Oracle Primavera Contract Manager (**PCM**) Premier Support for v14.x ceased in August 2016 and the product is now on Oracle's "Sustaining Support" indefinitely. Clients with existing PCM installations who do not wish to continue under this arrangement may wish to migrate existing data within PCM to an alternative system.

This document outlines our service to migrate PCM data into the PMWeb database.

Core Migration Service

McLachlan Lister provides a turnkey, one-time service for the migration of PCM data to PMWeb for PCM versions 13 and 14. We have the services broken out into two main components below with the associated cost:

Data Migration Modules	$ ex GST (AUD)
PCM Project Info → PMWeb Portfolio PCM Communication & Logs → PMWeb Templates & Forms	$30,000
Project Info → PMWeb Portfolio Contract Information → PMWeb Cost Management	$45,000

These core PCM data migration services include the creation of PMWeb records from the following PCM modules. Core migration only covers standard fields used per out-of-the-box PCM functionality. Custom fields or modified utilisation of these modules is outside the scope of our core service but can be accommodated as an additional custom service.

Projects, Communication & Logs

PCM Module/Feature	PMWeb Module	Comment
Projects	Projects	
Companies/Contacts	Companies	PCM duplicates companies/contacts across projects which is not allowed in PMWeb. Data migration will consolidate duplicates into single records shared across the multiple projects.
Drawing Log/Drawing Sets	Drawings Lists/Drawing Sets	
Submittals/Submittal Packages	Submittal Items/Submittal Sets	
Request for Information	Request for Information	
Transmittals	Transmittals	
Daily Reports	Daily Reports	
Defect Lists	Punch Lists	
Notices Letters Correspondence Sent/Received	Correspondence	
Meeting Minutes	Meeting Minutes	

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Budget/Cost Management

PCM Module/Feature	PMWeb Module	Comment
Projects	Projects	
Companies/Contacts	Companies	PCM duplicates companies/contacts across projects which is not allowed in PMWeb. Data migration will consolidate duplicates into single records shared across the multiple projects.
Cost Code Definitions	Cost Codes	If needed, our service involves working with an organization to establish a cost code structure that matches their organizational need/requirements in PMWeb prior to a migration. This allows the organization to leverage the flexibility with control/structure in PMWEB. We then develop a mapping of existing PCM cost codes as it may differ from the final code structure.
Budget Contracts	Budgets/Owner Contract	PMWeb distinguishes separately between budgets and owner contracts. Hill-PCI staff will work with the organization to determine the best location to migrate this information.
Commitment Contracts	Commitments	
Purchase Orders	Commitments	
Proposals > Estimates	Change Events	Consolidated into Change Events
Proposals > PCOs	Change Events	Consolidated into Change Events
Proposals > COR	Change Events	Consolidated into Change Events
Change Management	Change Events & Budget Requests	PMWeb provides a consolidated module for change management (Change Events). There is also a separate module utilized to manage budget changes. Where budget contracts are used to define a project budget, the PMWeb budget request module may be used.
Change Orders	Owner Change Orders & Commitment Change Orders	
Invoices	Progress Invoices	
Requisitions	Progress Invoices or Requisitions	Progress invoices process expenditures to commitments. Requisitions are used with owner contracts

Custom/Additional Services

It is common for an organisation to customise their use of PCM to meet business specific needs/requirements. While the core services listed above are limited only to out-of-the-box fields and utilisation of modules, we can provide a proposal to incorporate the following additional services:

Additional Modules
The following are additional items which are typically utilised in a customised manner for each organisation. As such, they are not included within our core service but can be added as custom migration elements after an evaluation of scope and utilisation.

- Trends
- Procurement
- Issues
- Materials
- Insurance
- Non-compliance
- Notepads
- Telephone Records
- Safety

Process/Workflow
While the workflow process capabilities in PCM are limited, various components are configured to customer specific requirements. Many customers go further and define custom fields to capture additional information regarding the review, processing and approval of records in PCM. In many cases, maintaining the ability to report from the PCM database is sufficient but in those cases where PCM process/workflow information needs to migrate to PMWeb, we can provide additional migration services tailored to organisational requirements.

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File Migration

PCM provides multiple options for the storage of digital files/attachments related to PCM records. We can provide file/document migration services to relocate these files within the document management module of PMWeb and where appropriate, restore linking to PMWeb records generated through the migration efforts.

Assumptions

- Our personnel will be provided access to the MS SQL / Oracle environment, PMWeb database environment, PCM13/14 application environment and all associated databases.

- Database server where PMWeb database is located will have both SQL Server Management Studio and SQL Server Integration Services installed/configured.

- If self-hosted, the PMWeb and PCM databases will be configured such that a SQL Server Integration Services instance can connect to both as needed during migration.

- For a SAAS PMWeb environment (hosted by PMWeb), the customer will be responsible for providing sufficient connectivity between networks and databases (e.g. via Site-To-Site VPN) for the duration of migration.