



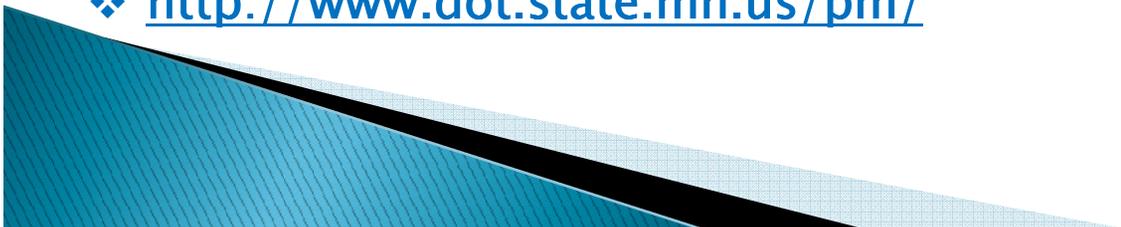
MnDOT Project Management  
Office Presents:

# Team Member Application

**Presenter: Jonathan McNatty**  
Senior Schedule Consultant  
DRMcNatty & Associates, Inc.

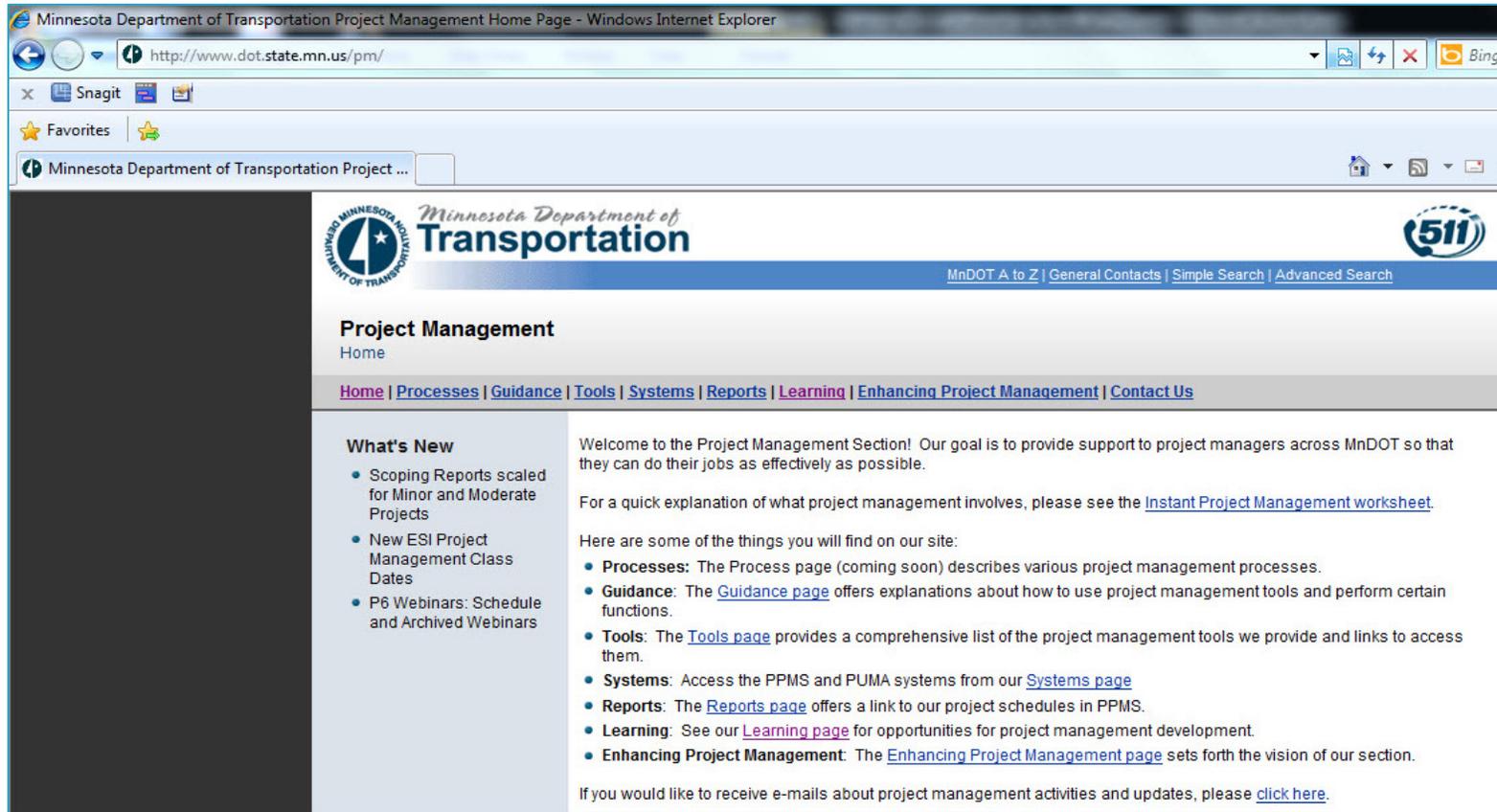
# Housekeeping Items

- ❖ Lines will be muted during the webinar
- ❖ Questions can be submitted thru the GoToWebinar Questions box on right of your screen and posted on website within 5 days
- ❖ Questions will be made available “Live” for this webinar, can download pdf on how to submit live questions for next weeks webinar on the MnDOT Website
- ❖ Webinar slides available in pdf on MnDOT website within 5 days
- ❖ Webinar is being recorded and will be available on the MnDOT website within 5 days
- ❖ <http://www.dot.state.mn.us/pm/>



# MnDOT Webinars

❖ <http://www.dot.state.mn.us/pm/>



The screenshot shows a Windows Internet Explorer browser window displaying the Minnesota Department of Transportation Project Management Home Page. The address bar shows the URL <http://www.dot.state.mn.us/pm/>. The page features the MnDOT logo and navigation links for "MnDOT A to Z", "General Contacts", "Simple Search", and "Advanced Search". The main content area is titled "Project Management Home" and includes a "What's New" section with three bullet points: "Scoping Reports scaled for Minor and Moderate Projects", "New ESI Project Management Class Dates", and "P6 Webinars: Schedule and Archived Webinars". The main text welcomes visitors to the Project Management Section and provides a list of resources: "Processes", "Guidance", "Tools", "Systems", "Reports", "Learning", and "Enhancing Project Management". A link to "click here" is provided for e-mail subscriptions.

Minnesota Department of Transportation

MnDOT A to Z | General Contacts | Simple Search | Advanced Search

## Project Management

Home

[Home](#) | [Processes](#) | [Guidance](#) | [Tools](#) | [Systems](#) | [Reports](#) | [Learning](#) | [Enhancing Project Management](#) | [Contact Us](#)

### What's New

- Scoping Reports scaled for Minor and Moderate Projects
- New ESI Project Management Class Dates
- P6 Webinars: Schedule and Archived Webinars

Welcome to the Project Management Section! Our goal is to provide support to project managers across MnDOT so that they can do their jobs as effectively as possible.

For a quick explanation of what project management involves, please see the [Instant Project Management worksheet](#).

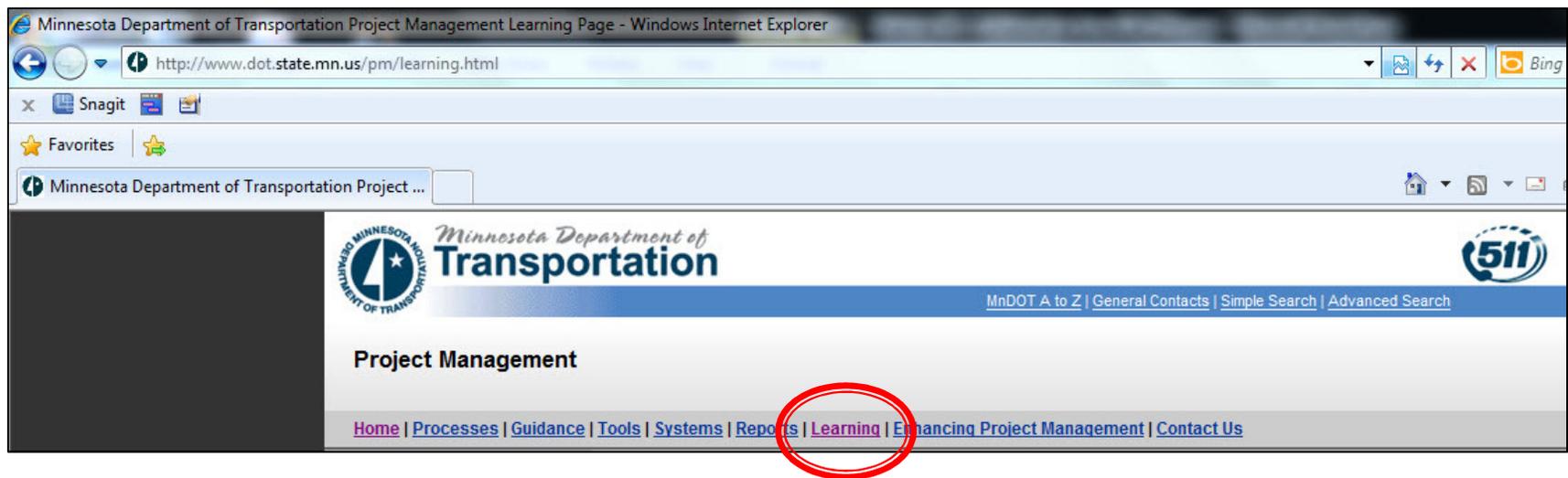
Here are some of the things you will find on our site:

- **Processes:** The Process page (coming soon) describes various project management processes.
- **Guidance:** The [Guidance page](#) offers explanations about how to use project management tools and perform certain functions.
- **Tools:** The [Tools page](#) provides a comprehensive list of the project management tools we provide and links to access them.
- **Systems:** Access the PPMS and PUMA systems from our [Systems page](#)
- **Reports:** The [Reports page](#) offers a link to our project schedules in PPMS.
- **Learning:** See our [Learning page](#) for opportunities for project management development.
- **Enhancing Project Management:** The [Enhancing Project Management page](#) sets forth the vision of our section.

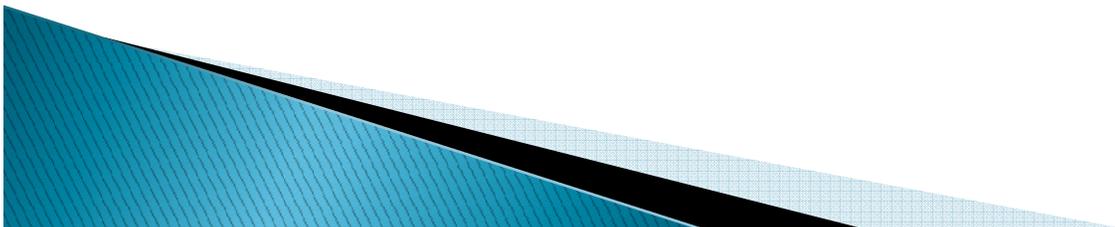
If you would like to receive e-mails about project management activities and updates, please [click here](#).

# MnDOT Webinars

❖ <http://www.dot.state.mn.us/pm/learning.html>

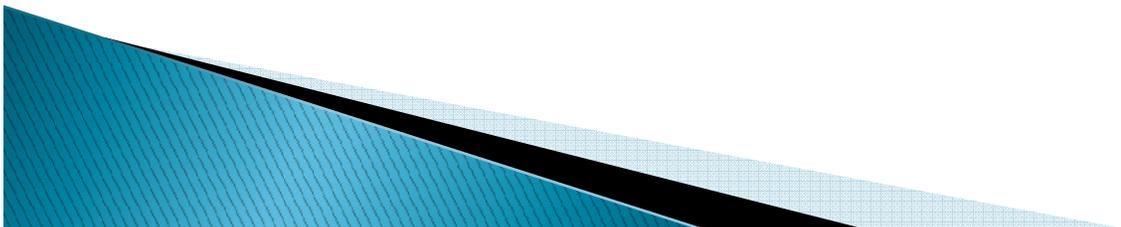


❖ Click on the “Learning” link

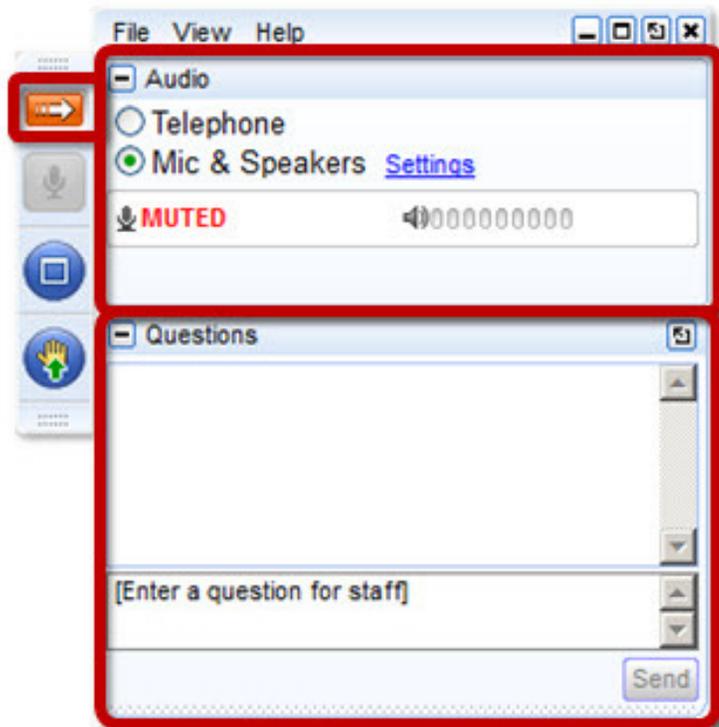


# Webinar “Live” Questions

- ❖ Live questions will now be available for MnDOT weekly webinars
- ❖ Live questions can be submitted during the webinar and will be answered in the final 10 minutes of the webinar
- ❖ Use the “Questions” box in the GoToMeeting dialog box during the webinar
- ❖ Use the “Raise Hands” to ask a “Live” questions during the questions and answer session, the lines will be un-muted



# MnDOT Webinars



## Your Participation

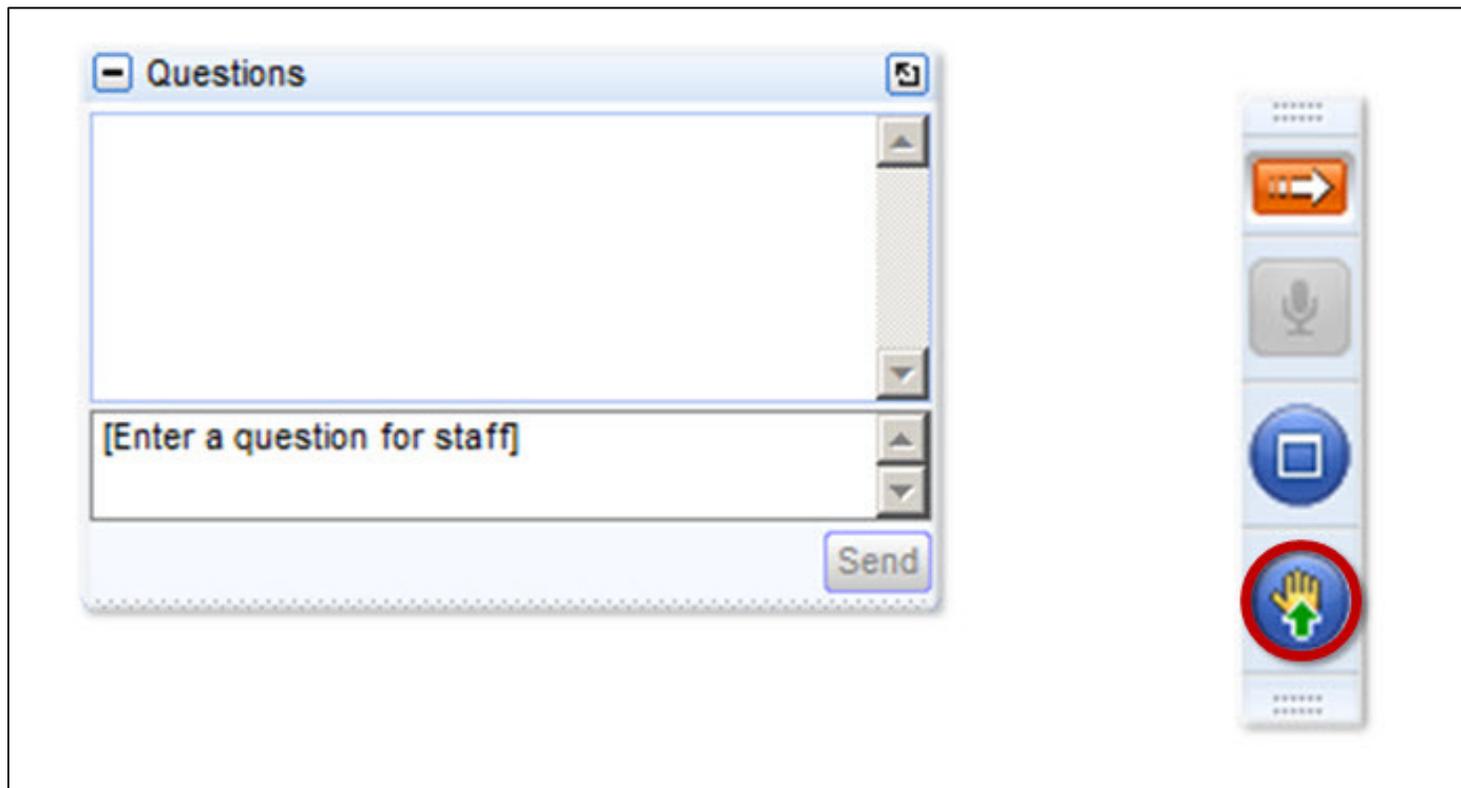
Open and hide your control panel

Join audio:

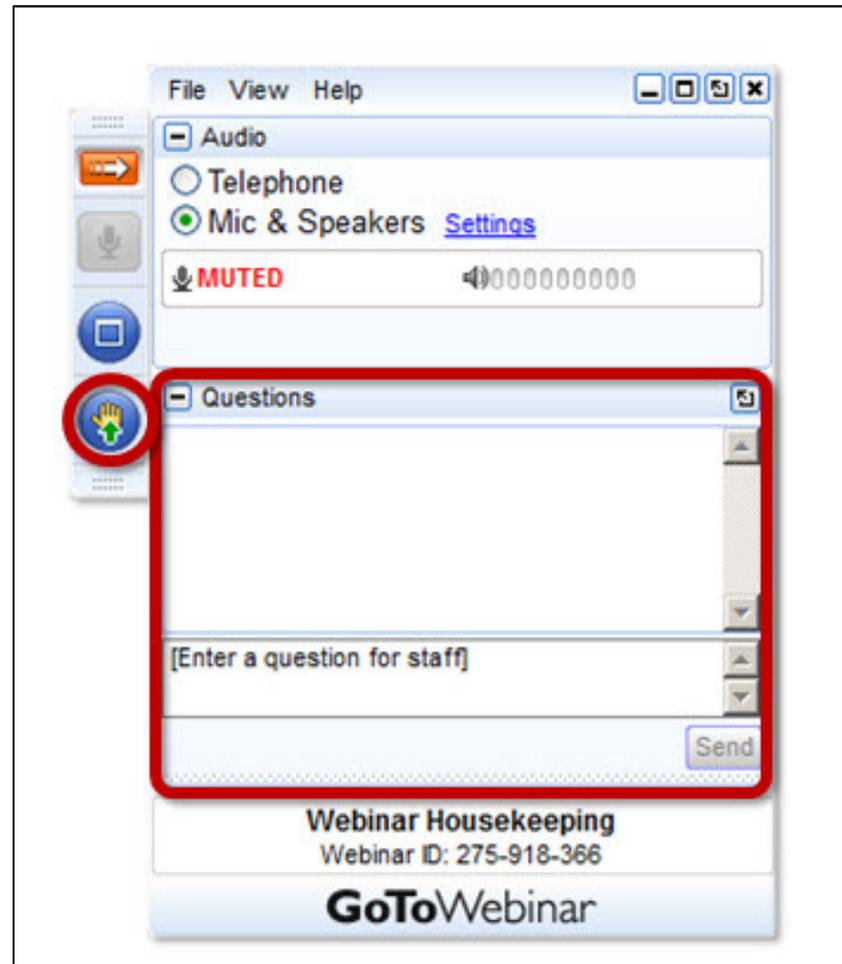
- Choose "Mic & Speakers" to use VoIP
- Choose "Telephone" and dial using the information provided

Submit questions and comments via the Questions panel

# Submit Webinar Questions

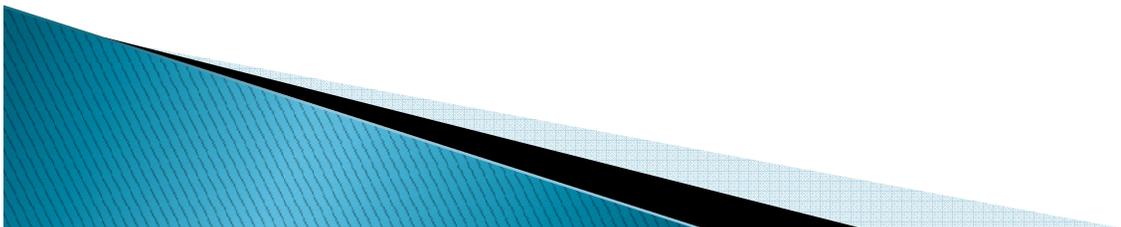


# Raise Hand for Question



# Webinar Abstract

Accurate project status is critical to the success of any project and capturing the information directly from the people doing the work is the best way to ensure your schedule reflects the true progress. Status the tasks to reflect the work that has been done including a single click to mark the task completed. Mark a task with a star to signify importance. You can view all your assigned tasks in one easy to view list.



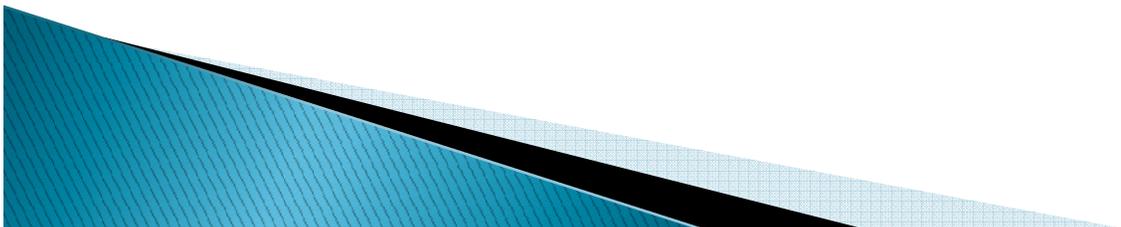
# What is Team Member

- ❖ The Primavera P6 Team Member interface is designed for team members to record status with a simple interface from anywhere on activities.
- ❖ Easily update tasks/activities to reflect the work that has been done including a single click to mark the task completed.
- ❖ Communicate with the project manager or other team members through discussions and email.
- ❖ View predecessor and successor tasks, documents and notebooks.



# What is Team Member – Access

- ❖ The P6 administrator will create logins for people who will perform the role of activity ‘Owner’ and provide them with Team Member module access.



User Access

Users

- OBS
- Global Security Profiles
- Project Security Profiles

Users

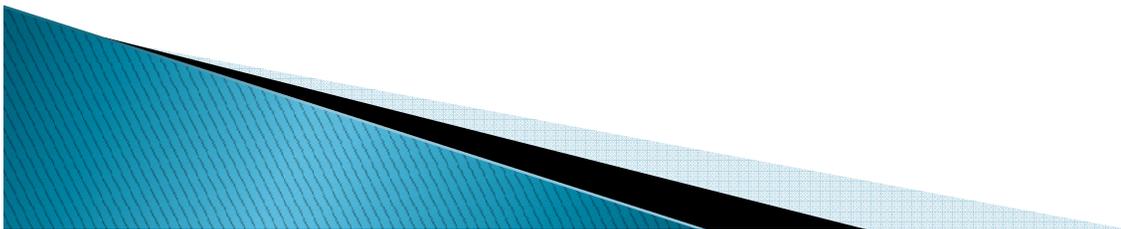
Login Name	Personal Name	Resource Access	Global Security Profile
dpaxon	Dan Paxon		Status Updater
julie	Julie		Status Updater
paul	Paul	All Resources	Administrator
pkim	Paul Kim	All Resources	Project Manager
rbaker	Roland Baker	All Resources	Status Updater
student00	Student 00	All Resources	Administrator

Module Access

Module	Access
Enterprise Reports	<input type="checkbox"/>
Integration API	<input type="checkbox"/>
P6 Analytics	<input type="checkbox"/>
P6 Professional	<input type="checkbox"/>
Portfolios	<input type="checkbox"/>
Progress Reporter	<input type="checkbox"/>
Projects	<input type="checkbox"/>
Resources	<input type="checkbox"/>
Team Member	<input checked="" type="checkbox"/>
Web Services	<input type="checkbox"/>

# Team Member – Activity Owners

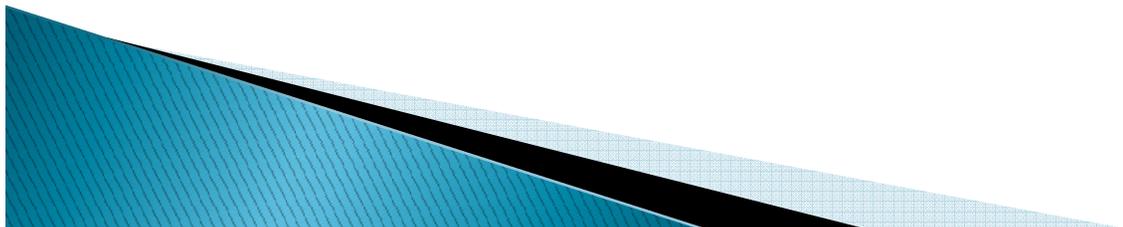
- ❖ The project manager can assign activity owners using the Owner column in the Activities page. This will determine who can update status using the Team Member Web application
- ❖ Team Members can login to the Team Member Web page and status any activities they own or are assigned to.



Activities of Titan II Orbiter IMS.xml

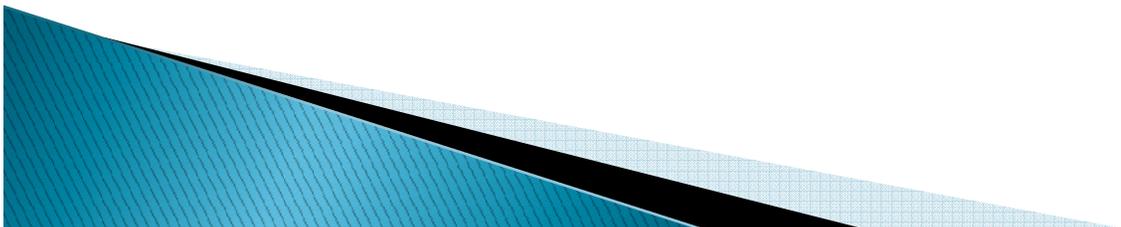
Actions ▾ Edit ▾ View ▾

WBS / Activity	WBS	Activity ID	Activity Status	Planned Labor Units	Activity % Complete	Owner	Finish	Remaining Duration
◆ Program Management C...	Management	6	Not Started	0.00	0%		04-Oct-10 0...	0.0d
▢ Titan II Orbiter.1.1.2	Spaceship			79,494.33			04-Aug-14 0...	1,000.6d
▢ Titan II Orbiter.1.1.2.1.2.1	Design			471.00			08-Oct-10 0...	4.9d
▢ Final Design Review	Design	11	Not Started	234.00	0%	rbaker	08-Oct-10 0...	4.9d
▢ Final Drawings Review	Design	12	Not Started	195.00	0%	rbaker	08-Oct-10 0...	4.9d
◆ Design Complete	Design	13	Not Started	0.00	0%	rbaker	08-Oct-10 0...	0.0d
▢ Titan II Orbiter.1.1.2.1....	Engineering Design			42.00			04-Oct-10 0...	0.9d
▢ Receive Final Conce...	Engineering Design	10	Not Started	42.00	0%	rbaker	04-Oct-10 0...	0.9d
▢ Titan II Orbiter.1.1.2.1.2.2	Build			24,940.33			07-Mar-13 0...	428.1d
▢ Titan II Orbiter.1.1.2.1....	Workshop Assembly			11,368.33			01-Feb-12 0...	142.6d
◆ Assembly Start	Workshop Assembly	16	Not Started	0.00	0%		15-Jul-11 04...	0.0d



# Team Member – Assigning Ownership

- ❖ Assigning ownership causes these activities to appear in the Team Members web page. At this point, the Team Member can enter status information for any of the activities they own.
- ❖ The Team Member can start an activity, adjust the actual start date, enter a % complete or units completed value, status activity Steps, E-mail an interested party or check the activity to mark it as completed.



Show my tasks in All projects that are Active 5 tasks found

- 10 - Receive Final Concept Design**  
Project: Titan II Orbiter IMS.xml Started: Oct-01-2010  
WBS: Titan II Orbiter Program...Engineering Design Finish By: Mar-01-2012
- 13 - Design Complete**  
Project: Titan II Orbiter IMS.xml Start By: Mar-07-2012  
WBS: Titan II Orbiter Program...Design Finish By:
- \*11 - Final Design Review** (highlighted with a red oval)  
Project: Titan II Orbiter IMS.xml Started: Mar-01-2012  
WBS: Titan II Orbiter Program...Design Finish By: Mar-07-2012
- 12 - Final Drawings Review**  
Project: Titan II Orbiter IMS.xml Start By: Mar-01-2012  
WBS: Titan II Orbiter Program...Design Finish By: Mar-07-2012
- 17 - Jig Assembly**  
Project: Titan II Orbiter IMS.xml Start By: Dec-12-2012  
WBS: Titan II Orbiter Program...Workshop Assembly Finish By: Feb-18-2013

11 - Final Design Review

Started: Mar-01-2012  
Finish By: Mar-07-2012  
%: 36  
RD: 4d 7hr  
Undo

Related Tasks

Predecessors (1)

10 - Receive Final Co... Start By: Mar-01-2012  
Roland Baker Finish By: Mar-01-2012

Successors (2)

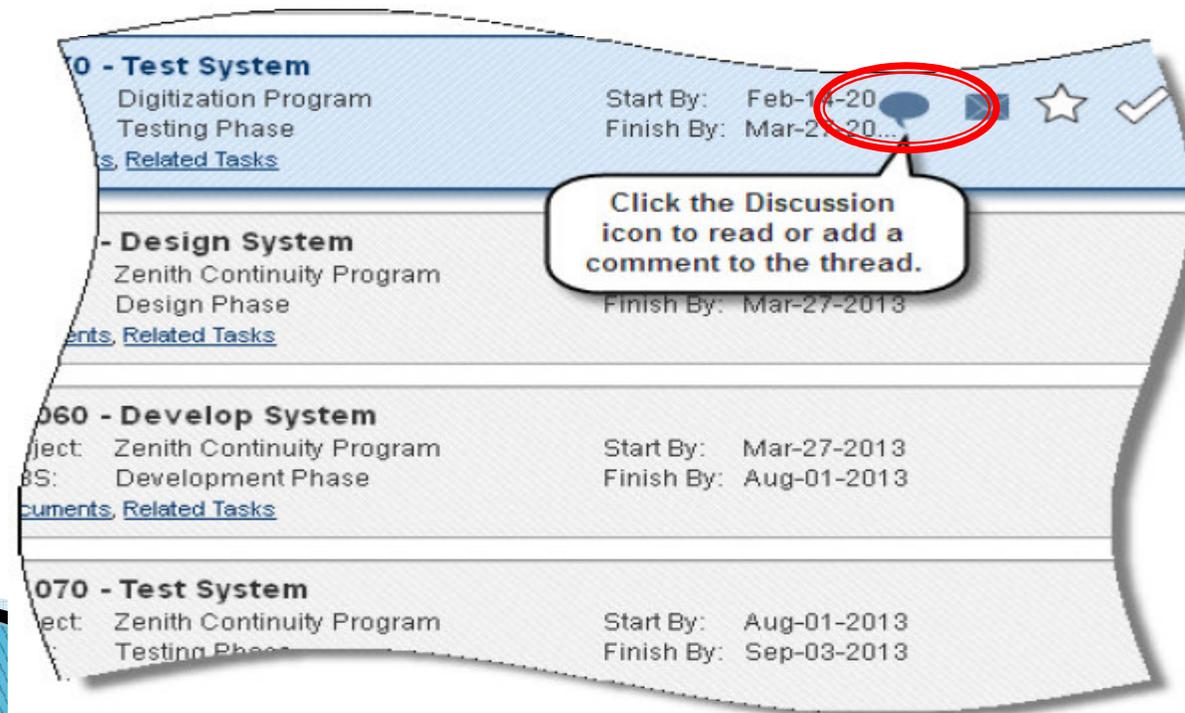
12 - Final Drawings R... Start By: Mar-01-2012  
Roland Baker Finish By: Mar-07-2012

13 - Design Complete Start By: Mar-07-2012  
Roland Baker Finish By:

More...

# Team Member – Discussion Feature

- ❖ All comments are saved with the task and are available for future reference. Comments are displayed in the Discussion detail window on the Activities page in P6 and on the Discussion tab in Activities Details in P6 Professional.



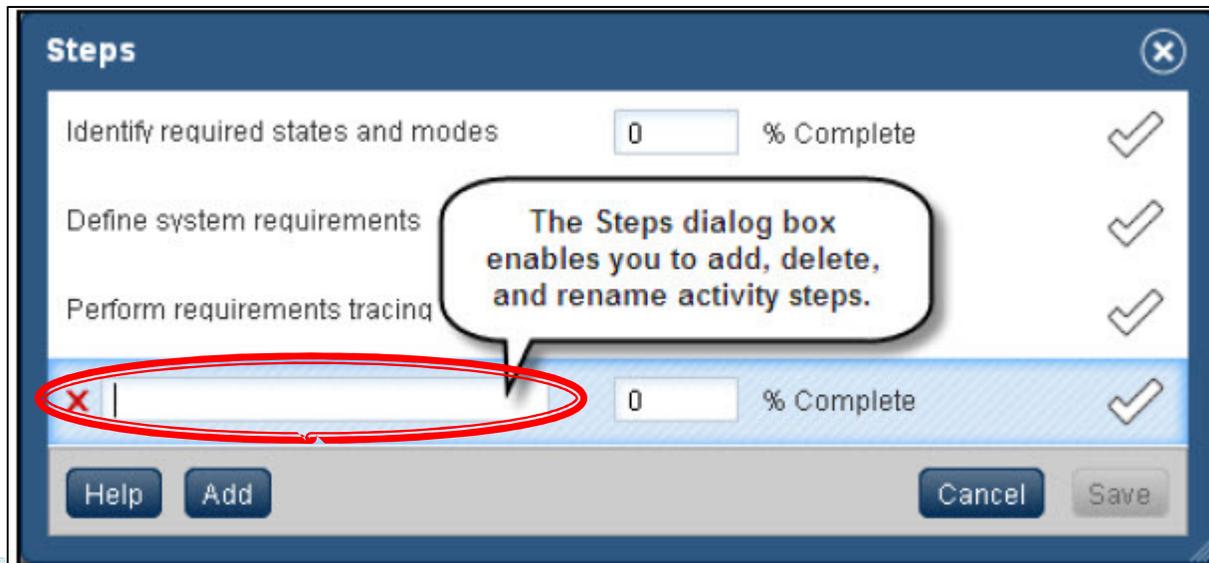
# Team Member – Discussion Feature

- ▶ All comments are saved with the task and are available for future reference. Comments are displayed in the Discussion detail window on the Activities page in P6 and on the Discussion tab in Activities Details in P6 Professional.

The screenshot displays the Primavera P6 Professional interface. At the top, a Gantt chart shows activity bars for 'Exterior Finishes' and 'Brick'. Below the Gantt chart is a navigation bar with tabs: General, Status, Resources, Codes, Relationships, Notebook, Steps, Feedback, WPs & Docs, Expenses, Summary, and Discussion. The 'Discussion' tab is circled in red. Below the navigation bar, the activity details for 'EC1620 Building Enclosed' are shown. The 'Project' field is set to 'CC5400'. The 'Show' dropdown is set to 'All' and the 'Sort' dropdown is set to 'Newest to Oldest'. The main content area shows a comment by 'John McNatty' stating: 'This activity is a Milestone and must be completed by June 25, 2012. We may need to have a meeting with the contractor to discuss this task being completed on time. Less than 1 minute ago'. A red arrow points from the 'Post' button at the bottom right to the comment area. The 'Post' button is also circled in red.

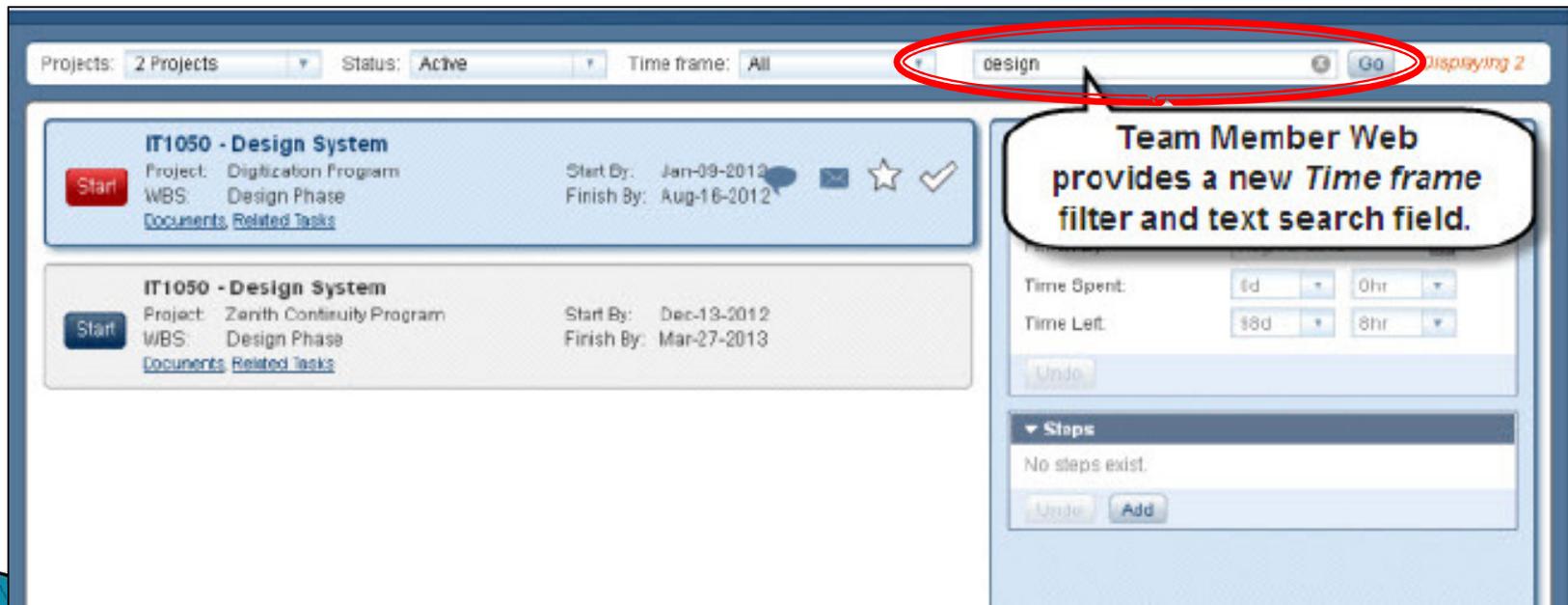
# Team Member – Add/Delete Steps

- ▶ Team Member Web enables users to add, delete, and rename activity steps directly from the task list. Use the Steps panel to view assigned steps and report progress. Select a task in the list and type a % complete value. If the step is finished, select the *Complete Step check mark*.



# Team Member – Enhanced Filtering of Tasks

- ▶ Team Member Web provides enhanced filtering of the task list with the addition of a new *Time frame filter* and a *text search field*.
- ▶ Filter by Projects/Status/Timeframe



The screenshot displays the Team Member Web interface. At the top, there are filter controls: 'Projects: 2 Projects', 'Status: Active', 'Time frame: All', and a search field containing 'design' with a 'Go' button. A red circle highlights the search field and 'Go' button. Below the filters, two task cards are visible. The first card is for 'IT1050 - Design System' with a 'Start' button, project details, and dates. The second card is for 'IT1050 - Design System' with a 'Start' button, project details, and dates. On the right side, there are 'Time Spent' and 'Time Left' controls, an 'Undo' button, and a 'Steps' section with 'No steps exist.' and 'Add' and 'Undo' buttons. A callout box points to the search field with the text: 'Team Member Web provides a new Time frame filter and text search field.'

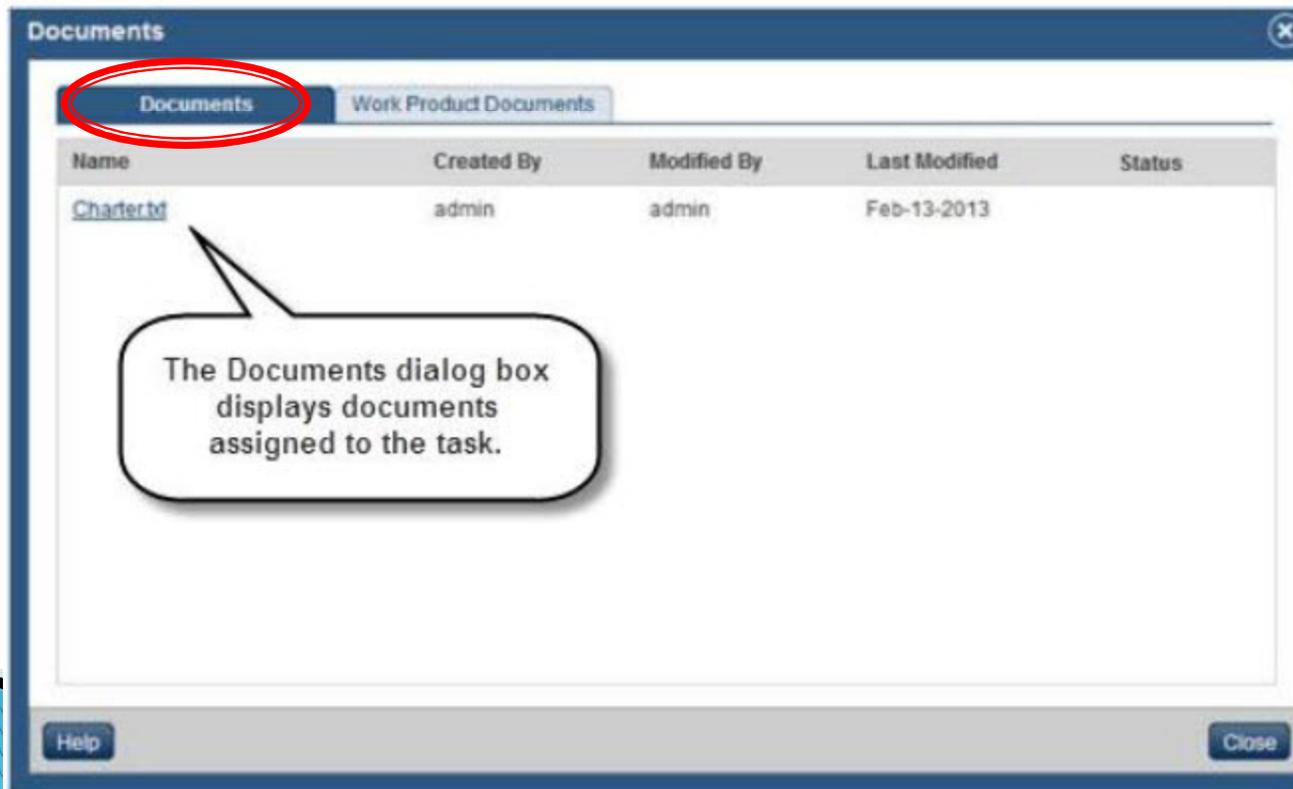
# Team Member – Notebook Topics

- ▶ Team Member Web enables users to view Notebook topics assigned to activities in P6 or P6 Professional directly from the task list.

The screenshot displays the Oracle P6 Team Member web interface. At the top, the Oracle logo is followed by the text "P6 Team Member". Below this, there are three filter dropdowns: "Projects: All projects", "Status: Active", and "Time frame: All". The main content area shows a list of tasks. The first task is "HR1020 - Perform system requirements analysis". It includes a "Start" button, the project name "HRSYS - Optimizing the Project Plan", start and finish dates (Jan-08-2018 and Jan-19-2018), and a WBS path "System Development...System Requi...". A red circle highlights the text "Documents, Notebooks, Related Tasks" in the WBS path. A callout box points to this text with the instruction: "Click *Notebooks* to view Notebook topics and their descriptions." The second task is "A1020 - Requirements", also with a "Start" button, project name, start and finish dates (Nov-21-2018 and Nov-27-2018), and a WBS path "Related Task...".

# Team Member – Documents

- ▶ Team Member Web enables users to view documents directly from the task list -- including documents stored in Oracle Universal Content Management system, Sharepoint, Work Products and Docs, and CMIS-supported documents.



# Team Member – Welcome Email

- ▶ Team Members can receive a Welcome e-mail initiated by their project manager containing the e-mail address to the E-mail Statusing Service and instructions for requesting a task list and updating the list through e-mail.

**Welcome to the P6 Team Member E-mail Statusing Service**

Your E-mail Statusing Service address: [Test-P6TeamMember\\_us@oracle.com](mailto:Test-P6TeamMember_us@oracle.com)

As a team member with assignments in P6, you can use the E-mail Statusing Service to request a filtered list of your assigned tasks using e-mail. You can reply to the e-mail and make updates to your tasks directly in the body of the e-mail.

**Note:** You may also receive an e-mail with your task list that was initiated by your project manager.

To use the E-mail Statusing Service:

1. Create a new e-mail to send to the E-mail Statusing Service ([Test-P6TeamMember\\_us@oracle.com](mailto:Test-P6TeamMember_us@oracle.com)).
2. Request a list of tasks from P6 by specifying the filter options in the subject line, using the format:  
  
<Task Status> <Optional Time Frame> <Optional Project>

A message with the list of tasks you requested will be sent to you.

3. Reply to the message and provide status on your tasks by updating your progress in the body of the e-mail message. If your e-mail application does not support inline editing, click on the Update this task link to update the individual task. The fields you can update depend on the status of the task; however, you cannot edit information for the project name, WBS name, task name, and status.

A confirmation message will be sent to you once your updates have been processed.

**Note:** If you are a timesheet user, you can request a list of your tasks through e-mail; however, you can only update your tasks using P6 Progress Reporter.

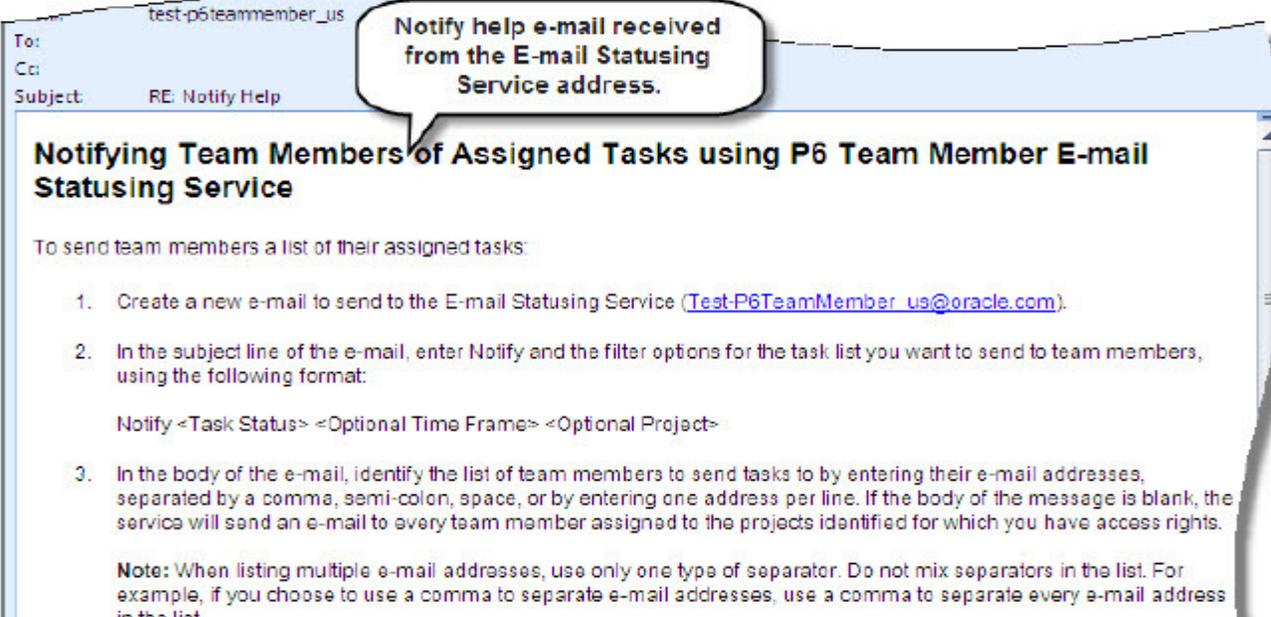
Filter Options

**Welcome e-mail sent from E-mail Statusing Service.**

**Note for Timesheet users.**

# Team Member – Request Updates via Email

- ▶ Project managers can push e-mails of task lists to team members, eliminating the step of the team member requesting their own tasks. The Notify feature enables project managers to send an e-mail to the E-mail Statusing Service address, set up by the P6 administrator, with *Notify as the keyword for sending/pushing the task list e-mail to team members.*



test-p6teammember\_us

To:  
Cc:  
Subject: RE: Notify Help

Notify help e-mail received from the E-mail Statusing Service address.

**Notifying Team Members of Assigned Tasks using P6 Team Member E-mail Statusing Service**

To send team members a list of their assigned tasks:

1. Create a new e-mail to send to the E-mail Statusing Service ([Test-P6TeamMember\\_us@oracle.com](mailto:Test-P6TeamMember_us@oracle.com)).
2. In the subject line of the e-mail, enter Notify and the filter options for the task list you want to send to team members, using the following format:  
  
Notify <Task Status> <Optional Time Frame> <Optional Project>
3. In the body of the e-mail, identify the list of team members to send tasks to by entering their e-mail addresses, separated by a comma, semi-colon, space, or by entering one address per line. If the body of the message is blank, the service will send an e-mail to every team member assigned to the projects identified for which you have access rights.

**Note:** When listing multiple e-mail addresses, use only one type of separator. Do not mix separators in the list. For example, if you choose to use a comma to separate e-mail addresses, use a comma to separate every e-mail address in the list.

# Shared Service Center Support

Jacob Rezac supports the North Region

[jacob.rezac@state.mn.us](mailto:jacob.rezac@state.mn.us)

District - 1

District - 2

District - 3

District - 4

Nicole Peterson supports the Central Region

[nicole.peterson@state.mn.us](mailto:nicole.peterson@state.mn.us)

Metro District

Central Office

Bridge

Maplewood

Other Metro are Offices

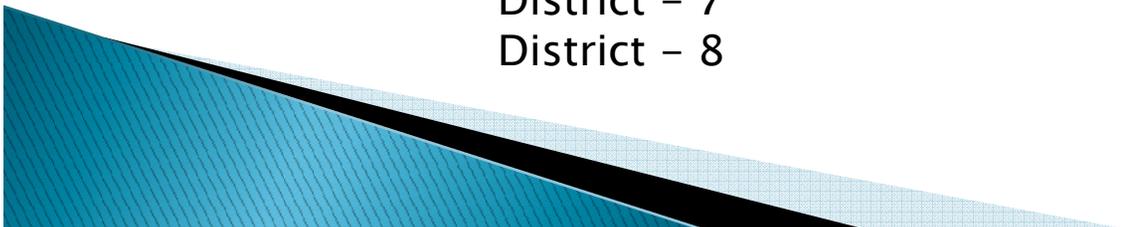
Matthew Rottermond supports the South Region

[matthew.rottermond@state.mn.us](mailto:matthew.rottermond@state.mn.us)

District - 6

District - 7

District - 8





# Questions or Comments

**Tom Wiener**

[thomas.wiener@state.mn.us](mailto:thomas.wiener@state.mn.us)

MnDOT Project Management Office

651-366-4239

**Peter Harff**

[peter.harff@state.mn.us](mailto:peter.harff@state.mn.us)

MnDOT Project Management Office

507-514-1095

<http://www.dot.state.mn.us/pm>

**Next Webinar: Wednesday, June 12, 2013**

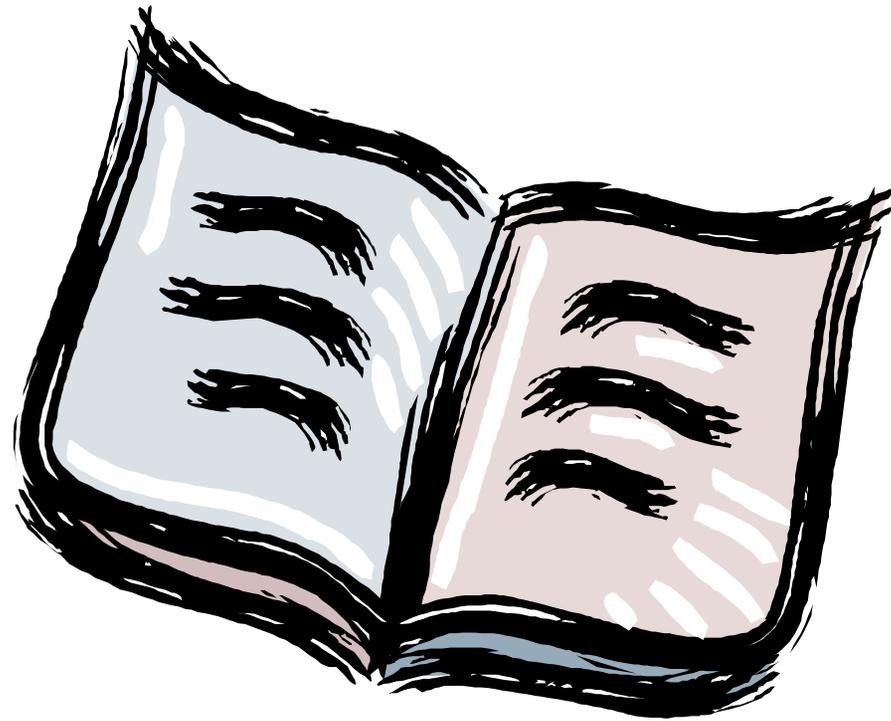
**Time: 1:00 p.m.**

**Topic: Dashboards and Reporting for Program Management**

**Presenter: Jonathan McNatty**

**DRMcNatty & Associates, Inc.**

# Glossary of CPM Terms



# Glossary of CPM Terms

**Activity** - An individual work task that is the basic component of a project.

**Activity Codes** - Values assigned to project activities to organize them into manageable groups for updating, analyzing, reporting, plotting, and summarizing.

**Actual Cost** - The cost incurred to date for a resource or activity.

**Actual Dates** - Start (AS) and Finish (AF) dates that you record for an activity that has progress or is complete.

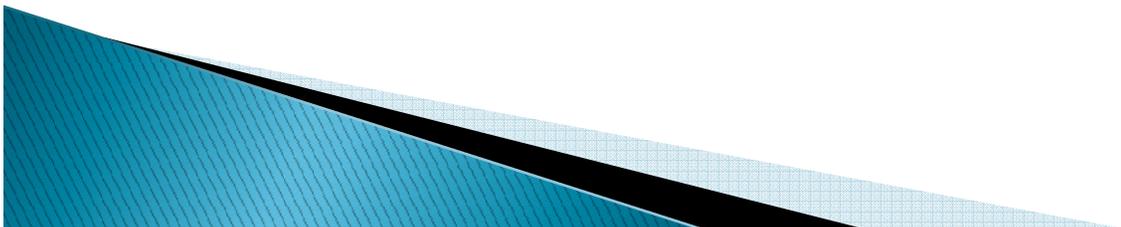
**Actual Quantity** - The amount of a resource used to date.

**Backward Pass** - The calculation of a network's late dates.

**Bar Chart** - The graphical display of activities according to time. Relationships between activities are not shown. A bar chart is also called a Gantt Chart.

**Baseline Schedule** - The original planned schedule for a project.

**Budget** - The estimate of the total units or costs required by a resource or cost account for an activity.



# Glossary of CPM Terms

**Calendar** - The workdays and holidays defined for a project that determine when an activity can be scheduled.

**Completion** - The date on which a project is to be finished.

**Constraint** - A restriction imposed on the start or finish of an activity.

**Critical Activity** - An activity that has the least amount of total float.

**Critical Path** - The series of activities in a project that will take the longest to complete.

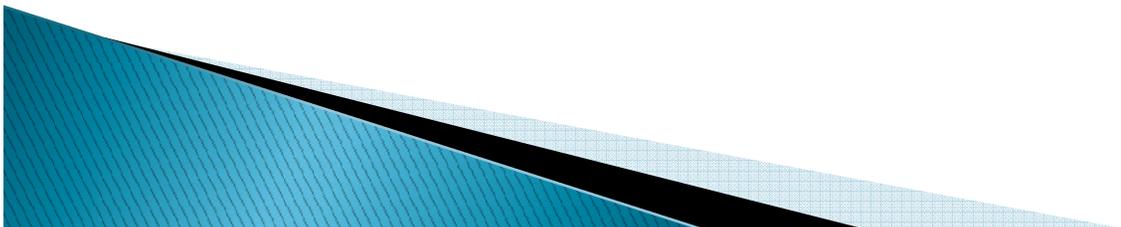
**Critical Path Method (CPM)** - The calculation of the earliest and latest start and finish dates of activities based on their duration and relationships to other activities.

**Data Date** - The date used as the starting point for schedule calculations.

**Driving** - A predecessor/successor relationship in which the predecessor

**Relationship** - Determines the successor's early dates.

**Duration** - The amount of time (in workdays) needed to complete an activity.



# Glossary of CPM Terms

**Early Start (ES)** - The earliest date when an activity can begin after its predecessors have been completed.

**Earned Value** - The value of work performed rather than actual work performed.

**Exception** - A day when work must occur that was originally designated as a nonworkday.

**Finish to Finish** - A type of relationship in which a successor activity finish depends on its **(FF)** predecessor activity's finish.

**Finish-to Start** - A type of relationship in which a successor activity can begin only when its **(FS)** predecessor activity finishes.

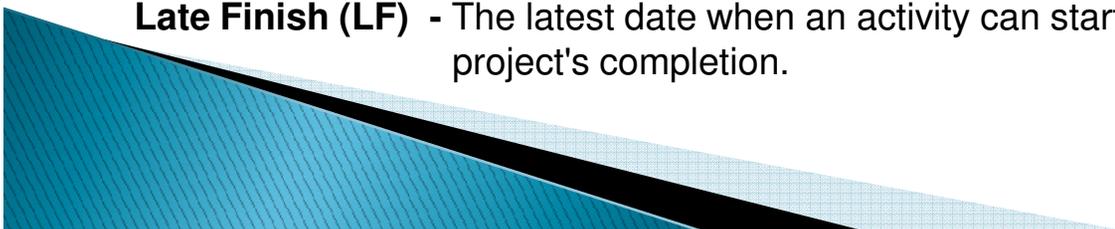
**Float** - The amount of time that the start or finish of an activity can be delayed without affecting the project finish date.

**Forward Pass** - The calculation of the network's early dates.

**Free Float** - The amount of time that an activity's early start can be delayed without delaying the early start of a successor activity.

**Lag** - An offset or delay from an activity to its successor.

**Late Finish (LF)** - The latest date when an activity can start without delaying the project's completion.



# Glossary of CPM Terms

**Late Start (LS)** - The latest date when an activity can start without delaying the project's completion.

**Loop** - Circular logic within a network.

**Milestone** - An activity that represents a significant point in time, that has no duration.

**Negative Float** - The total number of days that the start or finish of an activity exceeds the time allowed. Negative float indicates a delay in the schedule.

**Negative Lag** - An offset or lead time from an activity to its successor in which the successor's start date is earlier than the predecessor's start date.

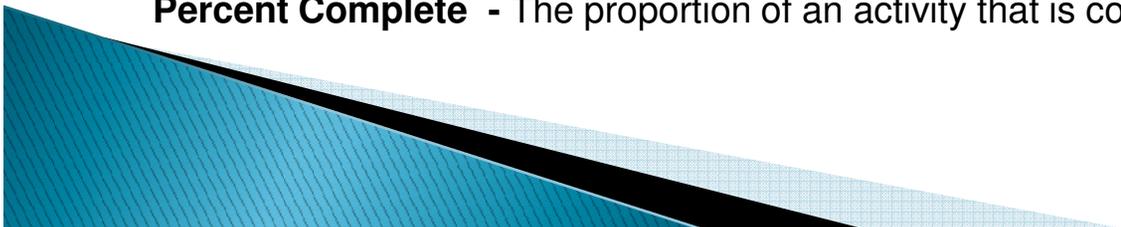
**Network** - The series of activities required to complete a project.

**Nonworkperiod** - A period of time when work may not occur.

**Open End** - An activity that has no successor or predecessor relationships to other activities in the network.

**Out-of-Sequence Progress** - Work completed for an activity before it is logically scheduled to occur.

**Percent Complete** - The proportion of an activity that is complete.



# Glossary of CPM Terms

**Performance Measurement** - The comparison of the current plan to a target plan to assess whether it is progressing as intended.

**Planning Unit** - The increment of time used to schedule a project. The planning unit can be in hours, days, weeks, or months.

**Predecessor** - An activity that must logically occur before another activity.

**Progress** - The completion of work.

**Resources** - The people, materials, equipment or services required to complete a project.

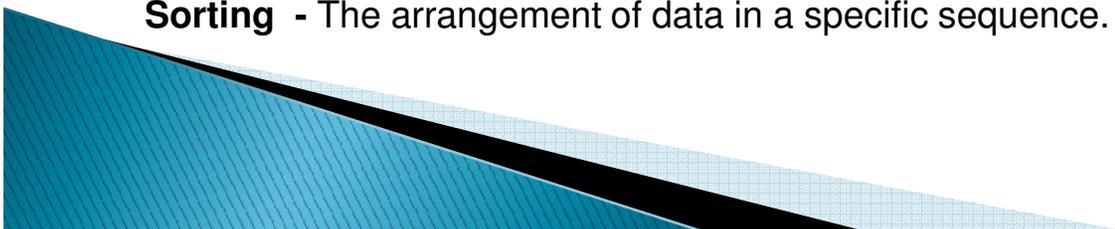
**Schedule** - A list of the activities needed to complete a project, along with their start and finish dates.

**Schedule Calculation** - The calculation of early and late dates for each activity in the project.

**Slack** - See Float.

**Slippage** - Lateness determined by measuring the target finish of an activity from its actual or current early finish.

**Sorting** - The arrangement of data in a specific sequence.



# Glossary of CPM Terms

**Start-to Start** - A type of relationship in which a successor's start depends on the start of **(SS)** its predecessor.

**Status** - The process of updating a project by indicating progress at regular intervals.

**Successor** - An activity that must logically occur after another activity.

**Target** - A project plan that can be compared to the current schedule to measure progress.

**Task** - A unit of work. Also called an activity.

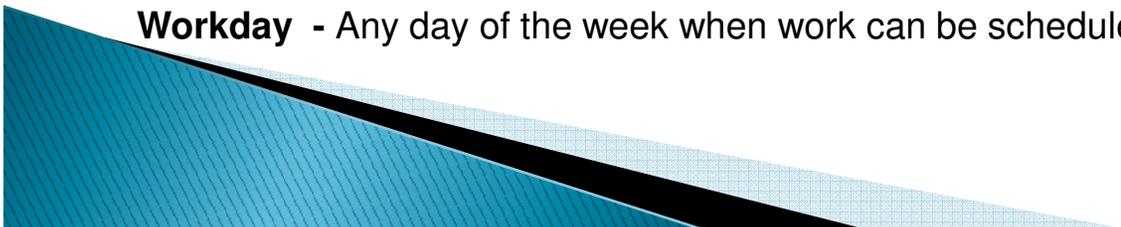
**Total Float (TF)** - The total number of days that the start or finish of an activity can be delayed without affecting the project finish date. Float can be negative, zero, or positive.

**Updating** - The process of recording progress in a project at regular intervals.

**Variance** - The difference between the current and target schedule dates.

**Work Breakdown Structure (WBS)** - The graphical depiction of the hierarchy of work needed to complete a project.

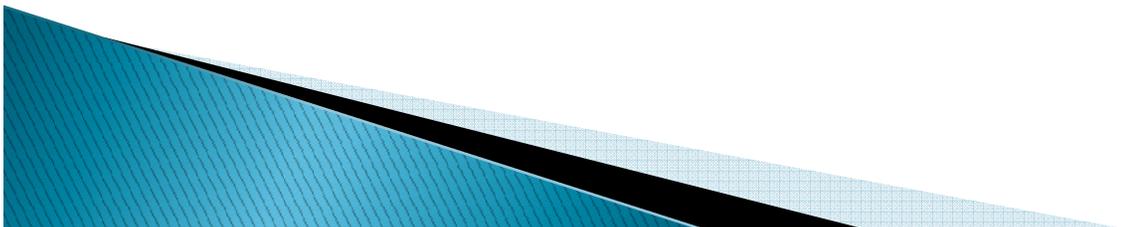
**Workday** - Any day of the week when work can be scheduled.



# MnDOT Goals Going Forward

## Projects in Construction Phase

- ❖ Contractor's Build Their Schedule in our Network 1/1/13
- ❖ Piloting Providing BIM Models and CTD Schedules to Contractors 3/1/13
- ❖ Select "Unit Rate" project– Resource and Cost Loaded 3/1/13
- ❖ Role and Resource Loaded of CE&I staff 6/1/14



# MnDOT Goals Going Forward

## Projects in Scoping and Design Phase

- ❖ “Active Projects” Role and Resource Loaded 6/30/13
- ❖ All planned projects Role loaded by June 30, 2014
- ❖ Taxpayer Transportation Accountability Act

