

# CASE STUDY

# Heat Map Reporting

DRMcNatty customized layouts and used exports of the P6 data into a formatted Excel worksheet to report project health via a visual heat map report.

## PROJECT AT A GLANCE

### COMPANY

- Southern CA Utility Provider

### TOOLS

- Primavera P6
- Microsoft Excel (reporting)

### SERVICES PROVIDED

- Implementation
- Support Staffing
- P6 Scheduling
- Business Process Development
- Custom Reporting

*“Publishing the project health graphically lets the client communicate key dates and drivers quickly and efficiently”*

-Rudy Ising, Director of Services  
DRMcNatty & Associates



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## Overview

A large Southern California Utility Provider constructed a transmission line to deliver renewable energy into one of its regions and needed support from project management experts to help with the complex challenges of the project. The Utility Provider was tasked with the update, replacement and maintenance of all aging transmission towers, and progress of these were dictated by and reported to CPUC. Typically, there were more than 300 active projects at any given time. They needed a solution that would assist them with coordinating and scheduling the work while also maintaining the schedule established by CPUC requirements.

## Challenges

Primavera P6 was in use by the vendor as their primary scheduling tool; however, the existing internal staff was unable to keep up with managing the steady flow of new work requirements. A major construction management firm was brought in to assist with the effort and DRMcNatty was tasked with providing implementation and support for the scheduling efforts needed for the program. Challenges included the large volume of projects, the accurate tracking of statistics for CPUC reporting as well as the changing process workflow for these projects. Lastly, the base schedules that were being initially used were unable to accurately report the

health of the projects because of incorrect logic in the schedules.

## Solution

DRMcNatty was tasked with assisting development of accurate and usable project templates that reflect a true reflection of the individual project requirements and components. In addition, DRMcNatty worked with both the internal staff and the CM firm to develop accurate views of the work types and processes. DRMcNatty obtained approval of the finalized templates, updated all the current projects to these standards and updated the activity logic on all schedules. In addition, DRMcNatty customized layouts and used exports of the P6 data into a formatted Excel worksheet to report project health via a visual heat map report. DRMcNatty staff provides ongoing support to update schedule information based on feedback.

## Results

These modifications greatly assisted the utility in gaining a stronger control over these projects and providing staff and management an easy to use progress view. This also takes some workload off of the utility's internal staff and the CM firm's management requirements. Currently the utility provider maintains the additional project support services for other fulltime responsibilities.

ALL ACTIVE PROJECTS IN DESIGN PHASE											
Data Date: 19-Dec-16											
Current Date: 22-Dec-16											
Project ID	Project Name	DLN Date	60% Design Approve		Materials Delivered		Enviro Submitted		Enviro Received		
			Forecast Date	TF Wrk Days	Forecast Date	TF Wrk Days	Forecast Date	TF Wrk Days			
TL663 Group 08	TL663 Group 08 CMP NON-TT	28-Feb-16			14-Mar-17	-276	30-Dec-16	-271	10-Feb-17	-271	
TL660 Z24515	TL660 Z24515 CMP TT# 10178	30-Mar-16			6-Jan-17	-198					
TL23004 297122	TL23004 297122 CMP (Civil/Engineered)	30-Apr-16									
TL692 Z225347	TL692 Z225347 CMP TT# 12351	29-Jul-16	23-Dec-16	-173	31-Mar-17	-173		10-Feb-17	-163		
TL692 Z225364	TL692 Z225364 CMP TT# 12350	29-Jul-16	23-Dec-16	-173	31-Mar-17	-173		20-Jan-17	-148		
TL6912 Z223465	TL6912 Z223465 CMP TT# 12428	15-Oct-16						31-Mar-17	-155		
TL626 Z213676	TL626 Z213676 CMP TT# 12478	5-Dec-16			5-Jan-17	-23		19-Dec-16	-35		
TL620 Z578165	TL620 Z578165 CMP TT# 11969	30-Dec-16									
TL23006 Z524998	TL23006 Z524998 CMP TT# 12215	31-Dec-16									
TL626 Z213675	TL626 Z213675 CMP TT# 12219	31-Dec-16			19-Dec-16	10					
TL694 Z317887	TL694 Z317887 CMP TT# 10211	7-May-17			24-Feb-17	50	30-Dec-16	32	10-Feb-17	32	
TL623 Z183591	TL623 Z183591 CMP TT# 12823	8-May-17			4-Mar-17	31	23-Dec-16	38	3-Feb-17	38	
TL623 Z185056	TL623 Z185056 CMP TT# 10428	8-May-17			24-Mar-17	-9	30-Dec-16	6	10-Feb-17	6	
TL623 Z185064	TL623 Z185064 CMP TT# 12760	8-May-17						10-Mar-17	16		
TL642 Z87301	TL642 Z87301 CMP TT# 12864	8-May-17			3-Mar-17	40	30-Dec-16	33	10-Feb-17	33	
TL644 Z89376	TL644 Z89376 CMP TT# 12848	8-May-17			24-Feb-17	51	30-Dec-16	40	10-Feb-17	40	
TL646 Z187487	TL646 Z187487 CMP (Civil/Engineered)	8-May-17			28-Mar-17	29	27-Dec-16	49	7-Feb-17	49	
TL646 Z187498	TL646 Z187498 CMP TT# 12861	8-May-17			14-Feb-17	51	30-Dec-16	49	10-Feb-17	49	
TL646 Z731393	TL646 Z731393 CMP TT# 12858	8-May-17			24-Feb-17	51	23-Dec-16	38	3-Feb-17	38	

### Total Float Legend

-	0	+
≥ 40 Days	40 Days - 20 Days	20 Days - 1 Day
Director Date	Manager Date	Supervisor Date