



# PDM 3.0 PRO/ENT Matrix

---

Functionality, Value Propositions & Licenses

McGraw Hill Construction

6/12/2009



This document provides a detailed listing of PDM 3.0 functionality. For each functional area a description, customer value proposition and associated required license is provided.

<b>Project Management</b>			Admin	Collaboration	Plan Room
<b>Function</b>	<b>Description</b>	<b>Value</b>	<b>License</b>		
Project Templates	Create projects based on predefine project templates	Quickly create projects	X		
Project Security	Projects can be secured to individuals or defined roles	Assures only the right people have access to a project	X		
Project Attributes	Projects can have standard and custom attributes capabilities	Assure projects are properly classified	X		
Project Location	Projects can be stored on the local PDM system or the Global Plan Room	Flexibility to manage projects stored in different areas	X		
Project Visibility	Project can be made visible on the main window or hidden	Allows the customer to decide which projects appear on their main screen	X	X	
Folder Creation	Each Project can have an unlimited number of folders and each folder can have a unlimited number of subfolders. Each of these of the folders can be configured to define its default behavior and status.	Complete flexibility with each project organizational structure.	X	X	

<b>Contact Management</b>			Admin	Collaboration	Plan Room
<b>Function</b>	<b>Description</b>	<b>Value</b>	<b>License</b>		
Contact Import	Contacts can be imported via Excel, flat files, scanned business cards, syncing with MHC Network or free form entry	Variety of different options for initially loading or updating contact database	X		
Public / Active Profiles	Public contact data is synchronized with the MHC Network but the customer can also maintain their own specific contact data	Assures the customer always has the most current public contact data maintained on the MHC Network but gives them the flexibility to maintain customer contact data they have obtained	X		
Static Contact List	Distribution list based on a set of defined contacts associated with the list	The contacts in the list will not change unless the user specifically adds new contacts or removes existing contacts	X		
Smart Contact List	Dynamic distribution list automatically populated based on a set of defined rules	When contacts are added or updated in the system they are automatically assigned to the relevant Smart List.	X		
Contact Search	Contacts can be searched by contact attributes using key grouping or search screens	Contacts can be quickly and easily located	X		
Contact Display	The attributes used in the display grid are defined by the user. Additionally, the user can select which of these attributes they want to sort on and in what order	The most relevant information is displayed on the main contact screen.	X		
Contact Creation and Updates	Contacts can be created including names, address, construction codes, service areas, custom attributes, job duties, organization / location, organizational information, preferences, notes,	Rich set of standard and industry information is associated with the contact	X		

	project / folder access, assigned contact lists and private profile information				
Contact Notifications	E-mail and Faxes can be sent to contacts containing key updates and information	Built in notifications and e-mailing allows for quick and trackable communications	X		
Print Shop Order	Initiate a print shop order to a selected contact(s)	Quick and easy tool for quickly submitting print jobs	X		
Contact Reports	Distribution list and contact based	Available PDF reports for displaying formatted contact lists, list of projects the contact was assigned and bid history.	X		
Organization and Location Management	Creation and management of organization and location details including name, address, key contacts, notes, classifications and other construction data	Each contact can be assigned to a location. Each organization can have unlimited locations. Each system can have unlimited organizations.	X		

<b>Prequalifications and Evaluations</b>			Admin	Collaboration	Plan Room
Function	Description	Value	License		
<b>Prequalification</b>					
Prequalification Capture	PDM comes standard with a full interactive prequalification solution where subs can use a web based tool for securely entering their prequal data. Solution captures general data, company resources, financial information, risk data, references, safety history / programs and attachments.	Significantly reduces the time and increases the accuracy of capturing customer prequalification data	X		X
Prequalification Approval	Customer can review all changes since last approval, review all previous approved prequalification, set a rating, set an expiration date and lock the record from future updates. Customer can review all historical record of previously submitted prequalification's	Consistent method for reviewing prequalification data that can be used to quickly identify responsible contractors	X		
Prequalification Smart List	Smart lists can be used to manage the prequalification process. Example smart list include prequalification expiring in the next 30 days, expired prequalification's, prequalification's pending approval and currently locked prequalifications.	Easy to use method for identify contacts who require attention.	X		
<b>Evaluations</b>					
Evaluations Creation	Evaluations are used to subjectively grade a contractor on the work they performed for a specific project. One or more evaluation questionnaires can be created with multiple sections and multiple questions per section	Provides flexibility around the creating questionnaires specific to different groups	X		
Evaluation Assignment	Evaluations, for a specific contact, can be assigned to a specific person based on a specific project	Provides a consistent and efficient method for assigning	X		

	at a set milestone.	evaluations			
Evaluation Response	Assigned contractor provides a grade form 1-10 for each of the questions on the questionnaire.	Easy to use electronic form reduces errors and increases turnaround time.	X	X	
Evaluation Review	Individual and overall average evaluation scores can be reviewed for each contact	Helps assure the correct contractors are selected for future jobs.	X		

## Bid Management

Bid Management			Admin	Collaboration	Plan Room
Function	Description	Value	License		
Bid Package Creation	Creation of bid packages including associated plans / specs / addendum, scope of work, invitees, bid location, pre-bid meeting information, basic schedule and attachments. Distributes an e-mail and/or fax to all invitees with ITB notification.	Interoperates with Contact Management to simplify invitee selection. Interoperates with document management to simplify document selection. Easy to use workflow assures quick and easy bid package creation.	X		
Bid Package Distribution and Review	Bid Packages are posted to a secure web site where invitees can review, print and download bid package material. They can also respond with bid status and overall or individual scope of work quotes	Web based tool provides a secure and easy to use tool for bid response. Result is more and faster bid responses.			X
Bid Package Management	Tools for reviewing the bid package include detailed plan holders views, bid coverage reports, bid call reports, scope of work spreadsheets and interactive invitee screens for manually updating status / comments and reviewing results.	Assures the appropriate contractors were invited and the necessary responses are being received.	X		

<b>Construction Document Management</b>			<b>Admin</b>	<b>Collaboration</b>	<b>Plan Room</b>
<b>Function</b>	<b>Description</b>	<b>Value</b>	<b>License</b>		
Document Import	Documents can be imported via drag and drop or synchronization with the MHC Network.	Multiple methods for capturing documents. Reduces capture time and costs.	X	X	
Document Types	PDM allows for the creation of multiple document types. Each document type can have a unique set of associated attributes, duplicate check key and parsing rule.	Multiple document type functionality assures documents are archived with the relevant data making them easier to find and categorize in the future.	X		
Document Custom Attributes	PDM allows for the creation of custom attributes which can be assigned to a document type. These attributes can be text, number, date or pick form a list.	Custom attributes assure the customer is capturing the data they want to capture.	X		
Document Parsing	Based on the assigned Document Type, PDM will parse the file name and automatically assign attribute values based on information extracted from the file name	Significant time savings and error reduction in the document capture process	X	X	
Document Naming	Based on a defined formula, documents can be auto named using any of the attributes entered. Delimiters can be set to break the name into a logical convention	Ease of access and use for end users. Flexibility of naming provides instant document recognition	X	X	
Smart Document Folders	PDM allows the creation of a dynamic document folder that is automatically populated based on a set of defined rules. These rules can include a specific value of an attribute (where discipline is mechanical) or property (where current version is true)	Smart Document Folders save large amounts of time by organizing documents into a common location for quick review. For instance, a dynamic folders based on currently checked out documents will display every checked out document in one	X	X	

		location.			
Document Audit Trails	Complete history of all document events is maintained in the system.	User can determine exactly who did what and when for every document in the system	X	X	
Document Collaboration	Within a protected environment, documents can be checked out and modified in a protect environment. Additionally, other related documents like Sketches / Markups can be linked.	Assure that while the document is under change no one else is modifying the same document resulting in confusion and errors	X	X	
Document Revisioning	PDM provides automatic document revisioning. When a document is imported into the system, if the system identifies the document as an update to an existing document the revision will be automatically incremented. If problems are encountered PDM provides document revision management.	Eliminates errors resulting from manual revisioning	X	X	
Document Viewing	Documents can be viewed using customers associated viewer	Easy viewing helps to identify documents and attributes	X	X	X
Document Extracting	Documents can be extracted directly from PDM	Extracting helps support customers external workflows	X	X	X
Document Hard Copy Ordering	Documents can submitted for hard copy reproduction from system defined ReproMAX reprographers	Provides optimized tools for printing large quantities of documents accurately and promptly	X	X	X
Document Takeoff	PDM is integrated with OnCenter OnScreen Takeoff tool. Initiating the take off capability in PDM automatically launches OnScreen TakeOff and loads the project documents into OnScreen	Elimates the requirement to manually load project documents into OnScreen TakeOff.	X	X	X
Submittals	PDM provides a predefined workflow process for capturing and managing submittals groups and items.	Predefined workflow significantly reduces submittal processing time and reduces errors	X	X	
Issues	PDM provides a predefined workflow process for capturing and managing issue groups and items. The issue workflow assures the issue approval process in	Predefined workflow significantly reduces issue processing time and reduces errors	X	X	

	completed in a protected environment and only when the issue has been released is made available to external use.				
Document Subscriptions	Users can subscribe to be updated for changes to a project or folder. Whenever a document is created or a new version is added, an e-mail is sent informing the user. The user has the option of being notified immediately or have all their updates grouped into a periodic (daily, weekly, etc) digest. The user also has the option of requesting a folder be automatically created with a list of the changed documents based on a period of time. For instance, a new folder could be created every day which include any document changed on that day.	Subscriptions provide a proactive response to a document change assuring the user they know as quickly as possible a document has been added or updated.	X	X	
Closeout	User can create a closeout for a specific project. The closeout is a self contained application residing on any distributable media (CD, DVD, USB, Etc.). The closeout contains any or all of the projects documents and the tools necessary to search the documents by folder structure, attributes or (if configured) the text in the document.	Manual close out process is extremely labor intensive, time consuming and costly. This electronic method saves money in the time required to create and cost to distribute. It is also much easier for the end user to find the information they require.	X		

<b>Plan Room / Portal Access</b>			<b>Admin</b>	<b>Collaboration</b>	<b>Plan Room</b>
<b>Function</b>	<b>Description</b>	<b>Value</b>	<b>License</b>		
Prequalification	Web Portal is provided for entering prequalification data	Contractor entry of the prequalification data save the customer time in entering data	X	X	X
Project Portal	Customer branded web portal allowing contractors to access project information. Functionality includes view project / bid details, viewing / printing / downloading project / bid documents, responding to bid packages, syncing project with primary document archive, upload and reviewing project notifications.	Provides efficient, trackable tool for organizations to distribute their information to external users.	X	X	X

<h1>Integrations</h1>			Admin	Collaboration	Plan Room
Function	Description	Value	License		
<b>Project Management Integration</b>					
Meridian Prolog Integration	PDM / Prolog Integration synchronize documents, Contacts and RFIs from PDM to Prolog. It also synchronizes drawing packages and RFIs from Prolog to PDM.	The integration removes redundant data entry thus saving time and reducing error. The most common integration is where documents are captured and managed in PDM and synchronized with Prolog saving countless hours in reindexing.	X		
Meridian Proliance Integration	PDM / Proliance Integration synchronize documents from PDM to Proliance including the documents and their attributes.	The integration removes redundant document entry thus saving time and reducing error.	X		
Primavera Contract Manager Integration	PDM / Contract Manager Integration synchronize documents from PDM to Contract Manager including the documents and their attributes.	The integration removes redundant document entry thus saving time and reducing error.	X		
<b>MHC Network Integration</b>					
Company Integration	Company contacts managed in MHC Network can be "Hosted" into a PDM solution. The hosting will copy all the contact information into the PDM public profile. Since the systems are synchronized, if data changes on the MHC Network it will automatically update the PDM contact.	Allows customer to quickly and easily populate their PDM contact database with valuable contacts.	X		
Project Integration	Projects managed in MHC Network can be "Hosted" into a PDM solution. The PDM user can download general project information, plans, specification	Allows customer to quickly and easily download project data and documents. Since the information is	X		X

	and addend.	download in a organized structure the time savings are tremendous.			
Submittal Integration	Sub-Contractors can drag and drop submittal information for MHC Sweets directly to PDM	The automated workflow of dragging relevant submittal information directly from Sweets to the customers system again saves time and reduces errors.	X	X	
<b>Other</b>					
Other PDM 3.0 Server integrations	Projects and documents can be "Synched" from one PDM system to your own.	Drastically reduces the time and potential for error when transferring information from PDM system to another	X	X	X
Take-Off Integration	PDM is integrated with OnCenter OnScreen Take-Off Tool. Selected documents or projects can be downloaded directly into the OnCenter product.	Automatically loads OnCenter with all the documents for Take-off avoiding time consuming document retrieval and load processes	X		X
AutoCAD Integration	PDM is integrated with AutoDesk AutoCAD product. The plug-in integration (embedded within AutoCAD) provides tools for importing native and distributable documents directly into the PDM document archive.	Eliminates the need to distribute documents by hardcopy or attachments to e-mails saving time and improving accuracy	X		

<b>Administrative Configurations</b>			Admin	Collaboration	Portal
Function	Description	Value	License		
Notifications	Multiple notifications can be configured, using XML, to provide customer specific e-mails / faxes for ITB, Prequalification Request, Addenda Notifications, etc.	XML flexibility assures customers can create detailed notifications providing key information, quick and efficiently.	X		
Document Types	Multiple document types can be created optimized for specific classes of documents like Plans or Specs	Flexibility of document types assure the only the "Right" information is be collected during document capture.	X		
Evaluations	Customer can define their own Evaluation with their own questions	Right questionnaire for the right project and milestone	X		
Lists	PDM allows the creation of list used for populating drop down boxes. This could be as simple as list of prequalification's ratings or a modification of the MasterFormat 95 CSIs.	Allowing the customer to define their own lists provide flexibility to adhere to existing work processes and assures the correct data is available for selection	X		
Custom Attributes	PDM strives to include as many standard attributes as possible but since customer always have their own unique requirements the ability to create custom attributes is available. Custom attributes can be created for Project, Document Types, Notification and Contacts	Allowing the customer to define their own custom attributes provide flexibility to adhere to existing work processes	X		
Security	On a contact or role level, view and edit access can be set against any project or folder in the system.	Assures only the people the customer want to have access do have access	X		