

Seattle Public Utilities

Rego U - September 26, 2023

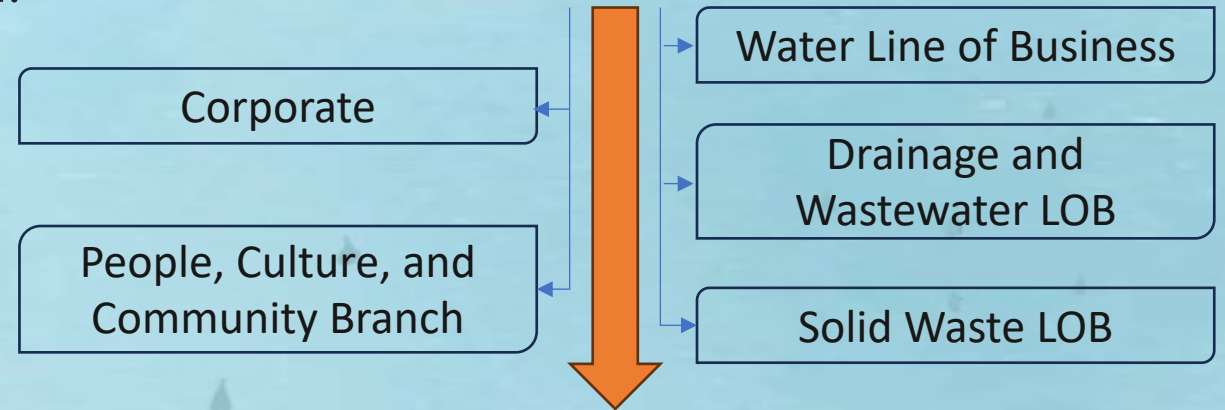
Maryanne Takahashi





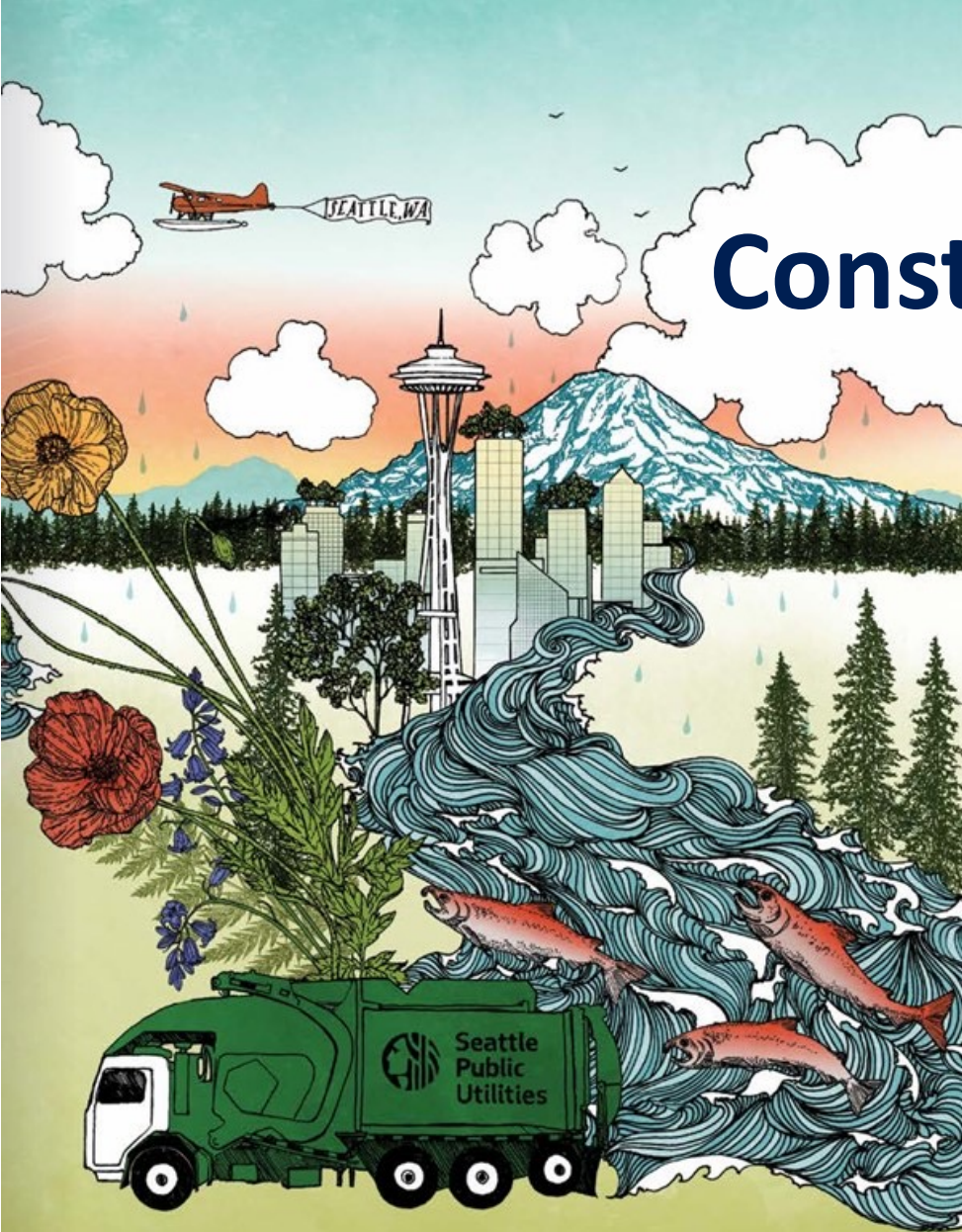
Seattle Public Utilities

SPU was created in 1997 when the City's water, solid waste, drainage and wastewater, engineering services and the construction engineering functions were combined.



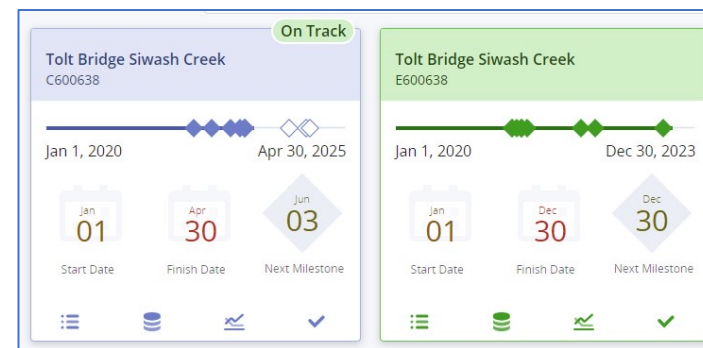
• **Project Delivery and Engineering Branch (PDEB)** delivers infrastructure projects and programs to all SPU lines of business, as well as engineering services to other City departments. These include project and construction management, engineering, design drafting, land surveys, and other technical and development services.





Construction Project Management

Project PHASE	Required MILESTONES
Initiation	1. Initiation Complete
Options Analysis	2. Options Analysis Complete
Design	3. Start of Design
	4. 30% Design Complete
	5. 60% Design Complete
	6. 90% Design Complete
Procurement	7. 100% Design Complete
	8. Advertise - Start
	9. Contract Execution Complete
Construction	10. Notice to Proceed Complete
	11. Project Substantially Complete
	12. Construction Complete
Closeout	13. Closeout Complete



▼ PHASE

The project's current stage of delivery, e.g., Planning, Initiation, Options Analysis, Design, Procurement, Construction, Closeout. Entered by the PM.

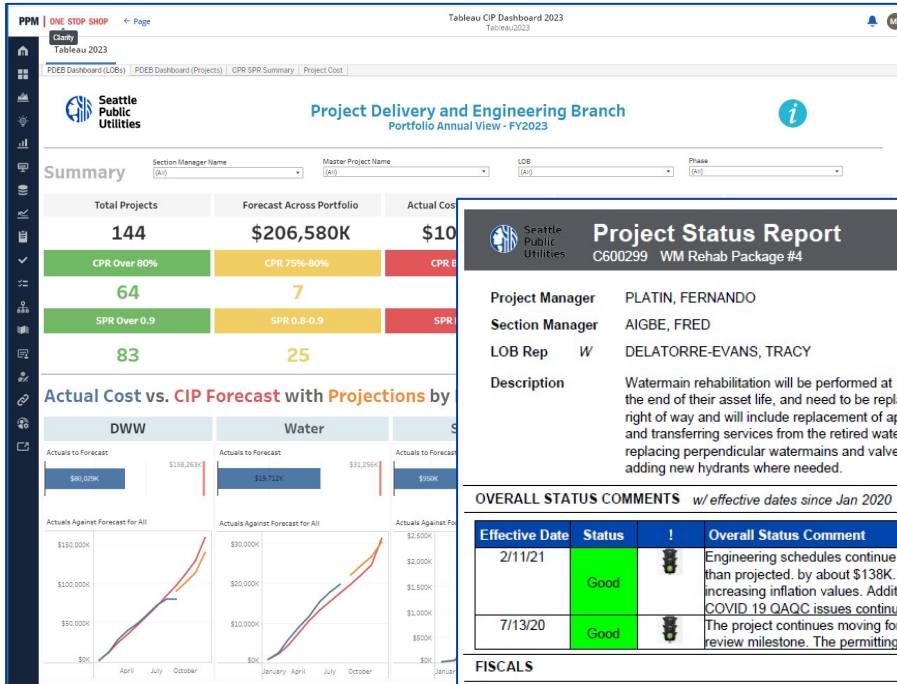
Project Phase

Construction



Communication | Reports

Jasper Soft, Jasper Studio, Portlets, SQL, Tableau, Power BI

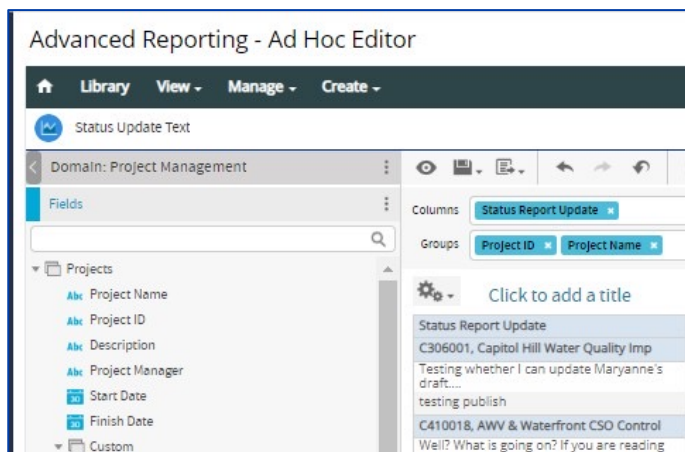


Project Status Report		Report as of: February 12, 2021	
Project Manager	PLATIN, FERNANDO	Project Type	Infrastructure
Section Manager	AIGBE, FRED	Project Phase	Design
LOB Rep	W DELATORRE-EVANS, TRACY	Legacy Status	Active
Description	Watermain rehabilitation will be performed at multiple locations. These watermains have reached the end of their asset life, and need to be replaced. At each of these 12 sites, the work within the right of way and will include replacement of appurtenances (e.g. valves, hydrant branches, etc.) and transferring services from the retired watermain to the new watermain. It may also include replacing perpendicular watermains and valves in intersections that serve cross streets, and adding new hydrants where needed.		
OVERALL STATUS COMMENTS w/ effective dates since Jan 2020			
Effective Date	Status	!	Overall Status Comment
2/11/21	Good	🚧	Engineering schedules continue to slip and soft costs for design are current higher than projected, by about \$138K. Schedule delays have shifted HC further back increasing inflation values. Additional survey and Tech Services cost occurred and COVID 19 QA/QC issues continue. The team is approaching 90% internal completion.
7/13/20	Good	🚧	The project continues moving forward and has achieved the 60% internal design review milestone. The permitting package continues to develop on time.
FISCALS			
Actual Cost LTD	\$ 1,266,289.3	Governance Approved Amount	\$ 7,096,153
Actual Cost YTD	\$ 658,807.77	Governance Period Projections	\$ 1,266,289.3
		Variance	\$ 5,829,863.7
Effective Date	Fiscal Comment - 2020/21		

Project Storyboard: C600273 - Cloverdale Bioretention			
Project Manager	SHARPLEY, JASON	Status Report Date	7/14/23
Section Manager	Sztern, Shailee Pia,	Status	SUBC
LOB	DWW	Phase	CLSO
Project Dates		Status Report Indicators	
Start	Finish	Overall	🚧 ➡
Plan	11/1/18 2/16/24	Schedule	🚧 ➡
Baseline (coming soon)		Scope	🟩 ➡
Days Late	0 0	Cost and Effort	🟩 ➡
Description			
This project will build bioretention cells at the northeast corner of S Cloverdale St and 5th Ave S. It will fulfill deferred water quality commitments from SPU to Department of Ecology as part of the S. Portland St. project. Project funding comes from the GSI in Urban Villages Program, E317024. (Program will continue under that E#, this project is a smaller spinoff that needs its own C#). The work will be done in coordination with a broader community planning effort focused on pedestrian safety, including sidewalk investments by SDOT.			
Key Accomplishments			
Construction and Landscape Establishment complete			

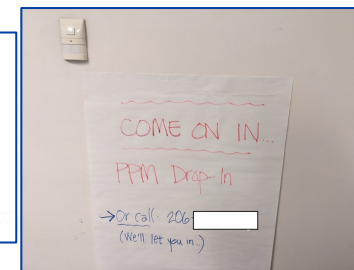


Communication | 😊



Four options for PPM help:

- [Watch a mini update](#)
- View training materials both videos and PDFs on [Wiki-PDEB](#)
- Attend a drop-in help session **Thurs 9/14 11:30 AM.**
- Email SPU_PPM@seattle.gov with screenshots of any problems.



Clarity PPM

UNEXPECTED ERROR server_error: Error in SAML response processing: PreSignUp failed with error GET_USER_ERROR - No valid user found. . Click [Here](#) To Login

Friday 5:17 PM

UNEXPECTED ERROR server_error: Invalid SAML response received: PreSignUp failed with error **GET_USER_HOME_IMMEDIATELY**



Clarity PPM Admins competing in a bridge building contest with actual engineers...

Clarity S'more Toolkits

portfolio
Manager
Toolkit

Resource
Manager
Toolkit

**HERSHEY'S
S'MORES**

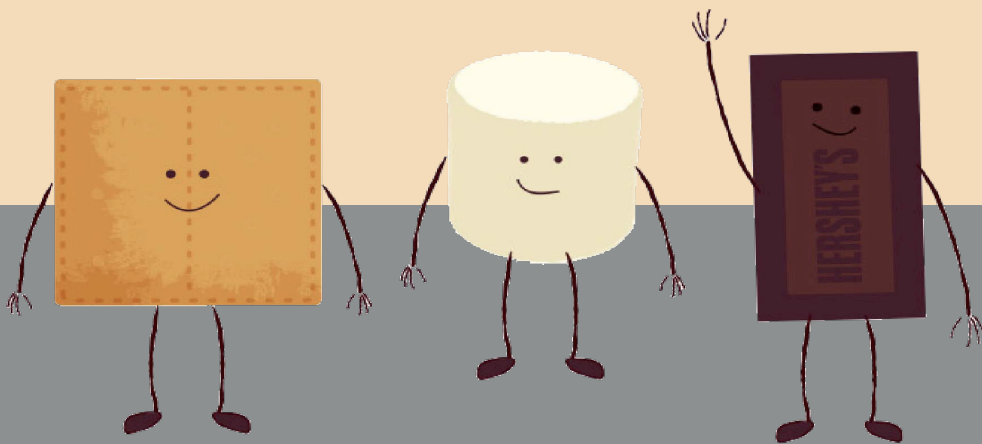


Project
Manager
Toolkit

THE SWEET STORY BEHIND S'MORES

No matter where you are, S'mores are the easy-to-make, nostalgic treat you can enjoy anytime. With just three simple ingredients, you'll find yourself transported to a familiar place where friends and family gather to make ooey, gooey "*S'mores magic.*"

The goal of our Hershey S'more Toolkits is to bring *More Moments of Goodness* to our Clarity PPM users.



WHY WE NEEDED S'MORES TOOLKITS

CONFLICT

What We Heard:

- ✓ There are TOO many different portlets to navigate to!
- ✓ I can never remember which page does what - Please Help!
- ✓ Can you just tell me what I need to focus on without me having to look for it?



SUPPORT

How can we help?:

- ✓ An easy to access “one-stop-shop” for managing work
- ✓ Simple and recognizable title headers providing clear direction to the user
- ✓ Straight-forward color coding and visualizations to enable quick analysis and next steps



MORAL

Moral of the story:

**HERSHEY
TOOLKITS
FILLED WITH
S'MORE
GOODNESS**

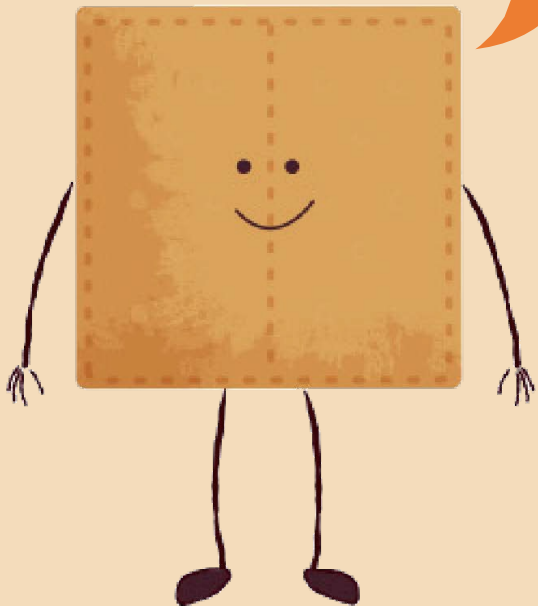


CREATING THE PERFECT S'MORES



Project Manager
Toolkit

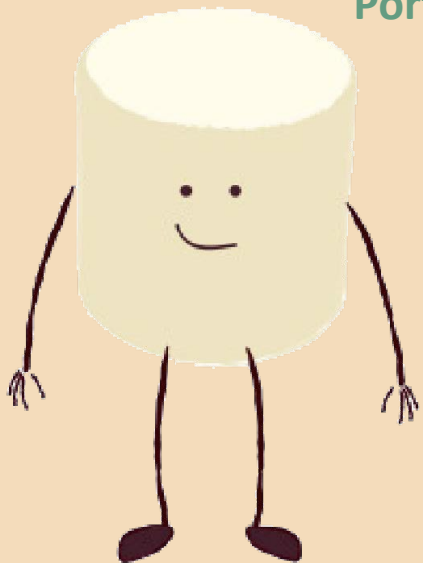
*Nerdy,
Holds the gang
Together*



GRAHAM

*Spontaneous,
Silly,
Smoooshable*

Portfolio Manager
Toolkit



SMOOSHY

*Smooth,
Resourceful,
Sweet*

Resource Manager
Toolkit



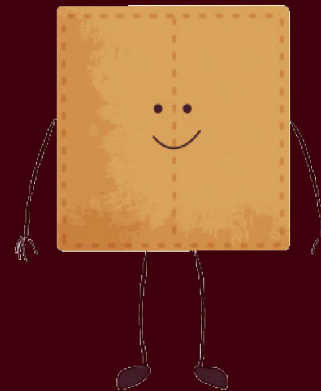
MELTON



Project Manager Toolkit

Graham's job is to manage his projects to stay in scope, in budget, and on schedule. The work he does as a project manager directly impacts his buddies Smooshy and Melton in managing the resources and portfolios.

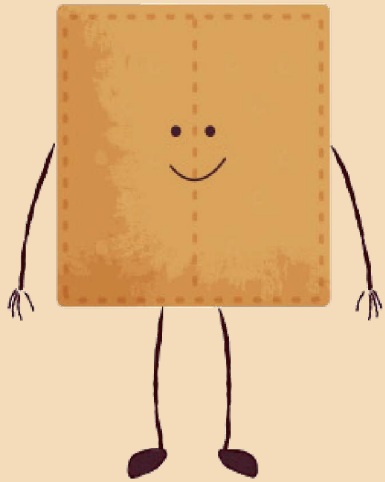
Holding everyone else together can get hefty, but the Project Manager Toolkit keeps Graham feeling sturdy and equipped!



Project Manager S'MORES Experience

Project Manager Toolkit:

- Trackable hours for Baseline and Actuals on an annual, quarterly, monthly, and weekly basis
- Time, Task, and Task IO Summaries for project managers to keep a pulse on the project
- Detailed views of Cost and Benefit Plan statuses
- Month-by-month breakdown of forecasted capital costs and variance to actual capital costs
- Data Quality portlets filter down to noncompliant projects, making a clearer path for outreach and correction
- Project Health capturing report details as well as missing status reports
- Risk and Issue tracking alerting project managers of potential areas of concern



GRAHAM

PM Toolkit Introduction

Project Management is the art of overseeing a project or group of projects that meet the long-term and short-term objectives for our Hershey pillars. Our goal is to enable Project Managers to successfully manage project financials, schedules, resources, data quality and overall health through the Project Manager Toolkit.

Project and Schedule Management



- ✓ Actuals
- ✓ Timesheet Review
- ✓ Project Schedule Review

What are my keys to success?



Evaluation



Financial Management



- ✓ Budgeting
- ✓ Rationalize Spend
- ✓ Project Forecasting

Why Project Management?



Data Quality Management



- ✓ Project Stage
- ✓ Project Hours Breakdown
- ✓ Project Schedule

Governance
Standardization
Processes

Project Health Management



- ✓ Status Reporting
- ✓ Risk Management
- ✓ Issue Management

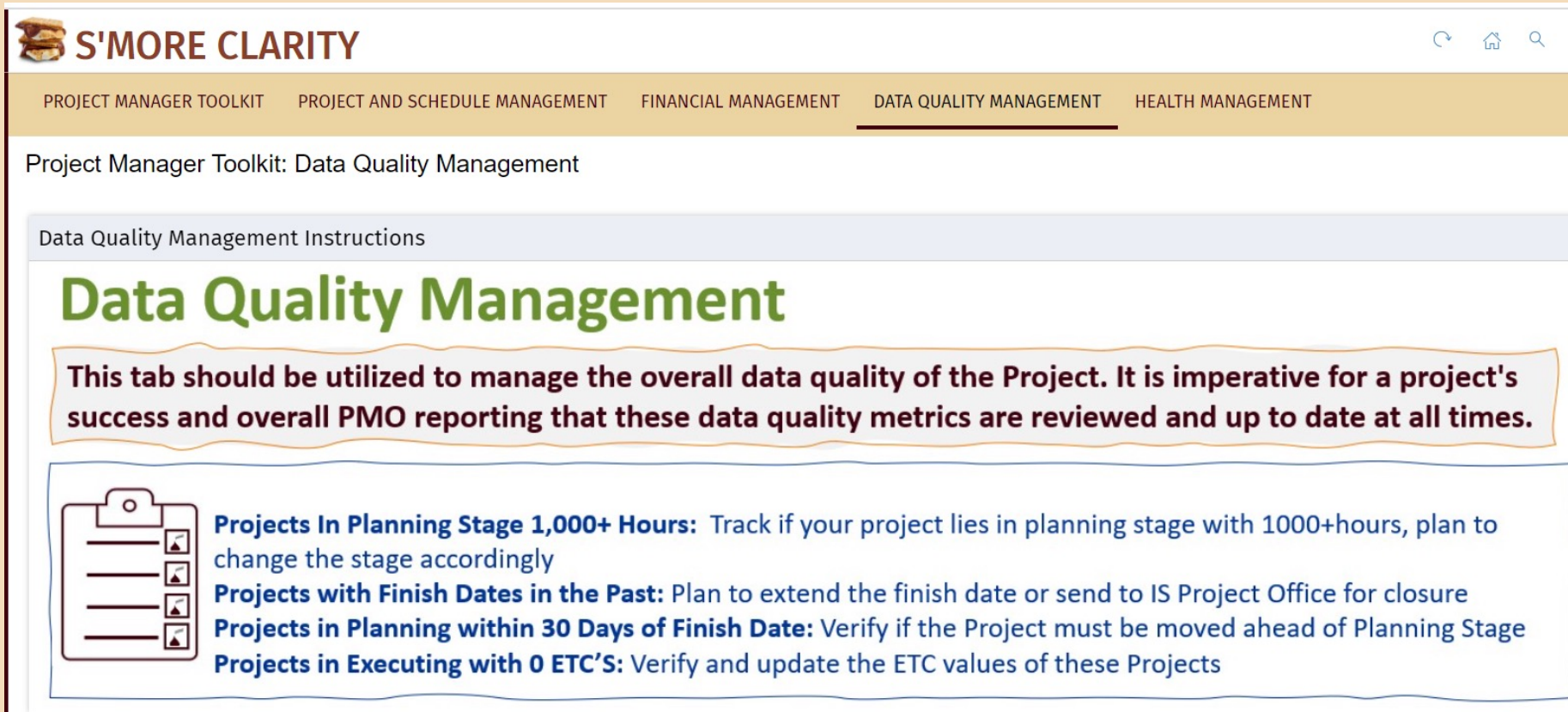
Are my project quality metrics within compliance?



S'more Tip

Create consistent images with custom colors, layout & design by utilizing Base64 Image Coding & a simple HTML portlet

PM Toolkit Tab View – Data Quality



The screenshot shows the S'MORE CLARITY web application interface. At the top, there is a navigation bar with the logo and the text 'S'MORE CLARITY'. Below this, a secondary navigation bar contains several menu items: 'PROJECT MANAGER TOOLKIT', 'PROJECT AND SCHEDULE MANAGEMENT', 'FINANCIAL MANAGEMENT', 'DATA QUALITY MANAGEMENT' (which is underlined), and 'HEALTH MANAGEMENT'. The main content area is titled 'Project Manager Toolkit: Data Quality Management'. Below this, there is a section for 'Data Quality Management Instructions' with the heading 'Data Quality Management'. A highlighted box contains the text: 'This tab should be utilized to manage the overall data quality of the Project. It is imperative for a project's success and overall PMO reporting that these data quality metrics are reviewed and up to date at all times.' Below this, a list of instructions is provided, each preceded by a clipboard icon: 'Projects In Planning Stage 1,000+ Hours: Track if your project lies in planning stage with 1000+hours, plan to change the stage accordingly', 'Projects with Finish Dates in the Past: Plan to extend the finish date or send to IS Project Office for closure', 'Projects in Planning within 30 Days of Finish Date: Verify if the Project must be moved ahead of Planning Stage', and 'Projects in Executing with 0 ETC'S: Verify and update the ETC values of these Projects'.



S'more Tip

Putting data quality metric results in the hands of Project Managers eliminates the need to send emails/follow-ups manually and can be easily tracked by anyone needing to review the data

PM Toolkit Tab View – Financials

Project Cost Plan Status						
Project ID ▲	Project Name	Cost Plan ?	Planned Capital Cost	Planned Opex Cost	Planned Total Cost	Team Count
PR001195	Dynamic software (SAP/ESKO) integration	✓	0	184,031	184,031	9
PR001542	Mandatory Federal & State Regulatory Changes(2022 HR Support Pack Upgrade)	✓	0	25,000	25,000	11
PR002515	Ogden WMS Migration to Blue Yonder Cloud	✓	2,430,000	52,500	2,482,500	4
PR002528	Blue Yonder Cloud Subscription	✓	2,100,000	315,000	2,415,000	4

Displaying 1 - 4 of 4

Project Benefit Plan Status						
Project ID ▲	Project Name	Charge Code	Benefit Plan ?	Total Benefit	Team Count	
PR001195	Dynamic software (SAP/ESKO) integration	Expense	✓	25,000	9	
PR001542	Mandatory Federal & State Regulatory Changes(2022 HR Support Pack Upgrade)	Expense	✗		11	
PR002515	Ogden WMS Migration to Blue Yonder Cloud	Capital	✗		4	
PR002528	Blue Yonder Cloud Subscription	Capital	✗		4	

Displaying 1 - 4 of 4



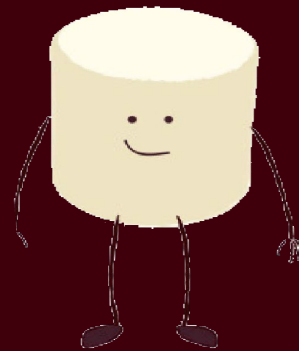
S'more Tip:

Combining corresponding views like Cost Plans and Benefit Plans in one view

Portfolio Manager Toolkit

Smooshy's portfolios and the investments in them are ever-changing and evolving, and like a marshmallow, no two are the same.

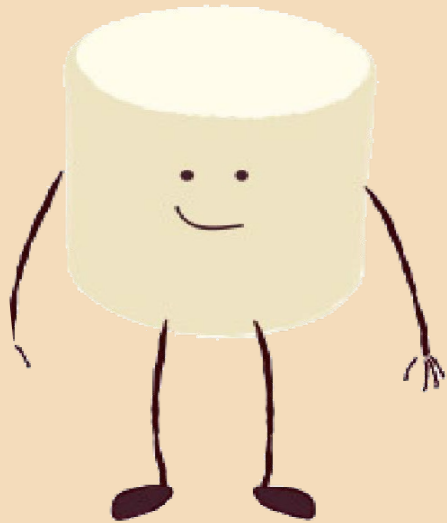
The Portfolio Manager Toolkit empowers him to standardize his investments so that they are the perfect golden brown all around!



Portfolio Manager S'MORES Experience

Portfolio Manager Toolkit:

- High-level schedule management allows leaders to see status and task counts across their portfolio and the associated projects
- Detailed view of Cost Plan and Benefit Plan statuses
- Month-by-month breakdown of forecasted capital costs and variance to actuals
- Counts of resources and teams across investments, including employees and contractors
- Paints a picture of Portfolio Health including risks and issues in addition to schedule, scope, resource, and cost statuses



SMOOSHY

Portfolio Manager Toolkit Introduction

Portfolio Management is the art of overseeing a group of investments that meet the long-term objectives for our Hershey pillars. Our collective goal is to enable Portfolio Managers to successfully manage the financials, schedule and resources for their respective pillar through the Portfolio Manager Toolkit.



Portfolio Manager Toolkit Tab View – Health Management

S'MORE CLARITY

INTRODUCTION PORTFOLIO SCHEDULE PORTFOLIO FINANCIALS PORTFOLIO RESOURCES PORTFOLIO HEALTH

Portfolio Toolkit: Portfolio Health

PFMG Toolkit Health

Health Management

This tab should be utilized to manage your portfolio overall health & status. This information will help you identify areas of concerns for project status, risks & issues.

- Portfolio Health Dashboard:** Review the status report details at a project level and review the overall health of each investment within the portfolio.
- Portfolio All Risks:** Provides a list of all active risks within the projects of the portfolio.
- Portfolio All Issues:** Provides a list of all active issues within the projects of the portfolio.

Portfolio Select

PORTFOLIO

FILTER SHOW ALL SAVE FILTER CLEAR



S'more Tip

Filters can be added to the top of each page and linked to one another so that by populating once, all pages and portlets automatically filter for the desired results

Portfolio Manager Toolkit Tab View – Portfolio Resources



Smore Tip:

Adding hyperlinks to the key metric allows the user to go directly to the source if updates are required

Portfolio Investment Resource Details							
Portfolio Name	Investment ID	Investment Name	Total Named Resources	Total Employees	Total Contractors	Total Unfilled Roles	Team Count
IS Project Portfolio 2019	PR000002	Category Management – Shelf Space Management (NASA)	6	6	0	0	6
IS Project Portfolio 2019	PR000003	Category Management – Data & Analytics (ATLAS)	6	6	0	0	6
IS Project Portfolio 2019	1001	Enterprise Mobility and Security (EMS E3)	21	19	2	0	21
IS Project Portfolio 2019	1011	ERP Define Rest of World Solutions	1	1	0	0	1
IS Project Portfolio 2019	1054	Project Portfolio and Resource Management Solution	19	19	0	0	19
IS Project Portfolio 2019	1056	ERP - ECM (OpenText xECM)	3	2	1	0	3
IS Project Portfolio 2019	1079	Parallel Inventory Analysis	5	5	0	0	5
IS Project Portfolio 2019	1081	ERP Central Finance Upgrade CFIN	23	20	3	0	23
IS Project Portfolio 2019	1086	Lancaster Plant VoIP Conversion	2	2	0	0	2
IS Project Portfolio 2019	1105	Tech Center 2.0 Traceability	6	5	1	0	6

Portfolio Manager Toolkit Tab View – Health Management Advanced Reporting

S'MORE CLARITY

INTRODUCTION | PORTFOLIO SCHEDULE | PORTFOLIO FINANCIALS | PORTFOLIO RESOURCES | **PORTFOLIO HEALTH**

Portfolio Toolkit: Portfolio Health

Portfolio Project Health Dashboard | Data refreshed 2023-09-14 at 21:05:15

Options: Saved Values: --None-- | * Portfolio: 2023 Enterprise Technology Portfolio (EPC) | Portfolio Strategy: --- | Stage: Available: 5, Selected: 0

Portfolio: 2023 Enterprise Technology Portfolio (EPC)
 Portfolio Strategy: International, Shared Capabilities, Infrastructure & Security, Enterprise Data, ERP, Supply Chain & Ops Tech, Commercial
 Portfolio Manager: ---

Total Projects: 175 | Green: 116 | Amber: 22 | Red: 0

Project Name	Project Stage	Project Manager	Portfolio Strategy	Overall	Schedule	Scope	Resource	Cost Status	Executive Summary
	Planning		Infrastructure & Security	Green	Green	Green	Green	Green	Overall Status is Green: * IO requests for the Colo East and Colo West Completed. * Vendor selection to be completed by 8/31
	Initiation		International	Amber	Green	Green	Amber	Green	ARPHRP - S4 Integration Impact analysis activities pending to determine the gaps in the as-is versus to-be changes when switching some interfaces from current-day automated to future-state manual, or when connecting ARP to S4 interfaces. As of 17-July-2023 IDEA20220039 was approved to initiate and converted to PR002463. Clarity record PR001576 will remain for now, specific to SAP ARPHRP - S4 interfaces, which should resume after PR002463 completes, possibly with some planning ahead of PR002463 completion.
	Close		Commercial	Green	Green	Green	Green	Green	Project will renew licenses for Adobe Campaign email marketing platform
	Initiation		Commercial	Amber	Amber	Amber	Amber	Amber	



S'more Tip:

Embedded Jaspersoft reports will allow for more customization, filter criteria and clean exportable formats for usability

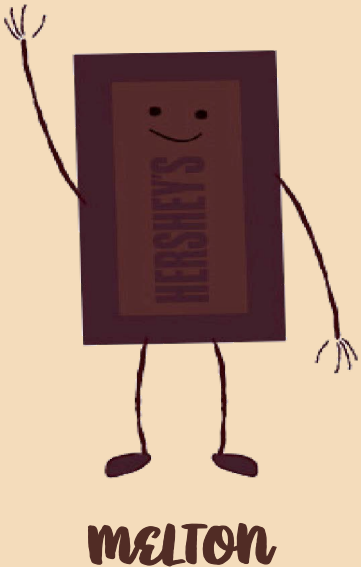
Resource Manager Toolkit

*Melton's mission is to hold his resources together,
and ensure they are supported and allocated
appropriately across their work efforts.*

*With the help of the Resource Manager Toolkit, he
feels he can serve up solid resource management
and support, so his team doesn't melt from being
overallocated!*



Resource Manager S'MORES Experience

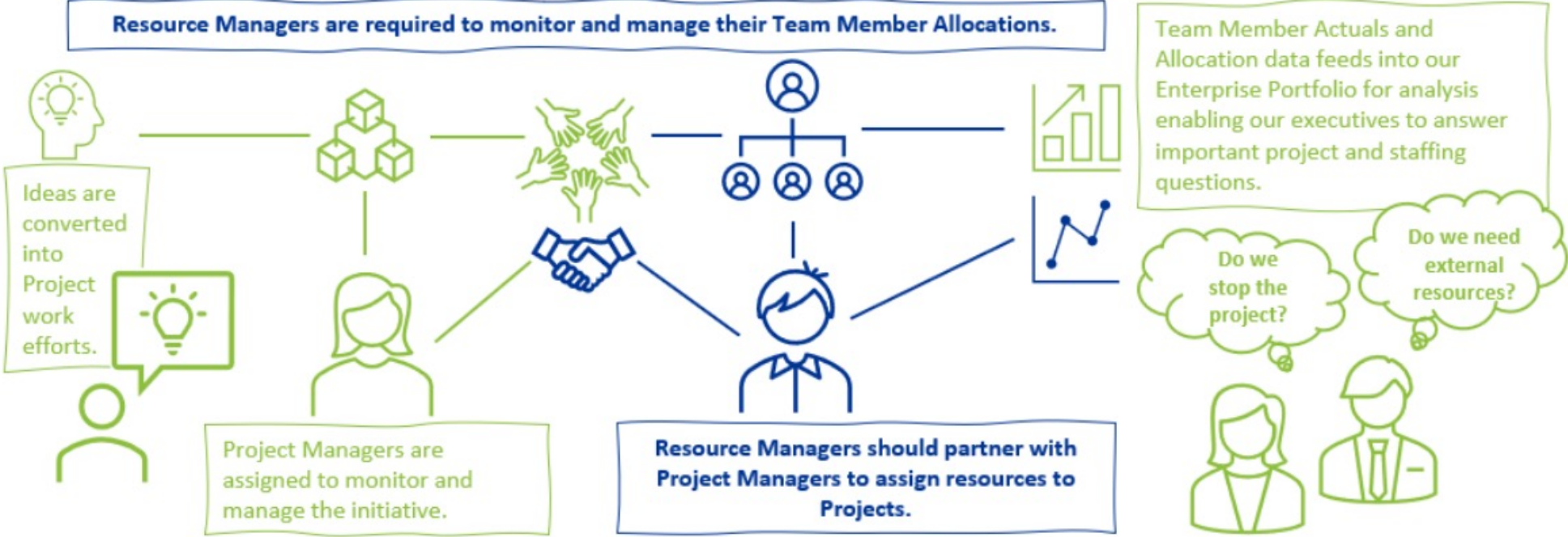


Resource Manager Toolkit:

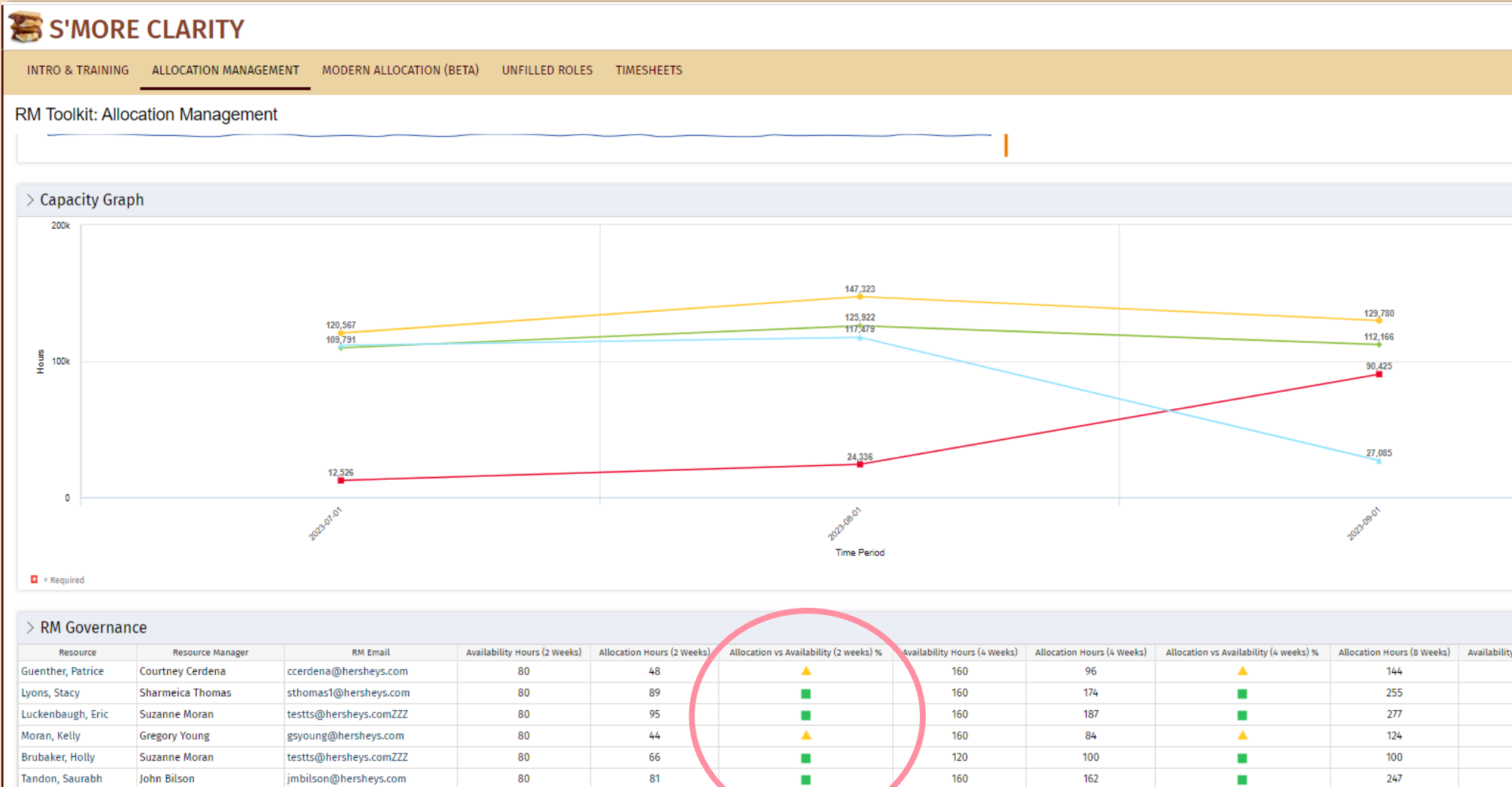
- Governance portlet allows for immediate update of team member allocations across various periods and interactive visuals to display updates in real-time
- Snapshot of resource requirements that remain unfilled across investments
- Holistic Booking Status grid empowers resource managers to compare team member statuses, allocations, and ETCs across all assignments
- Timesheet tab provides timesheet compliance per Resource Manager while giving the opportunity to review and approve in response to those metrics

Resource Manager Toolkit Introduction

Our collective goal for Resource Management is to know if we have enough team members to work on our highest priority initiatives at any given moment and continuously prioritize work for our team without overextending our resources.



RM Toolkit Tab View – Allocation Management



S'more Tip:

Bright and straight-forward visuals allow for quick reference of resource allocation variance

RM Toolkit Tab View – Timesheet Management

INTRO & TRAINING ALLOCATION MANAGEMENT MODERN ALLOCATION (BETA) UNFILLED ROLES TIMESHEETS

RM Toolkit: Timesheets

> Timesheet Approval Compliance by RM

Resource Manager	Timesheets Not Compliant (as of Monday 4PM EST)	Total Timesheets Required (as of Monday 4PM EST)	Current Week Compliance Percentage (as of Monday 4PM EST)	Sep 11	Sep 04	Aug 28	Aug 21	Aug 14
Acebedo, Katrina	0	8	◆ 100	◆ 100	◆ 75	◆ 88	◆ 88	◆ 75
Aguilar, Jose Ines	1	1	◆ 0	◆ 0	◆ 0	◆ 0	◆ 0	◆ 0
Allison, Robert	0	4	◆ 100	◆ 100	◆ 75	◆ 100	◆ 100	◆ 100
Amster, Sean	2	6	◆ 67	◆ 67	◆ 83	◆ 83	◆ 83	◆ 67
Angel, Juan	0	2	◆ 100	◆ 100	◆ 50	◆ 100	◆ 100	◆ 100

> Timesheet Submission Compliance by RM

Resource Manager	Timesheets Not Compliant (as of Monday 12PM EST)	Total Timesheets Required (as of Monday 12PM EST)	Current Week Compliance Percentage (as of Monday 12PM EST)	Sep 11	Sep 04	Aug 28	Aug 21	Aug 14
Acebedo, Katrina	0	8	◆ 100	◆ 100	◆ 88	◆ 88	◆ 88	◆ 88
Aguilar, Jose Ines	1	1	◆ 0	◆ 0	◆ 0	◆ 0	◆ 0	◆ 0
Allison, Robert	0	4	◆ 100	◆ 100	◆ 100	◆ 100	◆ 100	◆ 100
Amster, Sean	2	6	◆ 67	◆ 67	◆ 100	◆ 83	◆ 83	◆ 67
Angel, Juan	0	2	◆ 100	◆ 100	◆ 100	◆ 100	◆ 100	◆ 100



S'more Tip:

Compliance metrics provide insight into areas for improvement to continue to move forward in the right direction and pinpoint areas of contention



**Implementing
Toolkits for
Success**



We've Got S'MORE Of What They Need

User Friendly &
Usability

Key Data in One
Place

Visuals

Page Filters

Branding
with Common
Look & Feel

HERSHEY'S | &



Everybody Wants S'MORE Support!

QUICK
REFERENCE
GUIDES

VIDEO TRAINING
GUIDES

ROADSHOWS



Anything S'MORE We Can Help With?

Please feel free to contact us!

Danielle Weynberg: dweynberg@hersheys.com

Stacy Lyons: sjlyons@hersheys.com

