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What's New in Primavera Unifier 16.1

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PROJECT MANAGEMENT SOLUTIONS THAT *SIMPLY WORK* SINCE 1989.

Elecosoft Asta | PMWeb | ORACLE PRIMAVERA | ARES PRISM | Deltek | ACUMEN

www.drmcnatty.com

Thank you for joining today's 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.

Our Products and Services

- Project Controls System Implementation
- Cloud Based, Global Managed Hosting Services
- Software Training Services
- Integration, Analytics, Dashboards, Risk and Role-based User Access Tools
- Program and Project System Support Services and Partnering
- Mentored and Supported SB/DVBE Project Staffing Resources

Tool Matrix

Business Process	ORACLE PRIMAVERA	Asta Powerproject	PMWeb	ARES PRISM	ACUMEN	ProjectStatus
Portfolio Management	P6, Unifier		Portfolios			View
Planning & Budgeting	**Unifier**	**Powerproject**	**Planning**	**G2**		**Collaborate**
Estimating		BidCon	Estimating	Estimating		
CPM Scheduling	**P6**	**Powerproject**	**Scheduling**		**Fuse**	**Status**
Cost Management & Reporting	P6, Unifier	Powerproject	Cost Mgmnt	G2	Fuse	Collaborate
Document Management	**Unifier**		**Doc. Mgmnt**			
Change Management	Unifier		Workflows	G2		
Engineering Forms	**Unifier**		**Eng. Forms**			
BIM/Schedule Integration		Asta BIM	BIM			
Risk Analysis	**P6 Risk**	**Asta Risk**			**Risk**	**Collaborate**
Risk Management & Mitigation	P6		Risk Register		Risk	Collaborate
Role Based Cloud Dashboard	**Dashboard**		**Dashboard**	**Dashboard**		**View**
Earned Value	P6		Cost Mgmnt	Earned Value		
Claims Support & Analysis	**P6**	**Powerproject**	**Doc. Mgmnt**		**Fuse**	
Facility Management/Work Orders	Unifier		Fac. Mgmnt			
Mobile online/offline support	**Mobile**	**Mobile**	**browser**			**browser**
Integration with Finance/ERP	Gateway		Integrator	Integrator		Gateway

- DRMcNatty supports these project controls tools as an authorized partner, trainer and implementer as well as providing trained and supported project staffing resources.

What's New in Primavera Unifier 16.1

With the release of Oracle Primavera Unifier 16.1 on March 31, we have deployed and are taking a closer look at this "Contract Management Cloud" configuration of Unifier that includes many new business processes and reports designed to provide Primavera Contract Management type functionality, out of the box!

This release of Primavera Unifier includes most of the "Contract Management Cloud Accelerator" content and much more! Templates provide for both an Owner and a Contractor perspective to streamline your initial deployment of Unifier.

With several implementations underway for long-time PCM clients, our technical team is providing an initial overview of Primavera Unifier 16.1 including a live demonstration of some of the new content.

"Contract Management Cloud"

Agenda

What's New in Primavera Unifier 16.1

- Oracle Primavera Unifier
- What's New in Unifier 16.1
- Expectations for "out of the box"
- Extras in Unifier 16.1 compared to PCM 14
- Live Software Demonstration
- Compelling Features in Unifier 16.1
- Unifier Implementation Steps
- Questions

Oracle Primavera Unifier

- “Skire Unifier”…, purchased by Oracle in 2012.
- Next step for Contract Management licenses.
- Cloud based Project Delivery & Asset Management.
- Full function document management.
- Cost management incl. funding, budgets, contracts.
- Linked change management business processes.
- Two-way integration with P6 through Gateway.
- Internal report writer as well as Oracle BI Publisher.
- Workflow driven with email interaction.

What's New in 16.1

- Unifier Mobile App for iOS with OFFLINE sync.
- Enhanced Business Processes and templates to match PCM type features.
- Improved Document Manager with "unlimited" file size and drag & drop uploads of files and folders.
- Java free for the most part – can be browser neutral.
- Enhanced integration with BIP for reports & forms.
- Enhanced P6 two-way integration using Gateway.
- Analytics **(not covered)**
- Facilities Management Enhancements **(not covered)**

What's New in 16.1

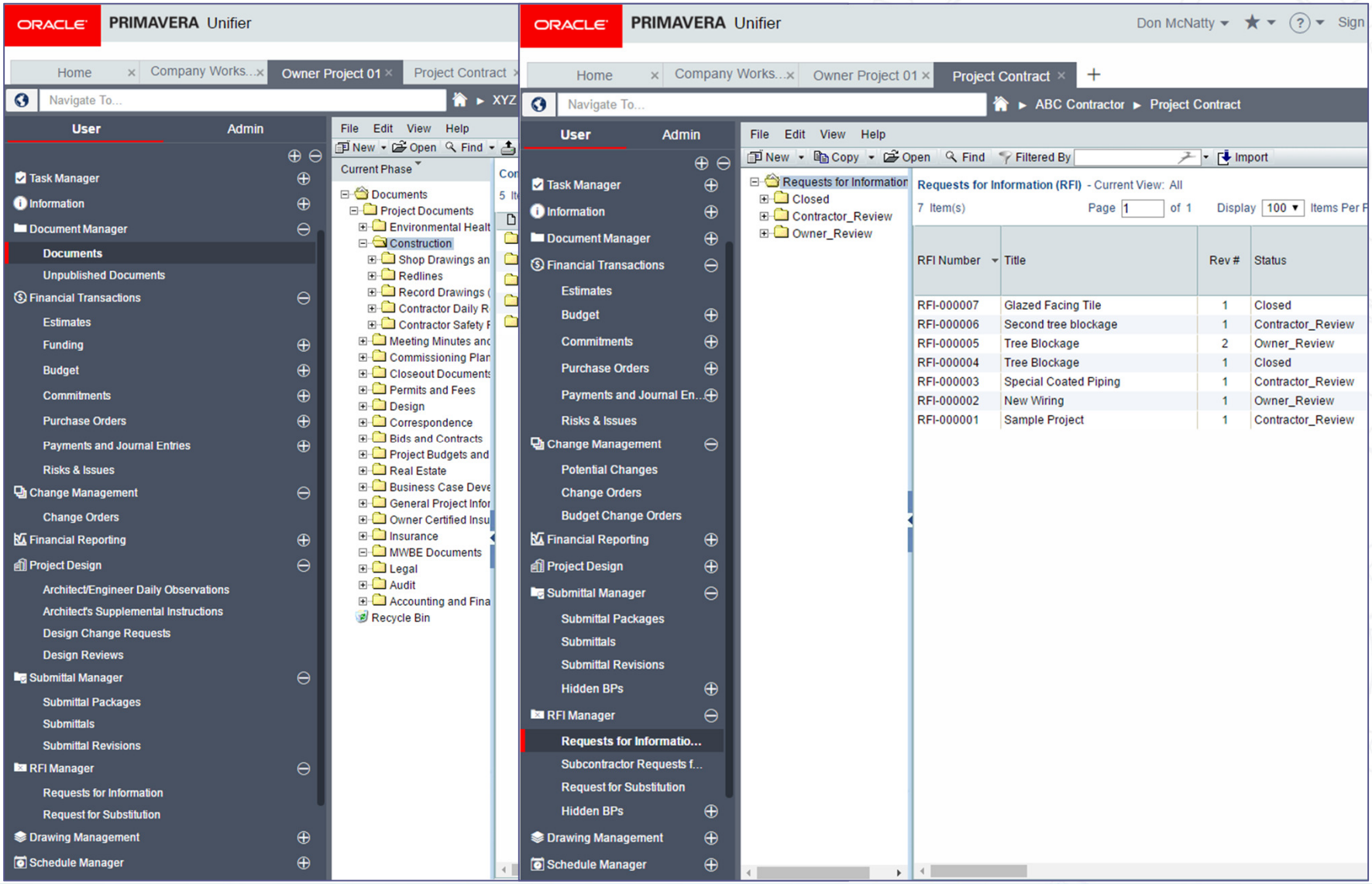
- Unifier Mobile App for iOS
  - English language only, no release date for Android.
  - Online/offline functionality (auto-syncs when connected).
  - Respond to assigned Tasks.
  - View business process logs in your projects.
  - Create new business process records.
    - RFI's, Daily Reports, Change Orders, more…
  - Business processes need to be enabled for Mobile App on the BP Configuration, General window.
  - Take photos and attach images to business processes.

Live demo of Mobile App

What's New in 16.1

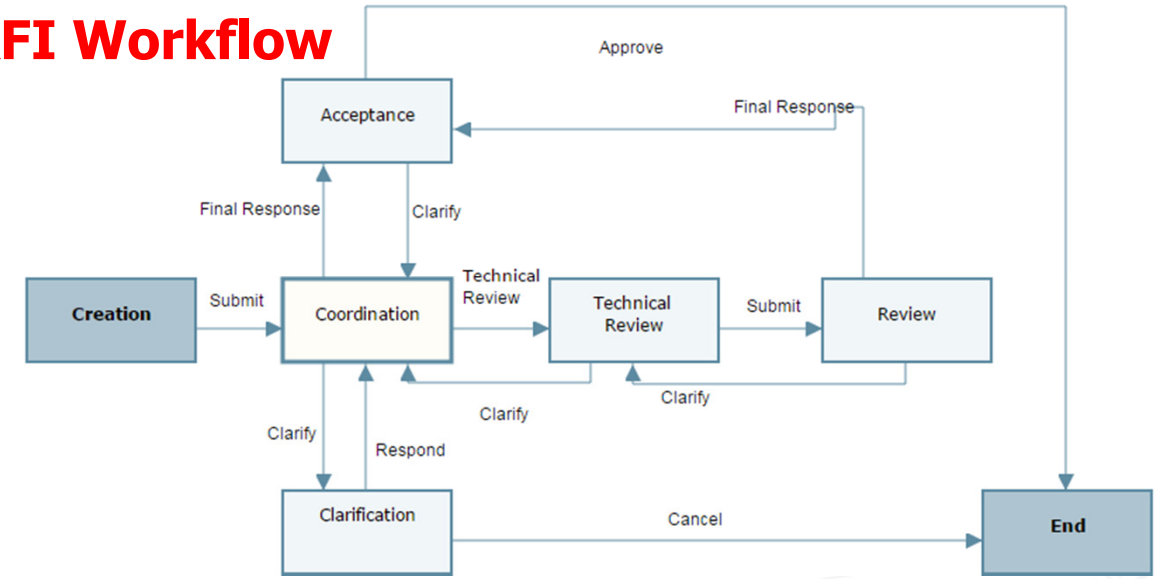
- PCM style Business Processes & Templates
  - Two preconfigured templates (Owner and Contractor).
  - Each template includes preconfigured business processes based on owner or contractor perspectives.
  - Contractors can collaborate with Owners on one side and Subs/Suppliers on the other.
  - Owners can collaborate with their team and insure security and traceability.
  - Enhancements to Summary Payment Applications
  - All business processes and forms can be modified.

What's New in 16.1

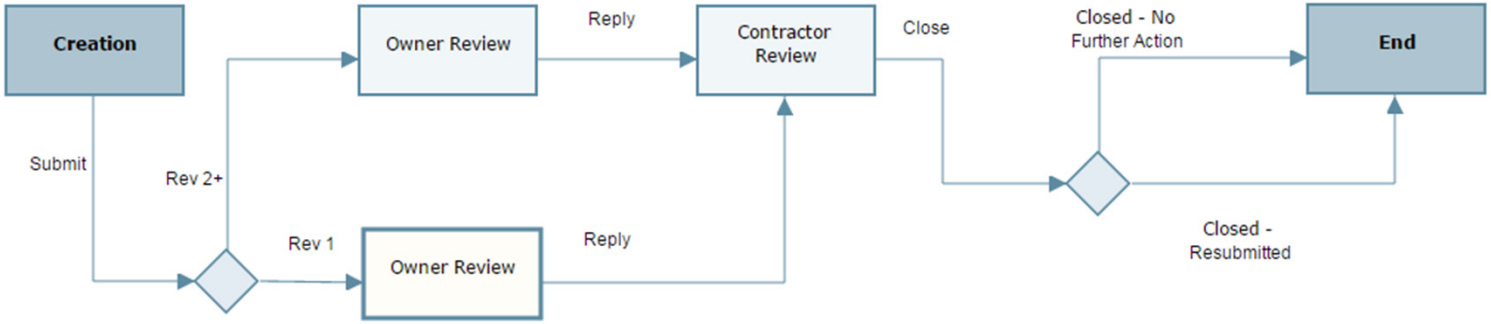


What's New in 16.1

Owner RFI Workflow



Contractor RFI Workflow



What's New in 16.1

- Improved Document Manager
  - File upload interface using HTML5 functionality.
  - Upload window now displays additional columns
    - File type icons and file size.
  - Unlimited file size (can be limited in Settings).
  - Drag & drop files (no Java required).
  - Drag & drop folders (in Chrome only).
  - Automatically creates zip files when multiple files downloaded.

What's New in 16.1

- Java Free – can be browser neutral
  - Interface consistent with other Primavera products.
  - Java applets used in intermediate and advanced file transfer have been removed.
  - Launches within the same browser window.
  - Supports multiple logins to separate tabs.
  - Multiple proxies so other people can act on your behalf.

  Hands on note:
  - Deploying with AutoVue does require Java for viewing.
  - Without AutoVue we've found viewing to be browser neutral.

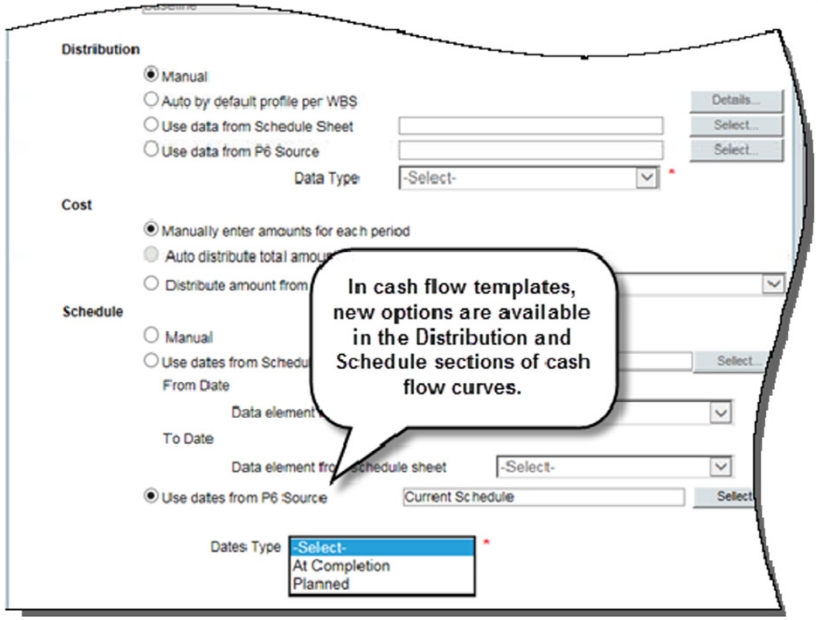
What's New in 16.1

- Enhanced integration with BI Publisher (BIP)
  - Version 10 added Oracle BIP for running reports.
  - Version 15.1 added custom print templates using BIP.
  - 16.1 provides much better integration to Oracle BIP.
  - Forms & reports created in BIP can be run by users from within Unifier 16.1.
  - BIP custom forms can attach to email notifications automatically as PDF's.

Live demo of Email Interaction

What's New in 16.1

- P6 Integration Enhancements
  - P6 Summary Sheets in Cash Flow Templates
    - The new feature provides additional options in the Distribution and Schedule sections of Baseline and Forecast curve definition windows to select a P6 source and its associated data (or date) types.



Expectations for "Out of the box"

- Can I do everything I now do with PCM?
- Does it improve on what I have now?
- Is it easy to implement?
- Is it easy to use?
- How does Oracle support moving from PCM?

PCM/Unifier Comparison Matrix

This 2 page spreadsheet matrix provided to all registrants as an attachment.

Primavera Contract Management 14 Compered to Unifier 16.1

Date 4/20/2016

		Primavera Contract Management 14.x						Primavera Unifier 16.1					
Process or Feature	Description	Incl?	W'Flow? (1)	Forms	Reports	Comments	Feature Name in Unifier	Incl?	W'Flow? (1)	Forms	Cust Print (2)	Reports	Comments
Project Information													
Schedule	View P6 schedule for the selected project	☑	☒	☑	☑	View Only	Schedule	☑	☑	☑		☑	Standalone or link to P6; Two Way Integration
Companies	List of all companies/contacts for this project	☑	☒	☑	☑		Vendors/Directory	☑	☑	☑		☑	Incl. Vendor Evals and Vendor Prequalifications
Issues	Issues are used to categorize (code) other records	☑	☒	☑	☑		Risks and Issues	☑	☑	☑		☑	
Communication													
Transmittals	Letters of Transmittals	☑	☒	☑	☑		Transmittals	☑	☑	☑	☑	☑	
Requests for Information	Requests (RFI, RFC, Clarifications...)	☑	☑	☑	☑	Approval Workflow Option (3)	Request for Information	☑	☑	☑	☑	☑	Multiple BP options
Request for Substitution	Request for Substitution	N/A	N/A	N/A	N/A	Could be included in RFI module	Request for Substitution	☑	☑	☑		☑	
Notices	Notices (oftem used to track liens & releases)	☑	☒	☑	☑		Several BP's	☑	☑	☑		☑	Design changes, etc
Non-compliance Notices	For sending contractors formal non-compliance notices	☑	☒	☑	☑		Several BP's	☑	☑	☑		☑	
Letters	Creates Word based free form letters with mail-merge	☑	☒	☑	☑		Use Document Manager for filing, logs for workflows	☒	☒	N/A		N/A	
Correspondence	Correspondence log can automatically import emails	☑	☒	☑	☑		Document Manager; Email Logs; Workflow Routing	☑	☑	☑		☑	Could be built; not part of base package
Received	Log of correspondence received (manual or import email)	☑	☒	☑	☑		Document Manager; Email Logs; Workflow Routing	☑	☑	☑		☑	Could be built; not part of base package
Sent	Outgoing documents sent from CM13 will post to this log	☑	☒	☑	☑		Document Manager; Email Logs; Workflow Routing	☑	☑	☑		☑	Could be built; not part of base package
Meeting Minutes	For recording Meetings including issuing agendas	☑	☒	☑	☑		Meeting Minutes	☑	☑	☑	☑	☑	
Notepads	User defined log for recording notes	☑	☒	☑	☑		Action Items	☒	☒	N/A		N/A	Could be built but not part of base package
Telephone Records	Telephone log	☑	☒	☑	☑		Could be created but rarely used in PCM.	☒	☒	N/A		N/A	Could be built but not part of base package
Safety Log	OSHA compliant Safety Log produces OSHA reports	☑	☒	☑	☑		Incident Reports	☑	☑	☑		☑	
Contract Information													
Cost Worksheet	Costs from other documents can post to this spreadsheet	☑	☒	☑	☑		Cost Sheet	☑	☑	☑		☑	
Estimates	Estimates	☒	☒	N/A	N/A	Not separate module in PCM	Estimates	☑	☑	☑		☑	
Funding	Provides comprehensive tracking for funding sources	☑	☒	☑	☑		Funding Sheet, Funding	☑	☑	☑		☑	
Cash Flow	Cash Flow analysis	☒	☒	☒	☒		Cash Flow	☑	☑	☑		☑	
Budgets	Provides budget tracking including multiple versions	☑	☒	☑	☑		Budgets, Budgets SOV	☑	☑	☑		☑	
Notice to Proceed	Notice to Proceed	☑	☒	☑	☑	Typically entered in Notices	Notice to Proceed	☑	☑	☑		☑	
Commitments	Two types of commitment forms are available	☑	☒	☑	☑		Not combined in one log	☒	☒	N/A		N/A	
Contracts	Usually used for contractor or vendor contracts	☑	☑	☑	☑	Approval Workflow Option (3)	Commitments	☑	☑	☑	☑	☑	
Purchase Orders	PO's can be used as PO's or as a different form of contract	☑	☑	☑	☑	Approval Workflow Option (3)	Purchase Orders	☑	☑	☑		☑	Also includes Blanket PO's
Work Releases	Work Releases	☑	☒	☑	☑	Typically entered in Notices	Work Releases	☑	☑	☑		☑	
General Spends	General Spends	☒	☒	N/A	N/A	Not separate module in PCM	General Spends	☑	☑	☑		☑	
Trends	Trends can be used to post values to the Cost Worksheet	☑	☒	☑	☑		Payments and Journal Entries	☑	☑	☑		☑	
Payment Requests	Pay Req's are tired to contracts and change orders	☑	☑	☑	☑	Approval Workflow Option (3)	Payments and Journal Entries	☑	☑	☑	☑	☑	
Change Management	Provides a formal method of managing the change process	☑	☑	☑	☑	PRESET Document Workflow (4)	Managed via Change Orders Module	☑	☑	☑		☑	
Change Proposals	or, all types of change proposals can be managed here	☑	☒	☑	☑		Potential Changes	☑	☑	☑		☑	
Change Orders	CO's can gather other CO's and proposals.	☑	☑	☑	☑	Approval Workflow Option (3)	Change Orders	☑	☑	☑	☑	☑	
Procurement	Intended for use by contractors to generate contracts	☑	☒	☑	☑		Estimates; Contracts BP's	☑	☑	☑		☑	Represented by use of multiple BP's

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Logs													
Drawings	Usually used for tracking all official project drawings	☑	☒	☑	☑		Drawings	☑	☑	☑		☑	
Sets	Drawings, issued in "Sets" record distributions and version	☑	☒	☑	☑		Drawing Sets	☑	☑	☑		☑	
Drawings	All drawing or document versions	☑	☒	☑	☑		Drawing Revisions	☑	☑	☑		☑	
Submittals	Use to track and manage contractor submittals	☑	☒	☑	☑		Submittals	☑	☑	☑		☑	
Packages	Detailed submittals can be grouped into "Packages"	☑	☒	☑	☑		Submittal Packages	☑	☑	☑		☑	
Submittals	Unlimited resubmittals and multiple reviewers	☑	☒	☑	☑		Submittal Revisions	☑	☑	☑		☑	
Materials	May be used to track owner furnished materials	☑	☒	☑	☑			☒	☒	N/A		N/A	Could be built but not part of base package
Daily Reports	Standard construction Daily Reports can tie to P6 activities	☑	☒	☑	☑		Daily Reports	☑	☑	☑	☑	☑	
Incident Reports	Document Incident Reports	☒	☒	N/A	N/A	Not separate module in PCM	Incident Reports	☑	☑	☑		☑	
Monthly Updates	Document Monthly Status Updates	☒	☒	N/A	N/A	Not separate module in PCM	Monthly Updates	☑	☑	☑		☑	
Insurance	Insurance Log, can provide alerts	☑	☒	☑	☑			☒	☒	N/A		N/A	Could be built but not part of base package
Punch Lists	Punch lists can be used for project closeouts	☑	☒	☑	☑		Punch Lists	☑	☑	☑		☑	
Lessons Learned	Document Lessons Learned	☒	☒	N/A	N/A	Not separate module in PCM	Lessons Learned	☑	☑	☑		☑	
Project CloseOut	Document Project Close Out	☒	☒	N/A	N/A	Not separate module in PCM	Project Close Out	☑	☑	☑		☑	
Warranties	Document Project Warranties	☒	☒	N/A	N/A	Not separate module in PCM	Warranties	☑	☑	☑		☑	
Project Design													
Architect Daily Observatio	Architect Daily Reports	☒	☒	N/A	N/A	Not separate module in PCM	Architect Daily Observations	☑	☑	☑		☑	
Arch. Supplemental Instru	Architect Supplemental Instructions	☒	☒	N/A	N/A	Not separate module in PCM	Arch. Supplemental Instructions (ASI)	☑	☑	☑		☑	
Design Change Requests	Design Change Requests	☒	☒	N/A	N/A	Not separate module in PCM	Design Change Requests	☑	☑	☑		☑	
Design Reviews	Design Reviews	☒	☒	N/A	N/A	Not separate module in PCM	Design Reviews	☑	☑	☑		☑	
Additional Features or Modules													
Templates	Owner or contractor perspective templates	☑	☒	N/A	N/A	Project Templates Only	Shell Templates	☑	☑				
Mobile App (iOS)	iOS Mobile App for all BP's; OFFLINE Data Entry	☒	☒	N/A	N/A		Unifier Mobile App	☑	☑				OFFLINE/Synch option
Complete workflows		☒	☒	N/A	N/A		Workflow design	☑	☑				
Action Items		☒	☒	N/A	N/A	Not separate module in PCM	Action Items	☑	☑			☑	
Master agreements		☒	☒	N/A	N/A			☑	☑			☑	"Blanket PO's"
Email interaction		☒	☒	N/A	N/A			☑	☑				
Document management		☒	☒	N/A	N/A		Document Manager	☑	☑				
Drag & drop		☒	☒	N/A	N/A			☑	☑				Options to allow drag and drop of entire folders/f
Configurable Folder Structure		☒	☒	N/A	N/A			☑	☑				By Template or by Project
Draft and Published		☒	☒	N/A	N/A			☑	☑				Draft Documents not accessed by other users
Version control		☑	☒	N/A	N/A	Limited Version Control Capability		☑	☑				
Check-in/check out		☒	☒	N/A	N/A			☑	☑				
Store in database		☒	☒	N/A	N/A			☑	☑				
SharePoint support		☑	☒	N/A	N/A			☑	☑				

Extras in Unifier 16.1

- Features not in Contract Management
  - Mobile App (iOS)
  - Complete workflows
  - Master Agreements
  - Document Management
  - Email interaction
  - Field level security

Live Software Demonstration

- Unifier 16.1 running from DRMcNatty data center in Irvine, CA.
- Jon McNatty accessing Unifier from Buffalo NY.
- Overview of 16.1 environment.
- Unifier 16.1 Owners Template perspective.
- Unifier 16.1 Contractors Template perspective.
- Compare to PCM 14.x

Compelling Features in Unifier 16.1

- Pre-built “perspective” templates.
- Pre-built Contract Management type Business Processes.
- Easily deploy for document management.
- Field application of Unifier Mobile with offline sync.
- Multi-level automated business processes.
- Expandability, for owners and contractors.

Expectations for "Out of the box"

- Can I do everything I now do with PCM? – **Close…**
  - Not all forms/reports there (or needed?).
- Does it improve on what I have now? – **Absolutely!**
- Is it easy to implement? – **Yes, if approached right.**
- Is it easy to use? – **It can be – requires more admin.**
- Does Oracle support moving data from PCM?
  - **While there is no direct "out of the box" link it does support export/import.**
  - **The data structures are different and require some manual data reconciliation before migration.**
  - **Consider a "BIP Viewer" approach to keep data in PCM.**

Unifier Implementation Steps

- Using Project Controls - Project Controls has been designed and configured for immediate use. These are steps you need to take to set 16.1 up:
  - Create projects using Project Templates.
  - Add users to the company.
  - Add users to company groups if they will participate in company-level activities.
  - Assign users to the projects.
  - Add users to project groups. Users assigned to groups inherit group permissions.
  - **KEEP IT SIMPLE** and grow into it.

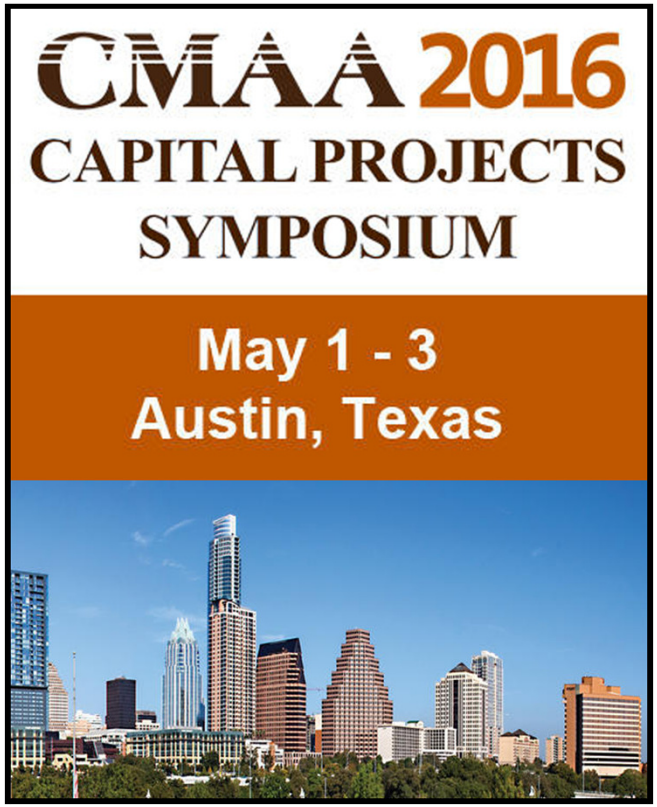
Questions & Comments

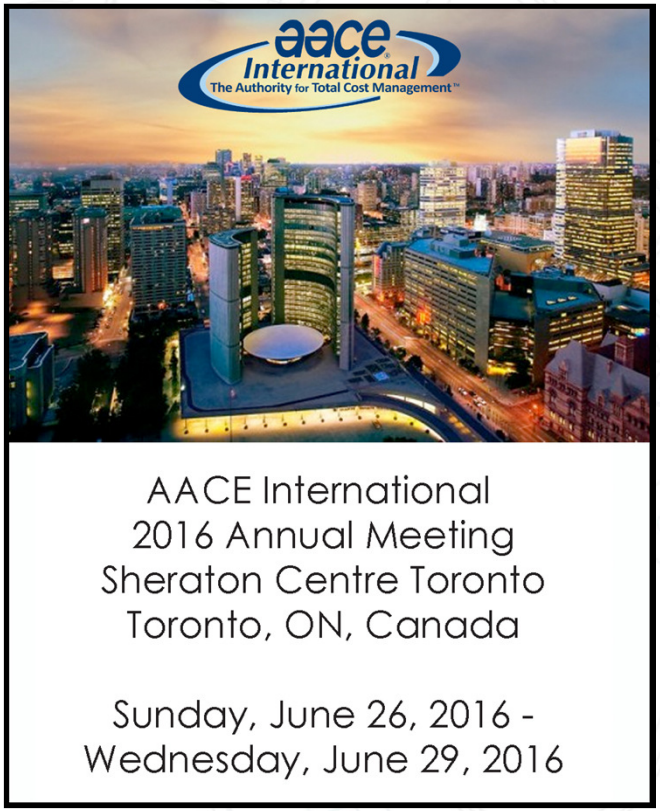
- All questions are gathered into a master sheet, answered and distributed to all registrants as well as posted on our website.
- Answers are based on our own experiences using the various software products covered in this webinar.

Thank you for participating

Contact - info@drmcnatty.com

Upcoming Events





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the loop

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