CASE STUDY

Contract Management Interface

DRMcNatty made the seamless submission of contractor information into agency systems simple, with an interface that minimized data entry, reduced staff time spent on administration, and offered tailored access permissions appropriate to the project.

CLIENT

M **Metro**

PROJECT
CMI

LOCATION
Southern California

TOOLS
Contract Management
Sharepoint

SERVICES PROVIDED
Implementation
Custom Programming
Documentation
Training

DRMcNATTY

+1 877-367-7990
info@drmcnatty.com
26300 La Alameda, Ste. 250
Mission Viejo, CA 92691
www.drmcnatty.com

OVERVIEW

A major transportation agency used a suite of project controls software to manage their projects, and desired to have contractors submit documents into this system in a secure manner while expediting the processing of these documents. This included Request for Information, Submittals, Change Requests and other Correspondence.

CHALLENGES

The contract management software did not provide adequate security and control over the documents submitted, resulting in the contractor having access to information not normally shared. There also was resistance from the contractors because a submission tool requires some duplicate data entry (the contractor's system and the agency's.) There were contractual time limitations to the submission and response for these documents, and the tool selected needed to assist in maintaining or improving turn-around time. In addition, the agency was transitioning from one management software to another and needed these submissions to be entered in one of these two systems without any further instruction to the contractor. Lastly, the license cost of additional users (the contractor) needed to be considered.

SOLUTION

DRMcNatty & Associates worked closely with the agency to develop an application using Contract Management's web services to provide a simple to use interface with minimal data entry required. The interface provides an email confirmation of the submittal and start of the review period. The application also sends email notifications to the agency staff as a means of expediting the review process. This application eliminates most of the manual data entry required by the agency staff, keeps the contractor's input to a minimum and updates the agency system with the record and all the attachments. The web services application also included status reports that could be run at any time to see the status of the submittals. Contractor accounts used web-service licenses, which provided the necessary access controls/permissions, and also minimized the costs to the agency. The tool was designed to communicate with both primary systems, so that project documents were submitted to the correct system seamlessly.

CASE
STUDY

RESULTS

Use of this application reduced the staffing support burden from the agency and put a very minimum requirement on the contractor for their data entry requirements. In addition, software license costs were reduced by using web service licenses instead of full use licenses. Access and security of the data input into the agency's system was maintained, while providing the contractor with transparency to the status of the documents submitted. Because documents submitted through this tool could be processed immediately, turnaround time improved. This single tool provided a simple consistent interface for the contractor and provides a seamless transition as the agency migrates from the older management system to the new.