CMCS INSIGHTS · DOCUMENT CONTROL · ACONEX MIGRATION

PMWEB Replacing Aconex

Four articles, based on real implementations, on moving document control from Aconex into PMWEB: why document submittals cannot live apart from the PMIS, Aconex-style adaptive forms built for Aconex users, the optional history import, on-premise hosting and rollout, and the dashboards, reporting and PMWEB AI that one database makes possible.

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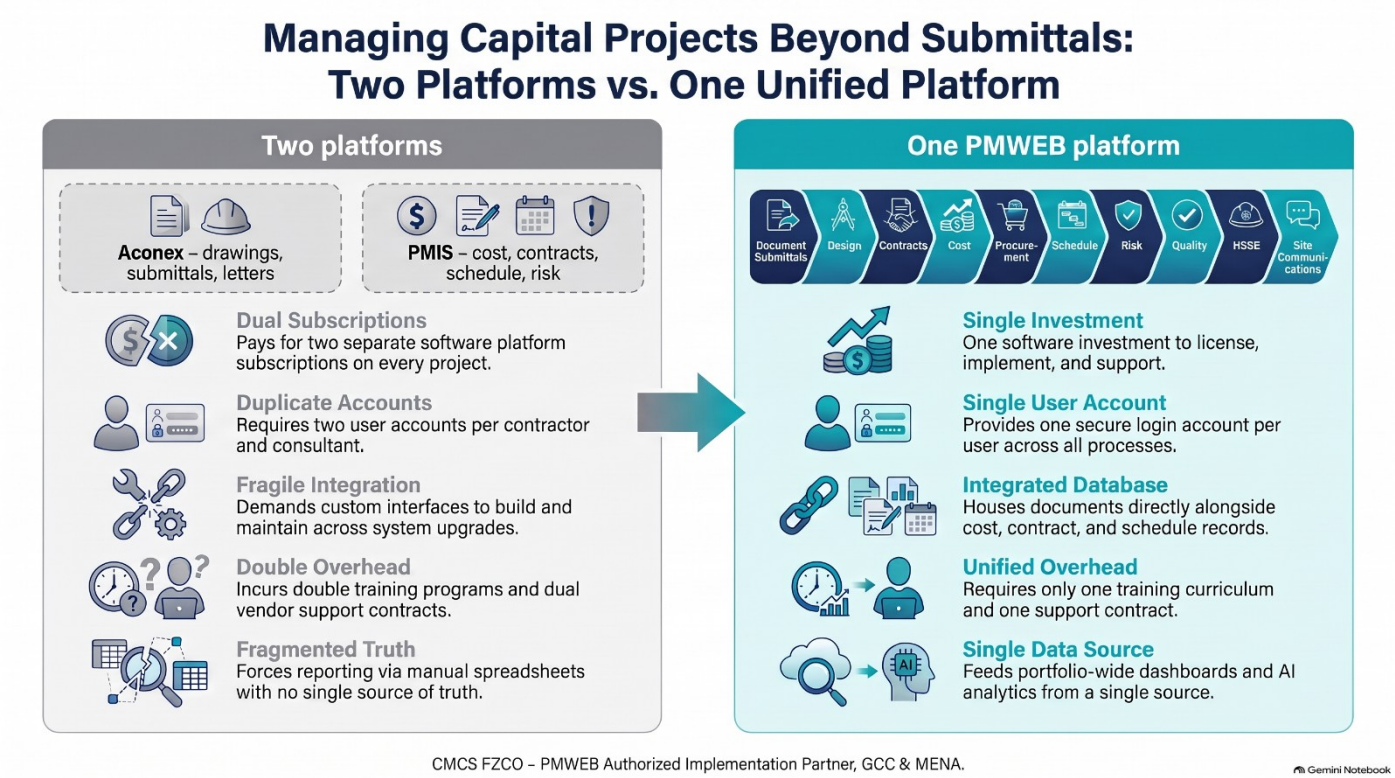
PMWEB for Capital Project Owners | Replacing Aconex | Part 1 of 4

One Platform, One Project History — Why Document Submittals Cannot Live Apart from the PMIS

A real use case: why owners are moving document control from Aconex into PMWEB, and the risk of keeping two databases

Managing a capital construction project goes far beyond managing document submittals. Cost, contracts, procurement, schedule, risk, quality, health and safety and design all have to be managed through every stage of the project lifecycle. Document submittals, usually handled in Aconex, cannot be managed in isolation from that overall picture. PMWEB brings all of these functions into one fully integrated platform, and it reduces the investment too: one platform to license, implement and support instead of two.

Most owners still run two systems on the same project: Aconex for drawings, submittals and letters, and a PMIS for everything else. Yet every shop drawing, material submittal and method statement is tied to a contract, a cost, a schedule activity, a procurement decision, a design review, a quality check or a safety requirement. Kept in a separate platform, a submittal becomes a file with a status and nothing more. Working on one platform removes the duplicate subscriptions, user accounts, integrations, training and support contracts, and gives everyone the same complete picture of the project.



Infographic 1 – One platform instead of two

This is not a hypothetical scenario. It is a real use case: a major real estate developer in the Gulf region took that step. It retired Aconex for document control and now runs every document submittal, review and letter inside PMWEB. Because its projects had already started on Aconex, it also migrated the complete Aconex history: every document, every revision and every file. New projects need no migration and start directly in PMWEB. This four-part series explains why it matters, how it was done, how projects already on Aconex move their history, and how the same records now feed dashboards and AI. Part 1 makes the case for one platform and one project history. Everything described can be repeated on any PMWEB instance.

Based on real implementations

This series is based on real PMWEB implementations, not a concept: CMCS has migrated **two clients** from Aconex to PMWEB, including **a major real estate developer in the Gulf region**. Client names and client data are withheld; the form illustrations and dashboards use sample data.

Is this article for you?

Yes, if your projects manage documents in **Aconex, another document management system or a CDE** while cost, contracts and schedules are managed somewhere else. This series is written for every layer of the project team and its stakeholders:

- **Document controllers:** keep the Aconex way of working, without double entry and manual tracking (Parts 2 and 4).
- **PMIS managers:** one platform and one database to configure, secure and support instead of two plus an interface (Parts 2 and 3).
- **Project and programme managers:** see a document's status next to its contract, cost, schedule and risk (Parts 1 and 4).
- **Executives and PMO heads:** remove the risk of a split project history and reduce the investment (Part 1).
- **Contract, cost, design, quality and HSSE leads:** work from the same approved documents that drive your own processes (Part 1).
- **Contractors, consultants and other project stakeholders:** one submission platform and one record of every decision (Parts 1 and 2).

Where Document Control Breaks Down Outside the PMIS

A document platform is good at what it was built for: storing files, controlling revisions and distributing transmittals. The problems start when the owner needs to manage the project, not just the documents.

- **Two records of the truth.** A shop drawing's status lives in the document platform, while the contract, the change it triggers and the schedule activity it delays live in the PMIS.
- **No link to cost and contracts.** A rejected material submittal cannot be tied to the commitment, the variation or the payment it affects.
- **Reporting by spreadsheet.** Review turnaround, overdue actions and contractor quality are rebuilt by hand from exports every month.
- **No asset view at handover.** Documents are not coded to the assets that cost, contracts and commissioning are tracked against.
- **Two sets of licences, accounts and support** for every contractor and consultant.

The High Risk of Two Separate Databases

> ### A statement every owner should weigh
>
> **Organisations that manage project documents in Aconex and the rest of their project information in another PMIS are taking a high risk.** They separate the history of their project documents from the history of cost, contracts, schedule, risk, procurement, quality and HSSE. Whatever PMIS product they use, if it does not share the same database as their document management, that risk to overall project success remains.

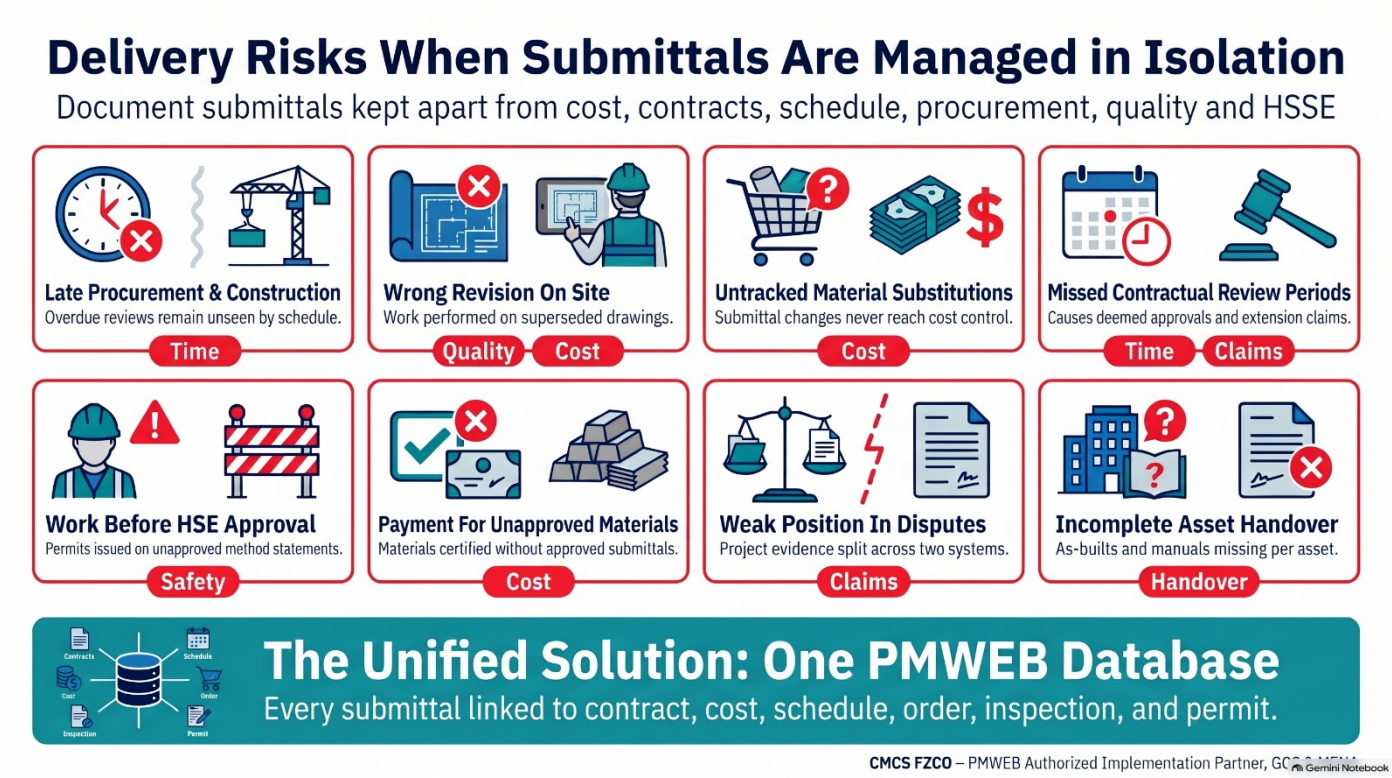
An integration between two platforms does not remove the risk. Interfaces usually pass a status, a number or a link, not the full history of who submitted what, which revision was reviewed, what was commented, when it was approved and what it led to. Each platform keeps its own audit trail, its own users and its own timeline, and the two drift apart over the years of a project.

- **Claims and disputes.** The evidence for a delay or a variation sits partly in the document platform and partly in the PMIS. Rebuilding the story for a claim takes weeks, and gaps weaken the owner's position.
- **Audit and accountability.** No single record shows that a drawing was approved before the work it covers was certified and paid.
- **Early warning lost.** A late review or a repeated rejection is visible in one system, while its cost and schedule impact appears in the other only after the damage is done.
- **Integration fragility.** Every upgrade of either platform can break the interface, and data silently stops flowing.
- **Incomplete AI and reporting.** Dashboards and AI assistants built on either database see only half of the project.
- **Handover gaps.** The asset handover file has to be assembled from two systems with different coding.

Keeping documents and every other project process in one PMWEB database removes these risks at the source: one history, one audit trail and one version of the truth from the first submittal to handover.

Project Delivery Risks of Managing Submittals in Isolation

When document submittals are managed in isolation from the other project management processes, the risk is not only to document control. It reaches project delivery itself: time, cost, quality, safety, claims and handover. The table below sets out the delivery risks we see most often on capital projects that run documents in one platform and everything else in another.



Infographic 2 – Delivery risks when submittals are managed in isolation

Delivery risk	What happens on the project	Impact	How one PMWEB database removes it
Late procurement and construction	A review overdue in the document platform is invisible to the schedule and to procurement. Long-lead orders are placed late and site work waits.	Time	The submittal is linked to its schedule activity and purchase order; overdue reviews show on the same dashboards.
Wrong revision used on site	Inspections, RFIs and work refer to a superseded drawing because site teams cannot see which revision is approved.	Quality, cost	Inspections, RFIs and NCRs reference the approved revision in the same database.
Untracked changes and substitutions	Material substitutions and design changes start as submittals but never reach cost control until the contractor claims them.	Cost	The submittal, the change order and the commitment are linked records.
Missed contractual review periods	Review periods are tracked in one system and contract terms in another, leading to deemed approvals and extension of time claims.	Time, claims	Review due dates come from the contract and are tracked step by step.
Work before HSE approval	Permits are issued and high-risk work starts before the method statement and risk assessment are approved.	Safety	HSSE permits check the approval status of the method statement.
Payment for unapproved materials	Materials on site are certified for payment without an approved material submittal.	Cost, compliance	Payment certification can check the material submittal status.
Weak position in claims and disputes	The evidence for a delay or variation is split across two systems, with gaps and conflicting dates.	Claims	One audit trail from submission to approval, change and payment.

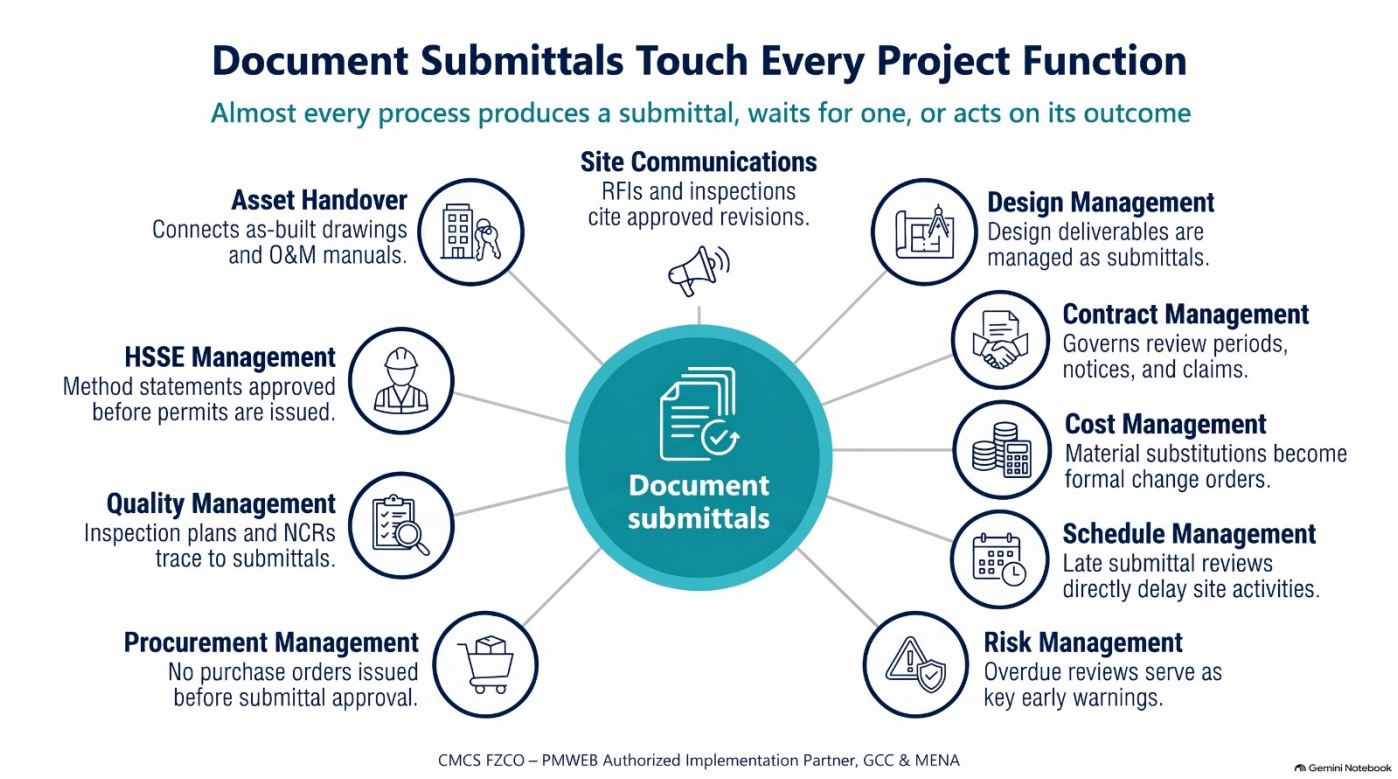
Delivery risk	What happens on the project	Impact	How one PMWEB database removes it
Late warning to management	Reports are assembled by hand from two systems, so problems surface weeks after they start.	Governance	Daily dashboards from one source show overdue reviews and quality trends early.
Incomplete asset handover	As-built drawings, O&M manuals and warranties cannot be matched to the assets tracked in cost and commissioning.	Handover	Every document is coded to its asset from the first submittal.

The bottom line

Each of these risks starts with a document that one part of the project team cannot see in context. **Managing submittals in isolation does not only make document control harder; it puts the delivery of the whole project at risk.** Keeping submittals in the same PMWEB database as every other process is the most direct way to remove that risk.

Document Submittals Are One Process Among Many

A capital construction project runs on dozens of connected business processes. Document submittals sit in the middle of them: almost every other process either produces a submittal, waits for one, or acts on its outcome. That is why submittals cannot be managed in isolation from site communications, design management, contract and cost management, schedule and risk management, procurement, quality and HSSE management.



Infographic 3 – Document submittals touch every project function

Process area	How it depends on document submittals
Site communications	RFIs, site instructions and inspection requests refer to the approved revision of a drawing or method statement. A submittal comment often becomes an RFI, and an RFI answer often forces a resubmission.

Process area	How it depends on document submittals
Contract management	Submittals are contract deliverables with contractual review periods. Late reviews and repeated rejections become notices, extension of time requests and claims.
Cost management	Material substitutions, value engineering proposals and design changes start as submittals and end as change orders. Payment for materials on site depends on an approved material submittal.
Schedule management	Each submittal supports a schedule activity. A review that runs over its period delays procurement and construction, and can move the critical path.
Design management	Design deliverables at each stage, design review comments and design changes are submittals. Their status shows whether each design stage can be signed off.
Risk management	Overdue reviews, low first-time approval and long-lead items waiting for approval are early warnings of delay and cost risk.
Procurement management	Purchase orders for long-lead equipment and materials cannot be placed until the material submittal is approved.
Quality management	Method statements, inspection and test plans and material approvals define what is inspected on site. Non-conformance reports trace back to the approved submittal.
HSSE management	HSE plans, risk assessments and method statements for high-risk work must be approved before permits are issued and work starts.
Asset handover	As-built drawings, O&M manuals and warranties are submittals too, and they make up the handover file for each asset.

When submittals live in a separate document platform, every one of these links has to be rebuilt by hand: an RFI log that quotes drawing numbers, a cost report that cannot see why a change order started, a schedule that does not know a review is late. In PMWEB the submittal, the RFI, the change order, the purchase order, the inspection and the schedule activity are records in the same database, linked to the same package, asset and contract. That, more than any single feature, is the reason to move document control into the PMIS.

> ### One platform for every project process
>
> PMWEB manages site communications, design, contracts and cost, schedules and risk, procurement, quality, HSSE and document control on one platform. Moving document submittals into PMWEB completes that picture: the process that touches all the others finally sits next to them.

What One Platform Means for Every Project Stakeholder

The case for one platform is not only a technology decision. It changes the working day of everyone on the project, inside and outside the owner's organisation.

Stakeholder	What it means for you
Document controllers	One place to register, number, distribute and track every document, with no re-keying into a second system and no manual response logs.
PMIS managers	One database, one security model, one set of forms and workflows and one upgrade path, with no fragile interface between two platforms.
Project managers	The status of every submittal beside the contract, cost, schedule and risk it affects, on the same screen.
Programme managers and PMO	Portfolio-wide views of review performance, overdue actions and contractor quality without monthly spreadsheet consolidation.

Stakeholder	What it means for you
Contract and cost managers	A change order, claim or payment traced back to the submittal that triggered it, with the full review history as evidence.
Design managers	Design deliverables and review comments tracked against each design stage and its sign-off.
Quality and HSSE managers	Inspections, NCRs and permits that refer to the approved revision, with no doubt about which revision applies.
Contractors and consultants	One platform for submittals, RFIs, variations and payments, with review due dates visible to everyone.
Executives, boards and funders	One version of the truth, a lower total investment and a complete history for audit, claims and handover.

Aconex and PMWEB Compared for Document Control

Capability	Aconex	PMWEB with Aconex-style forms
Document register and revisions	Strong, purpose-built	Adaptive forms with the same fields; Aconex history imported where a project has already started on Aconex
Numbering	Configured per project	Aconex-style pattern that continues the Aconex serials
Review workflow	Document review workflows	Business process workflows with steps, roles, due dates and delegation
Confidential distribution	Mail and distribution lists	Confidential flag plus notified users, enforced in the back end
Link to cost, contracts and schedule	Outside the platform	Same database as commitments, changes, payments and schedule
Asset coding for handover	Metadata only	Asset on every record, shared with cost and contracts
Portfolio dashboards	Exports and separate tools	Power BI dashboards built into PMWEB, reading PMWEB data and displayed within PMWEB
AI across project processes	Sees documents and their metadata	PMWEB AI Assistant (PMWEB-hosted instances) works on submittals together with contracts, cost, schedule, procurement, quality and HSSE data
Deployment	Cloud service only	Cloud hosted by PMWEB, or on-premise on the owner's servers
Licences and investment	A second platform beside the PMIS, with its own subscription, accounts, integration and support	One platform to license, implement and support for every project participant

> **Key takeaway**
>
> Keeping project documents in Aconex while the rest of the project runs in a separate PMIS, even an integrated one, splits the project history across two databases and puts project success at high risk.
>
> Managed in isolation, submittals create delivery risks in time, cost, quality, safety, claims and handover: late procurement, wrong revisions on site, untracked changes, missed review periods, work before HSE approval and weak evidence in disputes.
>
> Managing a capital project goes beyond document submittals. Submittals touch every other function and belong in the same platform, which also means one investment instead of two.
>
> This is proven in practice: CMCS has moved two clients from Aconex to PMWEB.

Next in the series: Part 2 shows the Aconex-style adaptive forms in PMWEB and the back-end logic that makes Aconex users feel at home from day one.

Talk to us: If your projects run on Aconex or another document management system alongside a PMIS, or on a PMIS whose submittal forms your document controllers will not use, CMCS can assess your current platforms and data, configure Aconex-style document control in PMWEB, migrate the documents of projects already running on Oracle Aconex or Oracle Unifier, and publish the submittal dashboards. Contact CMCS at info@CMCS-MENA.com.

About the Author

Bassam Samman, PMP, PSP, EVP, GPM is the Chairman and Chief Executive Officer of CMCS FZCO, the PMWEB Authorised Implementation Partner for the Gulf Cooperation Council and broader Middle East and North Africa region. CMCS holds the PMWEB Global Partner of the Year 2025 designation and serves capital project owners, contractors and consultants across the UAE, Saudi Arabia, Qatar and Kuwait.

Bassam has over four decades of experience providing project management and Project Management Information System (PMIS) services to more than two hundred capital projects with a combined value exceeding one hundred billion US dollars. He is the author of four published books on project management digitalisation, and has lectured at more than three hundred and fifty international events. He is a co-founder of the Project Management Institute Arabian Gulf Chapter. He holds a Master′s degree in Engineering Administration (Construction Management), with Faculty Commendation, from George Washington University and a Bachelor′s degree in Civil Engineering from Kuwait University, with executive education at Harvard Business School and London Business School.

About PMWEB

PMWEB is an enterprise-class, web-based capital construction project management platform trusted by organisations worldwide including Harvard University, the United Nations, and Atlanta Airport. Built on Microsoft .NET technology, PMWEB manages the entire project lifecycle within a single integrated platform — from portfolio planning and cost management through document control, procurement, scheduling, asset management, and business intelligence. With 150+ pre-configured SSRS reports, drag-and-drop dashboard design, multi-currency support, and open REST/SOAP API integration, PMWEB delivers enterprise capability with implementation timelines measured in months, not years.

About CMCS

CMCS (Collaboration, Management and Control Solutions) is the PMWEB Authorised Implementation Partner for the GCC and MENA regions and PMWEB Global Partner of the Year 2025, with offices in Dubai, Abu Dhabi and Riyadh. CMCS specialises in digital project management solutions for real estate developers, government

entities, infrastructure owners, project management consultants and construction companies across the Middle East and North Africa.

PMWEB for Capital Project Owners | Replacing Aconex | Part 2 of 4

Aconex-Style Document Control in PMWEB — Adaptive Forms Built for Aconex Users

Familiar fields, numbering and workflows, and the back-end logic that closes the gaps

Document controllers do not resist a new platform because it is new. They resist it because the fields, numbers and lists are not the ones they know. The adaptive forms in this solution were designed to remove that barrier: Aconex users open PMWEB and recognise what they see.

Part 1 of this series made the case for managing document submittals in the same platform as every other project function. This part shows how the developer in our use case did it in PMWEB: three adaptive forms that emulate Aconex, and four pieces of back-end logic that close the gaps document controllers care about most.

Based on real implementations

This series is based on real PMWEB implementations, not a concept: CMCS has migrated **two clients** from Aconex to PMWEB, including **a major real estate developer in the Gulf region**. Client names and client data are withheld; the form illustrations and dashboards use sample data.

Is this article for you?

Yes, if you need to know what Aconex users will see and do in PMWEB:

- **Document controllers:** the screens, fields, numbering and lists you will work with every day.
- **PMIS managers:** how the adaptive forms, workflow and back-end logic are configured and maintained.
- **Reviewers and technical leads:** how review steps, due dates and comments sheets work.
- **Project and programme managers:** how the review process is controlled and what confidential records mean for distribution.
- **Contractors and consultants:** what submitting a document will look like.
- **PMWEB clients:** whose document controllers resisted the built-in submittal forms.

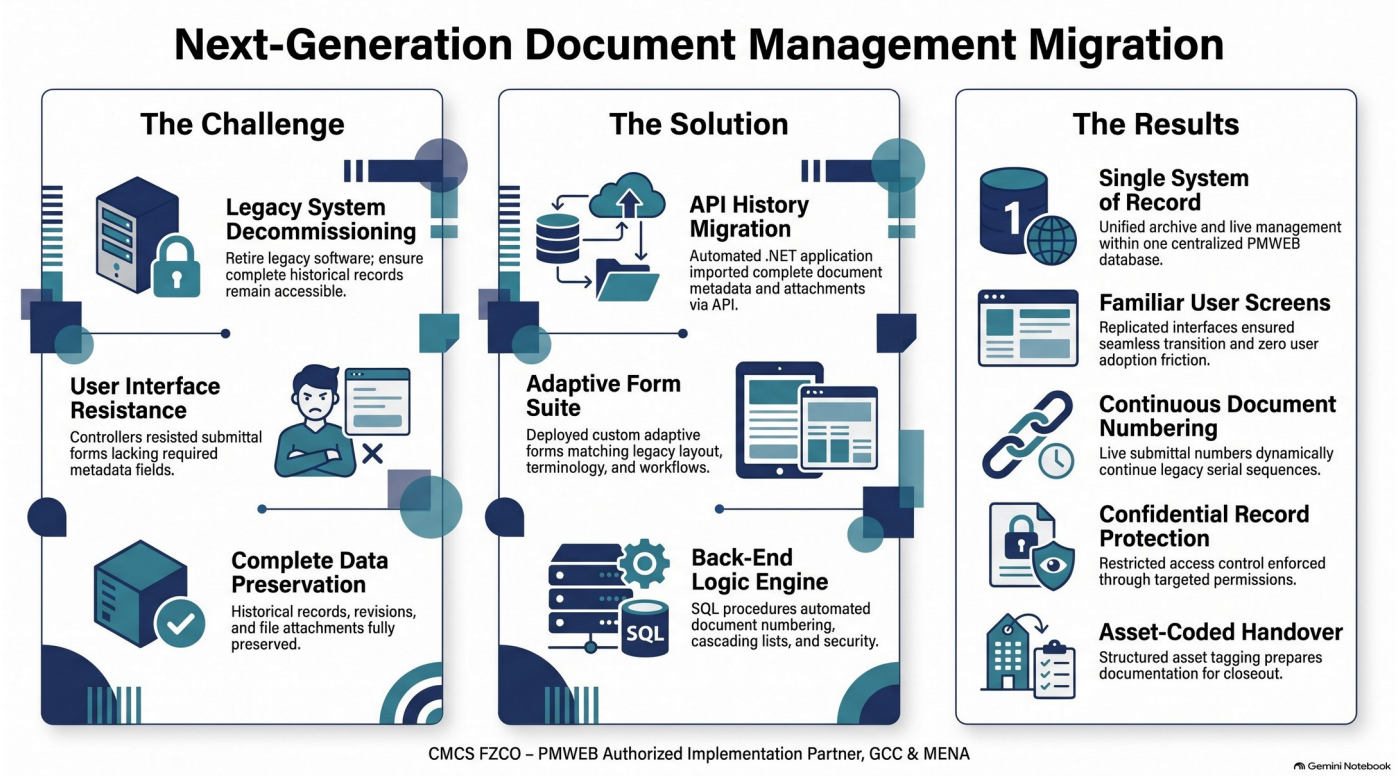
The delivery risk this part addresses

When document controllers resist a new platform, documents drift back to email and spreadsheets, and the project loses control of which revision is approved. Forms that Aconex users recognise keep every submittal inside PMWEB, coded to its package, asset and contract, so cost, schedule, quality and HSSE work from the same approved record.

Rebuilding the Aconex Experience Inside PMWEB

The developer's goal was one system of record without asking document controllers to give up the way they work in Aconex. That second condition shaped the whole design. PMWEB's built-in Document Submittal Sets and Submittal Items are capable, but the document controllers resisted them because the fields, numbering and

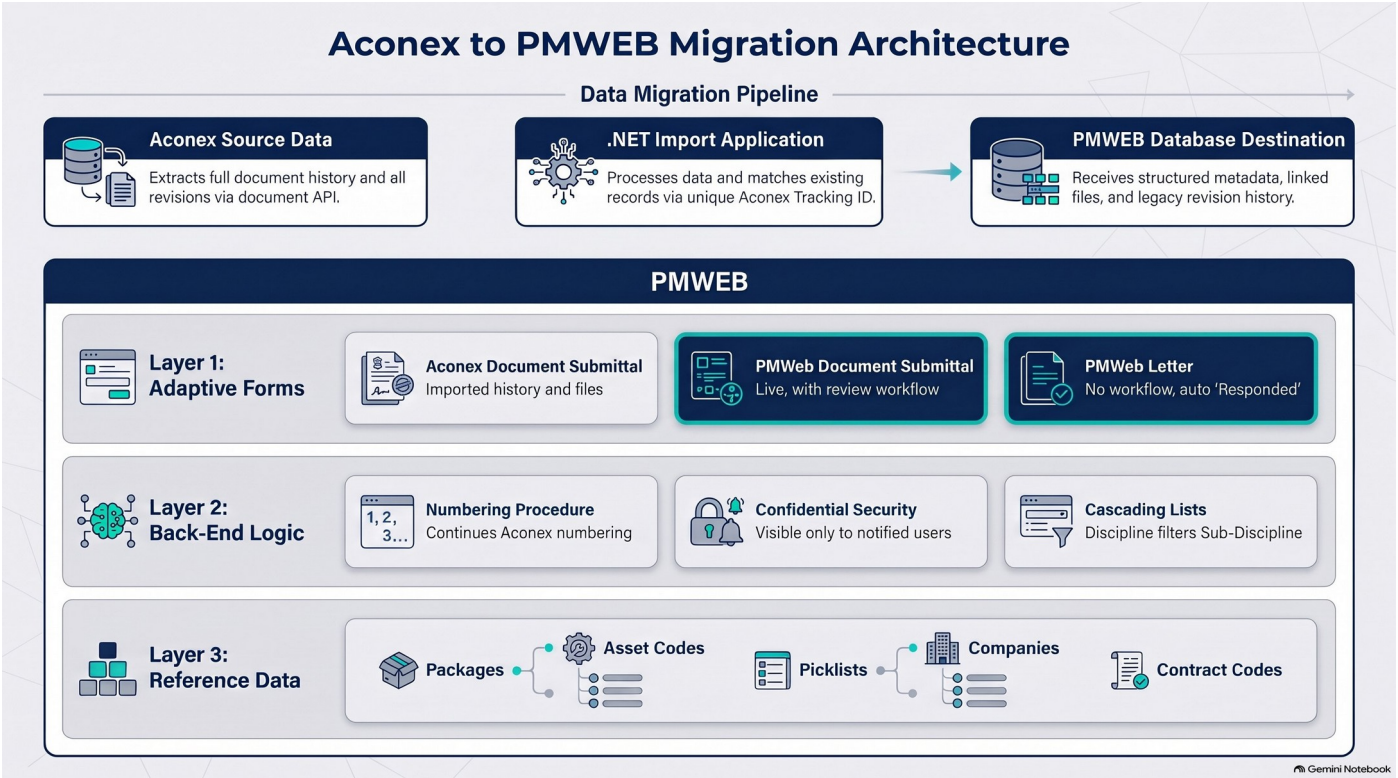
picklists were not what they knew. So the team rebuilt the Aconex experience inside PMWEB instead of asking people to change habits.



Infographic 1 – The challenge, the solution and the results

The Solution at a Glance

The solution has two parts. Three PMWEB adaptive forms, backed by a small amount of back-end logic, give document controllers Aconex's behaviour inside PMWEB. This is all a new project needs. For a project that has already started on Aconex, an optional one-way import also moves the Aconex history into PMWEB.



Infographic 2 – Solution architecture: the import pipeline and the three PMWEB layers

Component	Built as	What users get
Aconex history import (optional)	.NET application on the Aconex API	For projects already on Aconex: every Aconex document, revision and file in PMWEB
Aconex Document Submittal	Adaptive form	A searchable historical register
PMWEB Document Submittal	Adaptive form with review workflow	Live submittals with Aconex fields, terms and screens
PMWEB Letter	Adaptive form without workflow	Correspondence with automatic response tracking
Document numbering	SQL stored procedure	Aconex-style numbers that continue the legacy serials
Confidential records	Back-end security rule	Visibility limited to the parties and notified users
Cascading lists	External table and configuration link	Sub-disciplines filtered by the selected discipline
Submittal dashboards	PMWEB Power BI dashboards on the PMWEB database	Daily work queues and executive performance views

Three Adaptive Forms That Feel Like Aconex

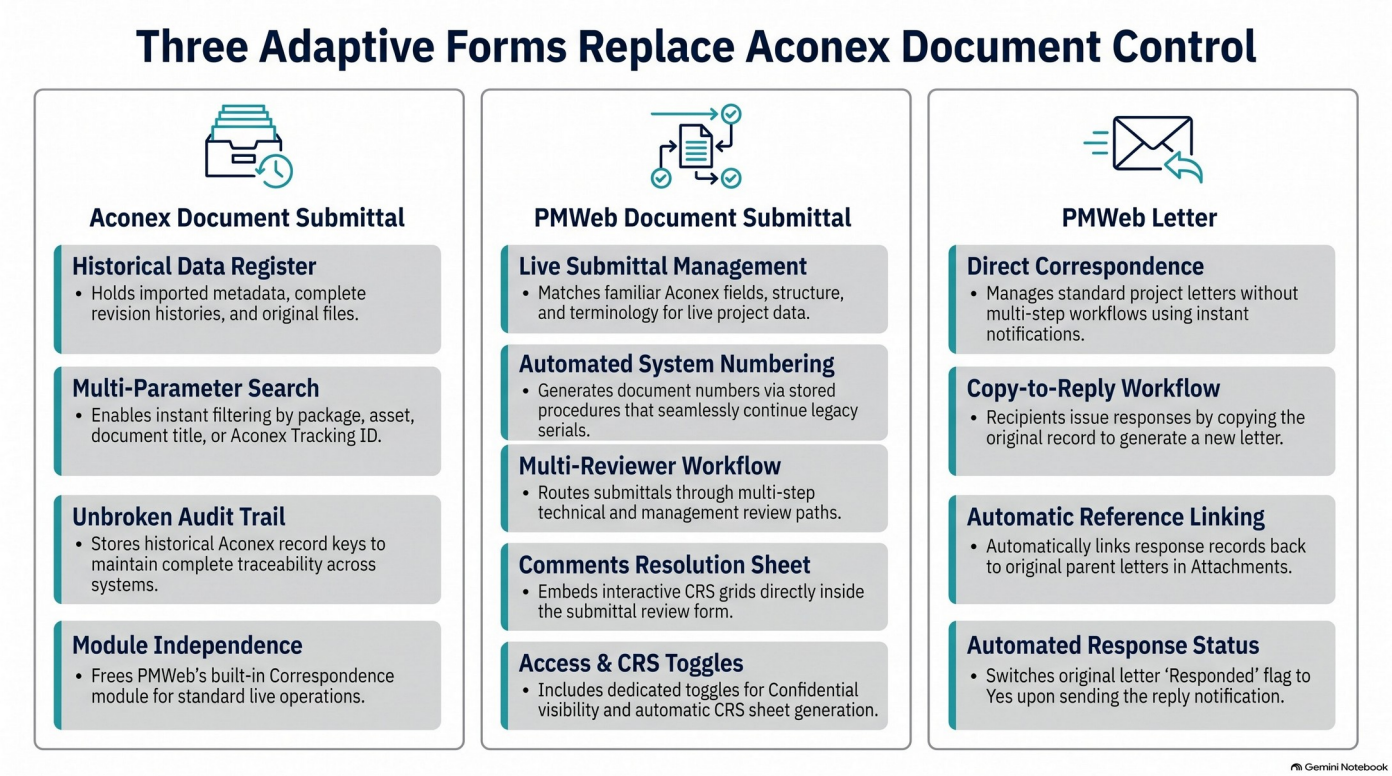
The adaptive forms were designed with one purpose: a smooth move for Aconex users into PMWEB. Document controllers, contractors and reviewers should not face different screens, different field names or new terminology on the day they switch. So the forms emulate what Aconex users are used to seeing, in their data fields, their order and labels, their picklists and their numbering, and in the way documents are submitted, reviewed and distributed.

> ### Designed for a smooth migration of Aconex users
>
> Users open PMWEB and recognise what they see. The same metadata is asked for in the same order, the same list values appear, document numbers follow the same pattern, and confidential documents are distributed the way they were in Aconex. Training focuses on what is new, such as the dashboards and links to contracts and cost, rather than on relearning document control.

What Aconex users are used to	How the PMWEB adaptive forms emulate it
Aconex document metadata fields	The same fields, with the same names and order, on the PMWEB Document Submittal form
Aconex picklists (discipline, document type, status, companies)	PMWEB lists with the same values, including discipline-dependent sub-discipline lists
Aconex document numbering	A stored procedure that builds the same number pattern and continues the existing serials
Review and approval of submittals	A review workflow with document control, technical and owner steps, and review codes
Confidential distribution and mail copies	A Confidential flag, with visibility limited to the parties and the users notified on the record
Correspondence with replies	PMWEB Letter, where a reply links to the original letter and marks it as responded

What Aconex users are used to	How the PMWEB adaptive forms emulate it
Searching the document register	Registers filtered by package, asset, title and, for imported records, the Aconex Tracking ID

In practice the solution uses three PMWEB adaptive forms. Each uses the same fields, order and terms as the Aconex screens they replace, laid out in collapsible sections and coloured in the owner's brand.



Infographic 3 – The three adaptive forms that replace Aconex document control

PMWEB Document Submittal is the live form. A new record opens with the General Information section: the Document No is left blank because the system generates it, and Package and Asset come first because every document is coded to both.

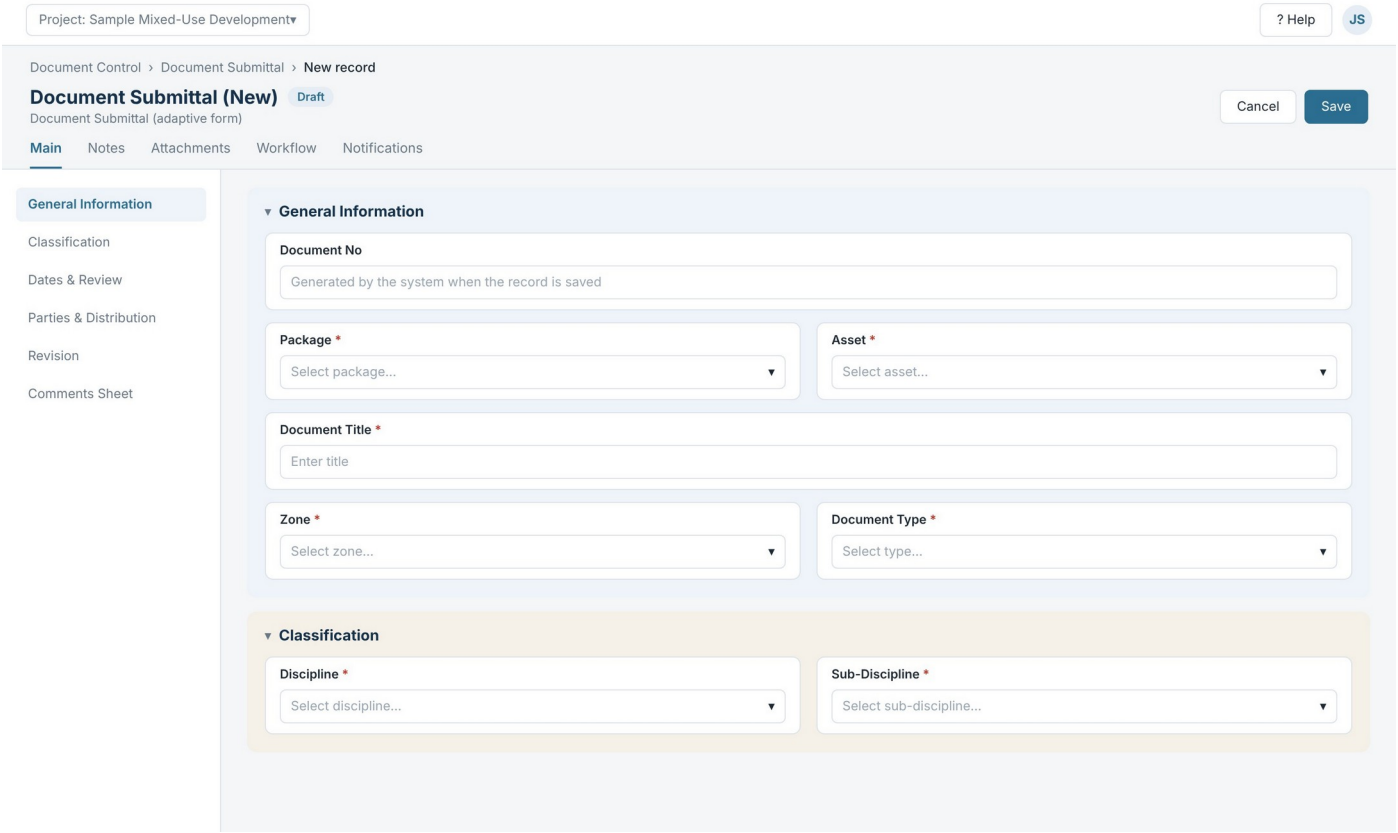


Illustration (sample data): a new Document Submittal record, with the Document No generated by the system

Section	Typical fields
General Information	Document No (generated), package, asset, document title, zone, document type
Classification	Discipline, sub-discipline (filtered by discipline), stage, work order
Dates & Review	Submission date, planned completion date, reference document, workflow, review status, review comments
Parties & Distribution	Originating and addressee company, document author, contract, confidential flag, comments sheet switch
Revision	Revision, revision date, record number (generated), workflow status
Comments Sheet	Comments sheet reference (generated) and a grid of comments by section, reviewer and response

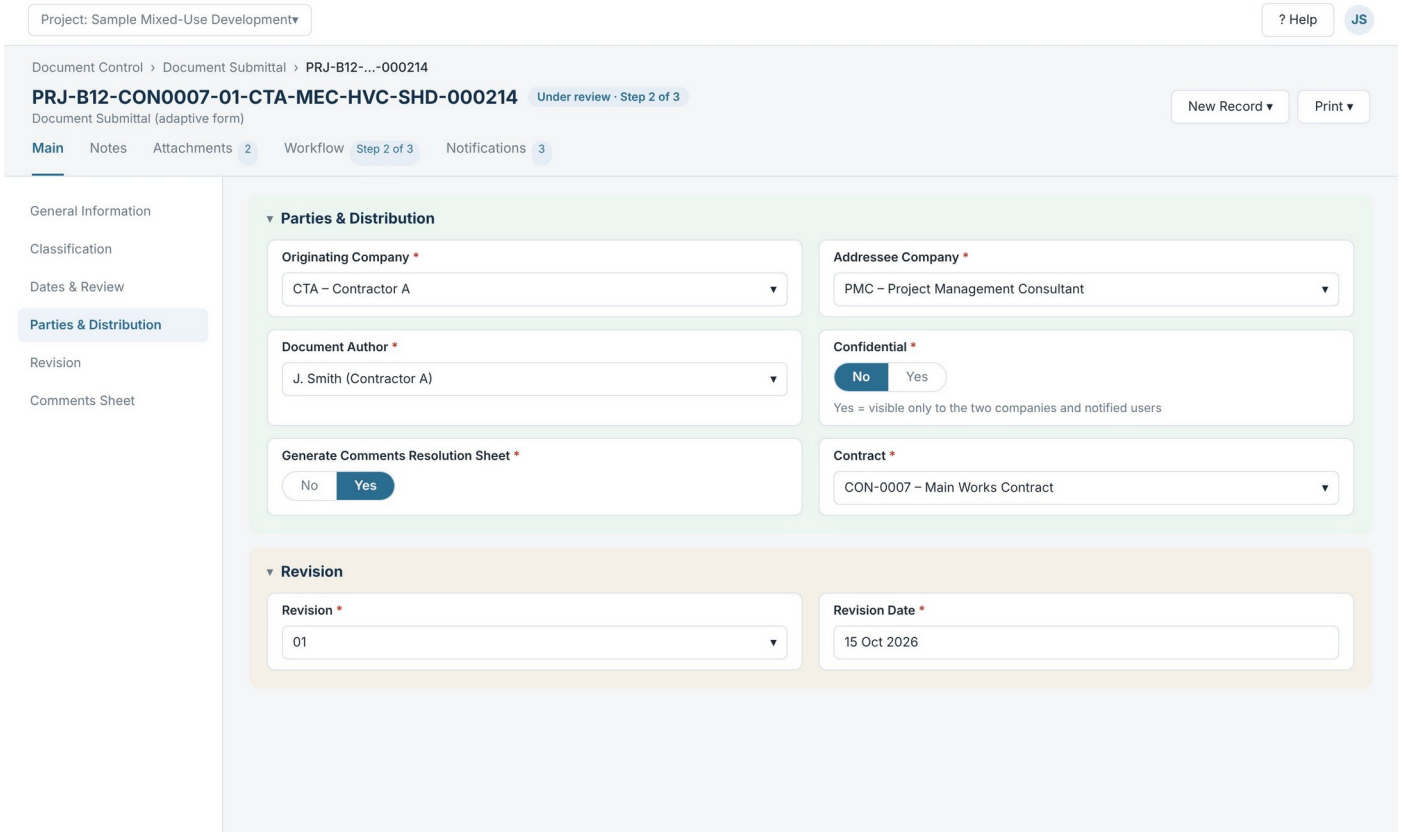


Illustration (sample data): parties and distribution, with the Confidential and Comments Resolution Sheet switches

Each submittal runs through a review workflow. In a typical set-up, document controllers check the submission first, technical reviewers review it next, and the owner approves last. Each step can have several reviewers, with withdraw and reject paths and a due date on every step.

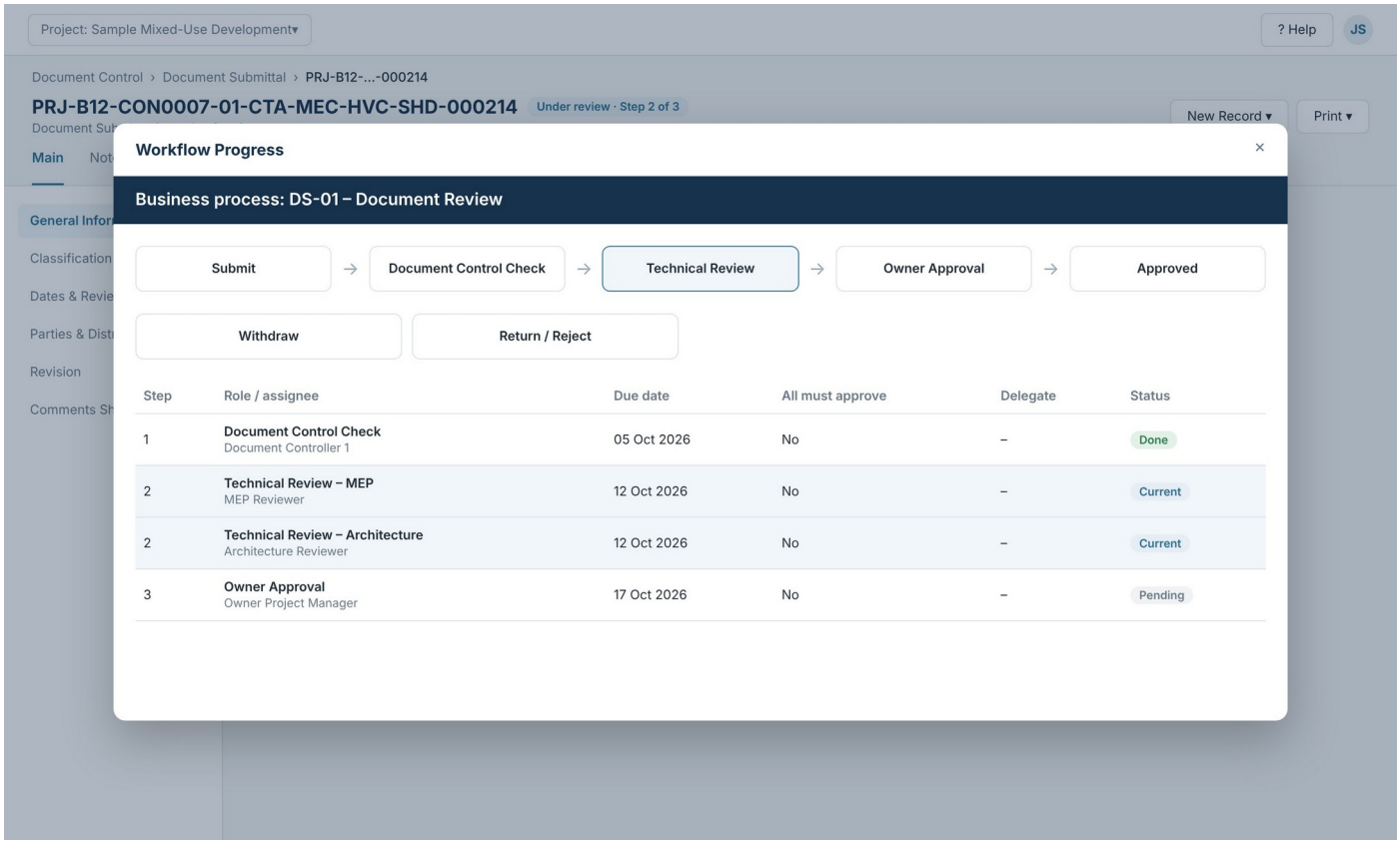
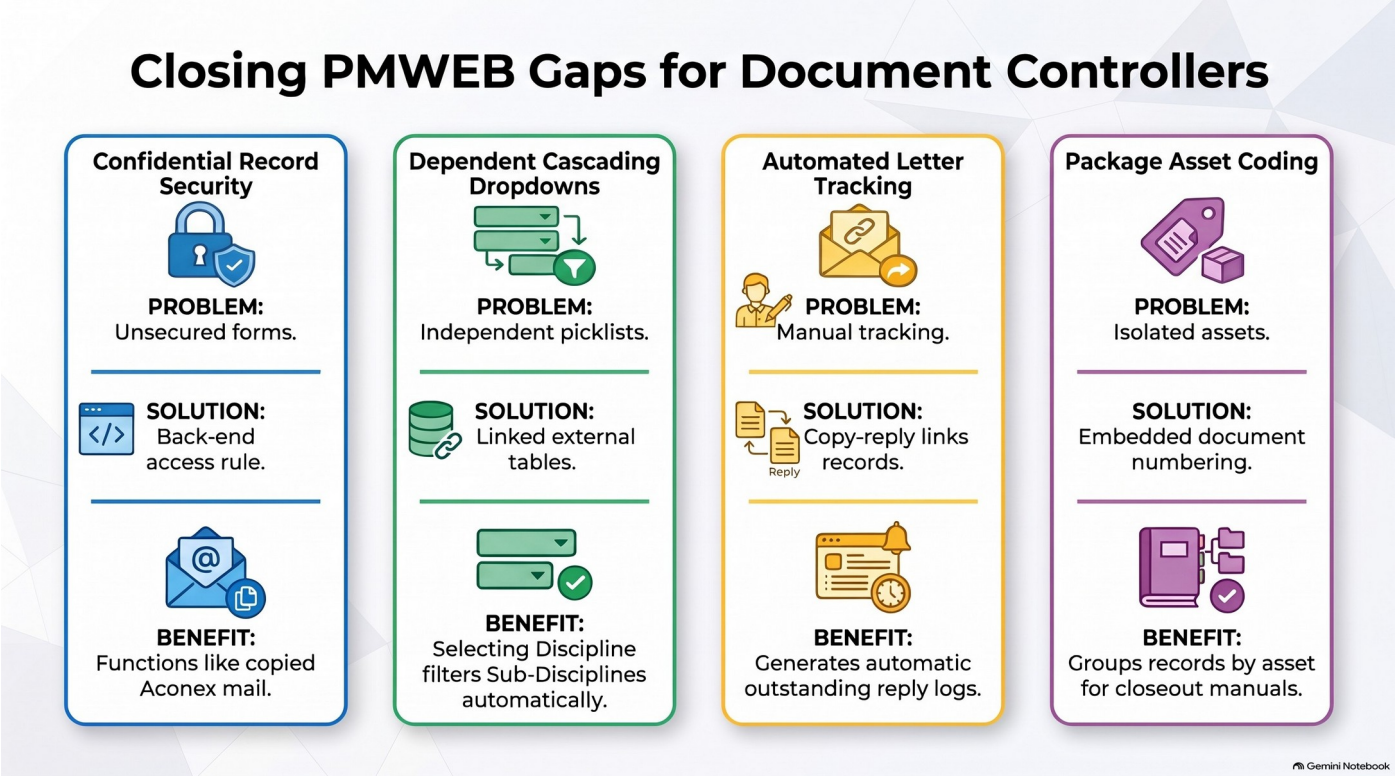


Illustration (sample data): workflow progress of a document review with three steps and parallel technical reviewers

Aconex Document Submittal is needed only when history is migrated from Aconex. It holds the imported history, searchable by package, asset, title and Aconex Tracking ID. **PMWEB Letter** handles correspondence without a workflow: letters are distributed by notification, which is how most correspondence works in practice.

Closing the Gaps for Document Controllers

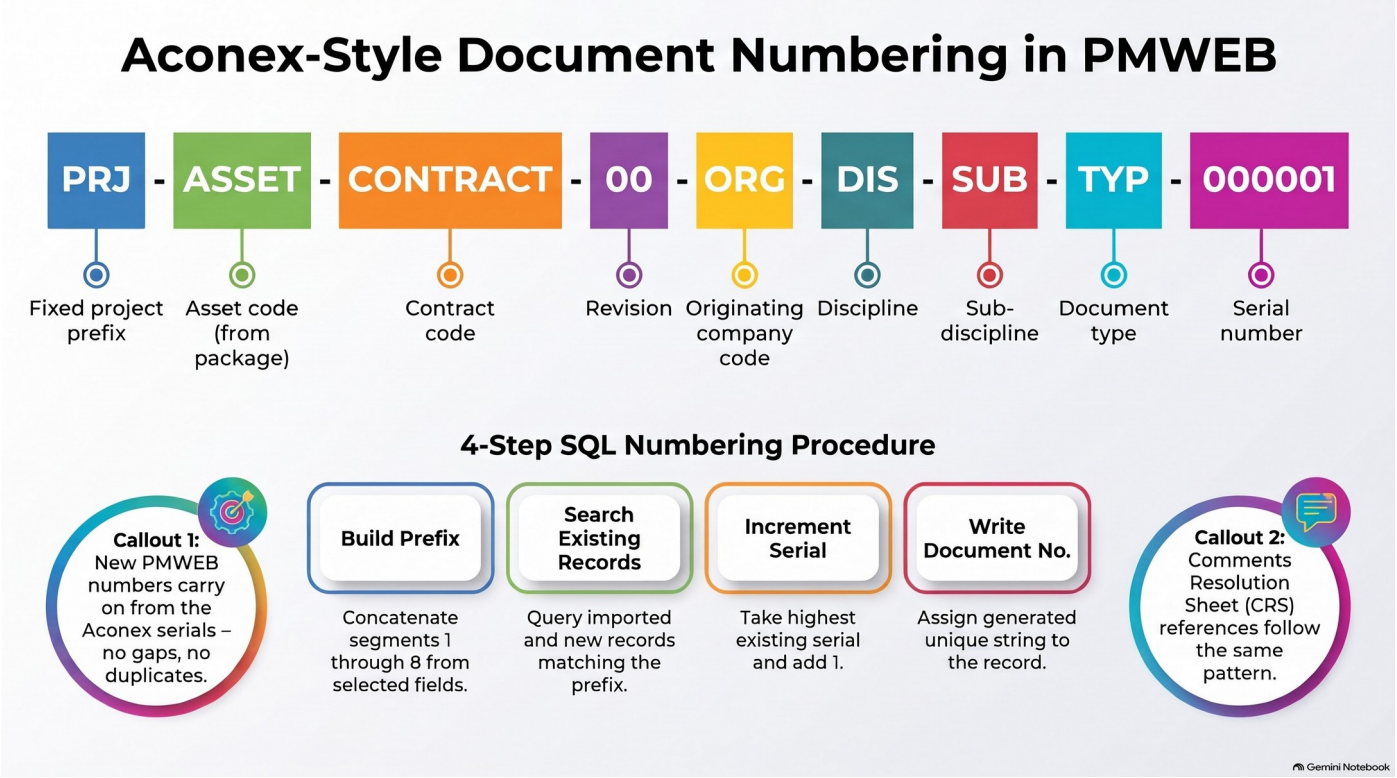
Adaptive forms cover most of what Aconex does. Four things needed extra work, and they are the reason document controllers accepted the change.



Infographic 4 – Closing PMWEB gaps for document controllers

Numbering that carries on from Aconex

The Document No is built by a SQL stored procedure from nine segments: a fixed project prefix, the asset code, the contract code, the revision, the originating company, the discipline, the sub-discipline, the document type and a serial number. The procedure searches existing records, imported and new, for the same prefix, takes the highest serial and adds one. New PMWEB numbers therefore continue the Aconex sequence with no gaps and no duplicates. Comments Resolution Sheet references follow the same pattern.



Infographic 5 – Aconex-style document numbering and the stored-procedure logic

Confidential records

Adaptive forms have no record-level security, so the client added it in the back end. When a record is marked Confidential, only the two companies on the record and the people the document controller adds on its Notifications tab can see it. This is the PMWEB equivalent of copying someone on an Aconex mail, and it is a good candidate for a standard PMWEB feature.

Cascading discipline lists

Built-in forms lack dependent picklists, a common complaint from document controllers. An external table holds each sub-discipline against its discipline, and a link registered in PMWEB's configuration table filters the list. Choosing MEC-Mechanical shows only the mechanical sub-disciplines.

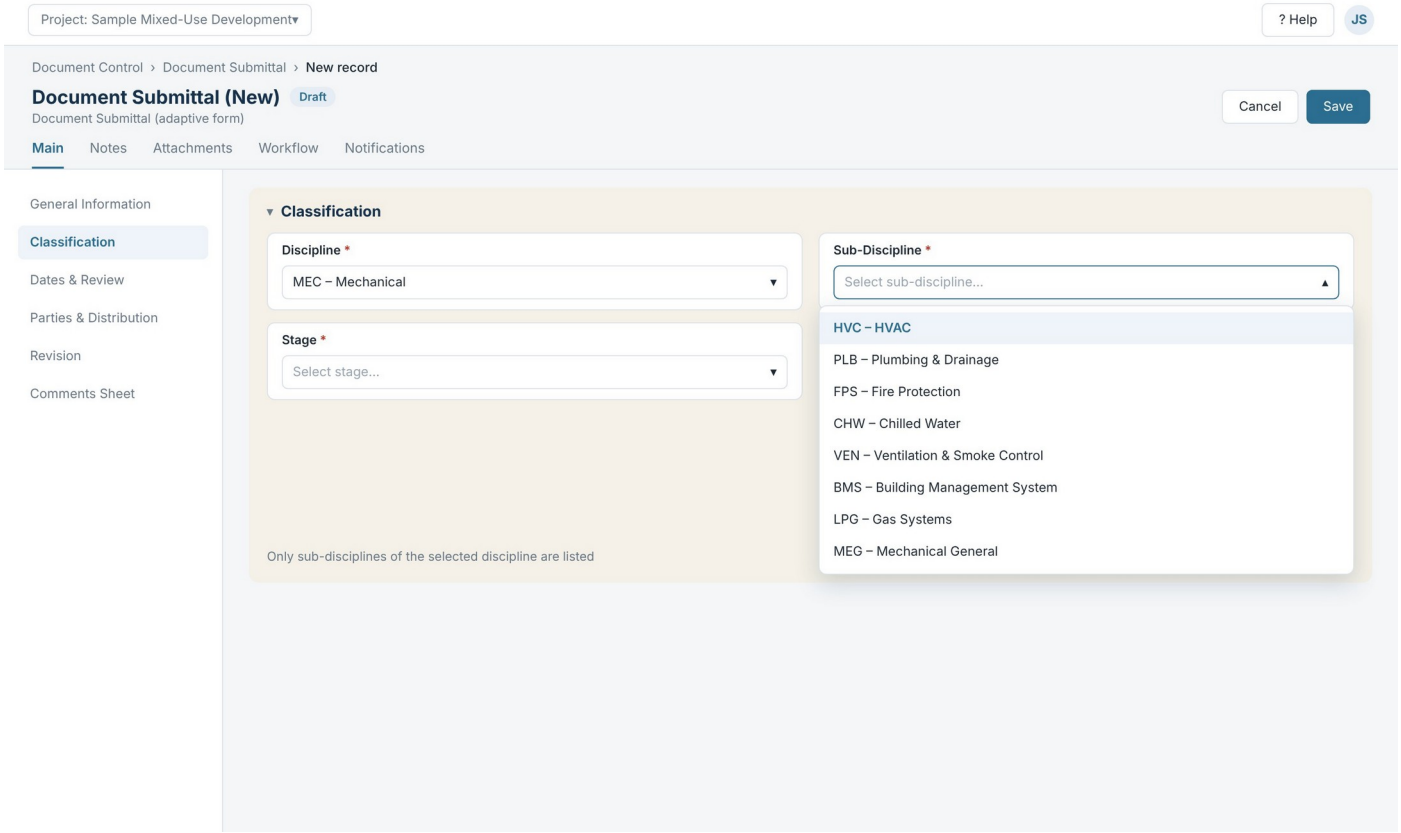


Illustration (sample data): the Sub-Discipline list filtered by the selected discipline

Letters that track their own responses

In Aconex, document controllers tracked letter responses by hand. In PMWEB the sender sets the status to Response Required. The recipient replies by copying the letter, which generates a new number and links the original letter in the attachments. When the reply is sent, the original letter's Responded flag switches to Yes, so outstanding responses can be listed at any time.

What Changes, Role by Role

For each stakeholder, the change is small where it matters most and large where it adds value.

Stakeholder	What changes
Document controllers	Same fields, terms, picklists and numbering as Aconex. New: no manual response logs, fewer data-quality fixes, and documents coded to package and asset from the start.
Reviewers and technical leads	Review tasks with due dates arrive in PMWEB, and comments go into a structured comments sheet instead of marked-up PDFs and emails.
Contractors and consultants	One submission screen that looks like the Aconex upload they know, with the document number generated for them.
PMIS managers	Adaptive forms, lists and workflows configured in PMWEB, plus a small set of documented back-end functions (numbering, confidentiality, cascading lists) to own and test at upgrades.
Project managers	Control of who reviews what and when, and confidential records limited to the right parties.
Programme managers and PMO	The same forms and numbering rules applied consistently across every project in the programme.

> **Key takeaway**
>
> The adaptive forms emulate Aconex fields, terms and functions, so Aconex users move to PMWEB without facing unfamiliar screens.
>
> Numbering that continues the Aconex serials, confidential records, cascading lists and self-tracking letters close the gaps document controllers care about.
>
> PMWEB becomes the single system of record for documents as well as cost, contracts and schedules.

Next in the series: Part 3 covers the optional Aconex history import for projects already on Aconex, on-premise deployment and the rollout plan.

Talk to us: If your projects run on Aconex or another document management system alongside a PMIS, or on a PMIS whose submittal forms your document controllers will not use, CMCS can assess your current platforms and data, configure Aconex-style document control in PMWEB, migrate the documents of projects already running on Oracle Aconex or Oracle Unifier, and publish the submittal dashboards. Contact CMCS at info@CMCS-MENA.com.

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PMWEB for Capital Project Owners | Replacing Aconex | Part 3 of 4

Moving from Aconex Without Losing History — Migration, Hosting and Rollout

The optional history import for projects already on Aconex, on-premise deployment and a four-phase rollout

A project that is already running on Aconex cannot afford to lose a single document, revision or comment when it moves. For those projects, the Aconex history can be imported into PMWEB in full. New projects need none of this and start directly in PMWEB.

Part 2 described the Aconex-style forms that document controllers now use in PMWEB. This part covers what happens around them: bringing the Aconex history across for projects that started on Aconex, choosing where PMWEB runs, and rolling the solution out on a new PMWEB instance.

Based on real implementations

This series is based on real PMWEB implementations, not a concept: CMCS has migrated **two clients** from Aconex to PMWEB, including **a major real estate developer in the Gulf region**. Client names and client data are withheld; the form illustrations and dashboards use sample data.

Is this article for you?

Yes, if you are planning, approving or taking part in the move:

- **PMIS managers and IT:** the history import, the match key, server capacity and the hosting choice.
- **Document control managers:** the parallel run, cut-over and checks that numbering continues correctly.
- **Project and programme managers:** when to move a live project and how to avoid disruption to reviews in progress.
- **Executives and security officers:** on-premise versus PMWEB-hosted, and what each means for data control and PMWEB AI.
- **Contractors and consultants:** what changes for you on cut-over day.

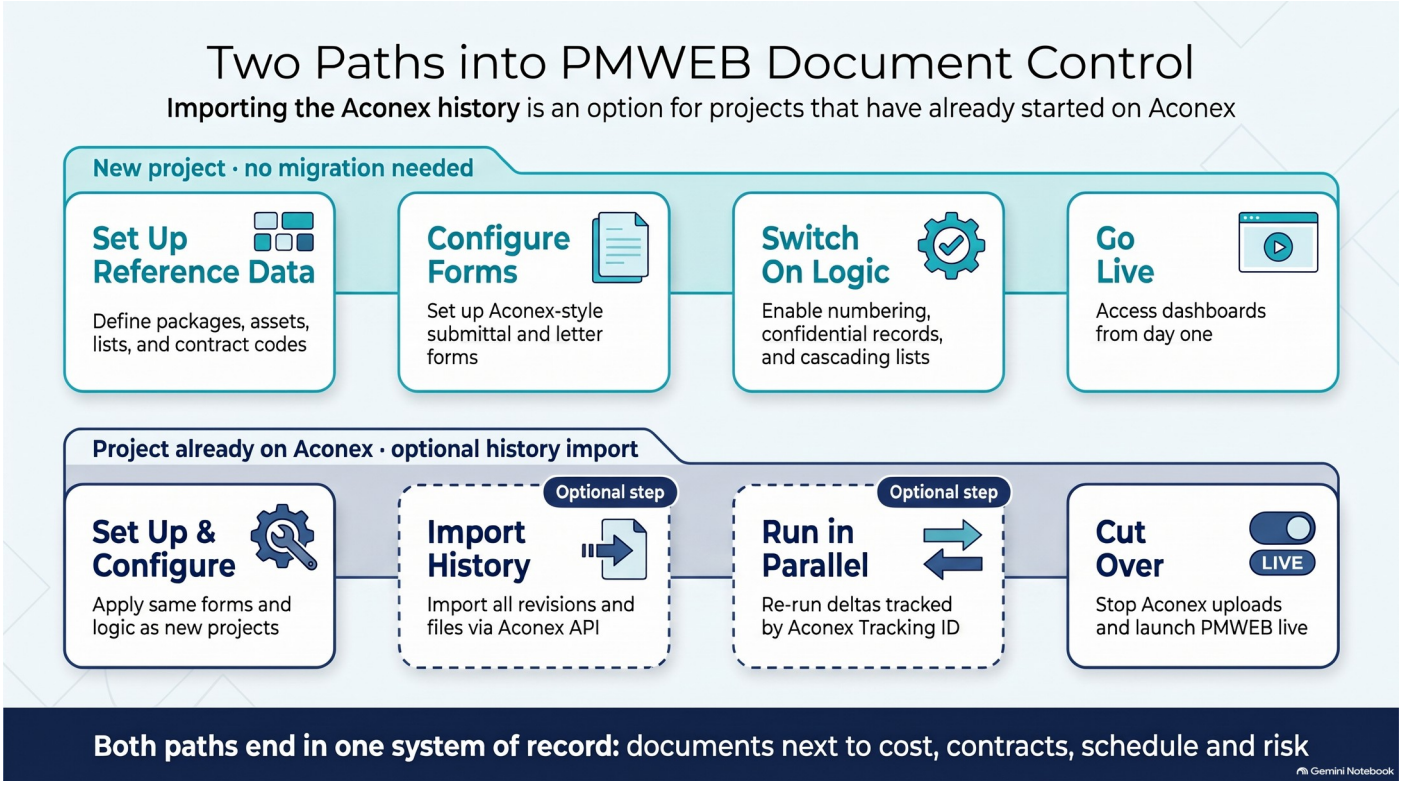
The delivery risk this part addresses

Moving a live project between platforms can break the evidence chain: approvals, comments and dates that later support claims, audits and handover. Importing the full Aconex history, keyed on the Aconex Tracking ID, keeps that chain intact, and a planned cut-over avoids losing reviews in progress.

Option for Projects Already on Aconex: Bringing the History Across

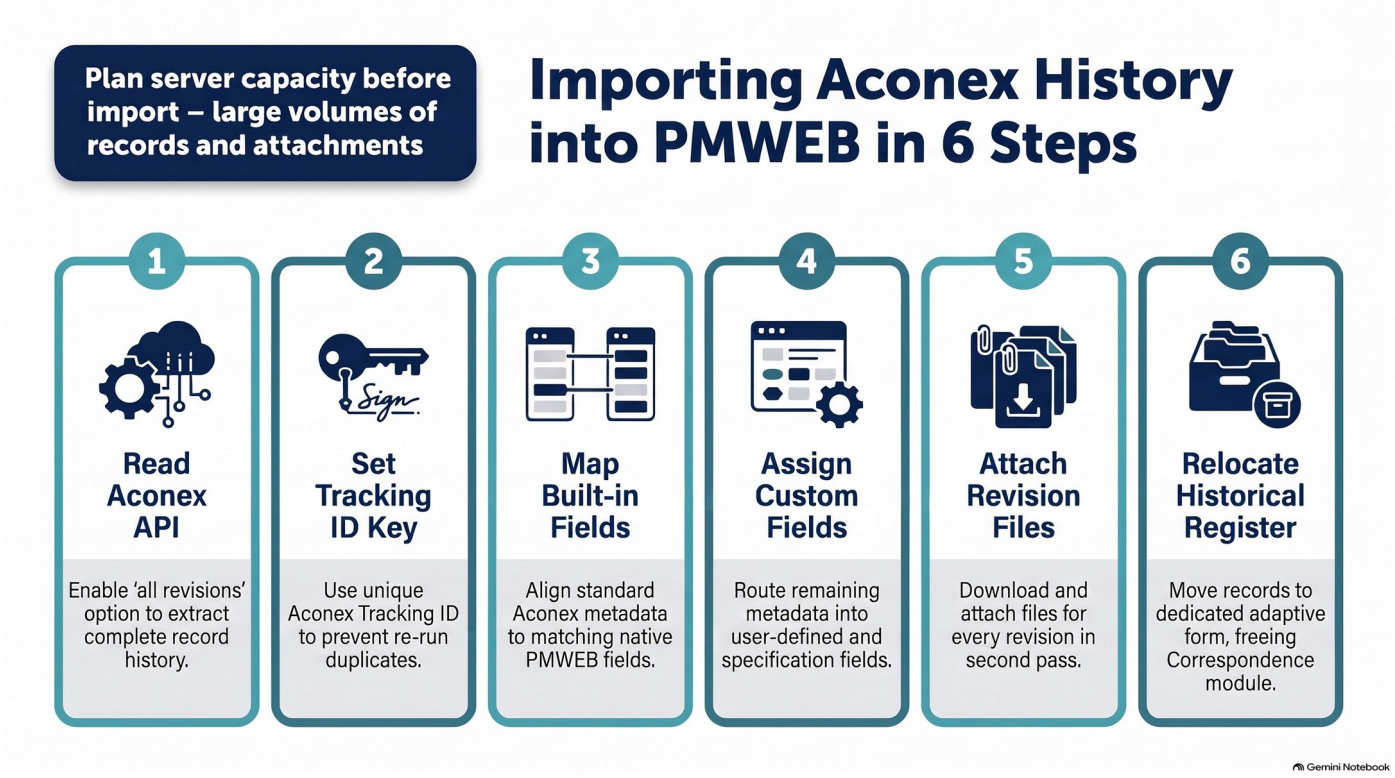
When you need this step

A new project can start directly in PMWEB with the Aconex-style forms described in Part 2; there is nothing to migrate. This step is for projects that **have already started using Aconex** and need to move to PMWEB mid-stream, for example when the owner standardises on one platform or an Aconex subscription ends. It ensures nothing recorded in Aconex is lost.



Infographic 1 – Two paths into PMWEB document control

For those projects, a custom .NET application reads each project's documents through the Aconex API and writes them into PMWEB. Nothing is retyped and nothing is left behind.



Infographic 2 – Importing Aconex history into PMWEB in six steps

Three decisions made the import reliable:

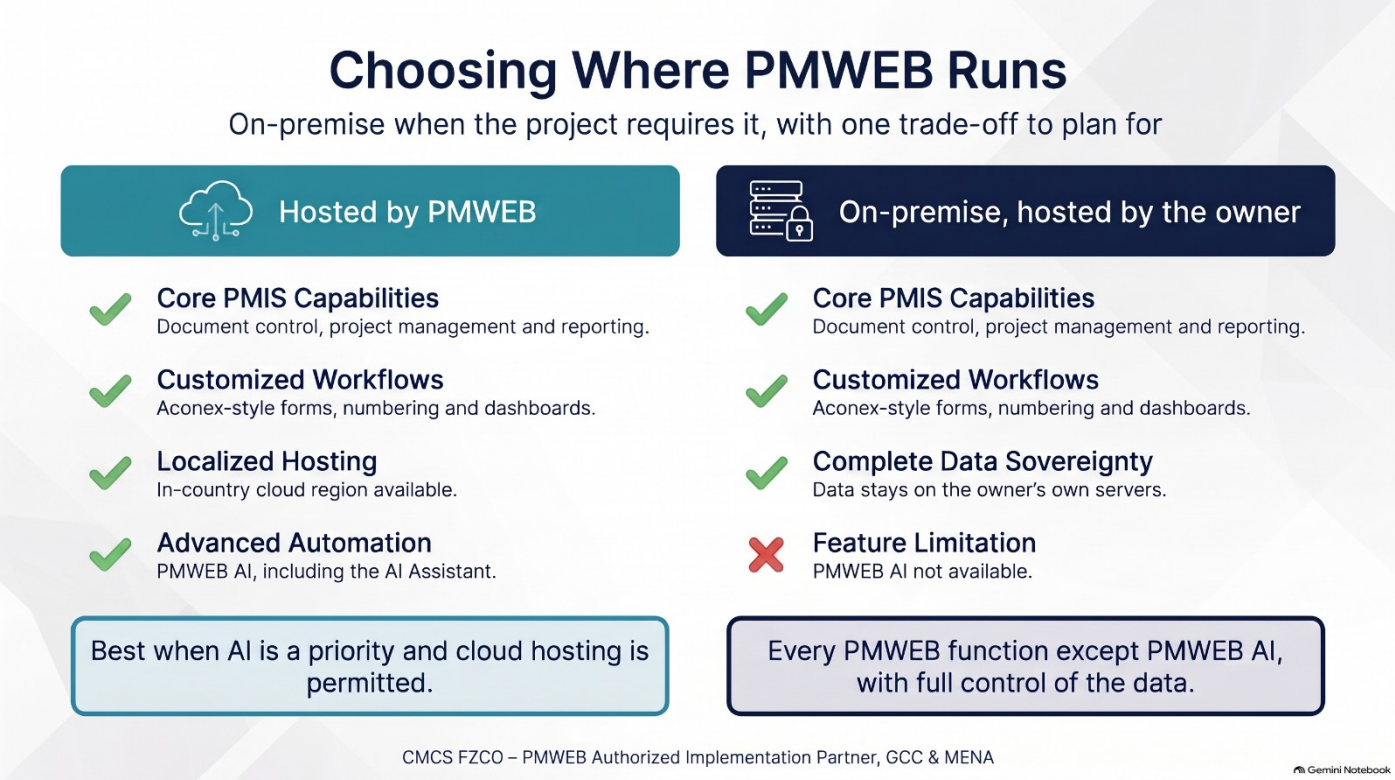
1. **All revisions, not just the latest.** By default the Aconex API returns only the current revision of each document. Switching on the all-revisions option brings the complete history.
2. **One match key.** Every Aconex record has a unique ID, stored in PMWEB as the Aconex Tracking ID. The import can be re-run as often as needed without creating duplicates, which matters during the weeks when both systems are still live.
3. **Built-in fields first, custom fields for the rest.** Aconex metadata goes into PMWEB's standard fields wherever one fits. Discipline, sub-discipline, companies, confidentiality and the Aconex dates go into user-defined and specification fields.

Metadata was loaded first and the files in a second pass. The history was first loaded into PMWEB's Correspondence module and then moved to its own register, Aconex Document Submittal, so the history never mixes with live work and Correspondence stays free for normal use. On a project that starts in PMWEB, this register is simply not needed. Volumes are large, so server capacity should be planned before the import starts.

On-Premise When the Project Requires It

Many government entities, defence and security projects, critical infrastructure owners and some giga-projects require their document management system and PMIS to run on their own servers, inside their own network. Cloud-only document platforms cannot meet that requirement. PMWEB can: it is available as a cloud service hosted by PMWEB and as an on-premise installation on the owner's infrastructure, with the same modules, adaptive forms, workflows and reports.

That makes PMWEB one of the few ways to bring document control and project management into one platform on projects that cannot use the cloud. The developer featured in this series chose to run PMWEB on-premise for cybersecurity reasons, and everything described here, from the Aconex import to the dashboards, runs on its own servers.



Infographic 3 – Choosing where PMWEB runs

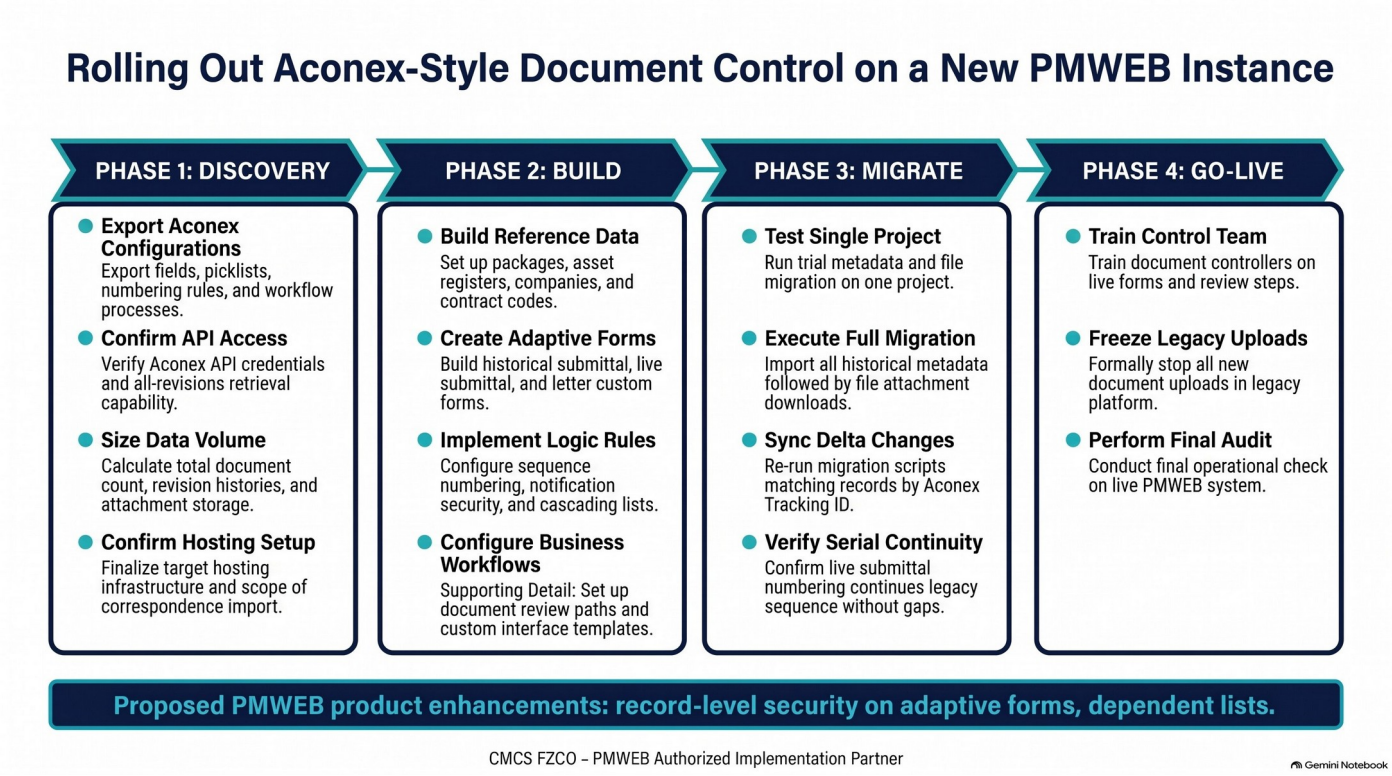
The trade-off to plan for

PMWEB AI functions, including the PMWEB AI Assistant, are only available when the instance is hosted by PMWEB. An on-premise instance hosted by the owner runs every document control, project management and reporting function described in this series, but without PMWEB AI.

Owners can choose per programme: a PMWEB-hosted instance, for example in an in-country cloud region, to use PMWEB AI, or an on-premise instance for maximum control of data.

Rolling It Out on a New PMWEB Instance

The approach is repeatable. On a new PMWEB instance the work runs in four phases. A project that starts in PMWEB skips the migration phase; one that has already started on Aconex runs all four.



Infographic 4 – Rollout roadmap for a new PMWEB instance

1. **Discovery.** Export the Aconex project settings: fields, picklists, numbering pattern, confidentiality rules and review workflows. Confirm API access and size the history.
2. **Build.** Set up packages with their assets, the lists, companies and contract codes, then the three adaptive forms, the numbering procedure, confidential security and cascading lists.
3. **Migrate (projects already on Aconex).** Test the import on one project, run the full import of metadata and then files, and re-run by Tracking ID until cut-over. Check that new numbers continue the legacy serials.
4. **Go live.** Train document controllers, stop Aconex uploads, publish the dashboards and switch on the weekly pending-actions report.

Checklist — before you replace your document platform

Questions to ask

- Can your document controllers create, number and review a submittal in the PMIS the same way they do today?
- If the project has already started on Aconex, will its full history, with every revision and file, be in the PMIS on the day you switch?
- Is every document coded to a package, an asset and a contract?
- Can you list every overdue review step, by person, without an export?

Recommendations

- Mirror the document platform's fields, numbering and terms before asking anyone to change habits.
- Key the migration on the source system's unique ID so it can be repeated safely.
- Publish the dashboards in the first week, so the benefit is visible from day one.

Who Does What During the Move

A smooth move depends on every stakeholder knowing its part.

Stakeholder	Role in the move
Executives	Approve the decision to standardise on PMWEB, the hosting choice and the cut-over date.
Programme managers and PMO	Sequence projects, choosing which start directly in PMWEB and which migrate their Aconex history.
PMIS managers and IT	Run discovery, build the forms and logic, run the import, plan server capacity and own the hosting set-up.
Document control managers	Validate imported records, run the parallel period, confirm numbering continuity and train document controllers.
Project managers	Agree the cut-over with contractors and consultants so that no review in progress is lost.
Contractors and consultants	Stop uploading to Aconex at cut-over and submit in PMWEB from the agreed date.

> ### Key takeaway
>
> Projects already on Aconex can bring their full history with them, keyed on the Aconex Tracking ID; new projects simply start in PMWEB.
>
> Where the project requires it, everything runs on-premise on the owner's own servers; PMWEB AI is available only on PMWEB-hosted instances.
>
> The rollout follows four repeatable phases: discovery, build, migrate and go live.

Next in the series: Part 4 shows the dashboards, the pending-actions report and how PMWEB AI benefits from the complete project picture.

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PMWEB for Capital Project Owners | Replacing Aconex | Part 4 of 4

Seeing Every Submittal — Dashboards, Reporting and PMWEB AI

Daily work queues, executive views and an AI that sees the complete project picture

Once submittals, reviews and letters live in the same database as cost, contracts and schedule, reporting stops being a monthly spreadsheet exercise. Every figure comes from one source, every day, and an AI assistant can finally see the complete picture.

Parts 1 to 3 covered why document control belongs in the PMIS, how the Aconex-style forms work and how to move across. This final part shows what owners gain once the data is in one place: dashboards for document controllers and executives, a weekly pending-actions report, and PMWEB AI working on the complete project picture.

Based on real implementations

This series is based on real PMWEB implementations, not a concept: CMCS has migrated **two clients** from Aconex to PMWEB, including **a major real estate developer in the Gulf region**. Client names and client data are withheld; the form illustrations and dashboards use sample data.

Is this article for you?

Yes, if you want to see where every submittal stands without exports and spreadsheets:

- **Document controllers:** the daily workbench and the weekly pending-actions list.
- **Reviewers:** your own open actions, due dates and response performance.
- **Project managers:** overdue reviews, plan versus actual submissions and contractor quality on your project.
- **Programme managers and PMO:** portfolio scorecards and review performance across projects.
- **PMIS managers:** how the dashboards read PMWEB data and are displayed inside PMWEB.
- **Executives and other stakeholders:** the seven numbers that tell you whether document review is healthy.

The delivery risk this part addresses

The most expensive document problems are the ones discovered late: an overdue review that has already delayed procurement, or a contractor whose submittals keep failing. Daily dashboards on the same database as cost, contracts and schedule make those problems visible while there is still time to act.

Dashboards and Reporting

Once submittals, reviews and letters live in PMWEB, reporting stops being a monthly spreadsheet exercise. A set of PMWEB Power BI dashboards reads the same PMWEB records every day and gives each audience the view it

needs. Microsoft Power BI has a built-in integration with PMWEB: it reads the data directly from PMWEB and the dashboards are displayed within PMWEB itself, so users never leave the platform to see them.

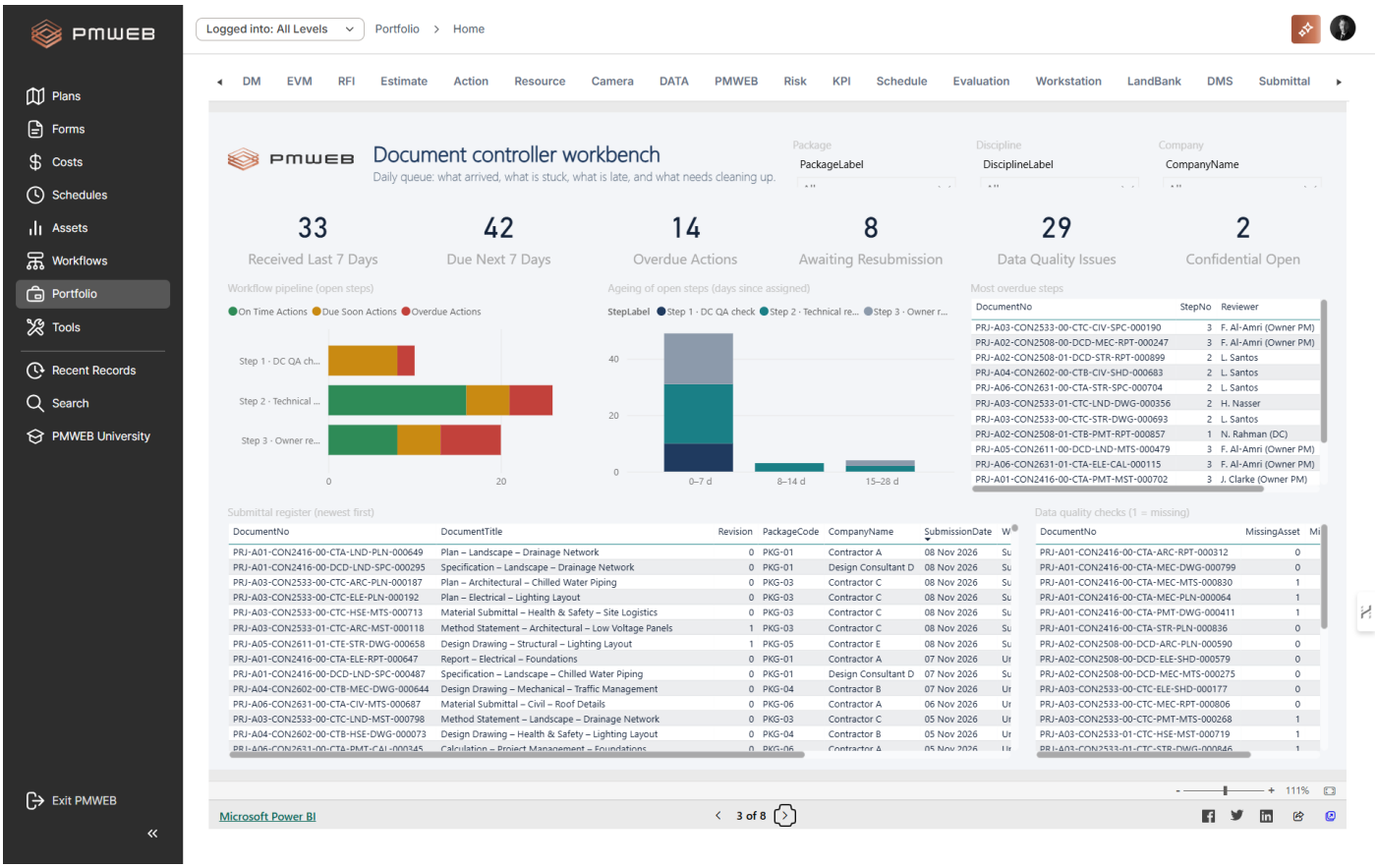
Dashboard	For	Question it answers
Executive overview	Owner executives, PMO	Is document review healthy across the portfolio, and where is it at risk?
Submission plan vs actual	Executives, project controls	Are contractors submitting documents when the programme says they should?
Document controller workbench	Document controllers	What arrived, what is stuck, what is late and what needs cleaning up today?
Review turnaround & SLA	Document control manager	Which review step loses time against its service level?
Quality & resubmissions	PMC lead, package managers	Which companies and document types are approved first time?
Reviewer workload	Reviewers and their managers	Who holds the open actions and how fast does each reviewer respond?
Correspondence responses	Document controllers	Which letters needing a reply are still unanswered?
Pending workflow actions	Everyone, emailed weekly	Every open review step, by the person who must act

The executive overview puts seven numbers on one page: submittals received, open in review, approval rate, first-time approval, average review cycle, share reviewed on time and overdue actions. A package scorecard flags each package as on track, watch or at risk.

The document controller workbench is the daily queue. It shows what arrived in the last seven days, what falls due in the next seven, where open submittals sit in the workflow, how long they have waited, the most overdue steps, and records missing an asset or a scheduled date.

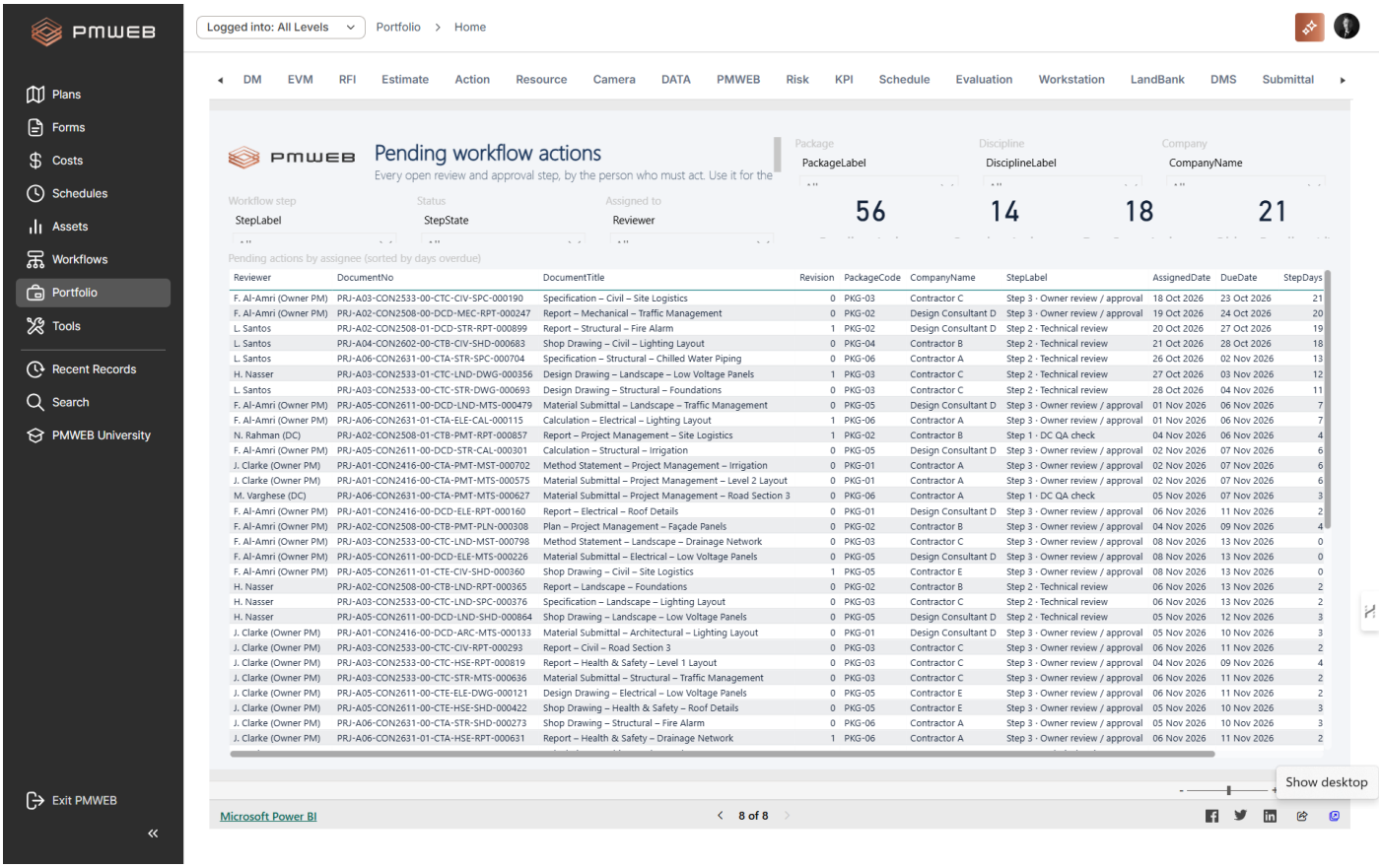


Executive overview dashboard (sample data)



Document controller workbench (sample data)

The pending workflow actions report lists every open review and approval step, grouped by the person who must act, with days pending, days overdue and a status flag. It is the weekly chase-up list for document controllers and each reviewer's personal to-do list. Reviewer performance figures are visible only to the reviewer and their direct manager.



Pending workflow actions report (sample data)

Why this reporting was not possible before

When documents sit in one platform and contracts in another, a dashboard like the package scorecard needs an export from each system and a person to join them. With submittals, letters, packages, assets and contracts in the same PMWEB database, every figure comes from one source, refreshes daily, and can be traced back to the record behind it.

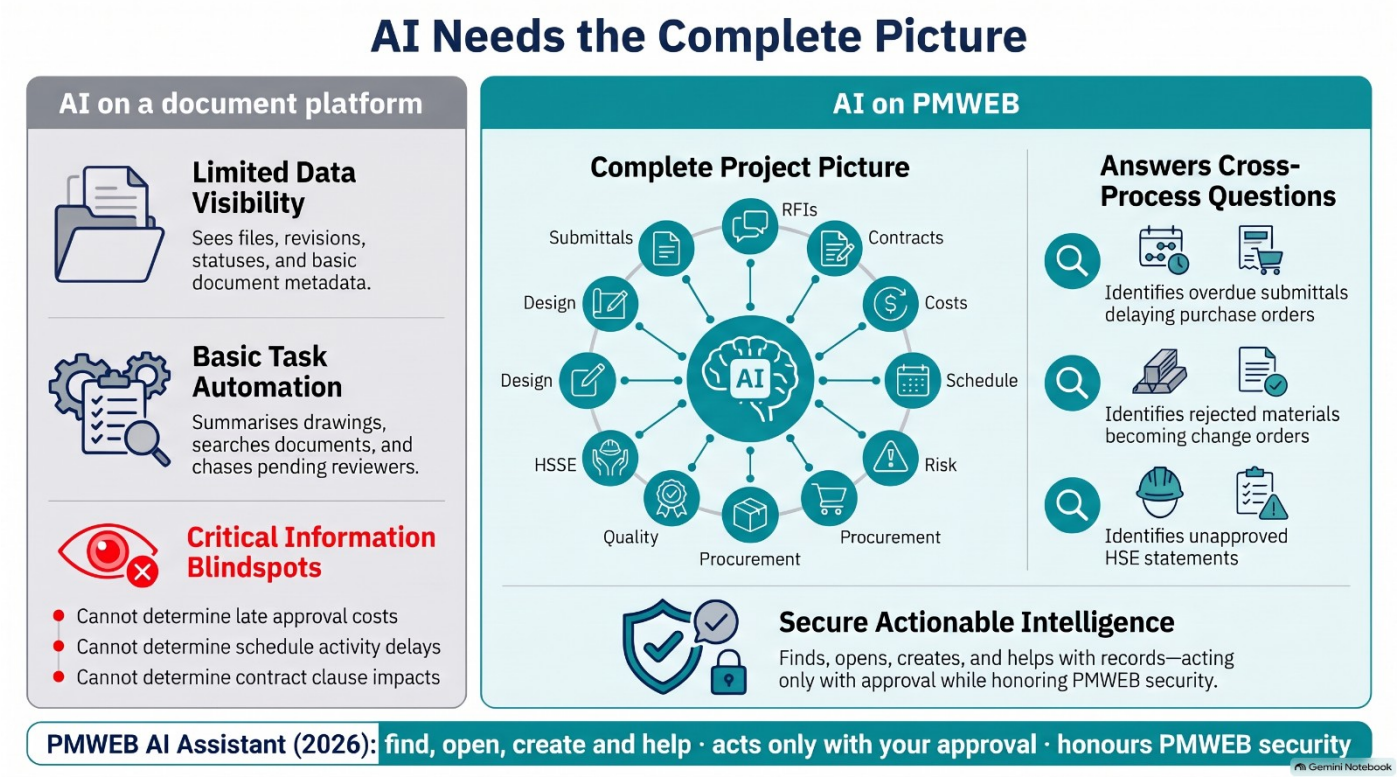
Your View, by Role

Each project stakeholder opens a different view of the same PMWEB data.

Stakeholder	Dashboards and reports
Document controllers	Document controller workbench, correspondence responses and the pending workflow actions report.
Reviewers and technical leads	Their own rows in the pending actions report and the reviewer workload page, visible only to them and their manager.
Project managers	Executive overview filtered to their project, submission plan versus actual, and quality and resubmissions.
Programme managers and PMO	Package scorecard, review turnaround against SLA and reviewer workload across the programme.
PMIS managers	The data model behind the dashboards, the refresh schedule and role-based security.
Executives	Executive overview: received, open, approval rate, first-time approval, review cycle, on-time share and overdue actions.

Why the Complete Picture Matters Even More with PMWEB AI

Artificial intelligence raises the stakes. An AI assistant can only answer from the data it can see, and the questions owners want answered are never about one process. Which overdue submittals hold up a long-lead purchase order? Which rejected material submittals have already become change orders? Which contractor has the lowest first-time approval and the most extension of time requests? Which HSE method statements are still unapproved for work planned next week?



Infographic 1 – AI needs the complete picture

An AI connected only to a document platform sees files and statuses. It can summarise a drawing or chase a reviewer, but it cannot tell you what a late approval costs, which schedule activity it delays or which contract clause it triggers. An AI connected to PMWEB sees the submittal together with the RFIs, the contract, the cost, the schedule, the risks, the purchase orders, the inspections and the HSSE records, all coded to the same package, asset and contract.

- **The PMWEB AI Assistant** in the 2026 release helps users find, open and create records, including adaptive form records such as the submittals and letters described here, and answers how-to questions. It acts only with the user's approval and honours PMWEB security settings, so confidential submittals stay confidential. PMWEB AI functions require an instance hosted by PMWEB; an on-premise instance hosted by the owner does not include them.
- **Later capabilities, such as risk identification,** depend on exactly this: structured, validated data across all project processes in one database, rather than documents scattered across platforms.

Moving document submittals into PMWEB is therefore also preparation for AI. The more of the project lives in one structured platform, the more complete and trustworthy the AI's answers become.

> **Key takeaway**
>
> With submittals in the PMWEB database, every dashboard figure comes from one source, refreshes daily and is displayed within PMWEB.
>
> The pending-actions report turns overdue reviews into a weekly, person-by-person action list.
>
> An AI can only see the complete picture if every project process, document submittals included, lives in the same platform.

Series recap: Part 1 – one platform and one project history; Part 2 – Aconex-style document control in PMWEB; Part 3 – migration, hosting and rollout; Part 4 – dashboards, reporting and PMWEB AI.

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