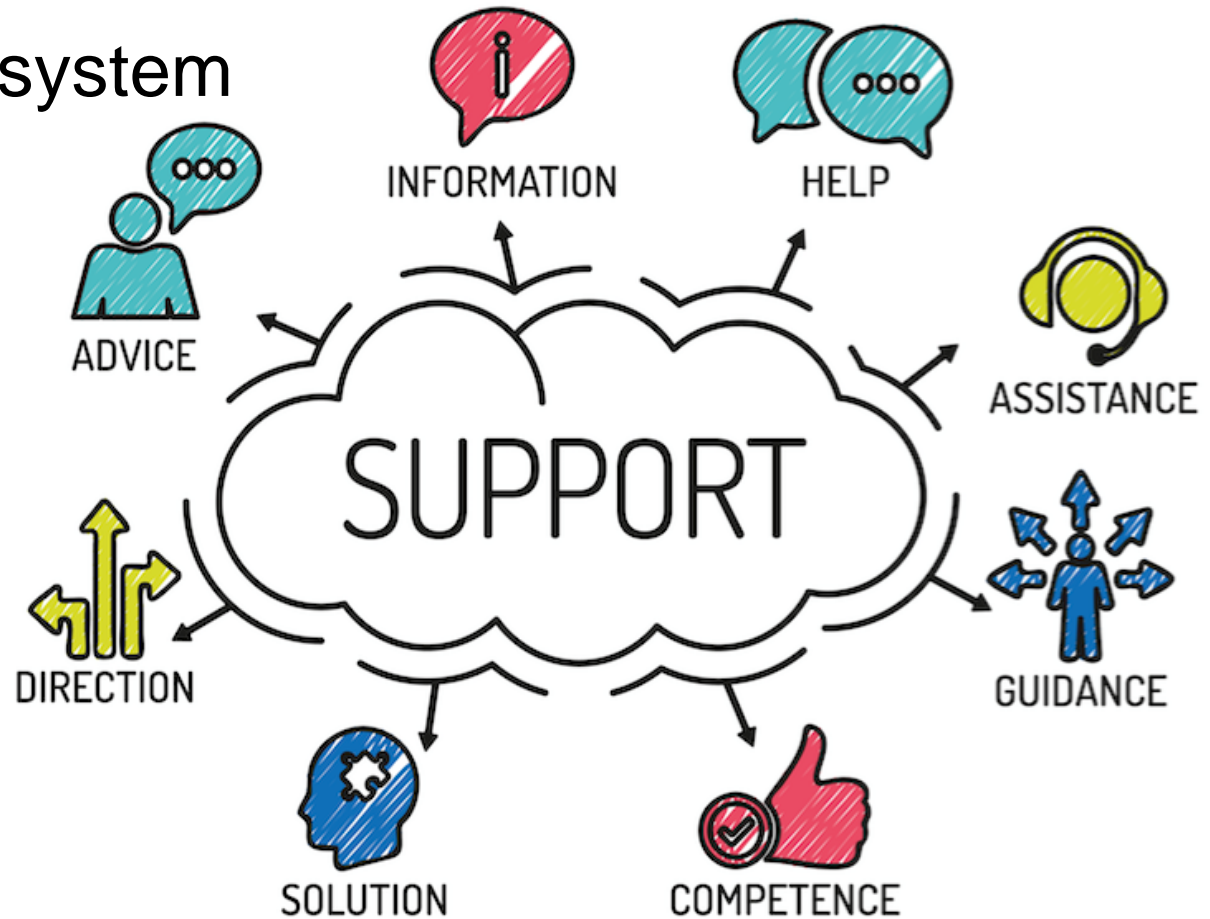- Design changes can impact Reporting/ Integration
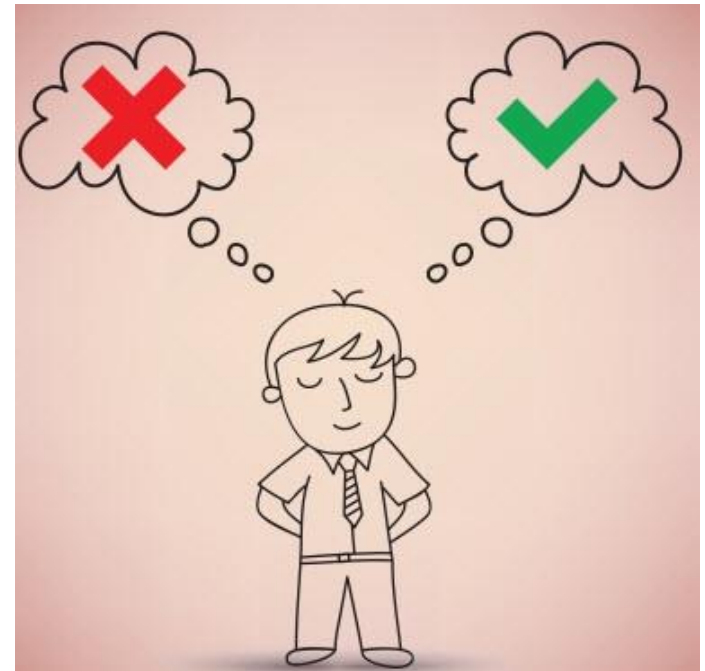
Transition to Pilot Testing

- Getting users involved in testing
- Start creating an action list
- Communication to all users of what's coming
- Start roll-out plan

Support

- Enhancement list
- Ticketing system

Questions

Contact Information

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Thank you.