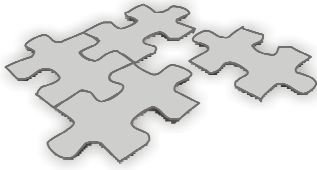


How easy can it be to get data loaded into Contract Management?



CM-EXCEL LOADER

Use Emerald's CM-Excel Loader® to load data into most modules of Oracle Primavera Contract Management.

- Budget
- Funding
- Procurement
- Contracts
- POs
- Change Proposals
- Change Orders
- Progress Payments
- Trends
- Cost Codes
- Drawings
- Submittals
- Issues
- More!

Emerald's CM-Excel Loader®

In a constantly changing corporate world, finding ways to improve processes and increase efficiency is essential if you want to stay competitive. Streamlining data entry reduces the time and effort spent duplicating data in multiple systems, not to mention improves data quality by ensuring accuracy and enforcing business rules.

Oracle Primavera Contract Management is the world leader in collaborative Contract & Cost Control. Emerald's CM-Excel Loader® is a user friendly tool that can quickly and easily populate Contract Management documents directly from Excel.

A SIMPLE PROCESS

Excel Data

The first step is to get the data into Excel, whether it be exported from CM and updated, exported from another system, or entered directly into Excel. User friendly data entry sheets can simplify the task. The format of data in Excel can be customized and the utility allows for custom field data to be imported, as well as all editable fields in the CM module and cost code distributions.

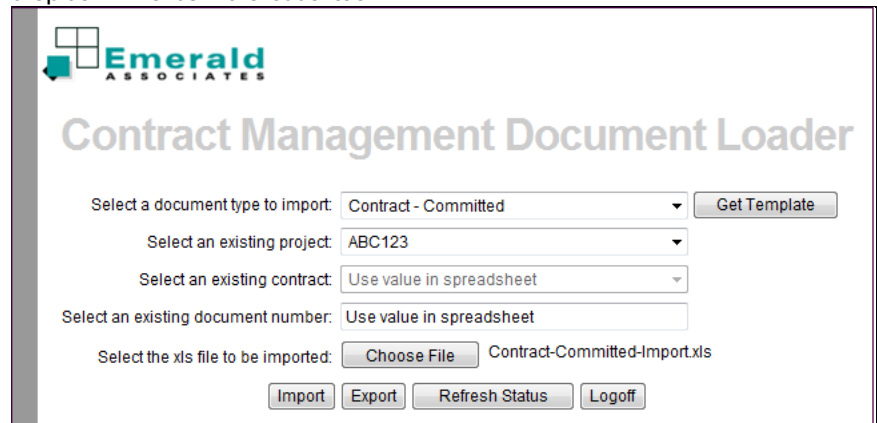
Multiple documents can be loaded simultaneously making a mass import of data from any other system via Excel very easy.

	A	B	C	D	E	F	G	H
1		Project Number:	ABC123					
2		Contract Number:	C-5000					
3		Contract Title:	CM Training			Copy		
4		Contract Date:	August 8, 2014					
5		Document Owner:	EAI	NJ				
6		FROM:	EAI	NJ				
7		TO:	EAI	DM				
8		Currency:	CAD					
9		Exchange Rate:	1.00					
10		Use Approval Process:		Y				
11								
12								
13	Item No.	Description	UoM	Quantity	Unit Price	Value	Cost Code	Item Type
14	001-01	Custom Training Documentation	hours	8.0	\$100.00	\$800.00	INDIRECT-LAB	Unit Price
15	001-02	Custom Training Course (2 days)	days	2.0	\$1,000.00	\$2,000.00	INDIRECT-LAB	Unit Price
16	002-01	Facility Rental for Training	days	2.0	\$500.00	\$1,000.00	INDIRECT-FAC	Unit Price

User Friendly CM-Excel Loader Interface

The second step in the data loading process is to actually import the data using the intuitive user interface of the CM-Excel Loader®.

Information specific to the document can be entered directly into Excel, or picked from drop down menus in the loader tool.



The screenshot shows the Emerald Contract Management Document Loader interface. It features the Emerald Associates logo at the top left. The main heading is "Contract Management Document Loader". Below this, there are several input fields and buttons:

- "Select a document type to import:" with a dropdown menu set to "Contract - Committed" and a "Get Template" button.
- "Select an existing project:" with a dropdown menu set to "ABC123".
- "Select an existing contract:" with a dropdown menu set to "Use value in spreadsheet".
- "Select an existing document number:" with a text input field set to "Use value in spreadsheet".
- "Select the xls file to be imported:" with a "Choose File" button and the filename "Contract-Committed-Import.xls" displayed.

At the bottom of the interface, there are four buttons: "Import", "Export", "Refresh Status", and "Logout".



A Few Ideas...

From a simple data entry facilitator to a system integration tool, the CM-Excel Loader® is versatile and can serve many purposes.

- **Avoid duplicate data entry:** Use the CM-Excel Loader® to load existing information into CM, such as information found in an accounting or CRM system, or even in Excel itself.
- **Build an integration:** System integrations are often costly but extremely beneficial in information accuracy and effort saved. With Emerald's CM-Excel Loader® you can very quickly build a manual integration into CM.
- **Enforce business rules:** Establish business rules, such as a numbering convention, and make sure they are enforced before data gets in to Contract Management.
- **Add an extra layer of security:** Set security on who is allowed to import documents, and who is allowed to edit what pieces of data. Force a review of data before it even gets entered into CM.
- **Migrate to Contract Management:** Simplify a migration from current project systems with data located in numerous un-linked tools and/or spreadsheets with Emerald's user CM-Excel Loader®.

Results in Contract Management

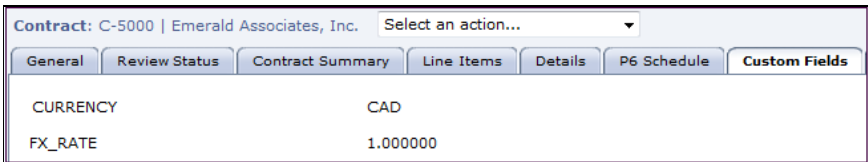
The imported documents are created or updated in Contract Management. Virtually all fields on documents can be loaded, taking away the pain of double data entry into Contract Management.



The Contract document is loaded into CM.



Contract Line Items are imported and distributed to cost codes.



The CM-Excel Loader can easily be configured to load custom fields.

To find out more about Emerald's CM-Excel Loader® or any of our other add-on products for P6 and Contract Management, please contact your local Emerald Solutions Executive.

