

CASE STUDY

Digitization of Inspector's Daily Reports

DRMcNatty designed and built a streamlined Inspector's Daily Report workflow, which enabled faster and more accurate validation of contractor payment requests while saving clerical staff time on data entry and achieving high user acceptance.

CLIENT



Transportation Agency

PROJECT

Unifier Implementation

LOCATION

USA

TOOLS

Oracle Primavera Unifier
Oracle Database
BI Publisher

SERVICES PROVIDED

Implementation
Training
Custom Programming
Documentation



OVERVIEW

This was a joint venture between DRMcNatty and another service partner. The client is a state agency responsible for the planning, designing, construction, and management of their transportation system. The client chose Primavera Unifier to support their new construction project initiatives, processes and document management. The Inspector's Daily Report (IDR) was selected as the first process to incorporate within Unifier. The IDR logs material installed or work (Pay Items) completed daily as recorded by field inspectors and is then used to validate contractor's pay items.

CHALLENGES

The existing paper-based IDR process made tracking and comparing the recorded Pay Item quantities against the contracted quantities time-consuming and difficult. The IDR review and approval process required diligent monitoring with many IDR's in various stages of review at any given time per project. Current reporting of these numbers were limited and their creation manually intensive.

The key challenge would be extracting accurate and agreeable requirements from the administrators, engineers and inspectors. The client was not familiar with using a digital solution, so translating the paper-based steps (and associated processes) into digital functionality would be challenging if not planned and approached correctly. User adoption is also critical if implementation was to be a success.

SOLUTION

A series of meetings were organized with project administrators, engineers and inspectors to identify what needed to be implemented in Unifier for the IDR process to function successfully. Through user-friendly design documents and walk-throughs of sample screenshots, we were able to further refine the requirements. This approach also allowed the client to gain more familiarity with the Unifier interface while ensuring all relevant data is captured. The Unifier workflow was designed to accommodate all types of projects and automate the review/approval process accordingly. Inspectors are able to use mobile devices in the field and input values there directly.

RESULTS

The business processes were developed and internal testing completed. Our designs were approved for migration to the Test environment where the User Acceptance Testing (UAT) phase would be completed on several different 'live' projects. The test team's feedback proved positive and migration to the production environment was approved. The solution provides time savings for clerical input, as well as improvements in the review and approval of inspectors' observations. Faster and more consistent results in validation of contractor payment requests were also realized.



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