



PROJECT MANAGEMENT SOLUTIONS THAT *SIMPLY WORK* SINCE 1989.

Implementing Primavera P6 Professional, EPPM and Team Member for a Public Works Agency

Presenter: Jonathan E. McNatty, PSP
August 22, 2018

www.drmcnatty.com



Thank you for joining today's webinar

- Mute – all call in phones are automatically muted in order to preserve the quality of the audio for all attendees.
- Questions – during the session, questions can be submitted through the Questions Box on the right side of the screen . We will try to address your questions at the end of the presentation, time permitting.
- Follow up – all registrants will receive an Excel file listing all questions and responses along with a link to the recorded webinar.

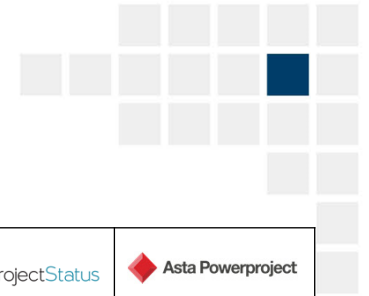
Safe Harbor








- The statements made in this technical presentation are based on our current knowledge of the tools.
- Our statements should not be construed to be an official “Vendor perspective”, but are intended to be the sharing of technical and user knowledge gained as we explore new paths and technologies, usually in advance of our clients.
- You need to make your own judgments as to the application of our shared ideas in your own, unique environment.

Products and Services

- Project Controls System Implementation
- Cloud Based, Global Managed Hosting Services
- Software Training Services
- Integration, Analytics, Dashboards, Risk and Role-based User Access Tools
- Program and Project System Support Services and Partnering
- Mentored and Supported SB/DVBE Project Staffing Resources

Tool Matrix



Business Process							
Portfolio Management	P6, Unifier				Aconex	View	
Planning & Budgeting	Unifier	G2			Aconex	Collaborate	Powerproject
Estimating		Estimating			Aconex		BidCon
CPM Scheduling	P6	Scheduling	Fuse	Synchro Scheduler		Status	Powerproject
Cost Management & Reporting	P6, Unifier	G2	Fuse		Aconex	Collaborate	Powerproject
Document Management	Unifier	Prism Docs			Aconex		
Change Management	Unifier	G2			Aconex		
Engineering Forms	Unifier	G2			Aconex		
BIM/Schedule Integration				Synchro	Aconex		Asta BIM
Risk Analysis	P6 Risk		Risk			Collaborate	Asta Risk
Risk Management & Mitigation	P6		Risk		Aconex	Collaborate	
Role Based Cloud Dashboard	Dashboard	Dashboard			Aconex	View	
Earned Value	P6	Earned Value			Aconex		
Claims Support & Analysis	P6		Fuse		Aconex		Powerproject
Facility Management/Work Orders	Unifier				Aconex		
Mobile online/offline support	Mobile				Aconex	Browser	Mobile
Integration with Finance/ERP	Gateway	Integrator			Aconex	Gateway	

DRMcNatty supports these project controls tools as an authorized partner, trainer and implementer as well as providing trained and supported project staffing resources.

Presenter



JM Consulting Services



Jonathan E. McNatty, PSP
Principal Consultant

Mr. McNatty has 27 years of work experience in construction, project management, project controls, construction management, CPM scheduling, project document administration & control, contracts & budget cost control, project controls implementation, claims preparation & analysis, and creating technical documents for a wide range of clients.

Mr. McNatty is the Principal Consultant for JM Consulting Services based out of Western NY providing Project Management, Project Controls, CPM Scheduling, Staffing Services, Hosting, Claims Analysis, Training onsite & online, and Custom Reporting using industry standard “Best Practices” that are proven to work.

www.jmconsultingservices.org

Abstract

- Managing large Public Works projects with hundreds of projects and dozens of Project Managers can be a daunting task for any Project Manager. Needing a simpler solution to get Project Managers to update their specific activities on multiple projects the Team Member option was selected for the Project Managers to perform updates on a monthly basis. Project Managers don't have time to become "project schedulers" using P6 Professional. Team Member provides an easy and simple way to update activities. Project Managers then can use the data updated in P6 Professional through Team Member to view in Dashboards in EPPM that can be presented in graphics and reported to management.
- The presenter will demonstrate the initial needs of the Public Works Agency and how a phased implementation strategy was approached and implemented within a short timeframe.

Agenda

- Background Info – Public Works Agency
- Challenge
- Solution - Phased Implementation
- Selling the Vision & Training
- Team Member – Setup in EPPM
- Team Member – Project Managers Update Activities
- EPPM – Team Leaders Approve Activities
- Project Manager & Team Leader User Guides
- EPPM Dashboards and Reports (BI Publisher)
- Questions

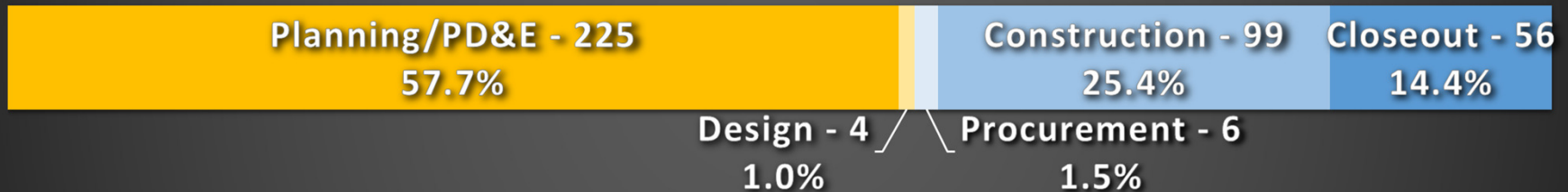
Background Info - Public Works Agency

- Provides drinking water and wastewater treatment services to county residents & businesses
- The department manages four water treatment plants, eight wastewater treatment plants, a bio-solids facility, and administrative and field support facilities
- Portable Water, Waste Water, and Reclaimed Water
- Population 1,229,226
- 1,266 sq. miles
- Provide 49 million gallons of clean, reliable drinking water each day

Background Info - Public Works Agency

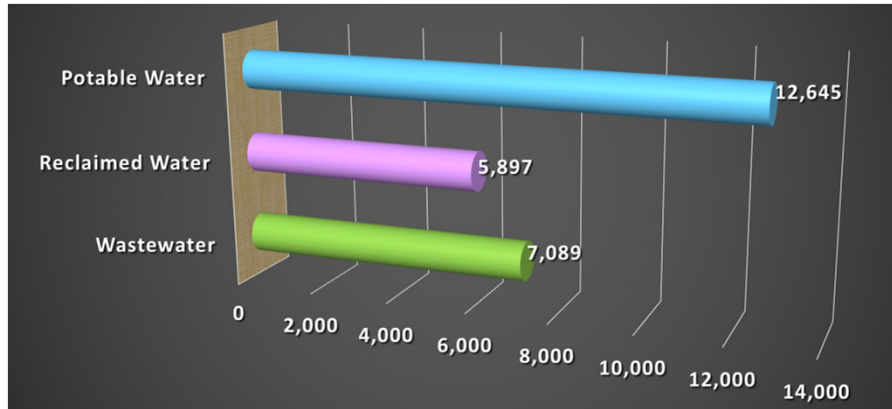
- Spend Goal: \$77.5Mil (through QTR2)
- YTD Actual Spend: \$87.1Mil (112% of goal through QTR2)
- FY18 Total Baseline: \$130.5Mil (original baseline for FY18)
- Now Forecasting: \$135.3Mil (105% of goal at Year End)

Number of Active Projects Each Phase

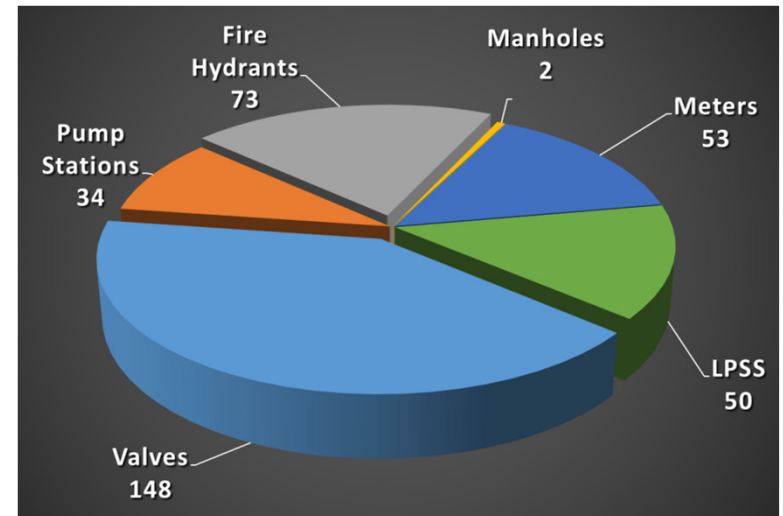


Background Info - Public Works Agency

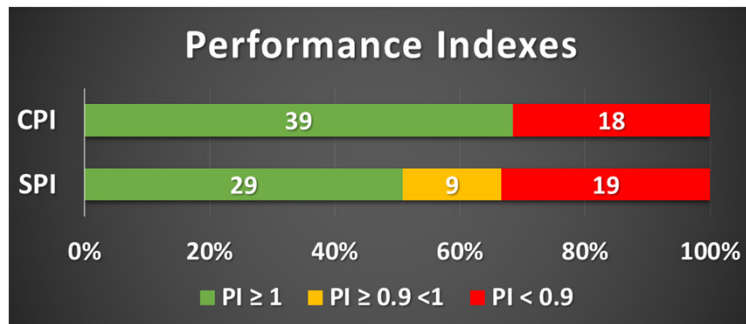
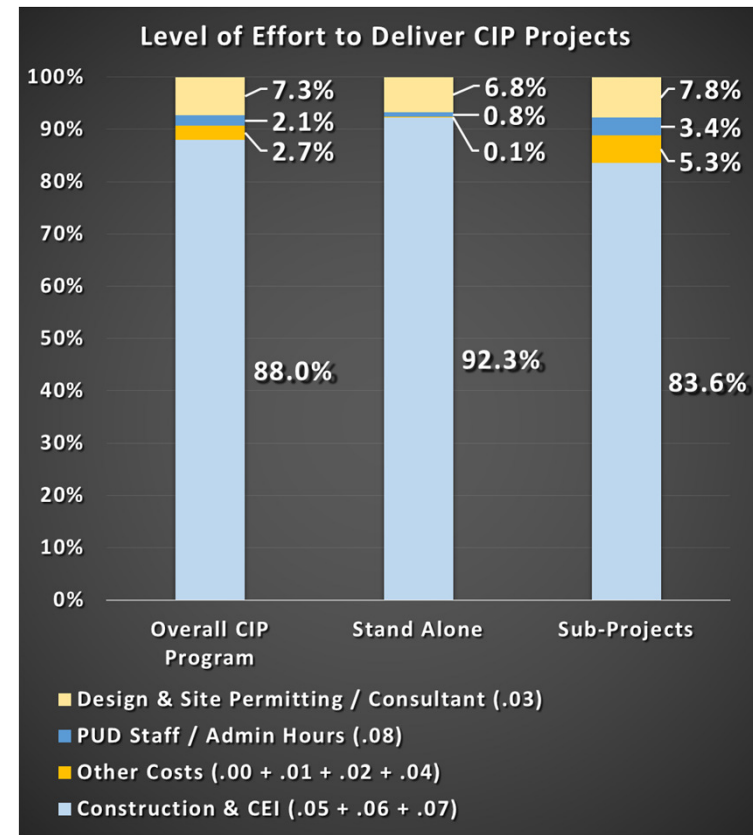
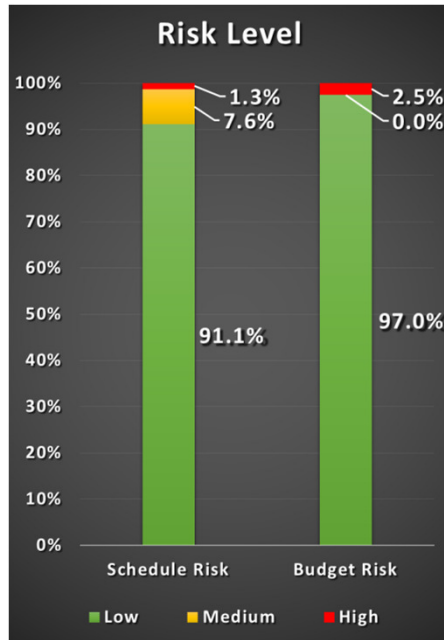
Assets Installed (Linear Feet of Pipe)



Assets Installed, Rehabbed or Replaced



Background Info - Public Works Agency



Background Info - Public Works Agency

- Need a simpler and more streamlined way to collect data from Project Managers to update project schedules on a monthly basis
- Project Managers use Excel to update schedules and send to their Team Leaders each month
- Team Leaders manual input update information into P6 Professional from the Excel update sheet
- Project Managers manage multiple projects, and Team Leaders manage multiple Project Managers
- Too much time spent creating Excel & PowerPoint monthly reports for upper management (Directors) manually

Background Info - Public Works Agency

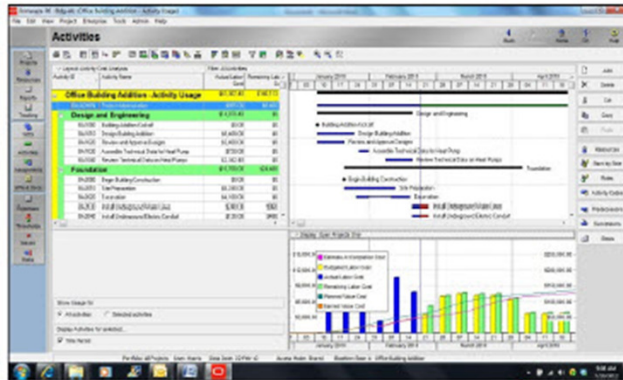
- Managing 809 projects in P6 Professional
 - Level 2 Summary Activities
 - Design & Planning
 - Procurement
 - Construction
 - Closeout

Activities									
Activities WBS Projects									
Layout: Classic Schedule Layout Filter: All Activities									
Activity ID	Activity Name	Original Duration	Remaining Duration	Start	Finish	Activity % Complete	Total Float	Resources	Owner
TLAP Team Leader Approval Project		360	360	12-Aug-18	06-Aug-19		0		
TLAP.1 Planning		120	120	12-Aug-18	09-Dec-18		0		
A1000	Planning & Design	120	120	12-Aug-18	09-Dec-18	0%		Jonathan McNatty	jmcnatty
TLAP.2 Construction		360	360	12-Aug-18	06-Aug-19		0		
A1010	NTP	0	0	12-Aug-18		0%			jmcnatty
A1020	Construction	360	360	12-Aug-18	06-Aug-19	0%		Jonathan McNatty	jmcnatty
A1030	Substantial Completion	0	0		12-Aug-18	0%			jmcnatty
TLAP.3 Closeout		60	60	12-Aug-18	10-Oct-18		0		
A1040	Admin/Closeout	60	60	12-Aug-18	10-Oct-18	0%		Jonathan McNatty	jmcnatty

Challenge

- Replace the Excel Schedule update sheet, but don't introduce a more complicated timely solution to the Project Managers (they are our customers!) Must have the buy-in from them first and foremost
- Train approximately 30 Project Managers on a new process and new software (we resist change!)
- Project Managers do not have time to become “project schedulers” using P6 Professional
- Train Team Leaders on a new process and new software
- New process needs to be expedited and running in a few months to report to upper management (Directors) on progress and show results with new reporting capabilities

Selling the Vision & Training

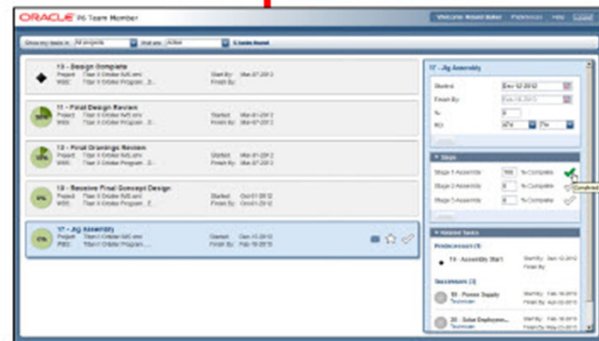


P6 Professional Client



P6 EPPM (Web)

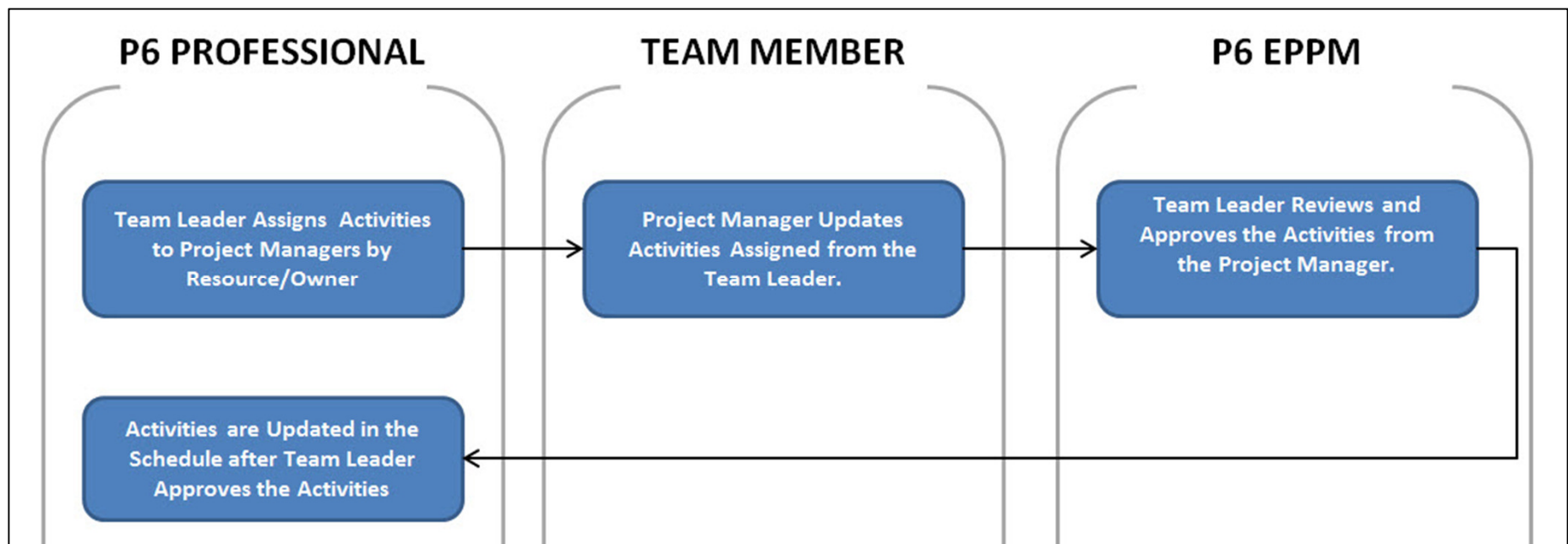
ORACLE®
DATABASE



Team Member

Selling the Vision & Training

- **Project Managers** – Responsible for managing multiple specific projects and update the schedule activities monthly in Team Member
- **Team Leaders** – Head of a specific department overseeing multiple Project Managers, responsible for reviewing PM monthly updates in EPPM
- **Manager Project Controls** – Responsible for monthly report to upper management (Directors) reviews Team Leaders, P6 Professional and EPPM



Solution – Hosted Phased Implementation

- PHASE I
 - Setup Hosting Environment & Servers
 - P6 Professional / P6 EPPM / P6 Team Member
 - Software IT Issues – Client Firewall & Security on Laptops/Java Issues
 - Setup Team Member Training Environment & Test (Training Database)
- PHASE II
 - Team Leader P6 Professional Training (1 Class 8 Students) 3 Days
 - Project Manager Team Member Training (3 Classes 10 Students) 1 Day
 - Team Leader Team Member Training (1 Class 8 Students) 1 Day
 - Create Team Member and Team Leader User Guides (after all training)
 - Collect data for EPPM Dashboards and BI Publisher Custom Reports
- PHASE III
 - Go “Live” Project Managers start using Team Member for monthly updates
 - Connected to Client P6 Professional Database (linked to P6 EPPM)
 - Create Custom EPPM Dashboards and Custom BI Publisher Reports
 - Demonstration to upper management (Directors) on implementation progress

Selling the Vision & Training

Team Member

- Quick, convenient and easy interface for Project Managers to status their work in one screen in the web version
- Team Members don't need to be a "Scheduler" to use the interface
- Communicate with the project manager or other Team Leaders through discussions, email, photos, and documents
- Preferences to determine which fields are available for updates
% complete and remaining duration
- View and update the steps, codes, notebooks, and user defined fields assigned to the task/activity
- iPad, iPhone and Android device applications support updating tasks/activities

Selling the Vision & Training

- PHASE II
 - **Team Leader P6 Professional Training (1 Class 8 Students) 3 Days**
 - Team Leaders will need to use P6 Professional to assign a Project Manager as the “Resource & Owner”
 - Team Leaders will need to understand the basics of scheduling and how P6 Professional, EPPM, and Team Member all work together. Most if not all have never used P6 Professional before
 - Prove that the Team Member solution is viable and can replace the existing Excel update sheet being used by the Project Managers.
 - This is focused “role based training” for just the Team Leaders

Selling the Vision & Training

- PHASE II

- Project Manager Team Member Training (3 Classes 10 Students) 1 Day**

- Project Managers will need to learn the Team Member application. This is the scariest part for the PM's and the most important time to "sell" the vision going forward. People automatically resist change, must prove the vision!
 - Training is broken into 2 sessions in one day of training:
 - Session 1 – Basics of Scheduling, P6 Professional & Team Member
 - Session 2 – Team Member overview and hands on training
 - Prove that the Team Member solution is viable and can replace the existing Excel update sheet being used by the Project Managers and will not add to their existing workload.
 - This is focused "role based training" for just the Project Managers. During this training we are looking for "Champions" to do testing before going live

Selling the Vision & Training

- PHASE II

- **Team Leader Team Member Training (1 Class 8 Students) 1 Day**

- Team Leaders will need to learn how the Team Member application works. They will perform same tasks as the Project Manager
 - Team Leaders will need to learn how to review and approve the Project Managers activities in EPPM using the “Approvals” tab in EPPM
 - Team Leaders provide input on selecting the “champions” total of 5 Project Managers to test the vision before rolling out live to all 30 Project Managers
 - This time period is used to work out any final issues with the vision, IT, and overall implementation success before going live

Selling the Vision & Training

- PHASE II

- **Create Team Member and Team Leader User Guides**

- Create Project Manager user guide to be given to the Project Managers just before going live
 - Create Team Leader user guide to be given to Team Leaders just before going live
 - Step by step guide with screen shots that reinforces the prior training

Selling the Vision & Training

- PHASE II

- **Collect data for EPPM Dashboards and BI Publisher Custom Reports**

- Custom reports need to be produced using the data from P6 Professional
 - Custom dashboards & reports need to be automated, need to stop manual entry of monthly reports to upper management (Directors)
 - BI Publisher custom report that mirrors an Excel report that was being updated manually, now using the “Reports” tab in EPPM this report is automated pulling data from P6 Professional

Team Member – Setup in EPPM

- Each User under the “Administration” tab must have the Team Member box checked to access the Team Member application

The screenshot displays the EPPM Administration interface. The 'Administration' tab is highlighted in red. Below it, the 'Users' section shows a list of users. The user 'jmcnatty' (Jonathan McNatty) is highlighted in blue and circled in red. Below the user list, the 'Module Access' section is shown, with the 'Team Member' checkbox checked and circled in red.

Module	Access
Team Member	<input checked="" type="checkbox"/>
Timesheet	<input checked="" type="checkbox"/>
Visualizer	<input checked="" type="checkbox"/>
Web Services	<input checked="" type="checkbox"/>

Team Member – Setup in EPPM

- Each individual Project in the EPS-Enterprise Project Structure needs the Team Member section to be updated for Team Member to be functional

The screenshot displays the Oracle Primavera P6 EPPM interface. The top navigation bar includes 'Dashboards', 'Portfolios', 'Projects', 'Resources', and 'Approvals'. The 'Projects' menu is highlighted. Below this, the 'Enterprise Project Structure' is shown with a table of projects. The 'Elrod Water Line Looping & Hydrants' project is selected, and a context menu is open over it. The 'Set Project Preferences' option in the context menu is circled in red, and a red arrow points from a gear icon in the project list to this option.

ID *	Name *
PU...	WORCS 11 Contract Admin and Preparation
WR...	Water Department Fiscal Year Milestones
PU...	PUD Typ Project Template
PTW	Potable Water
31...	Large Water Meter Replacement FY17 (Contract 1)
31...	South County Repump Station Chemical Addition and Yard Pip...
39...	Mulrennan Road WM Interconnects
39...	Wimauma Water System Phase III
39...	Bell Shoals WM Extension
30...	Roberts & Mathers Lane Looping & Hyd
30...	Elrod Water Line Looping & Hydrants
39...	Race Track Rd. PWTM
31...	Fawn Ridge/Lake Park Variable Frequency Drive Replacement
39...	Wimauma Water System Phase II

- Add Project
- Add Project Template
- Open Project
- Close
- Close All
- Copy
- Cut
- Paste
- Delete
- Fill Down
- Set Project Preferences
- View Calendar

Team Member – Setup in EPPM

- Select settings on the “Status Updates” tab

The screenshot shows the 'Project Preferences' dialog box with the 'Team Member' tab selected. The 'Status Updates' sub-tab is also selected. The 'Team Members are required to status at:' section has 'Activity Level' checked, with 'As Owner' and 'As Primary Resource' also checked. The 'When updating actual units, team members update via:' section has 'Total Time Spent' selected. The 'Timesheets' section has 'Percent Complete' selected and 'Primary resources can mark activities as complete' checked. The 'Assignment Fields' section has 'Actual Units' and 'Remaining Units' selected. The 'Activity Fields' section has 'Activity % Complete' and 'Remaining Duration' selected. The 'Cancel' and 'OK' buttons are visible at the bottom right.

Project Preferences

General Analytics & Services Calculations Integrations **Team Member**

Status Updates Activity Updates Status Reviews

My Activities General

Team Members are required to status at:

- Assignment Level
- Activity Level
 - As Owner
 - As Primary Resource

Select the fields team members can update

Note: Actual Start and Actual Finish are always editable. Remaining Early Finish is always editable for assignments.

Assignment Fields + Add

- Actual Units X
- Remaining Units X

Activity Fields + Add

- Activity % Complete X
- Remaining Duration X

When updating actual units, team members update via:

- Additional Time Spent
- Total Time Spent
- View Planned Units in My Activities and Timesheets

Timesheets

Select the fields team members use status activities in Timesheets view

- Percent Complete
- Remaining Units
- Primary resources can mark activities as complete

Cancel OK

Team Member – Setup in EPPM

- Select settings on the “Activity Updates” tab

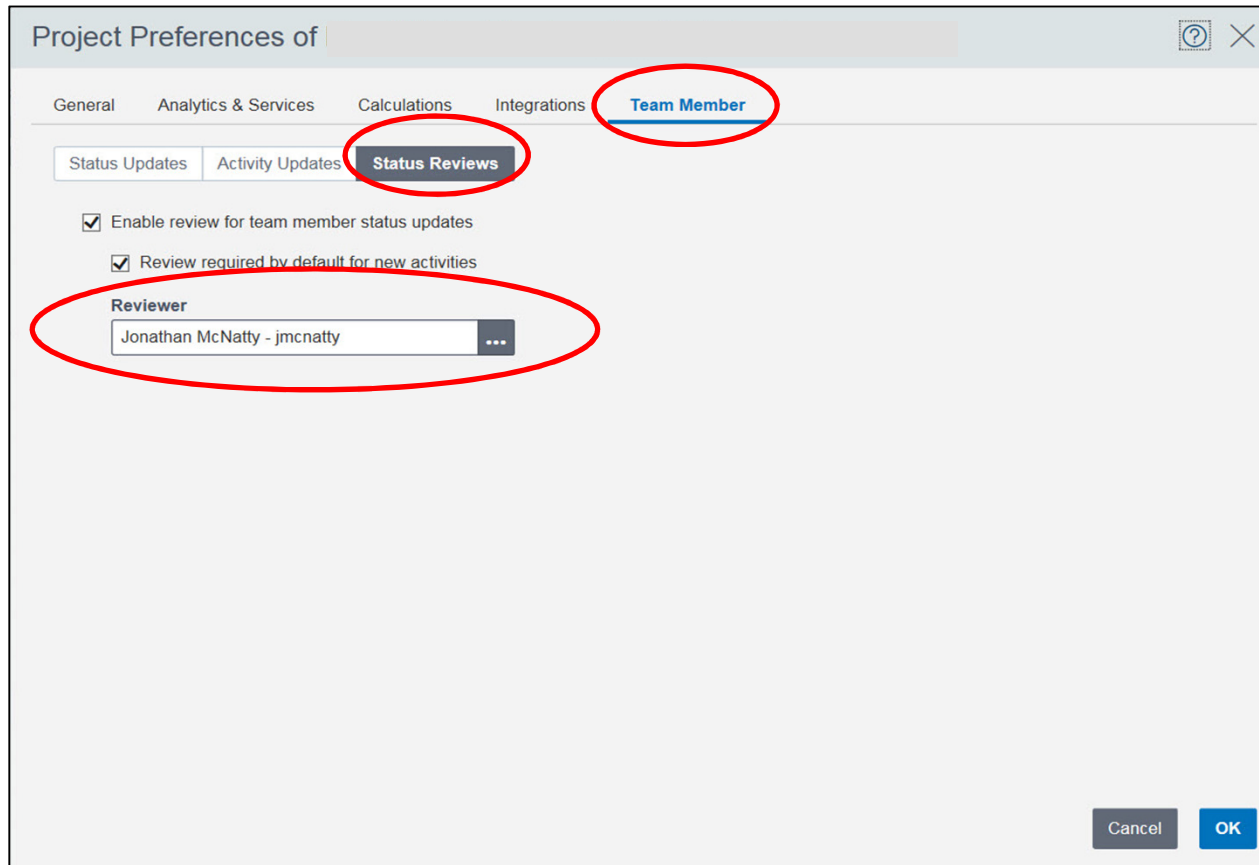
The screenshot shows the 'Project Preferences' dialog box with the 'Team Member' tab selected. The 'Activity Updates' sub-tab is also selected. The 'Team Members can:' section has the following options:

- Assign themselves to activities
- Add and delete steps
- Update notebooks
- Status other resource assignments

Below this, it says 'Select up to 20 activity codes and UDFs team members can update' and includes a note: 'Note: Team members cannot update codes and UDFs using the Email statusing service'. There is a '+ Add Code or UDF' button and a 'Read Only' label. At the bottom right are 'Cancel' and 'OK' buttons.

Team Member – Setup in EPPM

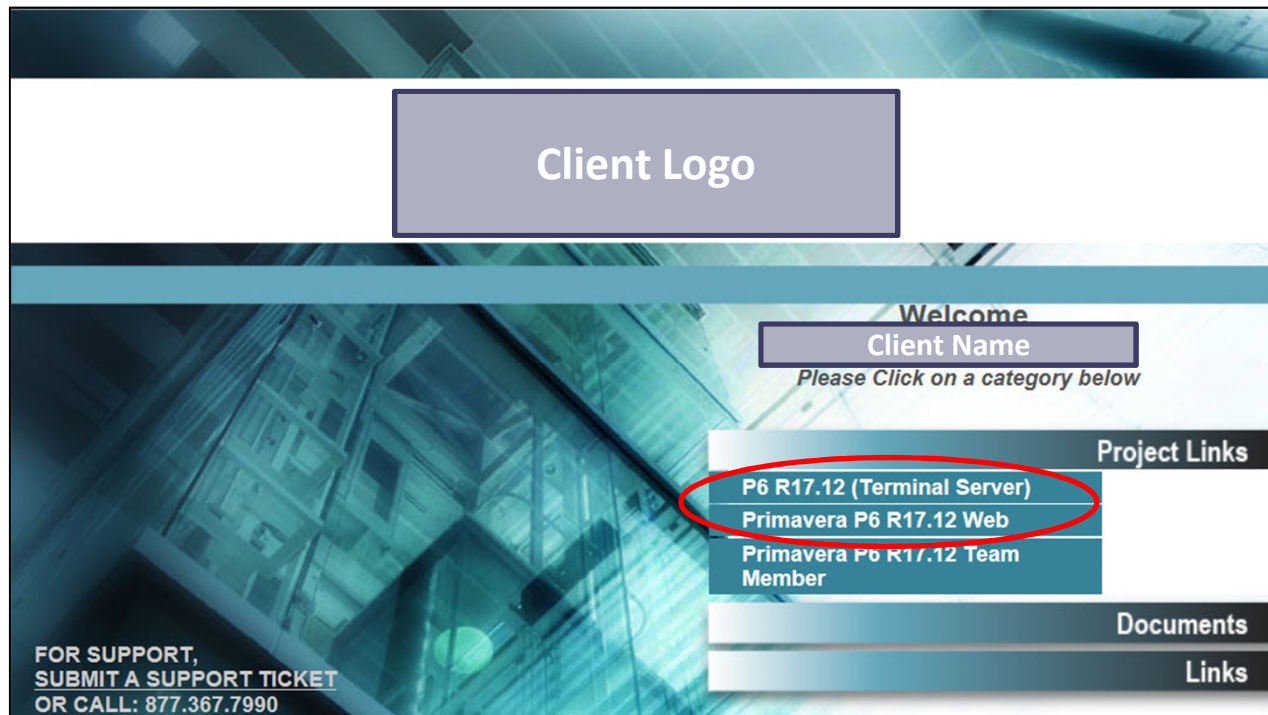
- Select settings on the “Status Reviews” tab. The Reviewer is the Team Leader that will review the Project Managers activities in EPPM



The screenshot shows a dialog box titled "Project Preferences of" with a close button (X) in the top right corner. The dialog has several tabs: "General", "Analytics & Services", "Calculations", "Integrations", and "Team Member". The "Team Member" tab is selected and circled in red. Below the tabs, there are three sub-tabs: "Status Updates", "Activity Updates", and "Status Reviews". The "Status Reviews" sub-tab is selected and circled in red. Under the "Status Reviews" sub-tab, there are two checked checkboxes: "Enable review for team member status updates" and "Review required by default for new activities". Below these checkboxes, there is a "Reviewer" field with a dropdown menu. The dropdown menu is open, showing "Jonathan McNatty - jmcnatty" and a three-dot menu icon. This field is also circled in red. At the bottom right of the dialog, there are "Cancel" and "OK" buttons.

Team Member – Project Managers Update Activities

- Team Leaders login via a “Portal” page using RDP - Remote Desktop Protocol with a link to P6 Professional and P6 EPPM (this is a hosted environment)



Team Member – Project Managers Update Activities

- Team Leaders must first assign the Project Manager as a “Resource & Owner” in P6 Professional. This will automatically put those activities in the Team Member queue when they login
- Project Managers need to be setup as a “Resource” in the Resource Dictionary in P6 Professional and must be associated with a P6 User ID & Account

Activities									
Activities WBS Projects									
Layout: Classic Schedule Layout Filter: All Activities									
Activity ID	Activity Name	Original Duration	Remaining Duration	Start	Finish	Activity % Complete	Total Float	Resources	Owner
TLAP Team Leader Approval Project		360	360	12-Aug-18	06-Aug-19		0		
TLAP.1 Planning		120	120	12-Aug-18	09-Dec-18		0		
A1000	Planning & Design	120	120	12-Aug-18	09-Dec-18	0%		Jonathan McNatty	jmcnatty
TLAP.2 Construction		360	360	12-Aug-18	06-Aug-19		0		
A1010	NTP	0	0	12-Aug-18		0%			jmcnatty
A1020	Construction	360	360	12-Aug-18	06-Aug-19	0%		Jonathan McNatty	jmcnatty
A1030	Substantial Completion	0	0		12-Aug-18	0%			jmcnatty
TLAP.3 Closeout		60	60	12-Aug-18	10-Oct-18		0		
A1040	Admin/Closeout	60	60	12-Aug-18	10-Oct-18	0%		Jonathan McNatty	jmcnatty

Team Member – Project Managers Update Activities

- Project Managers login via a “Portal” page using RDP - Remote Desktop Protocol with a link to Team Member (this is a hosted environment)

Client Logo

Welcome
Client Name
Please Click on a category below

Project Links

- P6 R17.12 (Terminal Server)
- Primavera P6 R17.12 Web
- Primavera P6 R17.12 Team Member

Documents

Links

FOR SUPPORT,
SUBMIT A SUPPORT TICKET
OR CALL: 877.367.7990

Team Member – Project Managers Update Activities

- Team Member opens to the “My Activities” screen and the activities assigned to the Project Manager will display in the queue

The screenshot shows the Oracle Primavera P6 Team Member interface. The top navigation bar includes the Oracle logo and the user's name, 'PRIMAVERA P6 Team Member'. Below this is a 'My Activities' section with a sub-header 'My Activities' and an 'Assign Activities' button. A filter bar contains several dropdown menus: 'Projects' (set to 'All Projects'), 'WBS' (set to 'All WBS'), 'Status' (set to 'Active'), 'Timeframe' (set to 'All'), 'Resources' (set to 'All Resources'), and 'Sort By' (set to 'Finish Date'). The main content area displays a list of activities. The first activity, 'PI12010 - Final Completion', is highlighted with a red box. It includes a red diamond icon, project details (Valrico AWTP RAS Pump Replacement), start and finish dates, and action icons (comment, email, star, checkmark). Other activities listed include 'A3130 - Closeout' (98% complete), 'A3220 - Admin Closeout Completion', 'A1290 - Planning', 'A7470 - Construction' (70% complete), and 'A7480 - Substantial Completion (C)'.

Team Member – Project Managers Update Activities

- The Team Member activities can be sorted by clicking the drop down in All Projects, and then activities can be viewed by individual projects

The screenshot displays the Oracle Primavera P6 Team Member interface. At the top, the user is identified as 'PRIMAVERA P6 Team Member'. Below this, the 'My Activities' section is visible, featuring a navigation bar with 'My Activities' and 'Assign Activities' buttons. A filter bar includes dropdowns for 'Projects' (set to 'All Projects'), 'WBS' (set to 'All WBS'), 'Status' (set to 'Active'), 'Timeframe' (set to 'All'), 'Resources' (set to 'All Resources'), and 'Sort By' (set to 'Finish Date'). A dropdown menu is open under 'All Projects', listing several project names, with 'Emily & Ruby Gravity Extension' highlighted by a red circle. The main content area shows a list of project activities with details such as project names, WBS codes, start/finish dates, and progress indicators (e.g., 98%, 70%).

Team Member – Project Managers Update Activities

- Project Managers can use the Discussion, Email and Starred functionality to communicate with their Team Leader

The screenshot displays the Oracle Primavera P6 Team Member interface. At the top, the Oracle logo and 'PRIMAVERA P6 Team Member' are visible. Below this is a 'My Activities' section with a blue 'Assign Activities' button. A filter bar includes dropdowns for 'Projects' (Emily & Ruby Gravity), 'WBS' (All WBS), 'Status' (Active), 'Timeframe' (All), 'Resources' (All Resources), and 'Sort By' (Finish Date). The main content area lists three activities:

Activity ID	Project	WBS	Start By	Finish By	Actions
A1290 - Planning	Emily & Ruby Gravity Extension	Planning	Jul-01-2018	Oct-28-2018	Discussion, Email, Starred, Checkmark
A1310 - Construction	Emily & Ruby Gravity Extension	Construction	Oct-29-2018	Oct-23-2019	
A1330 - Closeout	Emily & Ruby Gravity Extension	Admin/Closeout	Nov-08-2019	Jan-06-2020	

In the first activity row, the icons for Discussion (speech bubble), Email (envelope), Starred (star), and a checkmark are circled in red.

Team Member – Project Managers Update Activities

- Updating Activities to 100% or In-Progress Activities, when done click “Send”

The screenshot displays the Oracle Primavera P6 Team Member interface. The main view shows a list of activities under 'My Activities' for the project 'Emily & Ruby Gravity'. Three activities are listed: A1290 - Planning, A1310 - Construction, and A1330 - Construction. Each activity has a 'Start' button circled in red. A modal window titled 'A7490 - Punchlist Activities' is open, showing details for an activity with a 'Started' date of Jul-24-2018, a 'Finish By' date of Jan-05-2019, and a '% Complete' of 50. The 'Remaining Duration' is set to 8d 0h. A 'Save' button is circled in red at the top right of this modal. Another modal window shows the 'Steps' section with two items: 'Test Piping' at 50% complete and 'Piping Tested & Approv...' at 0% complete. A third modal window shows the '% Complete' field set to 100 and the 'Remaining Duration' set to 0d 0h. A fourth modal window shows the '% Complete' field set to 50 and the 'Remaining Duration' set to 8d 0h. A checkmark icon is circled in red in the top right corner of the main activity list area.

EPPM – Team Leaders Approve Activities

- Team Leader logs into EPPM and clicks on the “Approvals” tab

The screenshot displays the Oracle Primavera P6 EPPM interface. The top navigation bar includes 'Dashboards', 'Portfolios', 'Projects', 'Resources', 'Approvals', 'Reports', and 'Administration'. The 'Approvals' tab is highlighted with a red circle. Below the navigation bar, the 'Status Updates' section is visible, featuring a search bar and summary statistics: 'Pending 4', 'Held 0', and 'Accept all updates 4'. A list of projects is shown on the left, with 'TLAP - Team Leader Approval Project' selected and circled in red. The details for this project are displayed on the right, including a table of changed fields and buttons for 'Accept', 'Hold', and 'Override'.

Changed Field	Old	New
Remaining Labor Units	120.00d	0.00d
Actual Start		12-Aug-18 08:00 AM
Actual Finish		13-Aug-18 12:43 PM
Actual Labor Units	0.00d	120.00d

EPPM – Team Leaders Approve Activities

- Email and the Discussion feature are available to communicate with the Project Manager, status of all activities can be viewed on screen

The screenshot displays the Oracle Primavera P6 EPPM interface. A 'Send Email' dialog box is open on the left, with fields for To, Cc, Bcc, and Subject. The Subject field contains 'A1000 - Planning & Design'. Below the Subject field, project details are listed: Project ID: TLAP, Project Name: Team Leader Approval Project, WBS: Planning, Activity: A1000 - Planning & Design, Remaining Labor Units: 0.00d, and Actual Start: 12-Aug-18 08:00 AM. A 'Send' button is visible at the bottom of the dialog.

In the background, the main interface shows a list of activities. A red oval highlights the status buttons: 'Pending 4', 'Held 0', and 'Accept all updates 4'. Below the list, a 'Discussions' dialog box is open, showing a comment by Jonathan McNatty: 'This activity finished past the original date that was intended, why did it finish late. Less than a minute'. A 'Post' button is at the bottom of the dialog.

Red arrows indicate the flow of information: one arrow points from the 'Discussions' dialog box to the 'Send Email' dialog box, and another arrow points from the 'Discussions' dialog box to the 'Discussions' dialog box.

EPPM – Team Leaders Approve Activities

- Team Leader can then select “Accept/Hold/Override” on each activity after review and then click on Accept all Updates.

The screenshot displays the Oracle Primavera P6 EPPM interface. The top navigation bar includes 'Dashboards', 'Portfolios', 'Projects', 'Resources', 'Approvals', 'Reports', and 'Administration'. The 'Approvals' tab is active, showing 'Status Updates' and 'Timesheets' sub-sections. A search bar is present. On the right, there are buttons for 'Pending 4', 'Hold 0', and 'Accept all updates 4', with the latter circled in red. The main content area shows a list of projects on the left and a detailed view of the 'TLAP - Team Leader Approval Project' on the right. The project details include 'A1000 - Planning & Design' and 'A1010 - NTP'. The 'Accept', 'Hold', and 'Override' buttons for the 'A1000' activity are circled in red. A table below shows the 'Changed Field' details:

Changed Field	Old	New
Remaining Labor Units	120.00d	0.00d
Actual Start		12-Aug-18 08:00 AM
Actual Finish		13-Aug-18 12:43 PM
Actual Labor Units	0.00d	120.00d

EPPM – Team Leaders Approve Activities

- Once the activities have been reviewed and given a status of Accept/Hold/Override the activities will update P6 Professional and will be removed from the Team Leader queue unless status is Held

The screenshot shows the Oracle Primavera P6 EPPM interface. The top navigation bar includes 'Dashboards', 'Portfolios', 'Projects', 'Resources', 'Approvals', 'Reports', and 'Administration'. The 'Approvals' tab is selected, and the 'Status Updates' sub-tab is active. A search bar is present above the project list. The project list includes items like '3011615014 - Lake Park Yard Piping Modification an...', '1013817088 - Lakeview Master 900922 Terminal gra...', and 'TLAP - Team Leader Approval Project' which is checked. A summary card on the right shows 'No Updates Pending' and 'There are 1 updates that are held up' with a 'View Held Updates' button.

Project Manager & Team Leader User Guides

- All of the screen shots and call outs showing the sequence for both Project Managers and Team Leaders in this webinar are similar to the User Guides produced for the client


Client Logo

TEAM MEMBER - PROJECT MANAGER UPDATE PROCEDURE

- Click on the below link to access the Team Member application.

Client Web Portal Address

- Click under the Project Links group; click the Primavera P6 R17.12 Team Member Link.



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For IT Support starting at 8:00am (EST) dial (949) 367-7990 for Thomas Wagner at Extension # 4051
Email: twagner@drmcnatty.com

Team Member-Project Manager Page 1


Client Logo

TEAM LEADER – APPROVAL UPDATE PROCEDURE

- Click on the below link to access the Team Member application.

Client Web Portal Address

- Click under the Project Links group; click the Primavera P6 R17.12 Team Member Link.



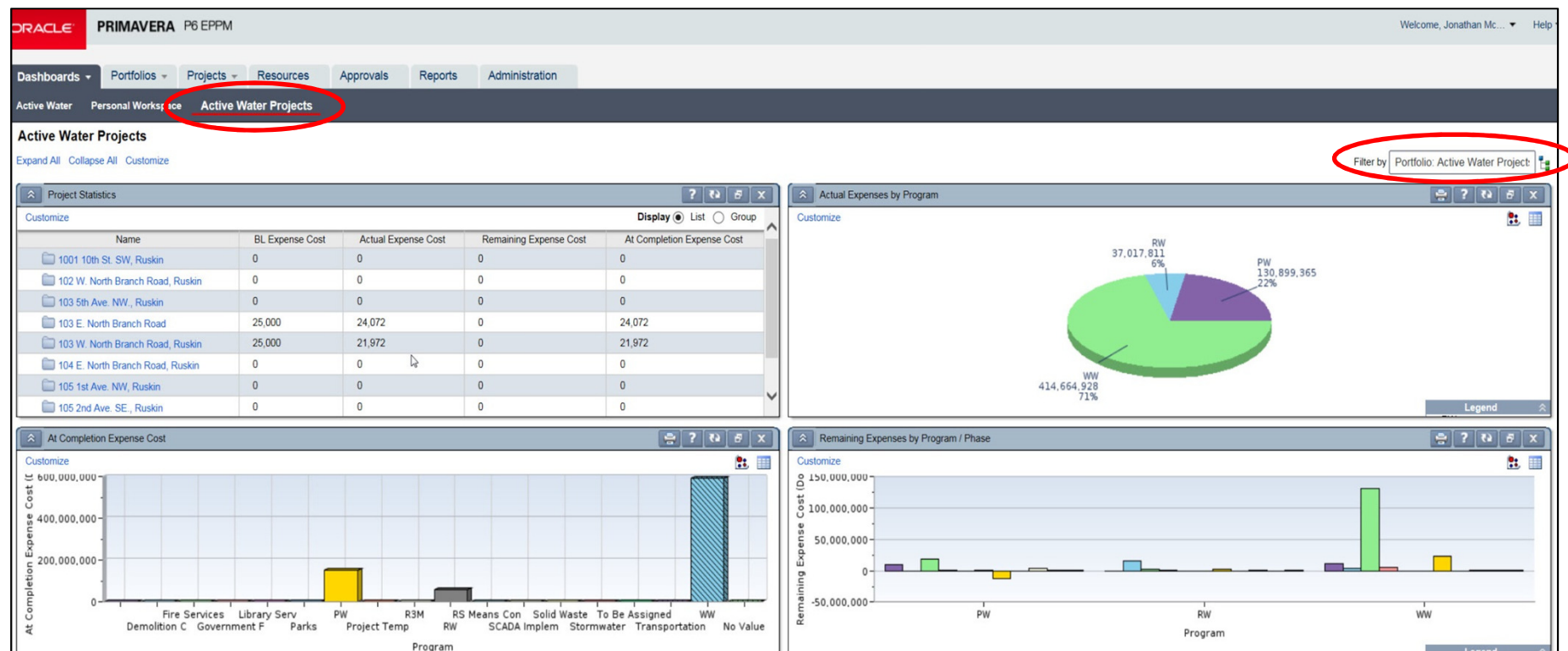
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Team Member-Project Manager Page 1

EPPM Dashboards and Reports (BI Publisher)

- Custom Portfolios & Dashboards in EPPM for high level reporting



EPPM Dashboards and Reports (BI Publisher)

- Custom Portfolios & Dashboards in EPPM for high level reporting

Earned Value Performance				
Legend: ✘ Critical ⚠ Warning ✔ Acceptable ★ Exceptional				
	As of Today		Forecast at Completion	
	Schedule	Labor Units	Schedule	Labor Units
Active Water Projects	⚠ 7,540.65d over	★ 121,063.46d under	⚠ 9,708.78d over	★ 165,557.83d under
1001 10th St. SW, Ruskin	★ 89.00d under	★ 120.00d under	★ 404.81d under	★ 141.00d under
102 W. North Branch Road, Ruskin	No Progress	No Progress	No Progress	No Progress
103 5th Ave. NW., Ruskin	on budget	on budget		
103 E. North Branch Road	on budget	on budget		
103 W. North Branch Road, Ruskin	on budget	on budget		
104 E. North Branch Road, Ruskin	★ 509.00d under	★ 540.00d under	★ 8,866.45d under	★ 540.00d under

Index Performance			
Legend: ✘ Critical ⚠ Warning ✔ Acceptable ★ Exceptional			
	Schedule Performance Index	Cost Performance Index	To Complete Performance Index
Active Water Projects	⚠ 0.94	★ 418.46	✘ 4.18
1001 10th St. SW, Ruskin	★ 3.87		✔ 1.00
102 W. North Branch Road, Ruskin	No Progress	No Progress	No Progress
103 5th Ave. NW., Ruskin			
103 E. North Branch Road			
103 W. North Branch Road, Ruskin			
104 E. North Branch Road, Ruskin	★ 17.42		
105 1st Ave. NW. Ruskin	★ 1.16		✘ 4.17

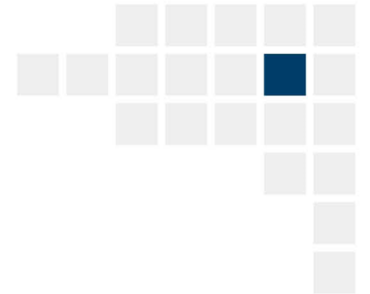
Project Manager & Team Leader User Guides

- Custom Reports using BI Publisher to eliminate manual entry

The screenshot displays the Oracle Primavera P6 EPPM Reports interface on the left and a Microsoft Excel spreadsheet on the right. The Reports interface shows a list of reports, with 'Active Projects' highlighted and circled in red. The Excel spreadsheet, titled 'Active Projects [Read-Only] [Compatibility Mode] - Microsoft Excel', shows a table with columns: Project Number, Project Name, Proj. Mgr., Project Phase, Schedule Risk, Budget Risk, and SPI. The 'Active Projects' report is highlighted in the spreadsheet, and the 'Schedule Risk', 'Budget Risk', and 'SPI' columns are circled in red.

Project Number	Project Name	Proj. Mgr.	Project Phase	Schedule Risk	Budget Risk	SPI
10768000	Low Pressure Sewer System (LPSS) Master Project	John Smith	Master	✓	✓	✗
31979000	Countywide Non-Urgent Facility R&R (Master Project)	John Smith	Master	✓	✓	✗
31986000	Countywide Potable Water Main Extension Program (Master Project)	John Smith	Master	✓	✓	✗
1013816043	Comanche Master PS Guide Rail Modifications	John Smith	PD&E	✗	✗	✗
1017114005	Old Memorial Hwy. FM Replacement	John Smith	PD&E	✗	✗	!
1017116002	Westchase WM Interconnection, FM Casing and Pipe	John Smith	Construction	✗	✗	!
1074515038	BMF Sludge Holding Tanks Rehab	John Smith	Completed	✗	✗	✓
10171000	Countywide Wastewater Forcemain R&R (Master Project)	John Smith	Master	✓	✓	✗
10234000	Bloomington Avenue RWTM Extension	Dave Brown	Closeout	✓	✓	!
10744000	Manhole Inspection & Rehabilitation Program (Master Project)	Dave Brown	Master	✓	✓	✗
10750000	Wastewater Slip Lining Master Project	Dave Brown	Master	✓	✓	✗
10259000	South Hillsborough Aquifer Recharge Expansion (SHARE)	Dave Brown	Design	✓	✓	!
1013816083	Demolition Contract for PUD Facilities	Julie Stevens	Inactive	✓	✓	✗
1013816083	South Pumps Cellular Autodialer Program	Julie Stevens	Closeout	✗	✗	✓

Questions & Comments



- All questions are gathered into a master sheet, answered and distributed to all registrants as well as posted on our website.
- Answers are based on our own experiences using the various software products covered in this webinar.

Thank you for participating

Contact - contact@drmcnatty.com



Upcoming Events

CMAA
National Conference & Trade Show
October 14 - 16, 2018
Aria Resort, Las Vegas, NV



Construction
CPM
Conference
January 20 - 23, 2019
Sheraton San Diego, CA



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