MnDOT Project Management Office Presents:

Team Member Application

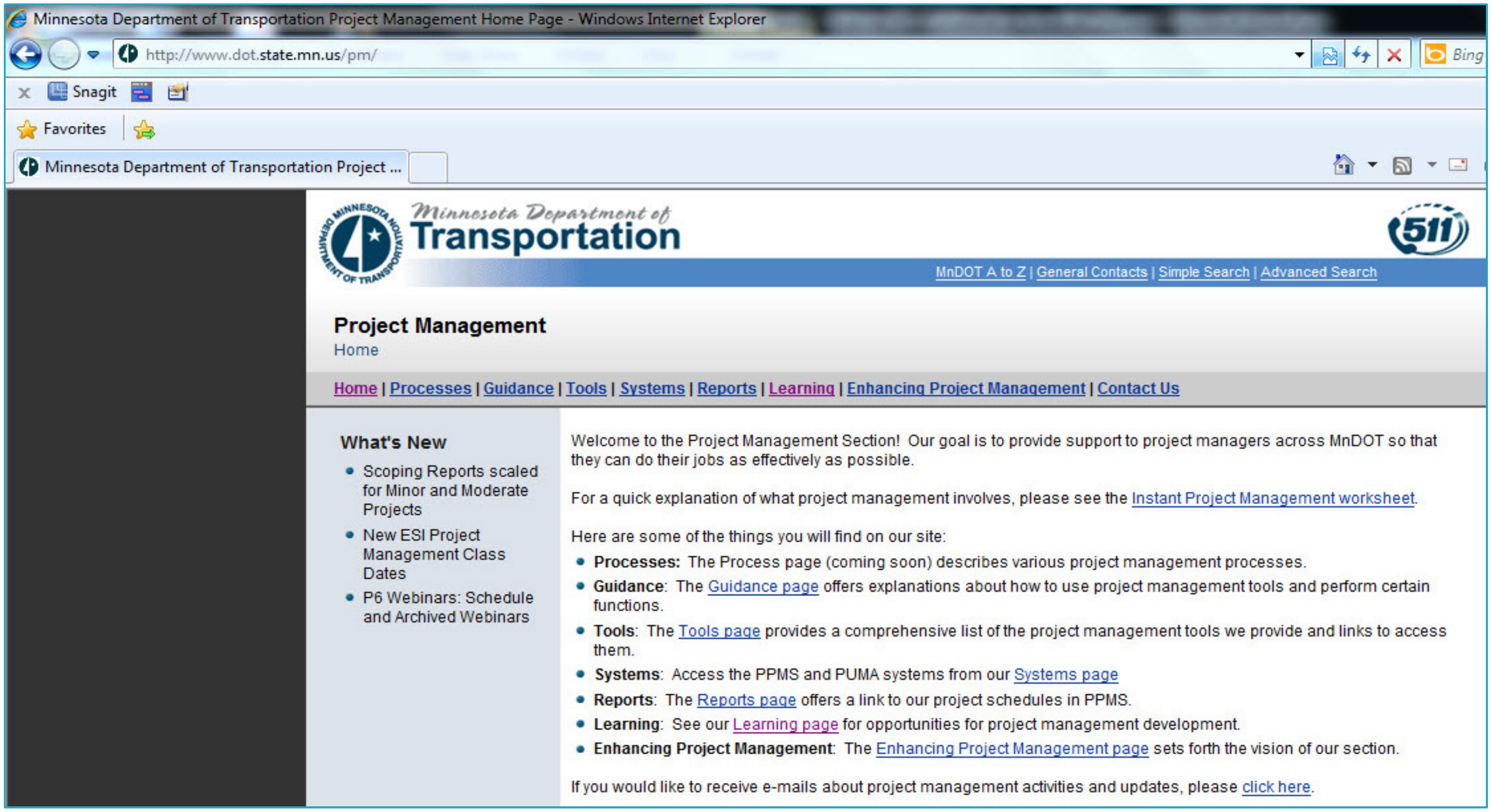
Presenter: Jonathan McNatty
Senior Schedule Consultant
DRMcNatty & Associates, Inc.

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 webiste 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 webiste 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/

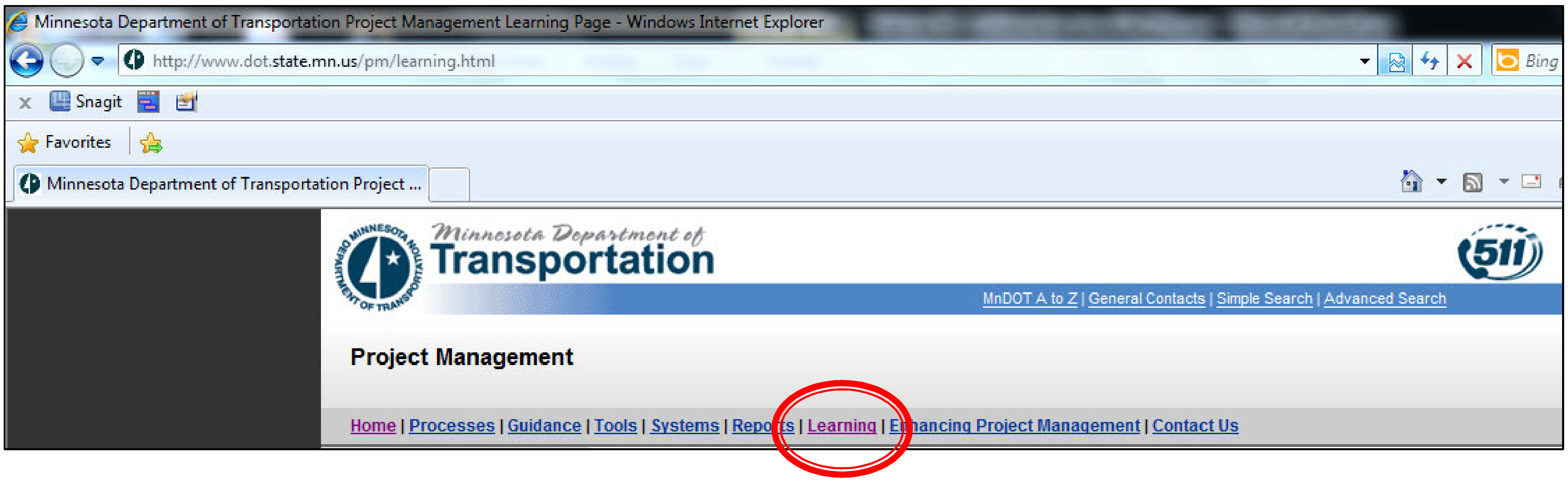
MnDOT Webinars

- http://www.dot.state.mn.us/pm/



MnDOT Webinars

- http://www.dot.state.mn.us/pm/learning.html

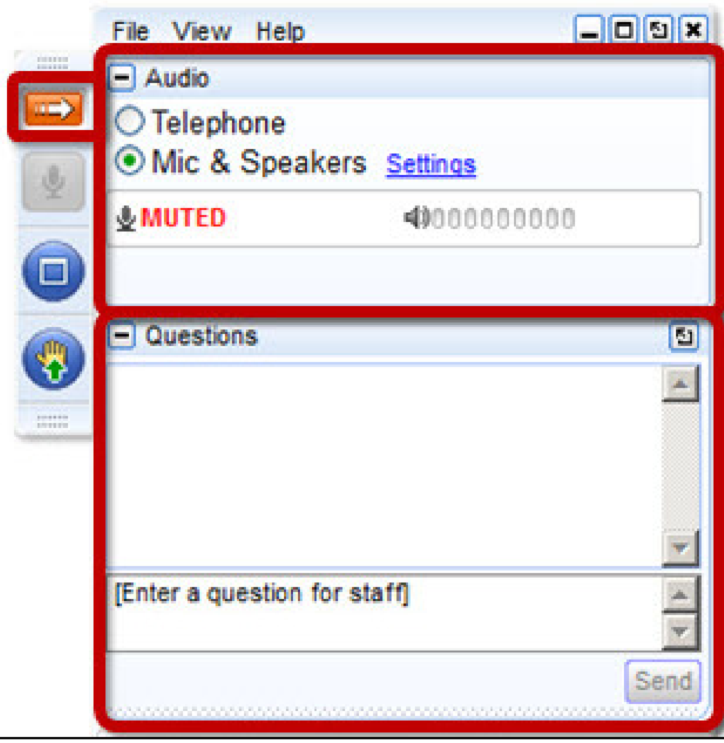


- Click on the "Learning" link

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

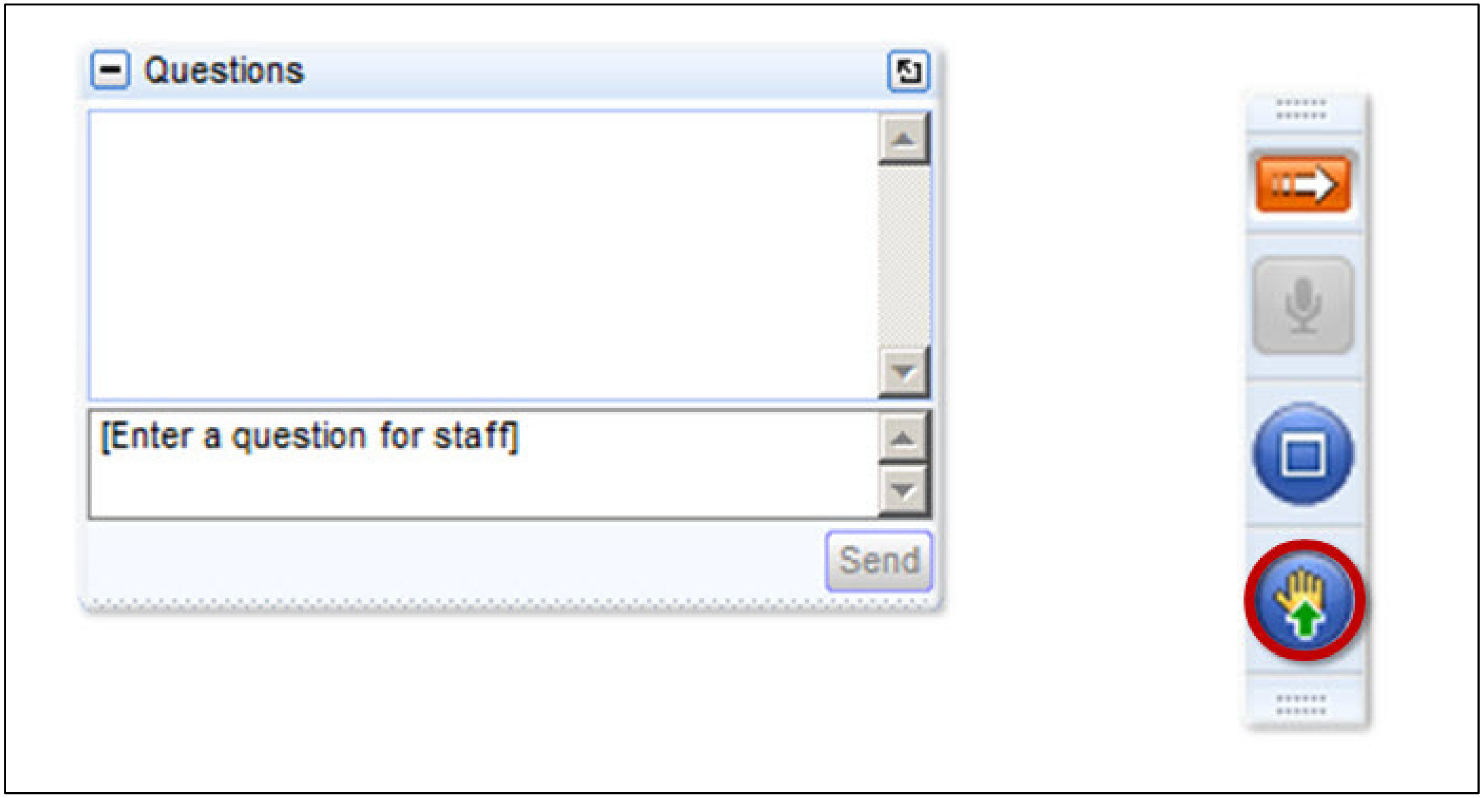
Open and hide your control panel

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.

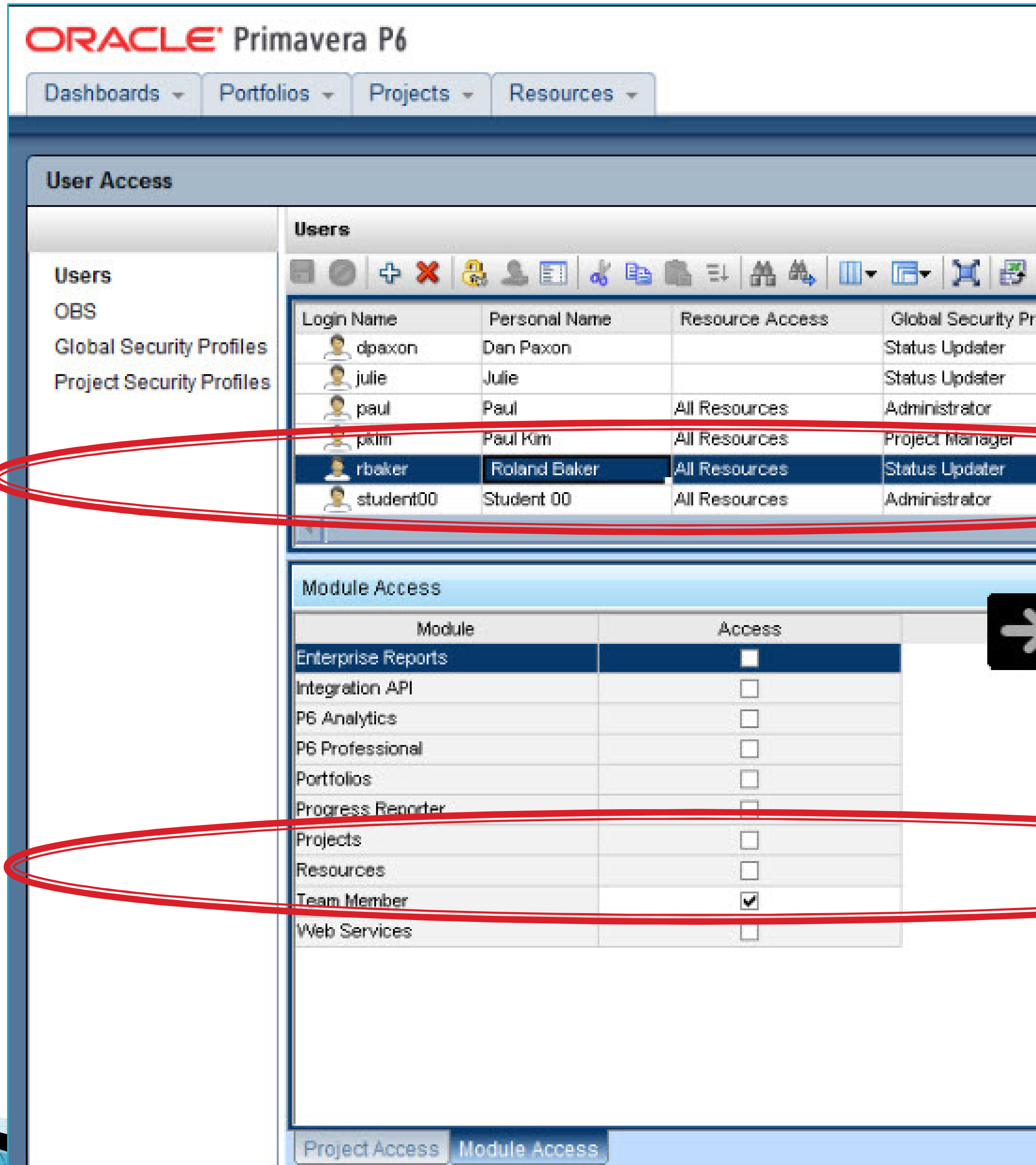
❖ Easily update tasks/activities to reflect the work that has been done including a single click to mark the task completed.

❖ 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

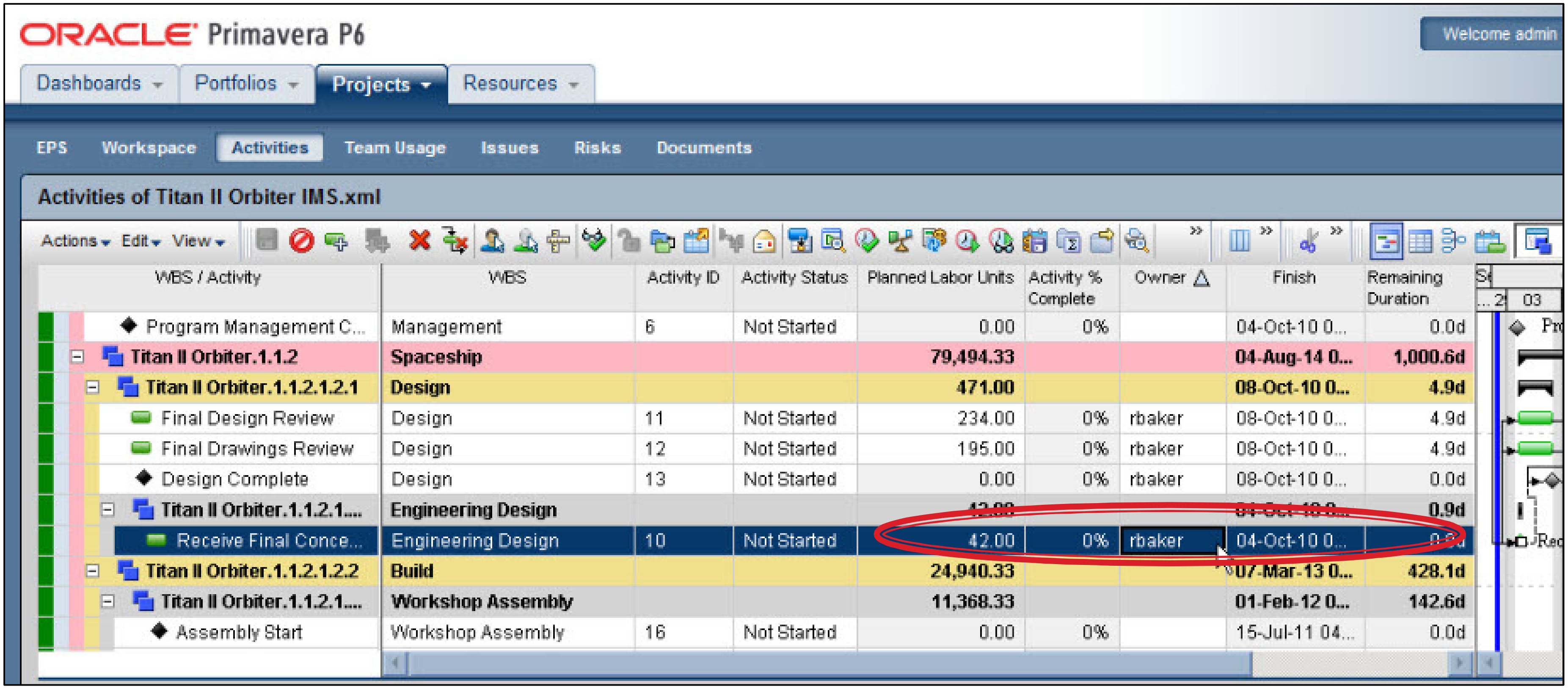
❖ The P6 administrator will create logins for people who will perform the role of activity 'Owner' and provide them with Team Member module access.


ORACLE Primavera P6
Dashboards
Portfolios
Projects
Resources
User Access
Users
OBS
Global Security Profiles
Project Security Profiles
Users
Login Name
Personal Name
Resource Access
Global Security Pro
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
Integration API
P6 Analytics
P6 Professional
Portfolios
Progress Reporter
Projects
Resources
Team Member
Web Services
Project Access
Module Access

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

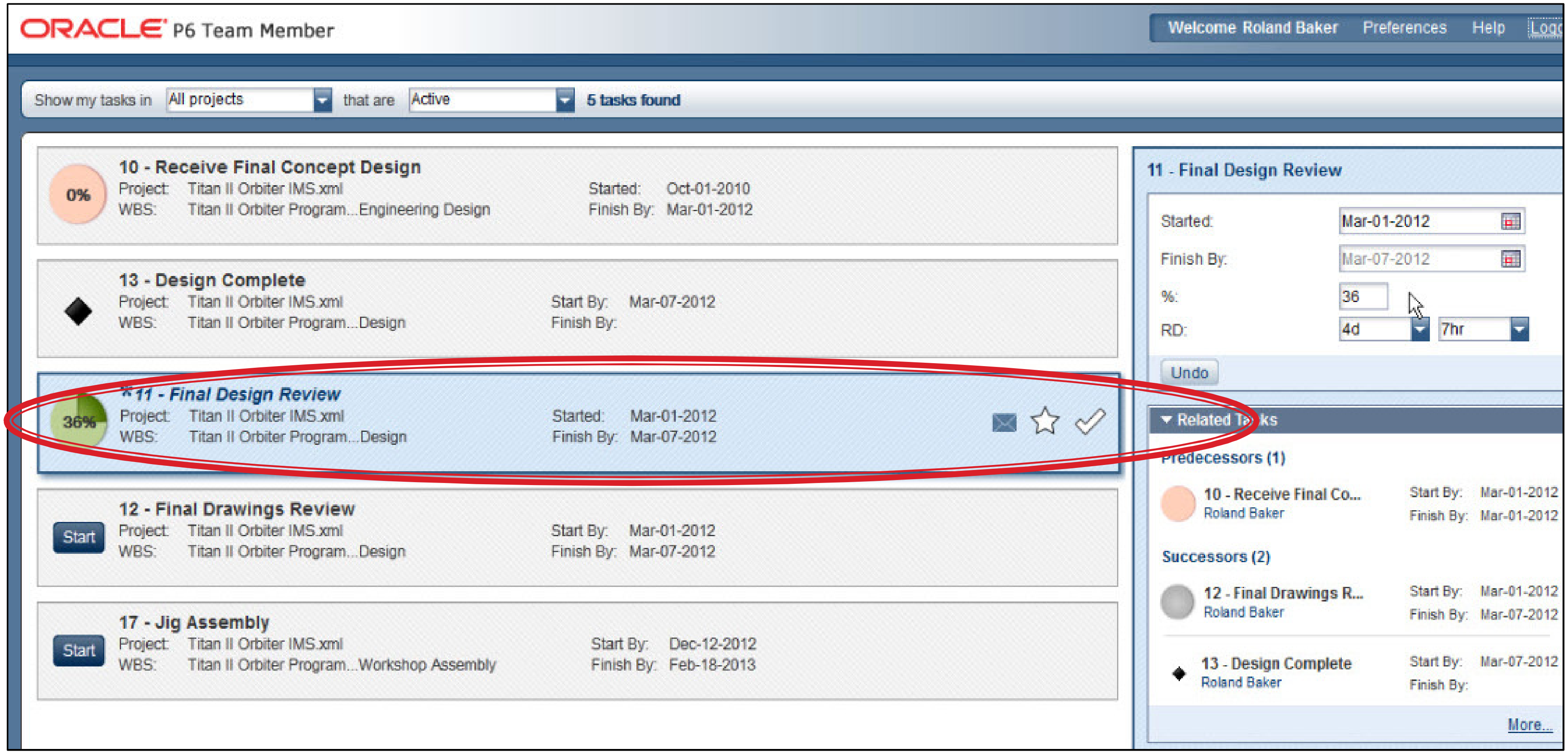
❖ Team Members can login to the Team Member Web page and status any activities they own or are assigned to.


ORACLE Primavera P6
Welcome admin
Dashboards
Portfolios
Projects
Resources
EPS
Workspace
Activities
Team Usage
Issues
Risks
Documents
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
0.9d
Receive Final Conce...
Engineering Design
10
Not Started
42.00
0%
rbaker
04-Oct-10 0...
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.

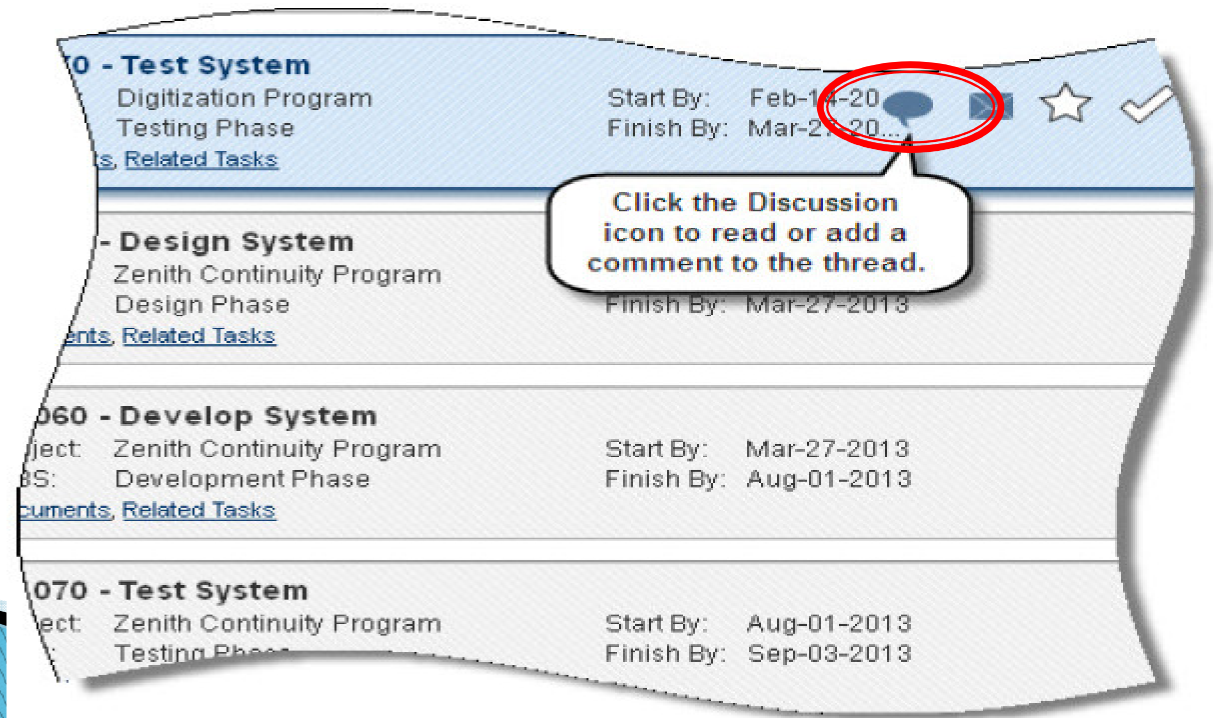
- ❖ The Team Member can start an activity, adjust the actual start date, enter a % complete or units completed value, status activity Steps, E-mail an interested party or check the activity to mark it as completed.



ORACLE P6 Team Member
Welcome Roland Baker
Preferences
Help
Show my tasks in
All projects
that are
Active
5 tasks found
10 - Receive Final Concept Design
0%
Project: Titan II Orbiter IMS.xml
WBS: Titan II Orbiter Program...Engineering Design
Started: Oct-01-2010
Finish By: Mar-01-2012
13 - Design Complete
Project: Titan II Orbiter IMS.xml
WBS: Titan II Orbiter Program...Design
Start By: Mar-07-2012
Finish By:
* 11 - Final Design Review
36%
Project: Titan II Orbiter IMS.xml
WBS: Titan II Orbiter Program...Design
Started: Mar-01-2012
Finish By: Mar-07-2012
12 - Final Drawings Review
Start
Project: Titan II Orbiter IMS.xml
WBS: Titan II Orbiter Program...Design
Start By: Mar-01-2012
Finish By: Mar-07-2012
17 - Jig Assembly
Start
Project: Titan II Orbiter IMS.xml
WBS: Titan II Orbiter Program...Workshop Assembly
Start By: Dec-12-2012
Finish By: Feb-18-2013
11 - Final Design Review
Started: Mar-01-2012
Finish By: Mar-07-2012
%: 36
RD: 4d 7hr
Undo
Successors (2)
12 - Final Drawings R...
Roland Baker
Start By: Mar-01-2012
Finish By: Mar-07-2012
13 - Design Complete
Roland Baker
Start By: Mar-07-2012
Finish By:
10 - Receive Final Co...
Roland Baker
Start By: Mar-01-2012
Finish By: Mar-01-2012
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

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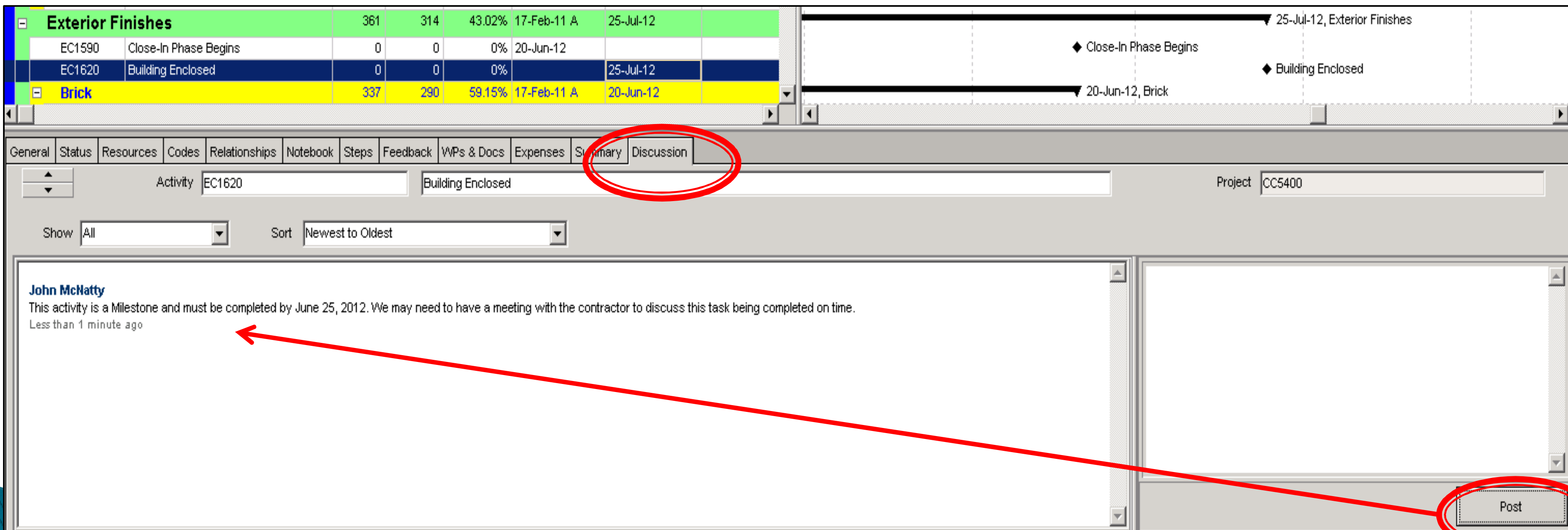
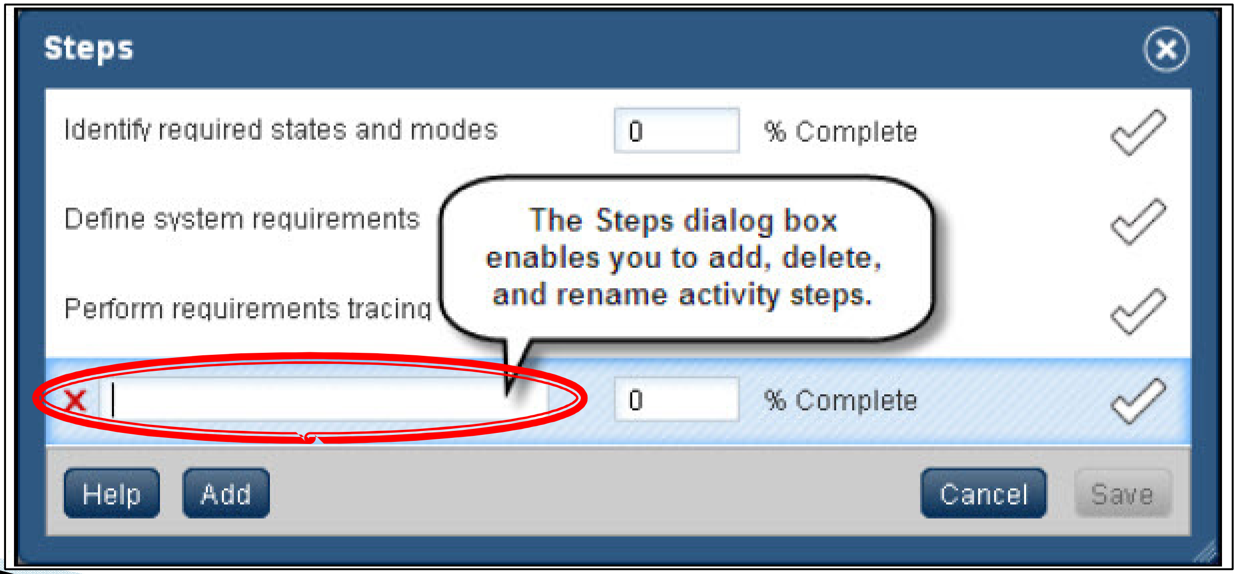


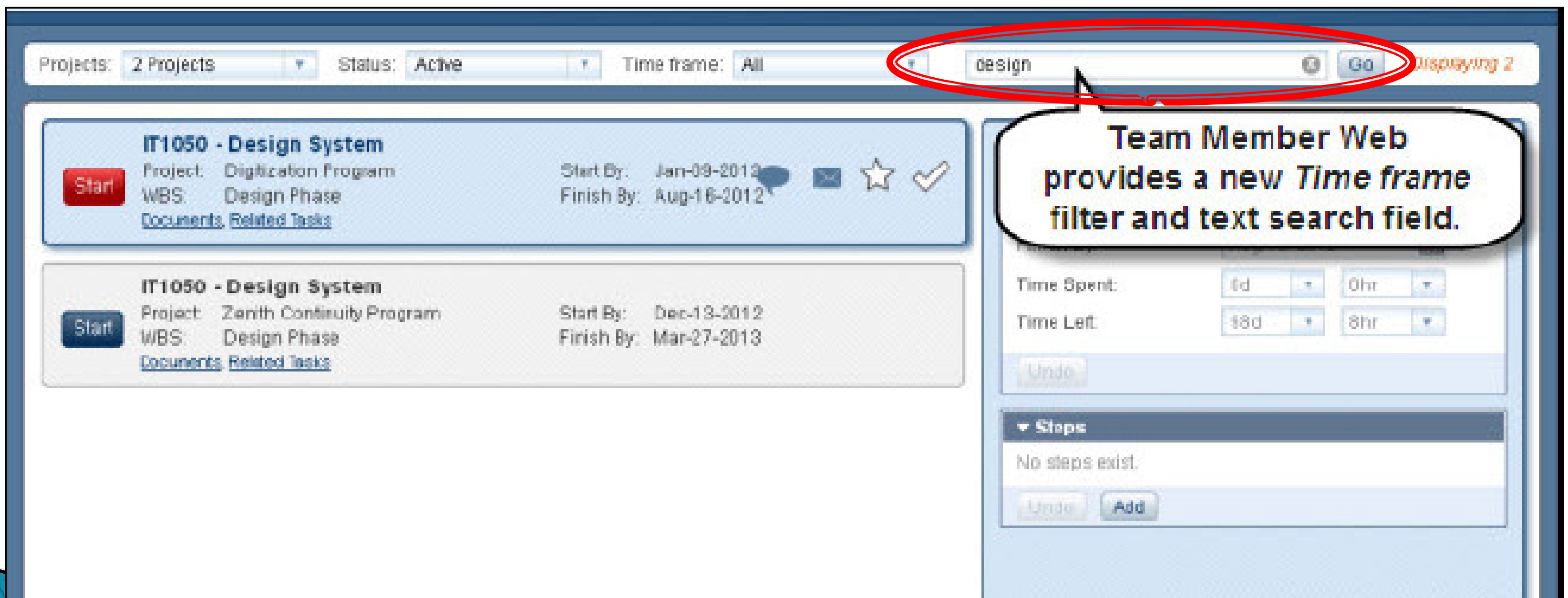
Team Member – Add/Delete Steps

- 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*.



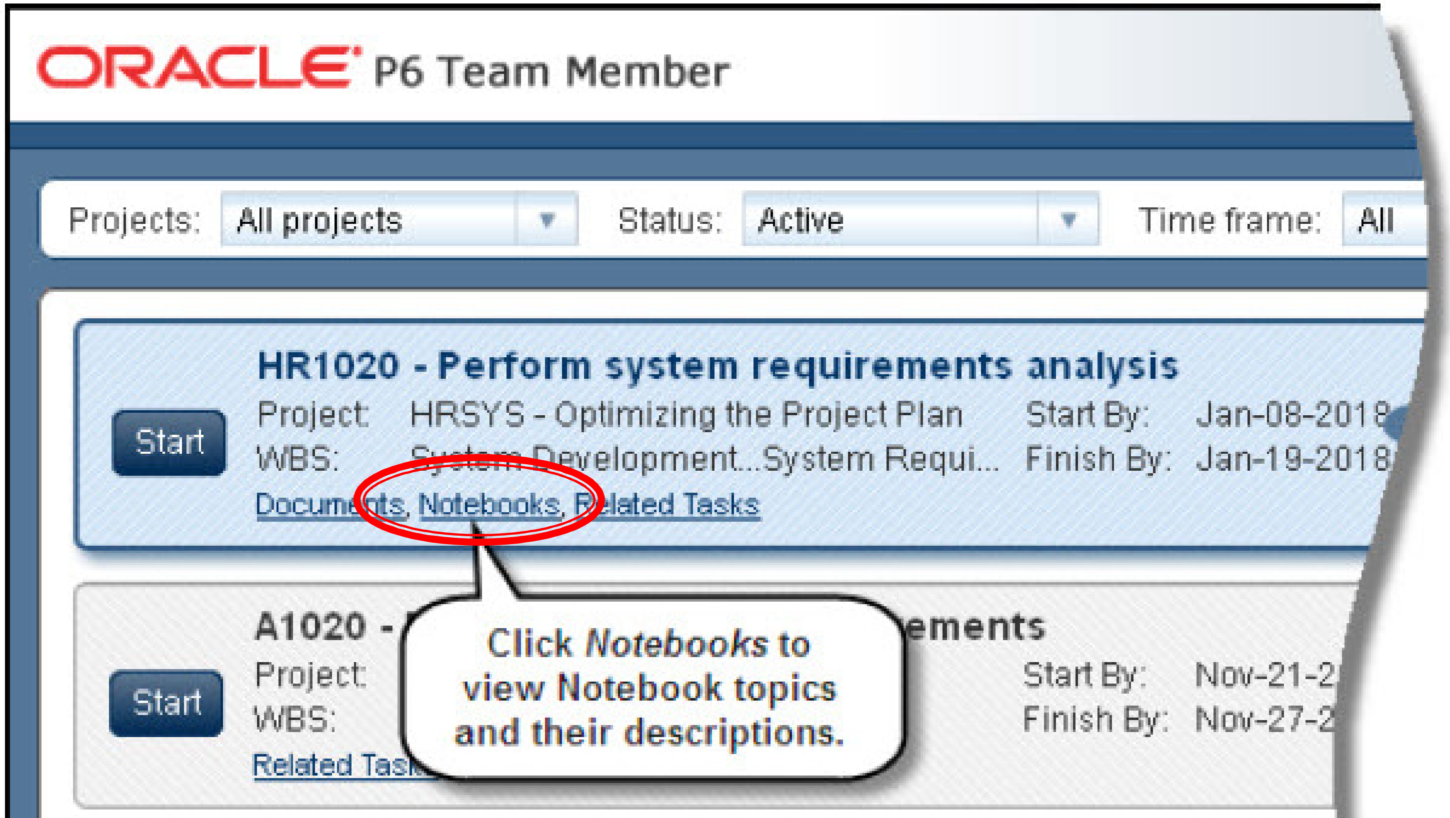
Team Member – Enhanced Filtering of Tasks

- 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



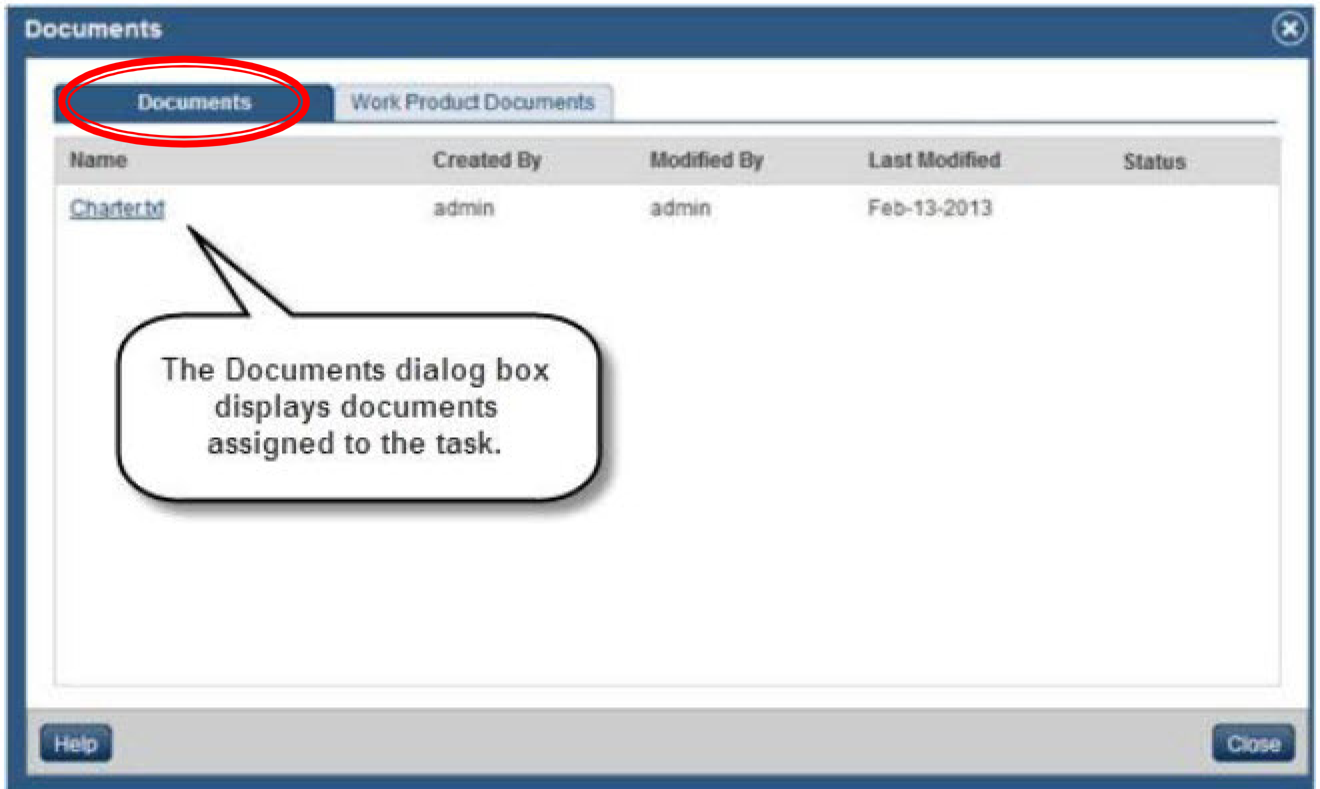
Team Member – Notebook Topics

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



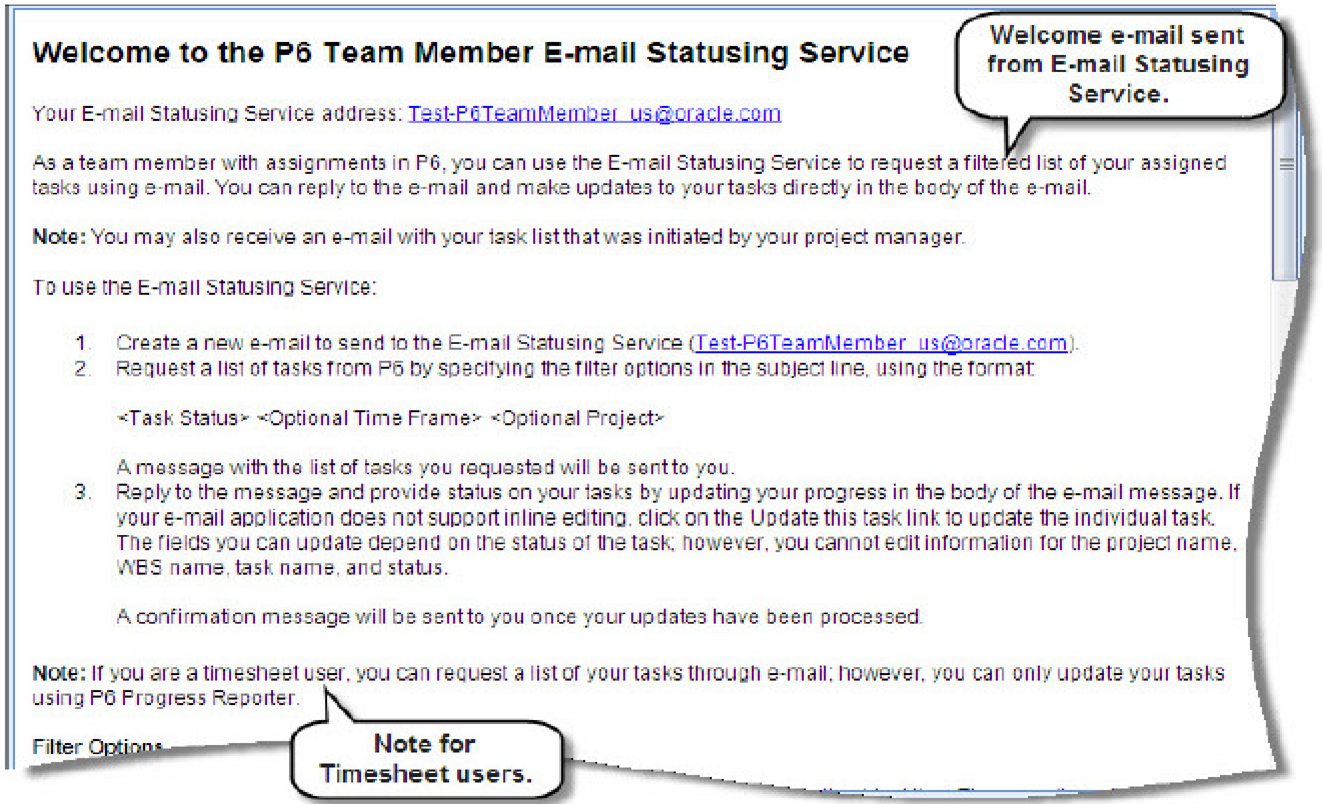
Team Member – Documents

- 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

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).
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.

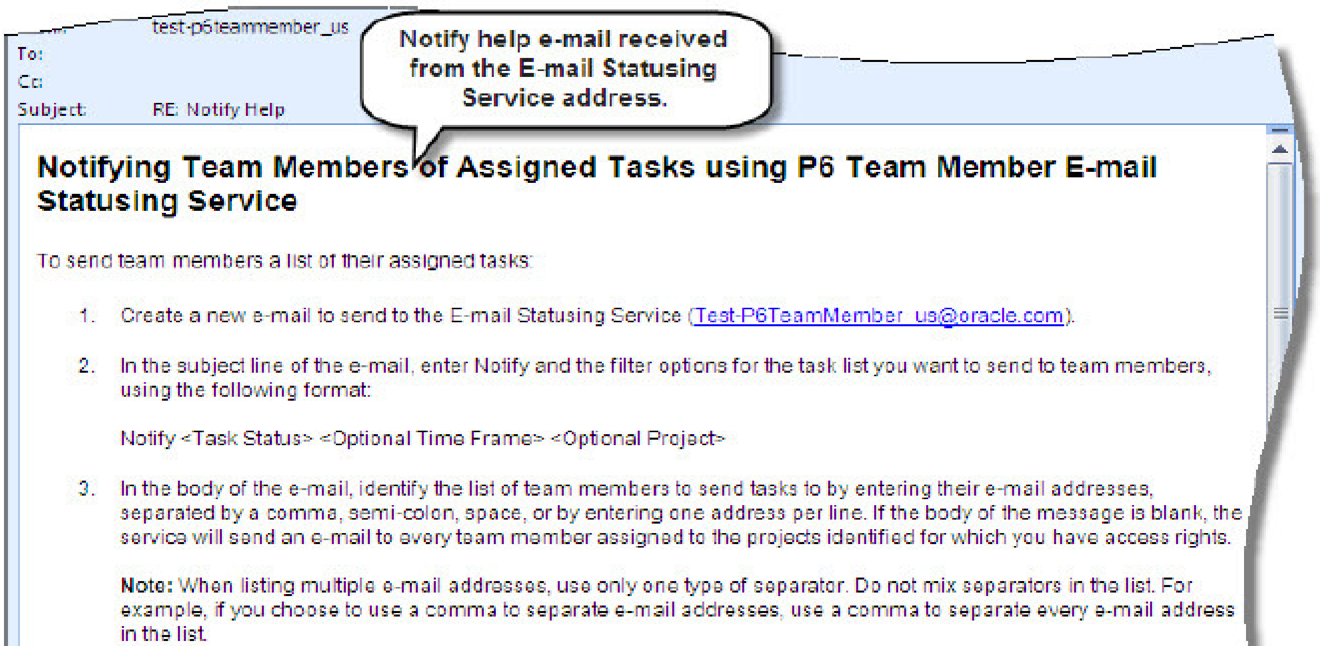
   A confirmation message will be sent to you once your updates have been processed.

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

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

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).
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
District – 1
District – 2
District – 3
District – 4

Nicole Peterson supports the Central Region
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
District – 6
District – 7
District – 8

Questions or Comments

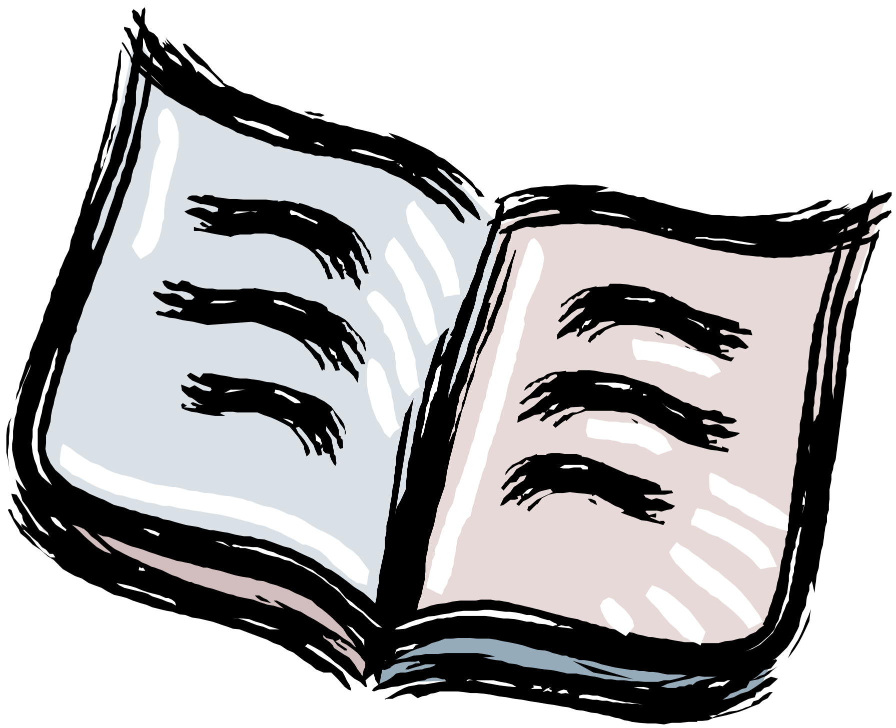
Tom Wiener
thomas.wiener@state.mn.us
MnDOT Project Management Office
651-366-4239

Peter Harff
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 then 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 (FF) - A type of relationship in which a successor activity finish depends on its predecessor activity's finish.

Finish-to Start (FS) - A type of relationship in which a successor activity can begin only when its 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 (SS) - A type of relationship in which a successor's start depends on the start of 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