

CFL – Panoptra / ETS Project Reporting

Ensto SOW #	Date	Requestor
1735	October 15, 2014	Hardeep Anand

Description

City of Fort Lauderdale (CFL) has implemented Oracle Primavera Unifier and has requested new scope from Ensto related to Project reporting in both the newly acquired Panoptra tool and ETS. Currently, FAMIS data (cost) is extracted into a CFL hosted data mart and utilized in ETS for Project reporting. ETS currently reports on all Capital Projects for the City of Fort Lauderdale. The City of Fort Lauderdale is looking to extend the Project Reporting capabilities of Panoptra to replicate the ETS project report. Going forward, all Public Works Engineering project reports will generated in Panoptra and will also be accessible via a link in ETS.

This scope will include:

- Importing the FAMIS cost data into the Panoptra
- The creation of the Project Status report in Panoptra
- Creation of a link to run Panoptra Reports from ETS

Benefits

- Ability to run Project reports in Unifier
- One version of the truth by running reports for Engineering projects from one System

Pricing

Ensto Consulting	\$	43,860
Travel Expenses	\$	2,000
Total CFL – Panoptra / ETS Project Reporting Price	\$	45,860

CFL – Panoptra / ETS Project Reporting

Scope of Work Proposal

Submitted To:
Hardeep Anand
City of Fort Lauderdale
HAnand@fortlauderdale.gov

Submitted By:
Bruce Earle
Director
Enstoa
bearle@enstoa.com
+1-617-797-3414

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Table of Contents

EXECUTIVE SUMMARY..... 3

 SCOPE.....4

 OUT OF SCOPE ITEMS.....4

COMMERCIAL PROPOSAL..... 6

 PRICING.....6



Executive Summary

City of Fort Lauderdale (CFL) has implemented Oracle Primavera Unifier and has requested new scope from Enstoa related to Project reporting in both the newly acquired Panoptra tool and ETS. Currently, FAMIS data (cost) is extracted into a CFL hosted data mart and utilized in ETS for Project reporting. ETS currently reports on all Capital Projects for the City of Fort Lauderdale. The City of Fort Lauderdale is looking to extend the Project Reporting capabilities of Panoptra to replicate the ETS project report. Going forward, all Public Works Engineering project reports will be generated in Panoptra and will also be accessible via a link in ETS.

Current Scope of this Proposal

Based on CFL priority, referenced processes and timing of planned initiatives will commence on approval of the SOW. The fixed price cost for the scope described in this document is \$45,860, including travel expenses.

Scope

This scope will include:

- Importing the FAMIS cost data into Panoptra (frequency TBD) – the scope includes taking the exact same extract of FAMIS cost data that is currently used for the ETS system and integrating that data into Panoptra. (Appendix A).
- The creation of the Project Status report in Panoptra see (Appendix B).
- Creation of a link to run Panoptra Reports from ETS – The City of Fort Lauderdale staff will be able to run Panoptra reports from ETS.
- Training – Two 2 hour ‘train the trainer’ sessions will be provided after completion of the project.

Out of Scope Items

These items below are out of scope for this proposal:

- › No data migration will be performed during this exercise.
- › Any additional reports other than the Project Report specified above
- › Additional security considerations for ETS / Panoptra linkage
- › No additional data from FAMIS will be integrated

Project Success Factors

Constraints

- ▶ Availability of CFL team, financial analysts and other key resources may be limited

Assumptions

- ▶ CFL will make necessary team members available to meet with Enstoa, and these team members will be capable of providing guidance related to the design and data definitions of each system.
- ▶ CFL will provide the necessary access to systems required in this scope of work.

Dependencies

- ▶ The project organization structure must remain intact throughout this initiative.
- ▶ Input will be obtained from all relevant Subject Matter Experts and application specialists.

Risks

- ▶ Project team members (SMEs, technical specialists, stakeholders) can only provide limited time to support the gathering of design requirements or testing of the system, potentially resulting in incomplete requirements and a recommendation that doesn't fully meet the business needs.

Commercial Proposal

Pricing

This is a fixed price proposal. Any additional travel expenses will be billed at cost and pre-approved by the CFL project lead.

CFL – Panoptra / ETS Project Reporting	Price
Integration of FAMIS Cost Data into Panoptra	\$26,660
Creation of Project Status Report	\$8,600
Creation of link between ETS and Panoptra	\$8,600
Total Consulting Services	\$43,860
Travel Expenses	\$2,000
Total Consulting Services and Travel	\$45,860

Appendix A – Exhibit 1: FAMIS Data Extract

From: Kimberly Tuohy [mailto:KTuohy@fortlauderdale.gov]

Sent: Thursday, October 09, 2014 8:42 AM

To: Hardeep Anand; Gustavo Pujals; Jay Stacy; Kevin Keimel; Jeffrey Benjamin; Aaron Stahly; Bruce Earle; Christopher Bennett; Susan LeSage; Kymberly Holcolombe; Ingrid Kindbom

Subject: Oracle Unifier, Webservices & ETS

Team,

Attached are schemas & SQL used to retrieve & present the data used in monthly reporting along with sample output.

The files are numbered; refer to the descriptions below.

In summary the data flow...

Famis → Famis Data Mart (aka Data Warehouse) → ETS (aka Engineering Project System) → Monthly Project Reports

Famis system has a proprietary data structure, and every night a job runs that copies data from Famis to an oracle database named "FamisDataMart"

The FamisDataMart enables us to use SQL statements query for Famis data.

1_FamisDataMart_EngFinancialSchemas.txt contains schema from Famis Data Mart tables that ETS refers to.

2_EPTS_LOAD_ENGTRACK_WAREHOUSE.txt contains SQL used to query & copy data from FamisDataMart to ETS's local tables (this is performed once a day using the data for the current Fiscal Month and Year)

3_EPTS_WAREHOUSE_FAMIS_BUDGET.xlsx is schema of ETS's local table (ETS monthly reports use local data for better performance)

4_EPTS_WAREHOUSE_FAMIS_BUDGET (Data Sample) .xlsx is a sample of data collected after ETS queries FamisDataMart

5_EPTS_PROJ_INDEX_CODES.xls contains schema for a lookup table in ETS...this lookup table is a crosswalk that allows users to associate additional index codes with a particular project. Most projects reference only one index code in Famis with that index code(s) having the same nomenclature as the project number (PROJ_ID). For example Project 11242 has index Codes P11242.468A, P11242.468, P11242.468B. But some projects are funded

or reference other indexcodes that are different than the project’s project number. I’m not sure if any of the projects in Unifier will need this or not…please check with Engineering Staff.

6_EPTS_PROJ_INDEX_CODES (Data Sample).xls is a sampling of the EPTS_PROJ_INDEX_CODES data in ETS

7_EPTS VIEW_FAMIS_ROLLUPS_BY_TYPE.txt is a view that provides rollup summary of the collected Famis Data.

8_EPTS_VIEW_FAMIS_ROLLUPS_BY_TYPE (sample data).xlsx The summary data is presented on the monthly report, see sample below.

Example output…

INDEX CODE	FUND TITLE	BUDGET	ACTUAL	ENCUMB.
P11242.468A	AIRPORT	304,000.00	237,977.96	19,093.16
P11242.468	AIRPORT	2,451,985.00	1,132,798.73	1,196,305.63
P11242.468B	AIRPORT	4,671,200.00	1,827,616.69	2,382,632.31
TOTALS:		7,427,185.00	3,198,393.38	3,598,031.10

Appendix B – Exhibit 1: Project Status Report

Sailboat Bend North Floating Dock					
This project is for the installation of a new floating dock on Argyle Canal, seawall repairs, extended seawall deck with shade covering, vehicle + trailer parking, new loading and unloading area to an upgraded existing boat ramp, landscape, irrigation.					11782
Client Dept:	Parks and Rec	Current Phase:	Construction		
Managing Dept:	Public Works	District(s):	<input type="checkbox"/> I <input type="checkbox"/> II <input type="checkbox"/> III <input type="checkbox"/> IV <input checked="" type="checkbox"/>		
Project Mgr:	Juan Pinheiros	PHASE	START	END	
Construction Mgr		Project Planning	08/01/2012	11/01/2012	
Construction Cost Update:		Design	10/01/2012	07/15/2013	
Original Contract Amount:	\$304,455.00	Bidding	07/15/2013		
Approved Change Orders:	\$0.00	Construction			
Revised Contract Amount		Warranty Phase			
Additional Days					
1400 Argyle Drive Fort Lauderdale, FL 33312					
INDEX CODE	FUND TITLE	BUDGET	ACTUAL	ENCUMB.	BALANCE
P10904.129A	MISC FEDERAL/STATE/COUNTY GRANTS	30,000.00	0.00	30,000.00	0.00
P11782.344	SPECIAL OBLIGATION CONSTRUCTION 2008B	0.00	0.00	0.00	0.00
P11782.344	EXCISE TAX BOND CONSTRUCTION 1998C	135,000.00	134,999.78	0.00	0.22
P10904.345	SPECIAL OBLIGATION CONSTRUCTION 2011	252,444.00	95,709.44	135,672.03	21,062.53
P10904.350	PARK IMPACT FEE PROJECTS	59,686.80	0.00	0.00	59,686.80
TOTALS:		477,130.80	230,709.22	165,672.03	80,749.55

Status Update:

As Of: 09/24/2014

On Time? No

On Budget? Yes

The Contractor has finished the fixed dock construction. The ADA chairs was delivered on Tuesday, September 23, 2014. The Punch list has been started. The Contractor will be completed with all of the construction activities by next week.

