

Migrating PCM Data to Unifier

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Prepared by:

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#C16LV



Presenter: Felicia Ortiz

CEO and President, PM Solutions Consulting

With over 8 years of Primavera Unifier experience, Felicia brings a wealth of knowledge beginning as a “Super User” for Tishman Construction during the \$8B MGM City Center Development Project to working with many high profile clients such as Rockefeller Development Corporation, Michigan State University, Citizens Energy Group, Northwest Redwater Partnership, Capital Power, Integrys Energy Group and most recently Los Angeles Department of Water and Power. On this project her role was Unifier Expert Administrator and Developer.

Ms. Ortiz has used her extensive business background to start two project management consulting firms that specialized in the deployment of Primavera Unifier. She has worked in virtually every capacity of sales, marketing, consulting and training of Primavera Unifier.

Felicia holds a Masters of Business Administration degree from Keller Graduate School of Business and Bachelor of Business Administration degree in Accounting from New Mexico Highlands University.



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Company History

PM Solutions Consulting was founded in 2014 by Felicia Ortiz. The firm specializes in helping construction project managers implement processes, systems and controls to ensure visibility and accountability throughout the construction cycle.

Company Services

- Project Management
- Cost/Change Control
- Software Configuration (Unifier expert)
- Business Process Improvement
- Report Design/Development
- Training



AGENDA

- Overview of Project History
- Project Planning and Resources
- Conversion Steps
 1. Data Source Evaluation
 2. Mapping PCM Data to Unifier
 3. Design Unifier Workflows
 4. Configuration of Business Process Workflows
 5. Creating Projects in Stage Environment
 6. Testing and Go-Live
- Lessons Learned
- Questions & Answers



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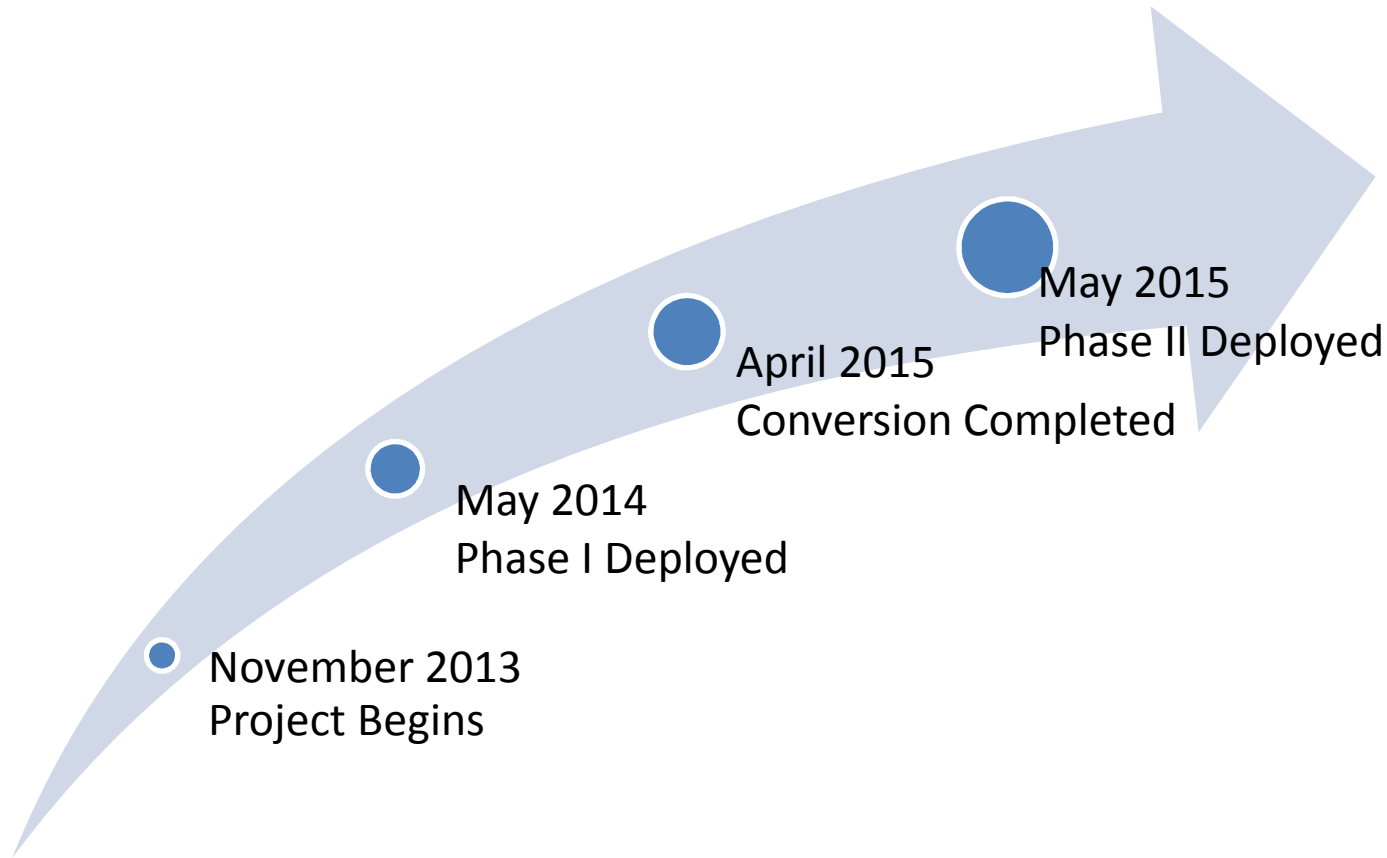
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Project History



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TOTAL ESTIMATED CONVERSION COST: \$400K (internal staff and external consultants)

Project Planning Considerations



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Number of Users Affected

Unifier Project Hierarchy

Timing

Volume of Data

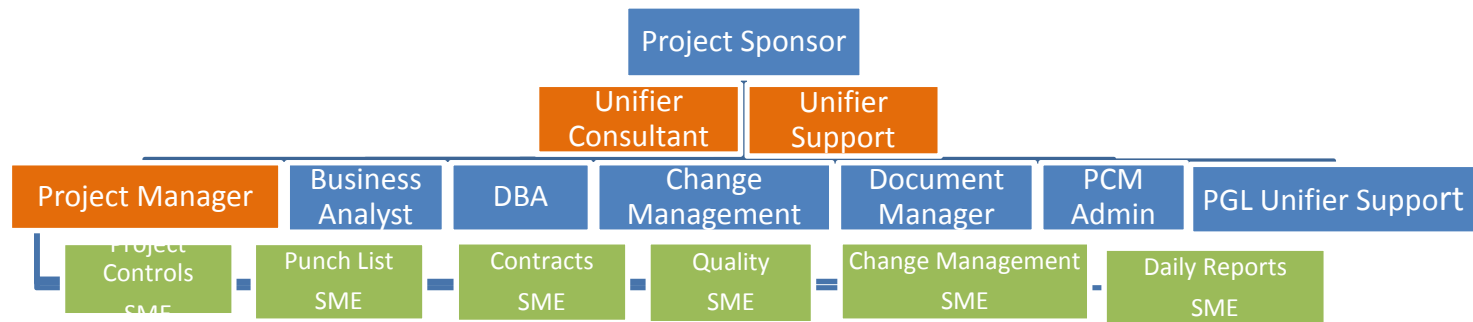
Project Mapping



Resources



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Source Data Evaluation



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PCM Data

Business Processes in Use

- RFI, Daily Reports, Meeting Minutes
- Field Orders, Punch List, NCRs
- Attachments

External Data (Excel)

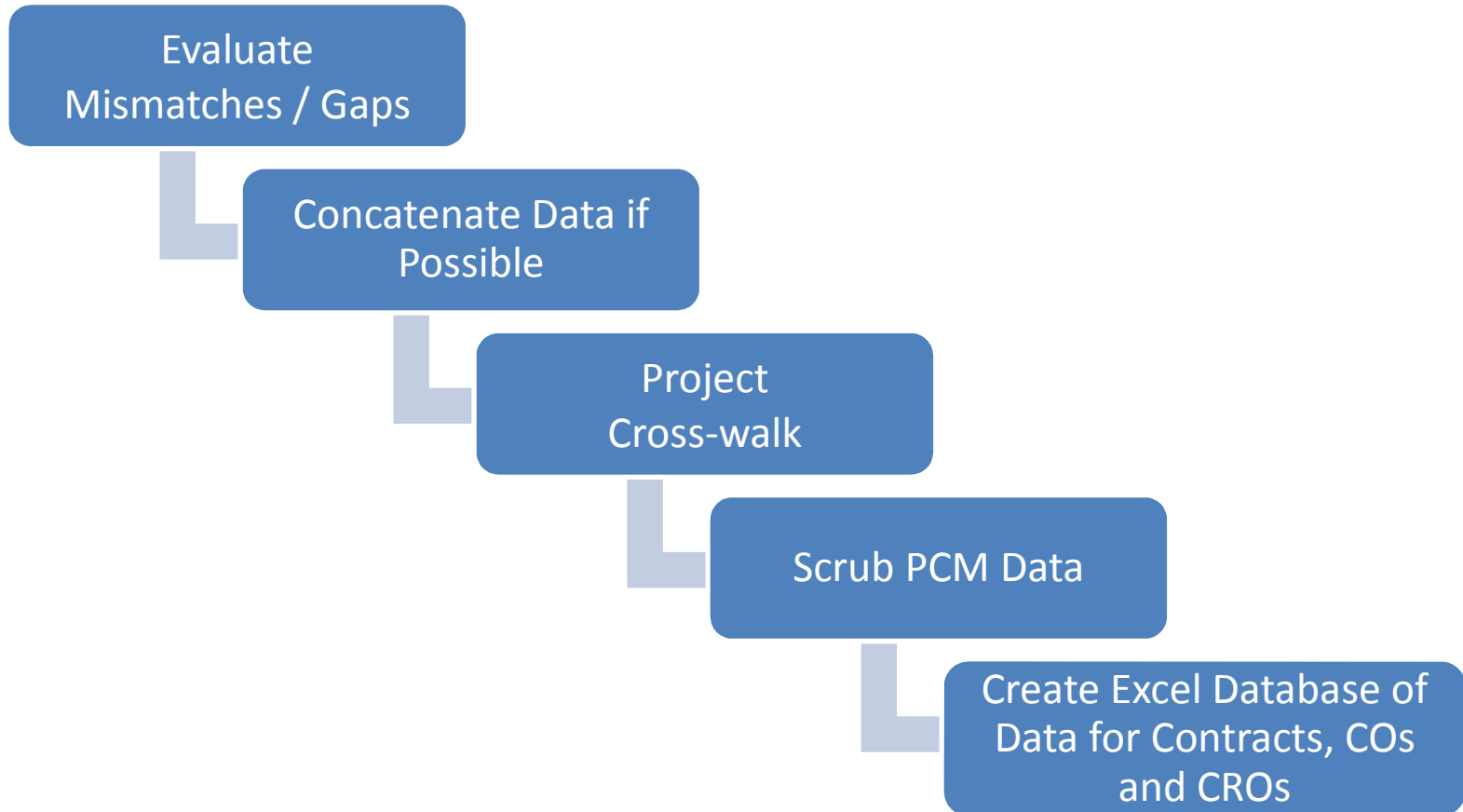
Business Processes in Use

- Contracts
- Change Orders
- Change Order Requests

Mapping PCM Data to Unifier



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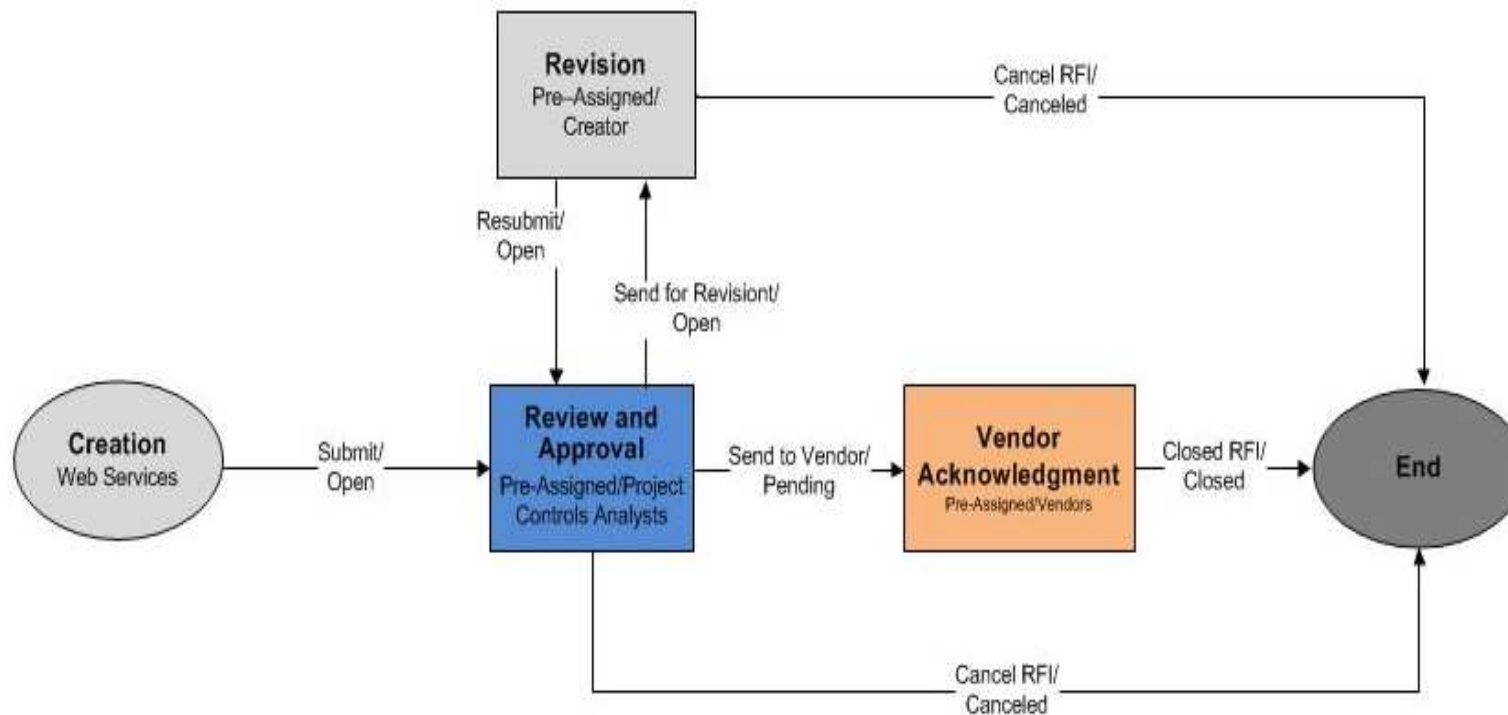


Design Unifier Workflows



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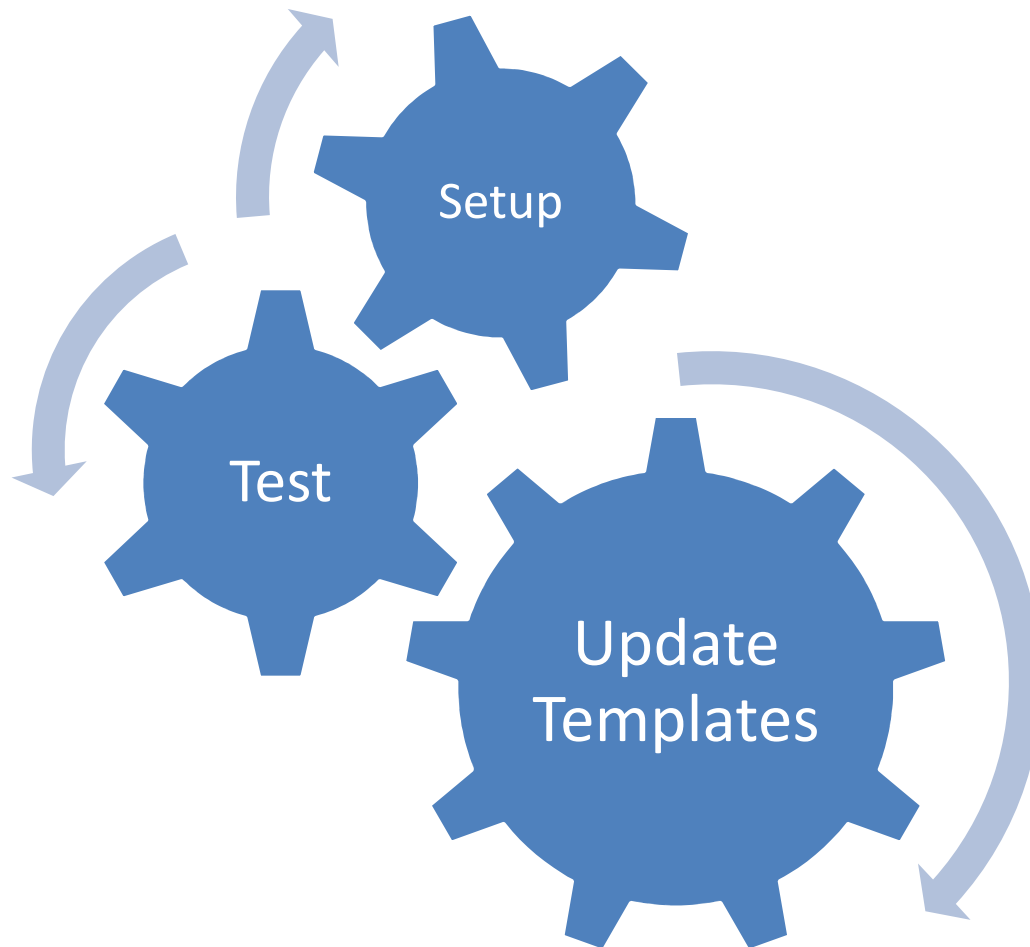
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Configuration of Business Process Workflows



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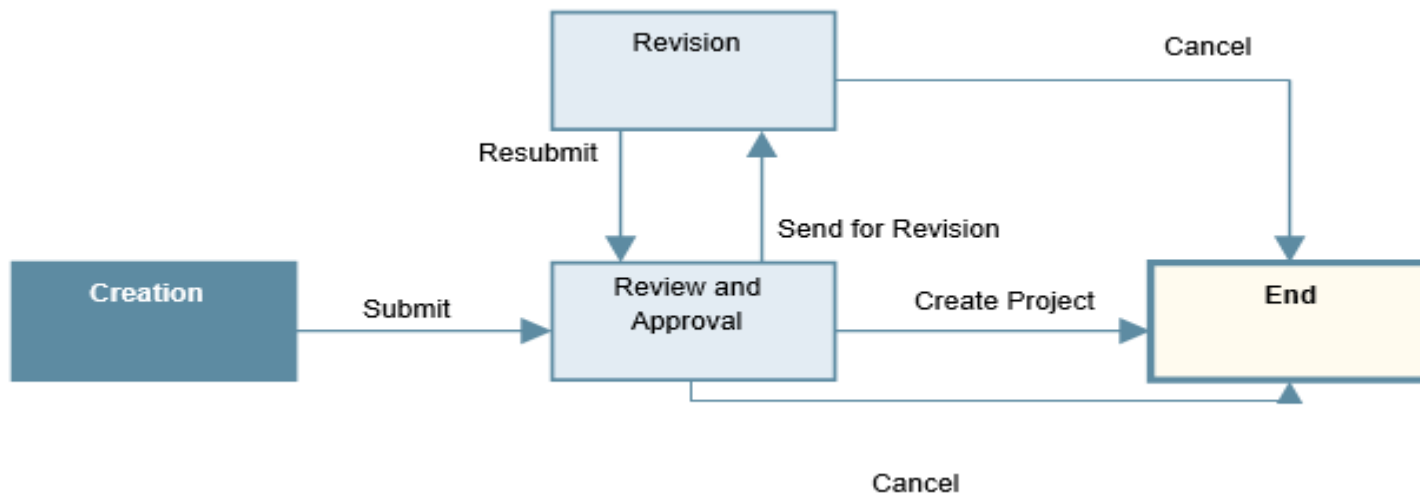


Creating Projects in Stage Environment

- Source of Data was Project Cross-walk
- Used CSV Import with the Project Creator BP
- Project Creator routes to Controls Manager for Review
- Upon Creation Project Cross-walk is updated with Unifier Record #
 - Web-Service Scripts reference the cross-walk to determine where records belong.



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Testing



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Test with Subset Data

- Cross-section of data (Open/Close Projects, Pending/Complete Records)
- Sequenced activities based on referenced information
 - Example: Project>Contract>RFI

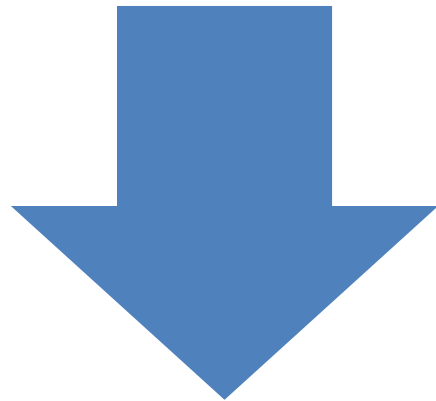
Test with all Data

- Full test in Stage (created all 114 projects)
- Migrated all data

Go-Live



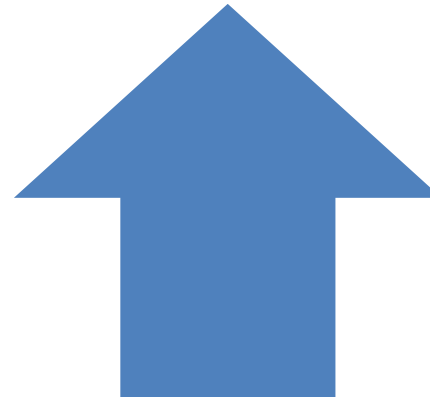
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Production Ready
Monday, May 18th



PCM and Unifier Shutdown
Friday, May 8th



Final Stats



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Migration Deliverables
108 Projects were migrated from PCM
536 Contracts were migrated from multiple data sources
312 new users were added for PGL
3,632 RFI's were migrated from PCM
21,586 Daily Reports were migrated from PCM
736 Meeting Minutes were migrated from PCM
215 Punch Lists migrated from PCM
105 Quality Items (NCR's) migrated from PCM
191 Field Orders were migrated from multiple data sources
2182 Change Orders were migrated from multiple data sources

Lessons Learned

- Validate all data and scrub if possible
 - Finding missing/incorrect data
- Complete full test scripts
 - Missed a key configuration that affected permissions
- Effective Communication ensured Users understood how the migration would affect their work
- Complete as many records as possible before go-live (less manual work after)
- Strong Project Management throughout was the key to success
- Change Management - Even though we were trying to do a straight migration, the accountability features and roles in Unifier changed some jobs and expectations.



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Questions & Answers



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Thank you for participating!!

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