

Oracle | Primavera Contract Management

How Can the Contractor Participate in the Owner/CM's Environment?



When an owner or Construction Manager is deploying Oracle-Primavera Contract Management on a project, how can the contractor participate?

There are several ways that clients initially approach doing this.

- A.** The contractor can log into Contract Management and use it as their system for the project.
- B.** The contractor can submit electronic documents (produced from their own system) that the Construction Managers' staff manually logs into the owner/Construction Managers' Contract Management system.
- C.** The contractor can periodically provide an import file from their own version of Contract Management, similar to how P3/Suretrak/P6 schedule files are shared.

What are the pluses and minuses of these options?

First, let's start with what doesn't work. **Option C;**

Contract Management data files cannot be shared like schedule files are commonly shared.

Next we'll discuss the most common approach. **Option A;**

The Contractor uses same Contract Management system as owner. This can be problematic to execute, even when the requirements are clearly spelled out in the contract by the Owner or CM. Contractors and architects will resist using the owner (or CM's) system to manage the process of creating or reviewing documents. Most will keep this process internal and only enter the final "official document" in the owners system. Contractors and architects require full "read/write" access to the owners Contract Management environment in order to originate any document or attach any backup documentation. If a document (RFI, Submittal) is managed inside a contractors specific project in Contract Management (as opposed to being manually re-entered in the Construction Manager's project by the Owner), all review comments can be seen by the contractor, in addition to the official response. These two issues ("read/write" access and the contractor being able to see reviewer's comments) are often fatal flaws when deploying Contract Management as a project team database. While **Option A** is a common approach, our experience is this option does not work well.

Last, we look at **Option B;**

The contractor submits an electronic copy of their document. The Construction Manager's staff logs the document into their Contract Management database system, routing the document for review and recording each reviewer's comments. The advantage to this approach is, the contractor may continue to use whatever system they currently use (you'd be surprised how many do not have a standard system), to create RFI's, proposal, submittals (85% of all documents submitted) into a printed PDF electronic document (documents cannot be scanned to PDF - scans are not searchable). The printed document is emailed to the Construction Manager by the contractor. The contractor is never given access to the Owners Contract Management System. This prevents the contractor from seeing others comments, which is often an important issue for the owners team.

The downside to this approach is that someone on the owners or Construction Manager's staff has to manually log and attach the document into the Contract Management database.

So what's the best approach?

Option B is the best for the owner/Construction Manager except for the requirement of manually logging incoming documents into Contract Management. This is where web service technology and our MLM hosting solutions come in to enhance the solution.

About 6 years ago, we were approached by a client who was trying to implement **Option A**, but did not want the contractor to see all the comments. They liked **Option B** but they did not have support staff to manually log all incoming documents. To solve this problem, DRMcNatty designed a web interface for Contract Management that allows a contractor to "SUBMIT" their documents into the owner/Construction Managers' Contract Management database using a web portal page.

Webservice technology makes it possible to build a web page that uses the Contract Management API and observes Contract Management security to allow the contractor to submit a document without having to actually log into Contract Management. .

This utility, which we deploy through our MLM project services hosting environment, is available for both MLM and self hosted clients on a monthly subscription basis. The utility, "Contract Management Interface (CMI)" is configurable for custom fields, uses Contract Management security (expadmin) and can be customized as needed. Several clients have added organization specific inspection reporting to CMI.

Using the CMI solution, the contractor continues to use their document system (Prolog, Word, Excel...), to create their RFI, Proposal or Submittal cover letter, and logs the document into the Contract Management database through the web interface. This approach will use fewer licenses than **Option A**, (often, each contractor designates a Contract Management administrator who "submits" documents using the CMI) The contractor is required to own one license of Contract Management for each person accessing CMI. In the Oracle environment, the owner/Construction Manager is not required to provide a Contract Management license for the contractor. The contractor can provide their own Contract Management license to access the owners Contract Management database and use the CMI. This requirement would need to be written into the contract.

Contact [Arthur Napurano](#) for more information on CMI and how this utility can make your Contract Management 12/13 deployment more efficient, save on data entry costs and reduce license costs.