

Lists! Lists! Everywhere a List! Tracking Issues at Los Alamos National Laboratory



presented by
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– S & R Associates, Inc. –

Division Profile

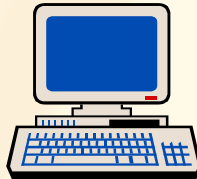


- ◆ Large organization
- ◆ Ongoing operations and capital projects
- ◆ Personnel in multiple locations
- ◆ Security critical
- ◆ Multiple systems to track multiple issues
- ◆ Difficulty managing resources

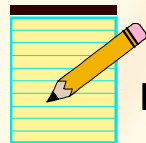
Multiple Systems to Track Multiple Issues



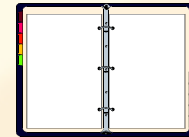
Readiness/Audit Findings



Nonconformance Report



Facility Safety Inspection Report



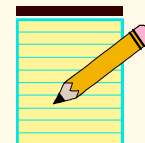
Radiological Incident Report

Employee Concern/Suggestion



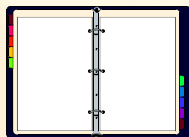
Primavera Project Planner* 3.0

Any Other Issue



Management Walkaround Assessment

Accident Incident Report



In the Past



- ◆ Tried to use only Primavera Project Planner (P3):
 - Training and maintenance costs too high
- ◆ Tried to use only spreadsheets:
 - Too many tasks interdependent

New Opportunity



- ◆ Technology advances:
 - Hardware
 - Enterprise software
 - Web and e-mail
- ◆ Corporate advances:
 - Centralized data warehouse
 - Improved use of resources
- ◆ Personnel advances

Criteria – Phase 1



- ◆ Transferred all lists to a single data file, Issue Management System (IMS)
- ◆ Implemented Remedy[®] with Web access
- ◆ Provided electronic notification of new assignments and work due
- ◆ Applied security
- ◆ Provided reporting

Remedy Corporation



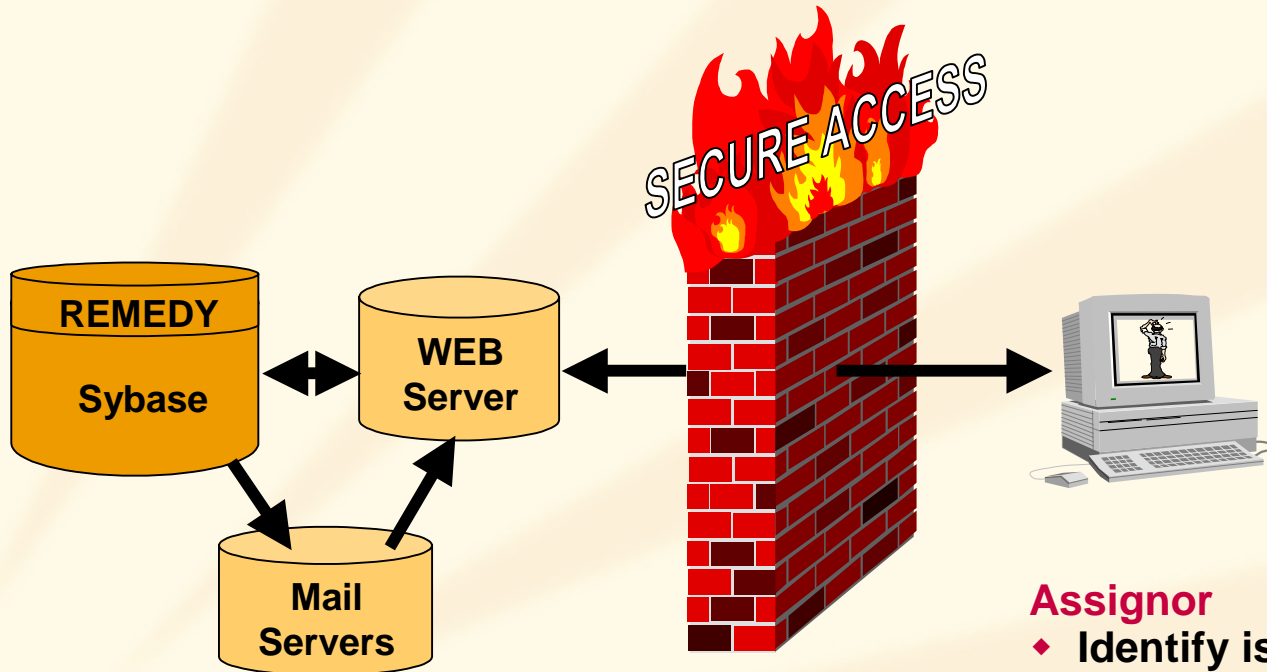
- ◆ Remedy Corporation is the leading provider of adaptable enterprise applications for
 - IT service management
 - Customer relationship management
 - Employee workplace automation
- ◆ Action Request System (AR System™)
- ◆ ARWeb®

Why Use Remedy®?



- ◆ Proven action tracking system:
 - Flexibility to meet customer needs
 - Rapid deployment
 - Database and platform independent
 - Internet enabled
 - Electronic notifications
 - Maintains an audit trail
- ◆ In use throughout the enterprise

System Overview – Phase 1



Sends email with URL link

Note: Employee ID No. links actions to assignor and assignee.

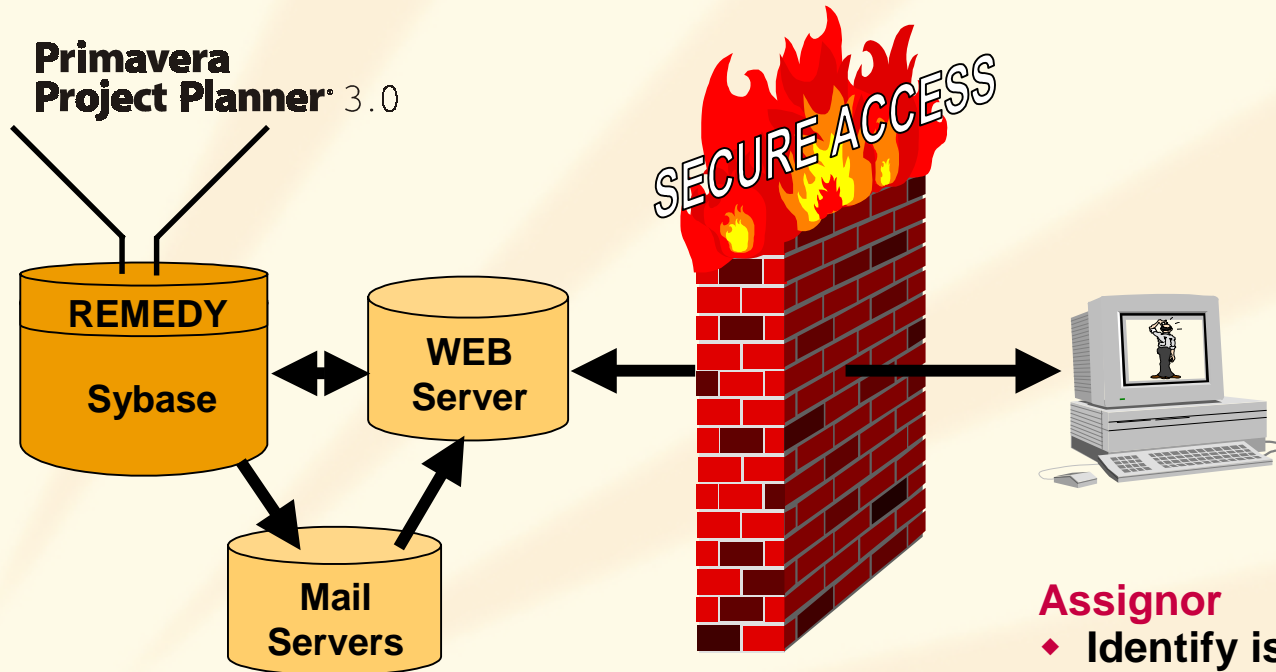
Assignor

- ◆ Identify issues
- ◆ Assign responsibility and due date

Assignee

- ◆ Provide status on assigned issues

System Overview – Phase 2



Sends email with URL link

Note: Employee ID No. links actions to assignor and assignee.

Assignor

- ◆ Identify issues
- ◆ Assign responsibility and due date

Assignee

- ◆ Provide status on assigned issues

Criteria – Phase 2



- ◆ Modified Issue Management System:
 - Current date and target date
 - Approval of work by assignor
 - Improved updating process
- ◆ Added interface with P3
- ◆ Modified P3 data:
 - New activity code field – assignor
 - Revised responsibility code – assignee

Criteria – Phase 2 (cont.)



P3 Multilevel Data Structure



25+ Sub-Projects



Template Contains
– 7 milestones
– 7 phases



Detail Activities

Criteria – Phase 2 *(cont.)*



- ◆ Modified P3 data:
 - New activity code field – “level” designator
- ◆ Modified Issue Management System:
 - IMS query screen enables selection on all activity code fields

Transfer of Data from P3



- ◆ Export data using Lotus file format.
- ◆ IMS does not validate data. Why?:
 - Values in data fields will change.
 - Inspect file prior to transfer.
 - P3 file MUST be accurate.
- ◆ Control scope of data (date range and detail) with P3 filters.

Data Transferred from P3



- ◆ Subproject number
- ◆ Activity number
- ◆ Activity description
- ◆ Activity detail level
- ◆ Assignor and assignee
- ◆ Target and current completion date

Note: All P3 records receive a “P3” code in a “document type field” when transferred to IMS.

Transfer of Data from IMS



- ◆ NO programmatic update of P3:
 - P3 files are modified only by project controls.
 - Quality control cannot be assured if updates are programmatic.
- ◆ “Activity” report lists changes to ***current*** date. (P3 target dates cannot be changed in IMS.)

Output



- ◆ Reports:
 - Totally user defined
 - Programmer required
- ◆ Query:
 - Allows selection on all activity code fields
 - No programmer required
- ◆ Electronic notification:
 - Criteria for issuing notice is user defined
 - Programmer required

Query Screen Samples



CMRU Project



-
- [Assign a Task](#)
 - [Query/Modify a Task](#)
 - [Run Reports](#)
-

LOS ALAMOS NATIONAL LABORATORY

Operated by the University of California for the US Department of Energy

feedback/concerns: [The Remedy Team / CIC-15](#)

CMRU Project

[HOME](#) [Assign a Task](#) [Query/Modify a Task](#) [Run Reports](#) [HOME](#)

>> Query <<

Status	Type	Level	ProjectId
Open Completed Closed	Clear P3 Task Admin Task	Stage Milestone Detail	68 - Stack Monitors (A) Design 69 - EPAS 71 - Air Compressor Replacement
Assignee		Assignor	
Kennicott, Mike Koepke, Merle Kuzmack, Michael Landry, Don Lujan, Mary Beth		Clear Basile, Dennis Bernstein, Lee Bridge, Al Brown, Jim	
Target Date		Current Date	
(mm/dd/yy)		(mm/dd/yy)	
08/12/99			
Run Query		Clear Fields	

CMRU Project

Apply Changes

Query Criteria:

('Status' = Open) AND ('Level' = Milestone) AND ('ProjectId' = 69) AND ('Assignee Z' = 111690) AND ('Record Type' = P3 Task) AND
'Target Date' <= 08/12/99

Level	PIId	Task Description	Target Date	Current Date	Status
Milestone	69	EPAS: Authorization to Proceed-TII	01/06/99	8/15/99	Open
Milestone	69	EPAS: A/E Design Complete-TII	06/01/99	09/15/99	Open
Milestone	69	EPAS: DCP Approval for Construction	07/14/99	10/28/99	Open
Milestone	69	EPAS: Constr WP Approved	07/21/99	11/04/99	Open
Milestone	69	EPAS: Release for Work	07/27/99	11/11/99	Open



CMRU Project



Email to Assignee

P3Activity Id : 69400005

ProjectId : 69 EPAS

Task Description : EPAS: Authorization to Proceed-TII

Assignor Name : Kuzmack Michael S., III

Assignee Name : Kuzmack Michael S., III

Target Date : 01/06/99

Current Date :

Days Late : 152 (Business Days)

Email To Assignee

Subject:

CC:

Message Text:

Send Email Return Clear

ect

on to Proceed-III

, III

Assignee Name : Kuzmack Michael S., III

Target Date : 01/06/99

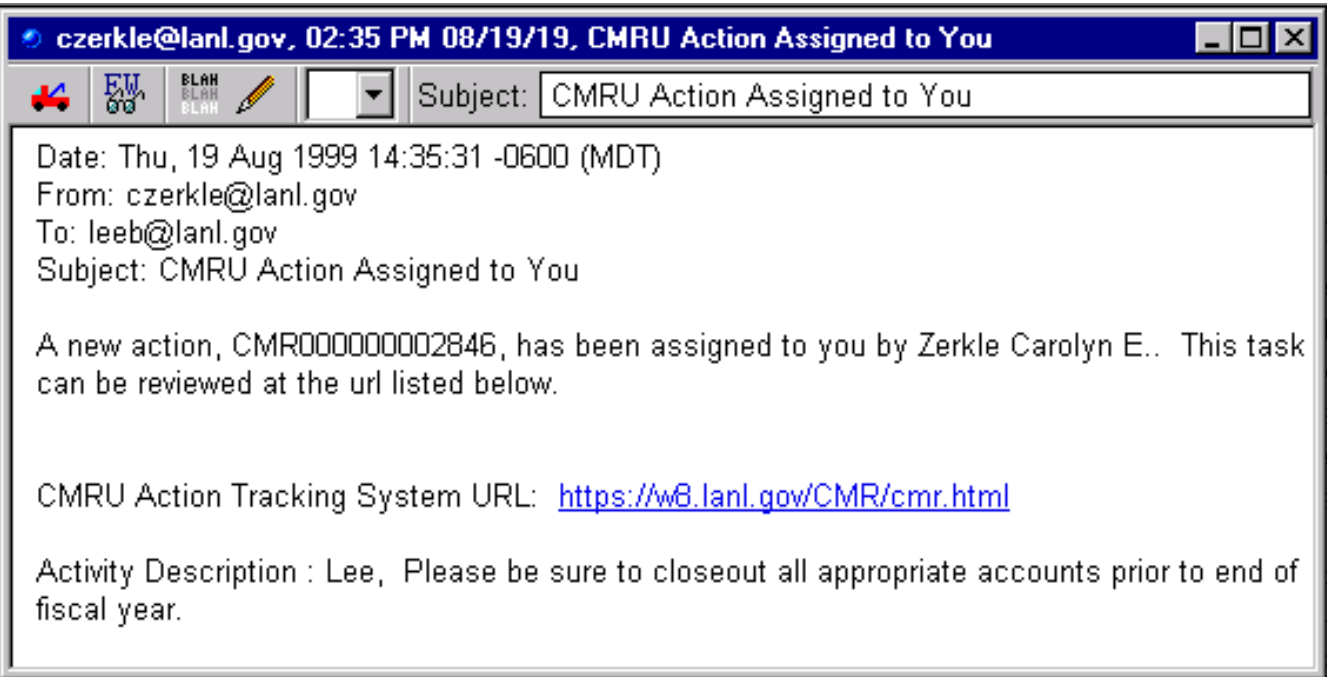
Current Date :

Days Late : 152 (Business Days)

>> Assign <<

(All fields are required except ProjectId.)

Type	ProjectId
Admin Task	53 - MCC Upgrades
	55 - Define/Develop Upgrade Scope/Prepare BAR
	56 - HVAC DP Indicators Design
Assignee	Assignor
All	Stringfield, Randy
Clear	Svitra, Zita
Basile, Dennis	Valdez, Leonard
Bernstein, Lee	Volkman, Doug
Bridge, Al	Zerke, Carolyn
Target Date (mm/dd/yy)	
09/30/99	
Description	
Lee, Please be sure to closeout all appropriate accounts prior to end of fiscal year.	
<input type="button" value="Submit Task"/>	<input type="button" value="Clear Fields"/>



Criteria – Phase 3



- ◆ Save query results as PDF file.
- ◆ Allow e-mail from query screen.
- ◆ Add design and construction forms.
- ◆ Display workload and resource requirements.

Closing Remarks



- ◆ Search other industries for ideas.
- ◆ Use commercially available software that can be implemented with minimal programming.
- ◆ Keep it simple.
- ◆ The improved definition of resource requirements and schedule has improved performance.

My Questions



- ◆ What would improve our success?
- ◆ What do you think about programmatically transferring actions to P3?
- ◆ What other approaches are being taken to solve this problem?

Your Questions?



My Questions/Your Questions?



- ◆ What would improve our success?
- ◆ What do you think about programmatic and training actions to P3?
- ◆ What other approaches are being taken to solve this problem?

