

# Managing Light Rail Projects with a Lightweight Team

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enterprise

cloud

mobile

talent



## Introduction

- Project
- Client & Goals
- Tools & Tech
- Implementation
- Summary



# Project - Metro Gold Line Foothill Extension

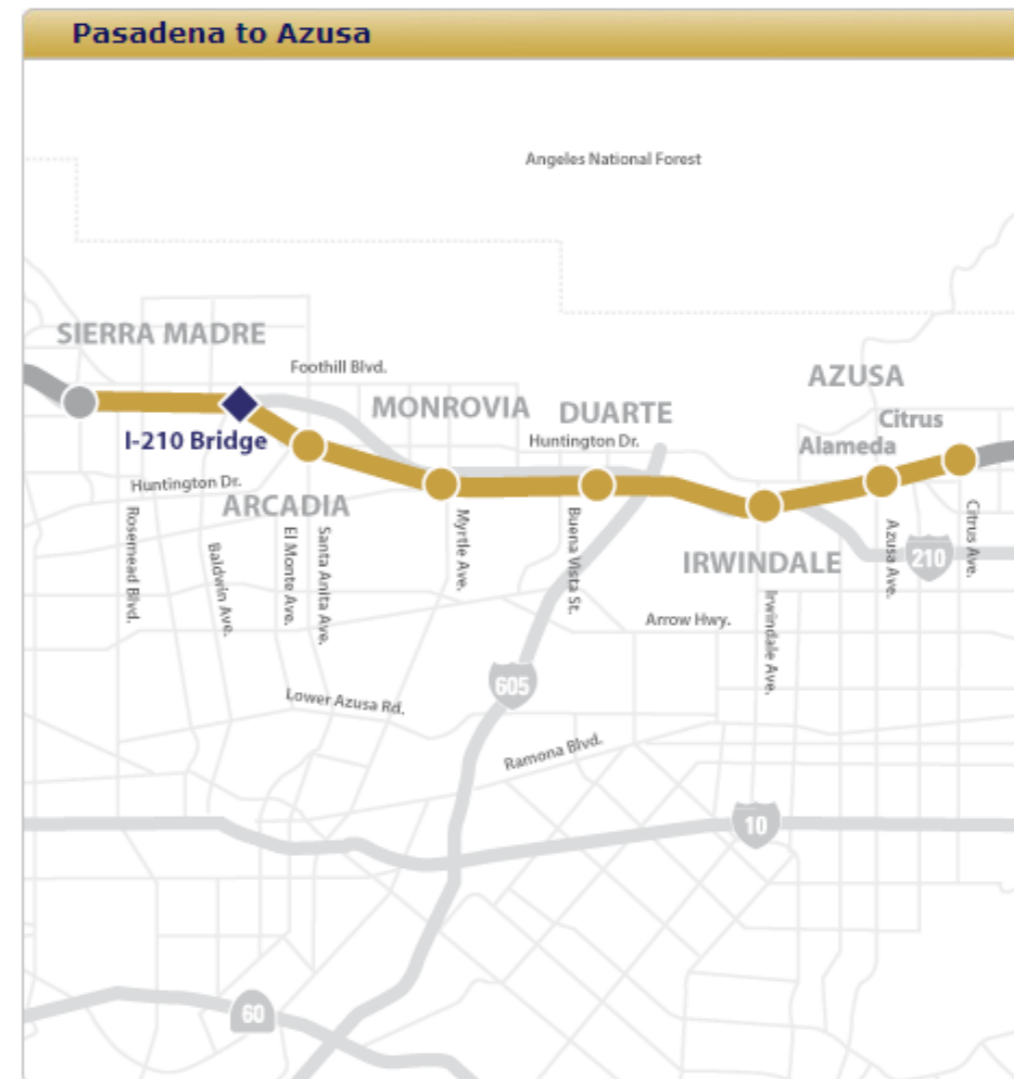
Under Los Angeles County Metro Rail

- Public Project overseen by Board
  - \$1.6B
  - Multiple Phases
- LA to Pasadena
  - 13.7mi, completed 2003
- Pasadena to Azusa
  - 11.5mi, ETC 2015
- Azusa to Montclair
  - 12.6mi, under study
- Ontario Airport
  - Possible last phase



# Client

- Foothill Extension Construction Authority
  - 5 year project
  - Manage Contracts
  - Manage Documents and Changes
  - Communicate with stakeholders



# Goals

- **Paperless Processing**
- No more piles
- No more boxes
- Automatic logging
- Automatic routing
- Easily searchable
- **Accurate Reporting**
- Record all change



# Tools

✘ PCM 13 **ORACLE** Primavera Contract Management

✘ SharePoint 2010 

✘ Partners Hosting Services



**Cloud** | IT Service Management



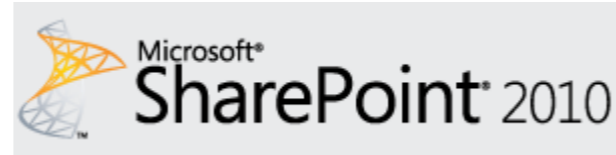
## Process: PCM

ORACLE Primavera Contract Management

- ✘ Central Location for all project documents
- ✘ Manage all phases of change
- ✘ Automate Contractor Document Upload
- ✘ Accurate Forecasts



## Process: SharePoint



- ✘ Avoid pre-defined folder structure
- ✘ Automate alerts
- ✘ Customize notifications





# Implementation: Document Upload

A screenshot of a web browser window showing the login page for 'DIMENSION'. The browser's address bar shows 'http://apps.fo...' and the page title is 'DUI'. The page header features the 'DIMENSION' logo and '© Partners Consulting 2013'. Below the header, there are two input fields: 'Username:' and 'Password:'. A 'Login' button is positioned below the password field.

For External  
Contractors  
(though used  
internally as well)

Login uses PCM  
Security  
Authentication and  
Authorization





Browser address bar: http://apps.foothillextens... DUI

Welcome, Daniel Williams (dwilliams@partnersconsulting.com) <-Email Logout

**Project List**

All Projects

- All Projects
- C1134 - IFS - Skanska
  - Requests for Information
  - Requests for Change
  - Informational RFIs
  - Submittals
  - Drawings
  - Cost Schedule Proposals
  - Notices
  - Noncompliance Notices
  - Letters and Other Correspondence
  - Reports
- TEST - Sample Metro Goldline Project
- C1135 - Alignment - FTC
- 3RD - Third Parties
- C1150 - Parking Structures

**Project Name:** C1134 - IFS - Skanska **To:**

**Authority Contract #:**  **From:**

Add RFI

Revise RFI

Upload Actions

Request For Information

Version: 1.0.0.0 Build Date: 2012-04-25 09:52:54 -07:00



# Implementation: Upload Actions

- [-] C1150 - Parking Structures
  - Requests for Information
  - Requests for Change
  - Informational RFIs
  - Submittals
  - Drawings
  - Cost Schedule Proposals
  - Notices
  - Noncompliance Notices
  - Letters and Other Correspondence
  - Reports



# Contract Security



Project Name: C1135 - Alignment - FTC      To: Kiewit-Parsons  
Authority Contract #: C1135-PS01 Utility Work      From: Foothill Ext. Const. Authority

Add RFI

Revise RFI

Request For Information

You may only take action once your contract is selected.





Project Name: C1135 - Alignment - FTC To: Kiewit-Parsons  
Authority Contract #: C1135-PS01 Utility Work From: Foothill Ext. Const. Authority

### UPLOAD A NEW REQUEST FOR INFORMATION

**To:** Foothill Ext. Const. Authority  
Christopher T. Burner

**From:** Kiewit-Parsons  
Bill Westland

**Authority Number:**

**\* Contractor's Doc #:**  Contractor Document Number is required.

**Date:** 02/24/2013

**\* Title:**

**\* Question:**

**\* Proposed Solution:**

**\* Signed By:**

**\* Attach Document:**

No size limit

- Key information is auto-filled
- Document Number auto-generated
- Controls follow workflow, keyboard friendly
- Validation for required data
- Filters, e.g. Subcontractor by Role
- Upload multiple documents



# Implementation: SharePoint

Folder Structure:

Phase->Project->Contract->Incoming->Doc Type->Spec Section



The screenshot shows a SharePoint document library interface. The breadcrumb path is 'Foothill > Foothill Documents > All Projects > All Documents'. The left sidebar shows 'Libraries' with 'Foothill Documents' selected. The main content area displays a table of folders:

Type	Name	Modified
Folder	C1134	9/21/2011 10:28 AM
Folder	C1135	11/2/2011 4:49 PM
Folder	TEST	9/19/2011 11:59 AM
Folder	Third Parties	11/21/2011 9:36 AM

Below the table is an '+ Add document' button. A red arrow points from the text 'DUI loads Contractor Documents beneath Incoming Folder.' to the 'C1135' folder entry.

DUI loads Contractor Documents beneath Incoming Folder.

Other folders for internal and external use.





Foothill Documents - 3RFI-3001.01-Test 3 Party RFI-revised-answer.pdf...

View

Version History | Alert Me | Manage Permissions | Manage Copies | Edit Item | Delete Item | Check Out | Workflows

Manage | Actions

Name	3RFI-3001.01-Test 3 Party RFI-revised-answer
Title	3RFI 3001.01 Answer
AuthorId	AGRUBB
Contract	C1134 - SKA
DocumentDirection	Incoming
DocumentType	3rd Party RFIs
GroupName	CMPROJ
isAttachment	No
ModuleName	3RFI
ObjectId	f50893e67de0443db102120c6c
ObjectType	
Phase	All Projects
ProjectName	C1134
SpecSection	No Spec Section

Content Type: PCMDocument  
 Created at 12/11/2011 2:10 PM by DUI Upload  
 Last modified at 12/11/2011 2:10 PM by DUI Upload

Close

SharePoint Document is tagged with PCM Metadata for fast search.





# After the Upload: Notifications

Email sent to:

- Person who submitted the document
- Document Controls
- Corresp. Received Log

The screenshot shows the Oracle Primavera Contract Management interface. The browser address bar displays 'http://apps.foothillextension.org:82/exponline/n'. The page title is 'ORACLE Primavera Contract Management'. The main content area shows 'Alignment - FTC (C1135)' with a date of 'February 24, 2013'. Below this, there is a 'Control Center > Corr. Received' section. A table lists received documents with columns for GC Document Number, Subject, Date Received, Status, and Document Type. The table is sorted by date received.

GC Document Number	Subject	Date Received	Status	Documnt Type
<a href="#">PS03-004</a>	Encroachment Removal SCRRRA Storage Bldg	Feb 22, 2013	Closed	Provisional Sum Auth
<a href="#">MTG-SED-0015</a>	Southern California Edison Distribution Meeting Minutes (02-19-13)	Feb 22, 2013	Open	Meeting Minutes
<a href="#">SDS-05650-003</a>	Track Shop Drawings- Pre Curve Rail Curve No. 601	Feb 22, 2013	Open	Shop Drawing Submittals
<a href="#">MTG-DMG-0050</a>	Manager Design Meeting Minutes (02-04-13)	Feb 21, 2013	Open	Meeting Minutes
<a href="#">MTG-DMG-0051</a>	Manager Design Meeting Minutes (02-11-13)	Feb 21, 2013	Open	Meeting Minutes
<a href="#">PS01-037</a>	ATT UG at 1st Ave and Santa Clara St	Feb 20, 2013	Closed	Provisional Sum Auth
<a href="#">PS01-034</a>	ATT Remove Track at Santa Anita	Feb 20, 2013	Closed	Provisional Sum Auth





# Paperlessness Achieved!

- ✘ Documents uploaded
- ✘ Documents logged in PCM
- ✘ All relevant parties notified
- ✘ World Saved



# Summary

Manage Contracts | Manage Change | Automate Processes

- ✘ Foothill was able to eliminate need for cardboard boxes, manual logging and routing
- ✘ All relevant parties automatically notified of documented activities
- ✘ All project information stored in PCM and SharePoint

Document Upload | Storage and Alerts | Hosted Simplicity



# Questions?



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