



**Metro**

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**MRPD9**

**MEASURE R PROJECT DELIVERY COMMITTEE  
SEPTEMBER 16, 2010**

**SUBJECT: STATUS REPORT ON PROJECT MANAGEMENT INFORMATION  
SYSTEM IMPLEMENTATION**

**ACTION: RECEIVE AND FILE**

**RECOMMENDATION**

Receive and file this status report on Project Management Information System (PMIS) implementation.

**ISSUE**

This is a status report regarding PMIS implementation. Phase 1 has been successfully completed and subsequent work on Phase 2 and 3 is commencing.

**BACKGROUND or DISCUSSION**

On March 25, 2010, the Board of Directors approved a life of project budget of \$1,695,000 to implement a Project Management Information System (PMIS). The Board recognized that the appropriate management and controls systems were necessary to effectively manage the Measure R program within schedule and budget. The Board authorized implementation of the following PMIS modules:

- Oracle Primavera P6 Scheduler for planning and scheduling
- Oracle Primavera P6 Web for collaboration and dashboard reporting
- Oracle Primavera Contract Management for document and change management
- EcoSys Financial Manager for financial reporting, cost forecasting and what if analysis

The first phase of PMIS implementation began in April 2010. During the past four months, the following activities were completed:

## **Overall Project**

- PMIS consultant agreement executed and project kickoff meeting held
- System software procured and hosted environment erected
- Conducted monthly progress meetings and inter-department coordination meetings

## **Oracle Primavera P6 Scheduler**

- Deployed Oracle Primavera P6 enterprise database and configured users
- Established a scheduling process tiger team to ensure ongoing development and product knowledge transfer to staff
- Developed Enterprise Project Structure within P6 environment and established security privileges
- Defined enterprise data structures for calendars, resources, cost accounts, and activities
- Established standards for rail project master level schedules and milestone reporting
- Drafted external contract specifications to require PMIS participation and data submission
- Developed process and procedure for managing contractor schedule submittals within production P6 environment

## **Oracle Primavera P6 Web**

- Deployed Oracle Primavera P6 Web via the hosted portal site
- Began system administrator training and security profile definition
- Tested sample portfolio level dashboards for rail projects
- Designed and configured initial project scorecard reports
- Identified pilot participants to assist in system design

## **Oracle Primavera Contract Management**

- Conducted staff interviews to identify document control and change control existing processes and develop system requirements
- Issued Oracle Primavera Contract Management system requirements document
- Established project file folder structure for Measure R rail projects for system prototype
- Identified core team members and trained early participants
- Developed system prototype for document control and drafted role based user guide

PMIS implementation was accelerated in June 2010, in response to the Metro Board approval of the 30/10 Measure R delivery initiative in May 2010. Staff and consultant resources were allocated to begin Phase 2 ahead of schedule and timing of Phase 3 was accelerated. The following PMIS modules began ahead of schedule:

### **Reporting Database**

- Deployed Reporting Database to facilitate multi-system reporting from Primavera P6 and Contract Management
- Developed sample one page project summary report format and report generation requirements

### **EcoSys Financial Manager**

- Deployed EcoSys Financial Manager via the hosted portal site
- Conducted kickoff meeting and began system requirements gathering for automated reporting of budgets, commitments, and expenditures
- Established ground rules for Measure R project and portfolio reporting and PMIS module integration

From a financial perspective, PMIS implementation is progressing within the Board approved life of project budget for the original scope of work. There are some potential scope additions that have been discussed, which if approved would require additional funding. They are as follows:

- There have been some requests to implement PMIS on non-Measure R Metro projects. Metro is managing a significant number of capital projects which were not part of the original scope of PMIS. While we feel there is a benefit to implementing PMIS on these projects, additional non-Measure R funding would have to be secured to do so.
- In support of the Metro Board approved cost containment policy, there have been some discussions with the Expo and Foothill Construction Authorities about implementing PMIS on their projects. These potential users were not anticipated in the original budget therefore additional funding would have to be secured from these entities.

### **NEXT STEPS**

Work will continue for PMIS implementation at an accelerated pace with an estimated project completion in May 2011, approximately one year earlier than originally planned. Work areas anticipated over the next few months are as follows:

#### **Oracle Primavera P6 Scheduler**

- Roll-out Oracle Primavera P6 to all Measure R scheduling users

#### **Oracle Primavera P6 Web**

- Conduct Oracle Primavera P6 Web pilot
- Design project and portfolio level dashboards and collaboration features
- Develop P6 Web role-based user training manual and train users
- Roll-out Oracle Primavera P6 Web to all Measure R users

### **Oracle Primavera Contract Management**

- Conduct Oracle Primavera Contract Management pilot
- Issue Oracle Primavera Contract Management Design Document
- Develop Oracle Primavera Contract Management role-based user training manual and train users
- Roll-out Oracle Primavera Contract Management to all Measure R users

### **EcoSys Financial Manager**

- Issue EcoSys Financial Manager design document
- Conduct system reporting prototype
- Issue system design document
- Develop role-based training modules and train users

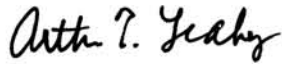
Subsequent PMIS implementation updates to the Metro Board are anticipated in December 2010.

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