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

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.
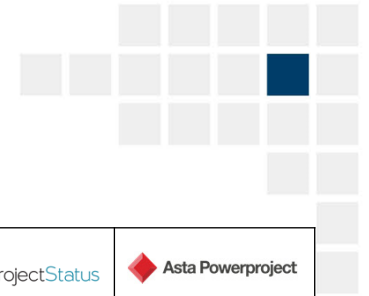
Safe Harbor

- 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	ORACLE PRIMAVERA	ARES PRISM	Deltek ACUMEN	SYNCHRO SOFTWARE	aconex	ProjectStatus	Asta Powerproject
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 <u>Active</u> Projects Each Phase

Planning/PD&E - 225	Design - 4	Procurement - 6	Construction - 99	Closeout - 56
57.7%	1.0%	1.5%	25.4%	14.4%
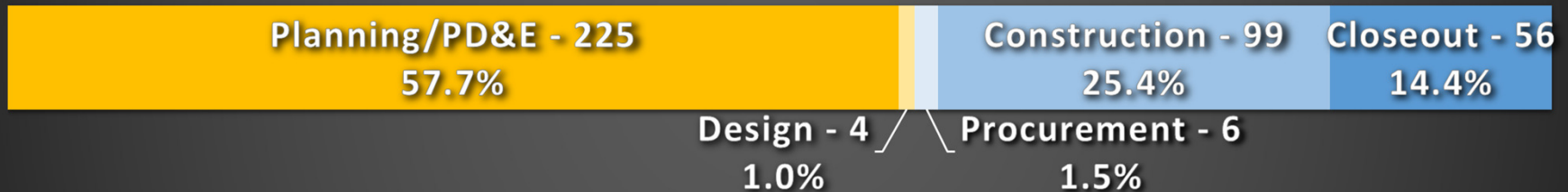
Background Info - Public Works Agency

Assets Installed (Linear Feet of Pipe)
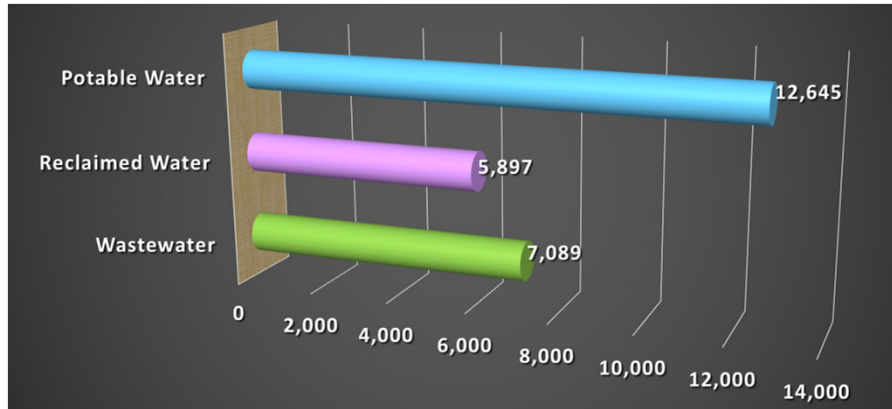
Assets Installed, Rehabbed or Replaced

Background Info - Public Works Agency

Risk Level

- Schedule Risk: 91.1% Low, 7.6%, 1.3% High
- Budget Risk: 97.0% Low, 0.0%, 2.5% High

Legend: Low, Medium, High

Performance Indexes

- CPI: 39 | 18
- SPI: 29 | 9 | 19

Legend: PI ≥ 1, PI ≥ 0.9 <1, PI < 0.9

Level of Effort to Deliver CIP Projects

- Overall CIP Program: 88.0%, 2.7%, 2.1%, 7.3%
- Stand Alone: 92.3%, 0.1%, 0.8%, 6.8%
- Sub-Projects: 83.6%, 5.3%, 3.4%, 7.8%

Legend:
- Design & Site Permitting / Consultant (.03)
- PUD Staff / Admin Hours (.08)
- Other Costs (.00 + .01 + .02 + .04)
- Construction & CEI (.05 + .06 + .07)
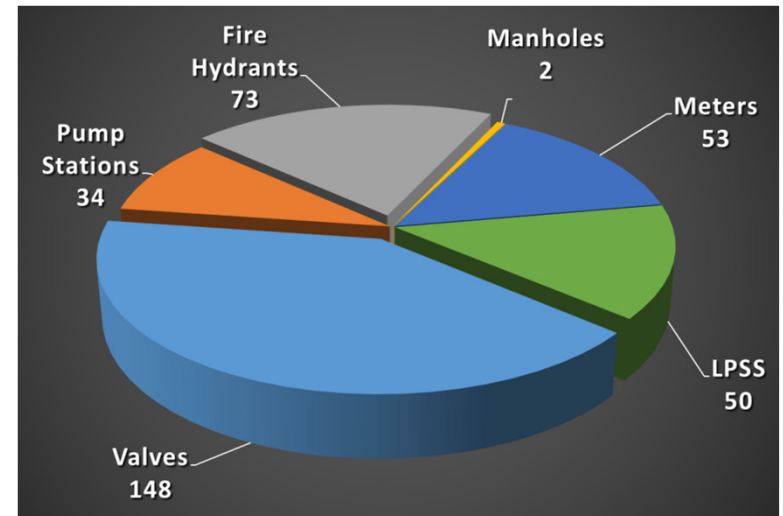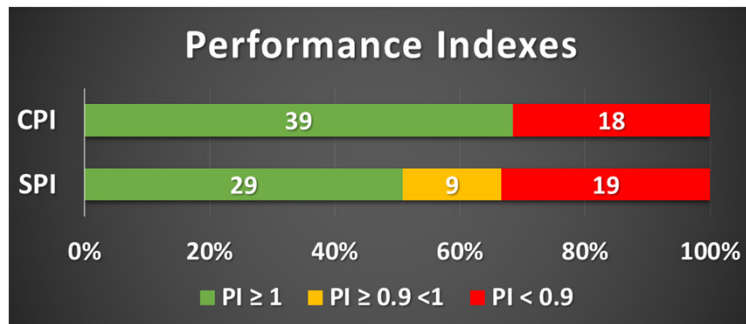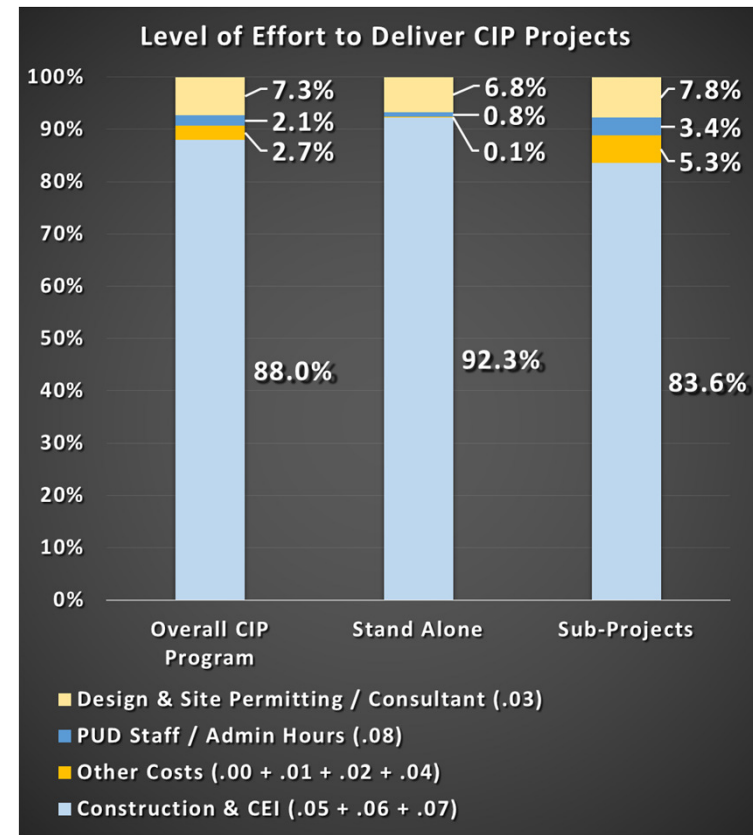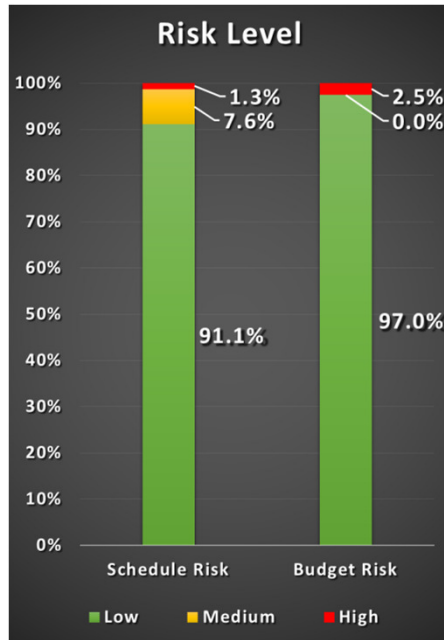
Background Info - Public Works Agency

- 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

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 bye-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
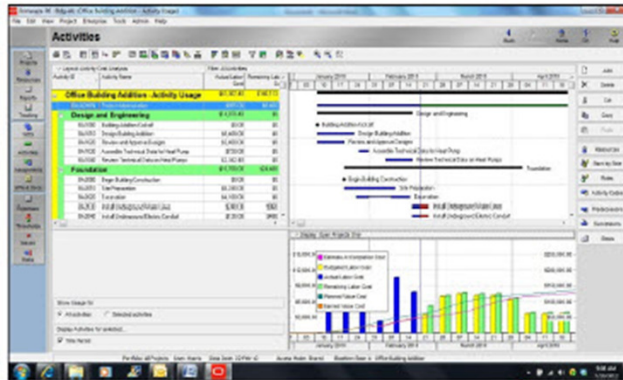
P6 Professional Client

P6 EPPM (Web)

ORACLE®

DATABASE
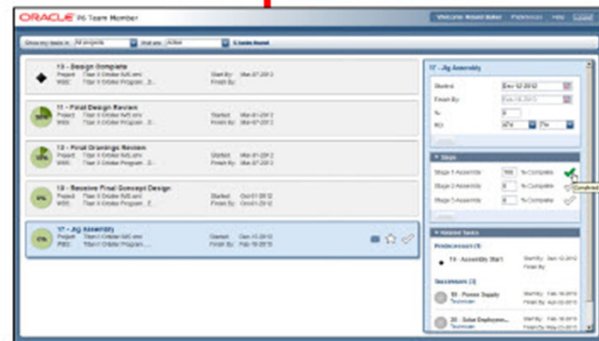
Team Member

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
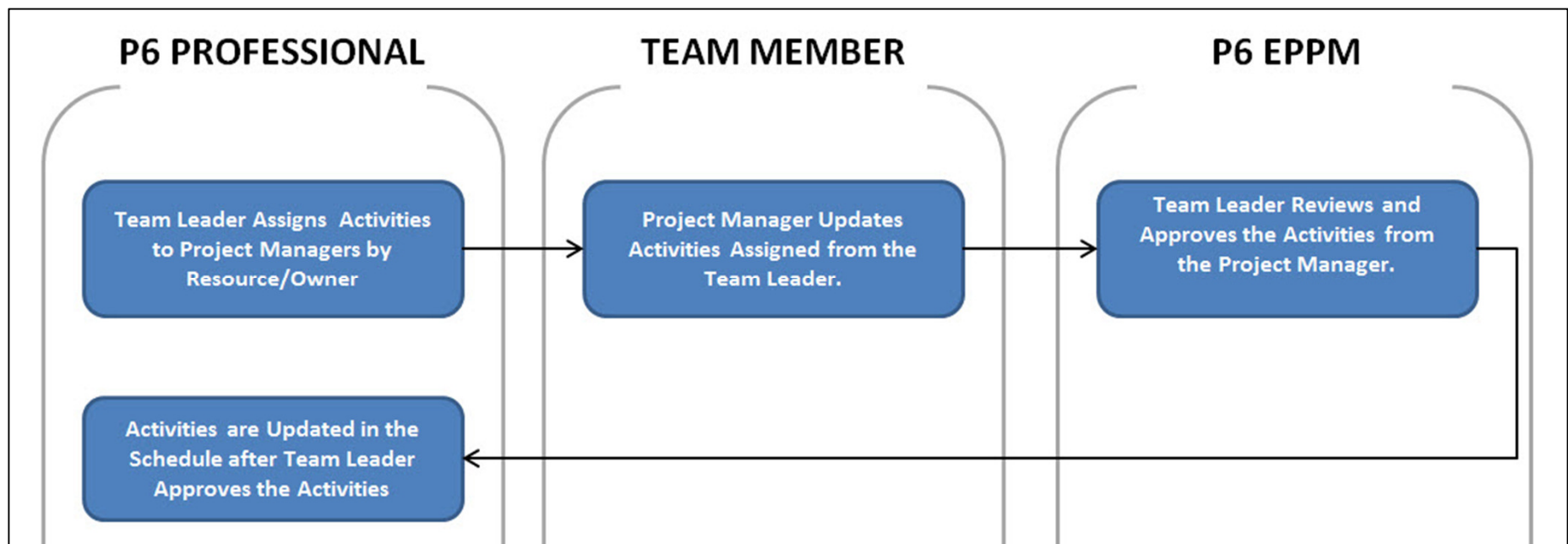
Solution – Hosted Phased Implementation

- 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**

    o Team Leaders will need to use P6 Professional to assign a Project Manager as the "Resource & Owner"

    o 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

    o Prove that the Team Member solution is viable and can replace the existing Excel update sheet being used by the Project Managers.

    o 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 Mangers 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 Mangers 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 gong 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

    o Custom reports need to be produced using the data from
      P6 Professional

    o Custom dashboards & reports need to be automated, need to stop
      manual entry of monthly reports to upper management (Directors)

    o 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

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software • professional services • hosting

Team Member – Setup in EPPM

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

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

Team Member – Setup in EPPM

- Select settings on the "Status Updates" tab

Team Member – Setup in EPPM

- Select settings on the "Activity Updates" tab
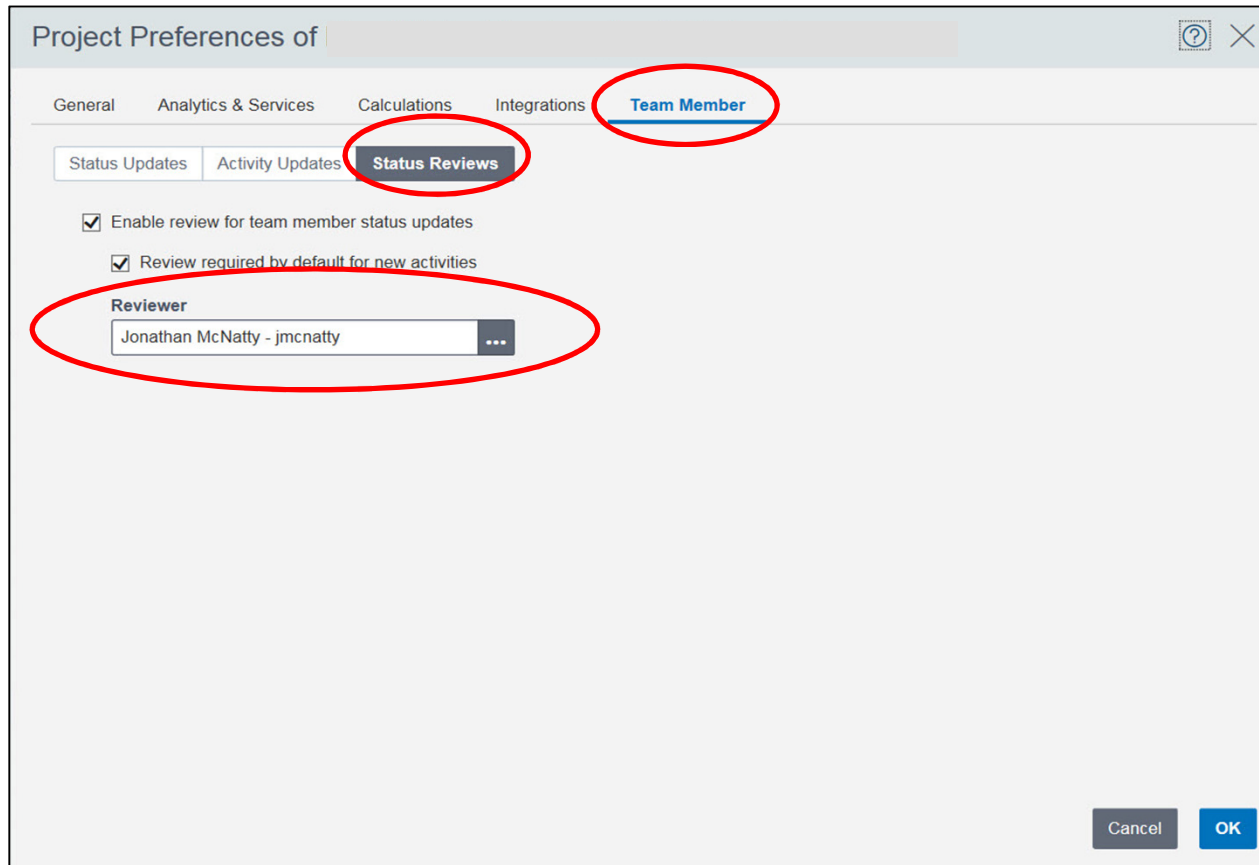
Team Member – Setup in EPPM

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

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)
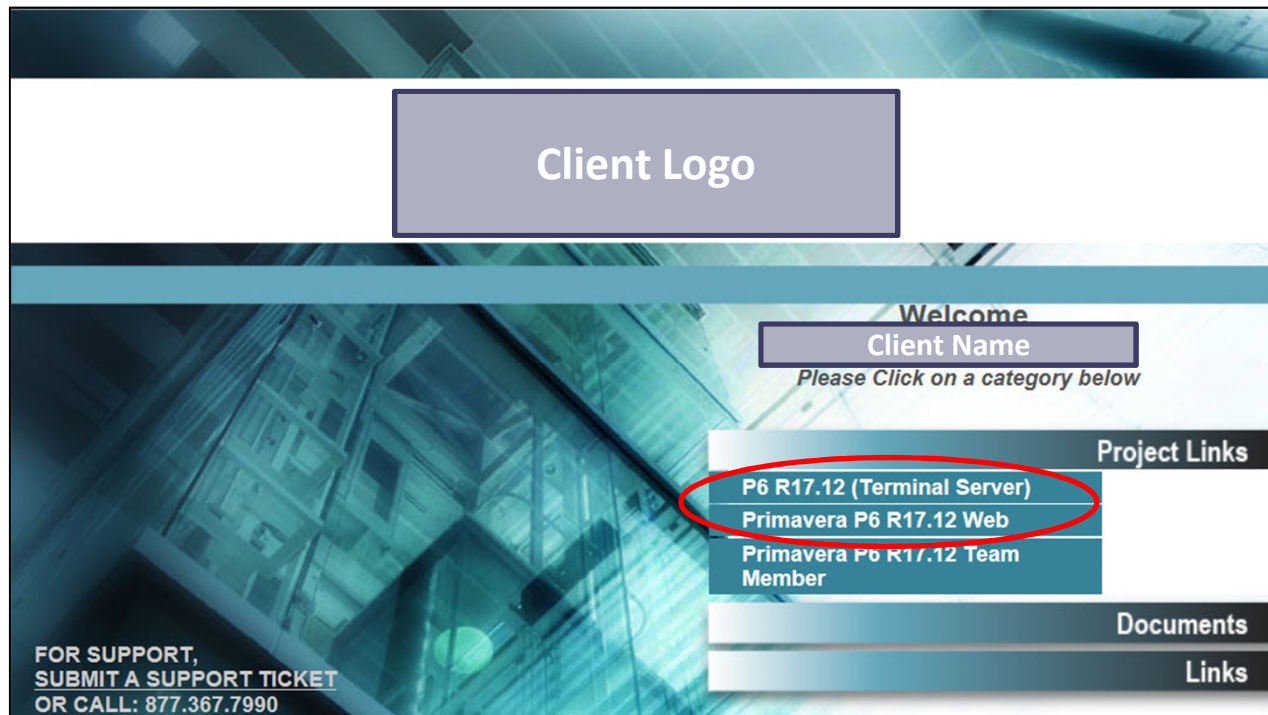
Team Member – Project Managers Update Activities

- 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 Mangers need to be setup as a "Resource" in the Resource Dictionary in P6 Professional and must be associated with a P6 User ID & Account

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)

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

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

Team Member – Project Managers Update Activities

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

Team Member – Project Managers Update Activities

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

EPPM – Team Leaders Approve Activities

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

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

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.

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

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

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

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

DRMcNatty Monthly e-newsletter

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events and upcoming webinars.

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