

Unlocking Project Success

Building Timely and Accurate Reporting
for a Major Capital Project

PRESENTED BY **Orion Matthews** **Tonya White**



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Today's Speakers



Orion Matthews

Project Services Reporting Lead @ Santos
(Consulting via Queryon)



Tonya White

Sr. Project Services Manager @ Santos

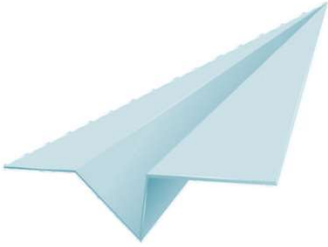


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What to expect in this presentation

Agenda

Outline

- 
- 🌀 History of the Pikka Project
 - 🌀 Laying the groundwork for integrated Project Controls
 - 🌀 Implementing integrated reporting
 - 🌀 Peek at reporting outputs
 - 🌀 Action plan – self assessment tool
 - 🌀 Questions & answers

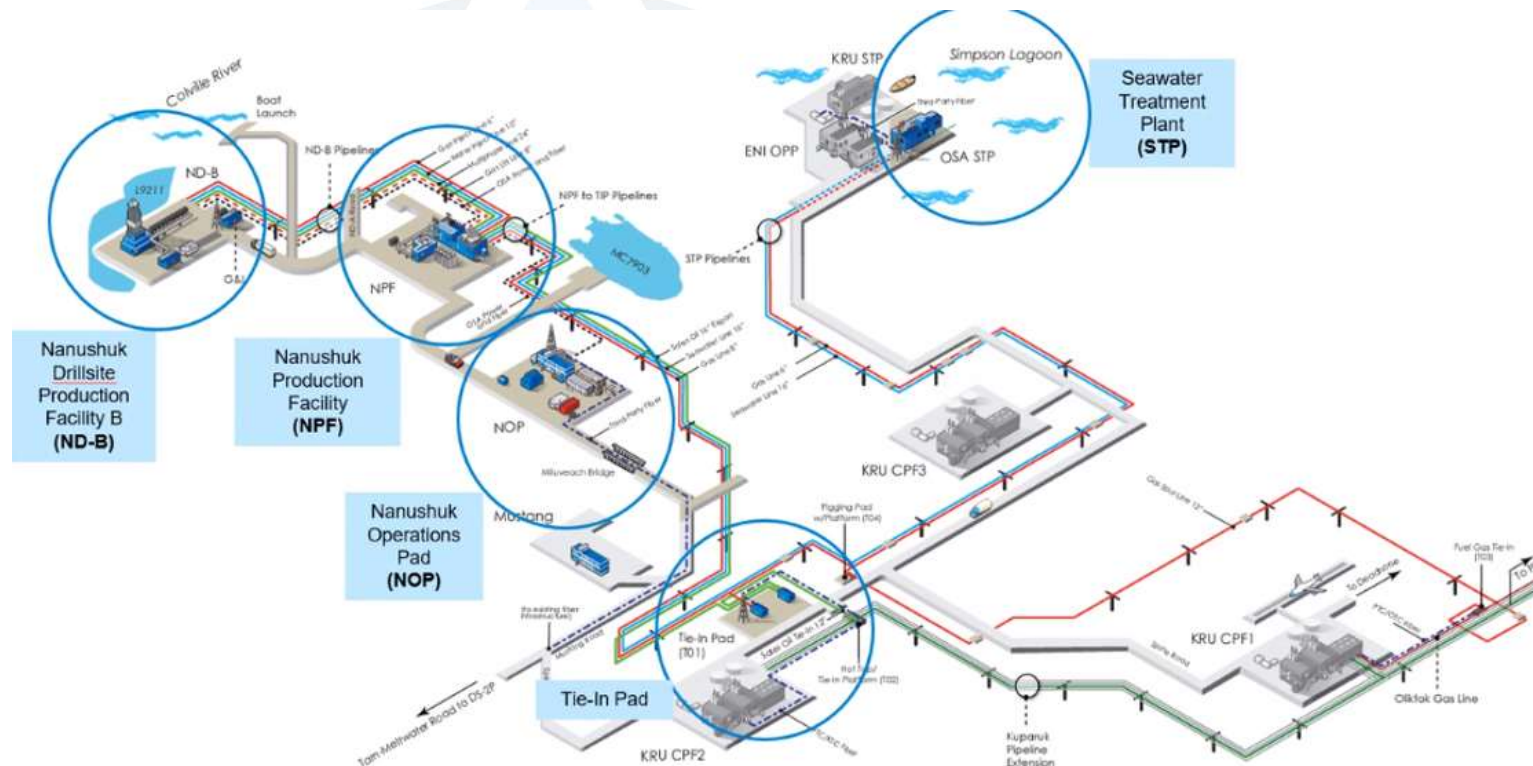
About the Project

About

\$2.6 billion gross
Pikka Phase 1 oil
project located in
Alaska

Phase 1 is expected
to produce 80,000
barrels per day

Represents one of
the lowest-cost and
emissions intensity
of new oil projects in
the region





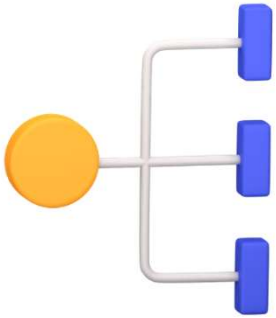
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Laying the Groundwork for Integrated Project Controls



Laying the Groundwork for Integrated Project Controls

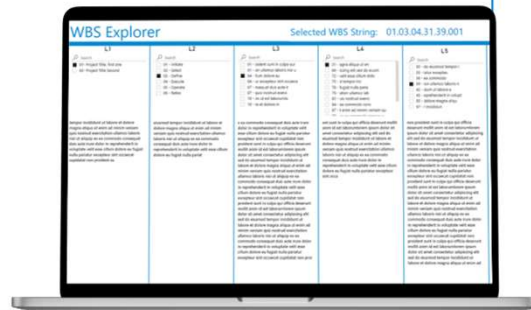
Problem “It’s all a mess”: Disparate systems, contractors, data sources.



- 🔗 Define your scope with a standard WBS
- 🔗 Document stakeholder requirements and reporting strategy
- 🔗 Define your contractor requirements
- 🔗 Establish a reporting calendar
- 🔗 Document your reporting process

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Reset

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Document Your Stakeholder Requirements & Reporting Strategy



- 📄 Understand what leadership wants before you start
- 📄 Support project lifecycle
- 📄 Don't automate analysis, strategy should enable analysis

Define Your Contractor Requirements



-  Enforce data compliance
-  Garbage In – Garbage Out
-  Can't align a reporting calendar without these requirements

Establishing Report Calendars

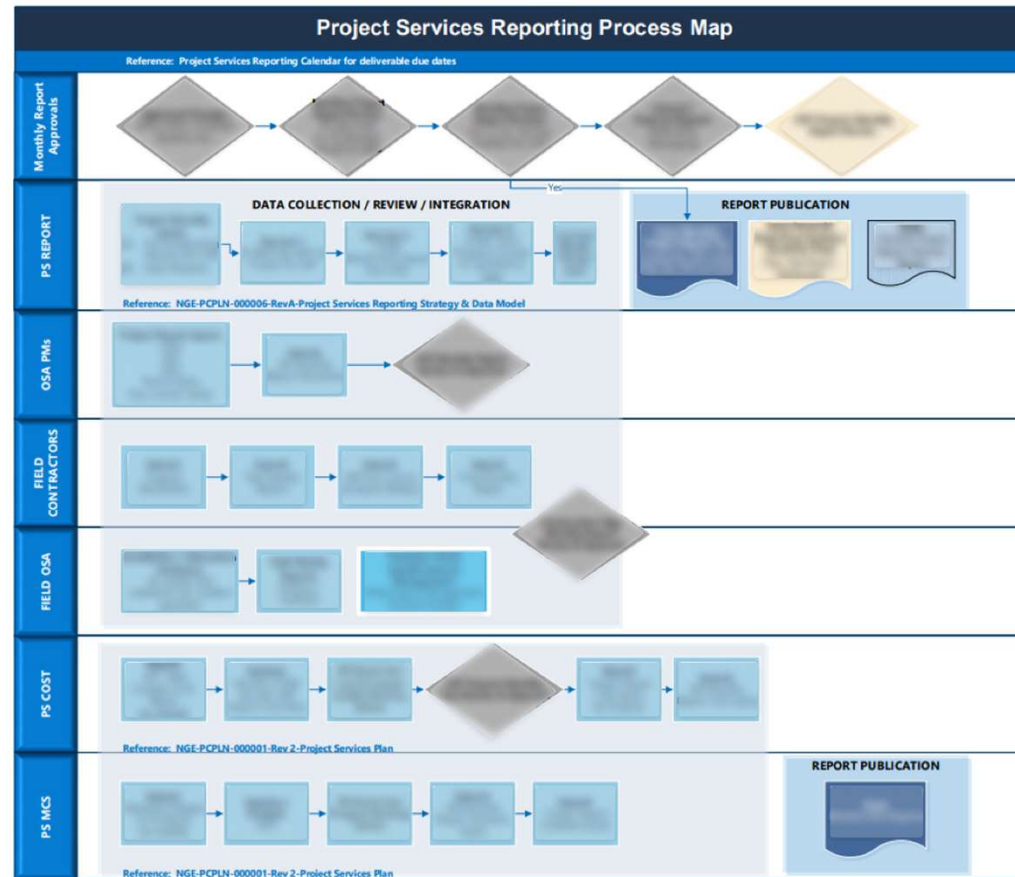
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Sun	M	Tu	W	Th	F	Sat
26	27	28	29	30	31	1
Feb / Const Weekly Schedule Progress cut-off			Feb / Const Weekly Schedule Progress Due		Monthly Schedule Progress Due	
2	3	4	5	6	7	8
9	10	11	12	13	14	15
		Monthly Report Due				
16	17	18	19	20	21	22
				VOWD / FCST Due		
23	24	25	26	27	28	29
Monthly Schedule Progress cut-off					Monthly Schedule Progress Due	

Contractor Reporting
Report Dates

APRIL						
Sun	M	Tu	W	Th	F	Sat
26	27	28	29	30	31	1
				Final Weekly Report Due		Site Schedule and Meeting 4 Review
2	3	4	5	6	7	8
Review Site Report for all projects	Review Work and Report for all projects				Review Site Report	Review Site and Reporting Information
Site Report				Review Site Report		Review
3	4	5	6	7	8	9
Site Report 2	Review Site Report for all projects	Site Report 1	Review Site Report	Review Site Report	Review Site Report	Review Site Report
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Internal Reporting
Deliverables and Due Dates

Document Reporting Process



Swim lane diagram is helpful for process mapping many stakeholders. More about swimlanes here:





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Implementing Integrated Reporting



Implementing Integrated Reporting

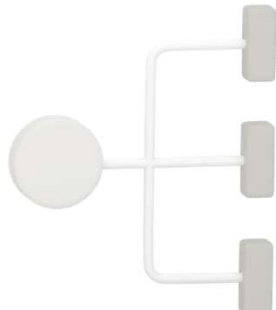
Process before tool. E.g. It doesn't matter what tech you have if you don't lay the groundwork.



- 🔗 Assess business systems with gap-fit analysis
- 🔗 Identify your data tools and clarify reporting grey-areas
- 🔗 Build an enterprise data model & data dictionary
- 🔗 Implement a data harvest process
- 🔗 Standardize your communications
- 🔗 Create writing guidelines and glossary
- 🔗 Don't forget to train your users!

Gap-Fit & Tool Selection

“Complement not compete”

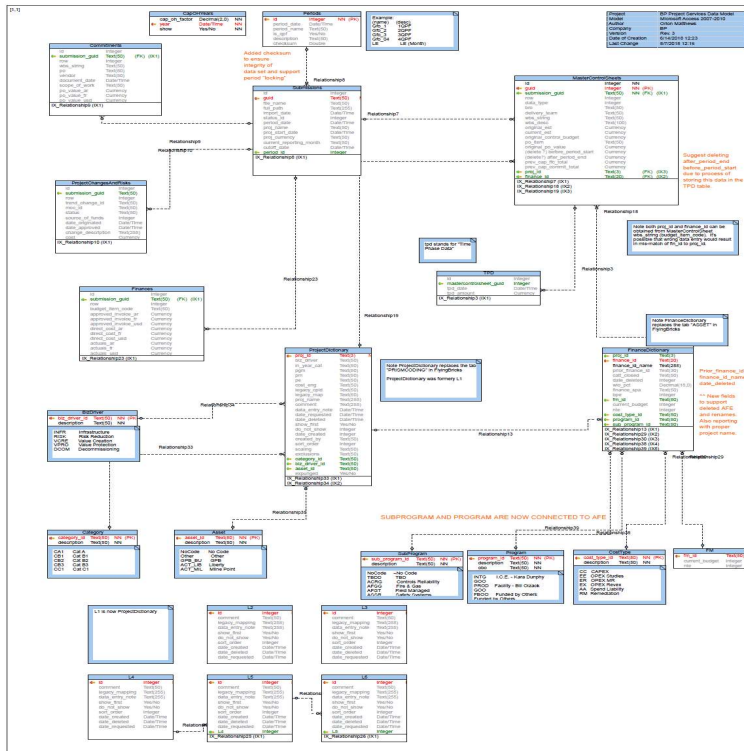
- 
- Conduct a reporting gap-fit of all your data systems to see where they are meeting needs and where there are gaps.
 - Don't recreate the wheel. Avoid replacing well regarded current reporting solutions (SAP, P6).
 - Support the “Architects Workbench”. Leave room for people to be creative with data and access ad-hoc reports for project analytics and discovery.
 - Identify your tools:

A data warehouse solution	(Azure)
Integrated reporting solutions	(Power BI)
Data modelling tool	(Toad Data Modeler)
Collaboration space	(Teams & Sharepoint)

Learn more about Gap-Fit analysis with this Forbes article and template:



Build an Enterprise Data Model & Data Dictionary



DATA

employee_id	first_name	last_name	nin	dept_id
44	Simon	Martinez	HH 45 09 73 D	1
45	Thomas	Goldstein	SA 75 35 42 B	2
46	Eugene	Comelsen	NE 22 63 82	2
47	Andrew	Petculescu	XY 29 87 61 A	1
48	Ruth	Stadick	MA 12 89 36 A	15
49	Barry	Scardelis	AT 20 73 18	2
50	Sidney	Hunter	HW 12 94 21 C	6
51	Jeffrey	Evans	LX 13 26 39 B	6
52	Doris	Bemdt	YA 49 88 11 A	3
53	Diane	Eaton	BE 08 74 68 A	1

DATA DICTIONARY (METADATA)

Column	Data Type	Description
employee_id	int	Primary key of a table
first_name	nvarchar(50)	Employee first name
last_name	nvarchar(50)	Employee last name
nin	nvarchar(15)	National Identification Number
position	nvarchar(50)	Current position title, e.g. Secretary
dept_id	int	Employee department. Ref: Department
gender	char(1)	M = Male, F = Female, Null = unknown
employment_start_date	date	Start date of employment in organization.
employment_end_date	date	Employment end date.




Data Model

A diagram showing data in systems and their connections (keys).

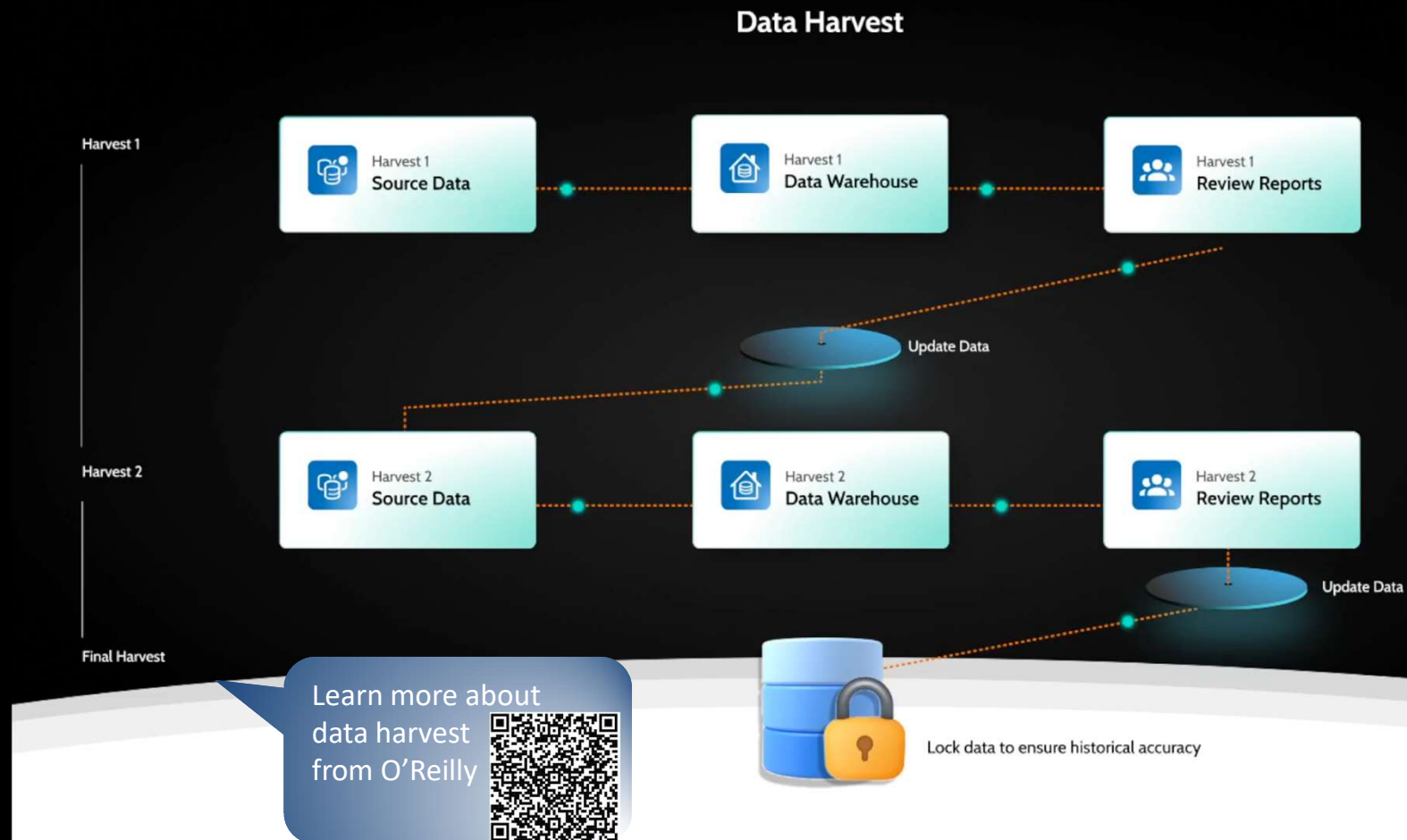
Data Dictionary

A tool that tells you what the fields mean in each system.

Common Keys

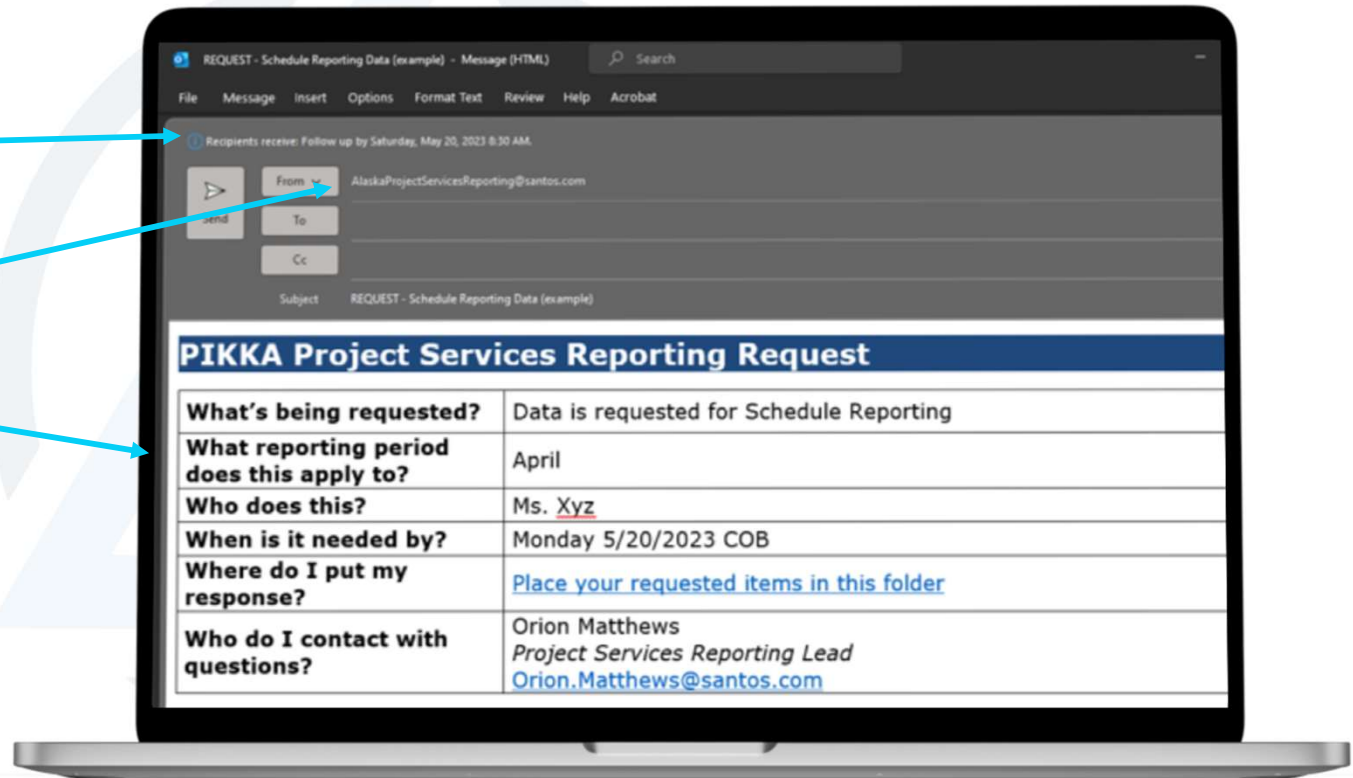
-  Project ID is your key for all things project controls related.
-  Finance ID is finance's key.
-  Period ID is your Historical Snapshot key.

Implement a Data Harvest Process




Standardize your Communications

- Add reminders for your recipients.
- Use a positional account.
- Create standard templates for requests and publishing notices



Don' Forget to Train Your Users



-  Training is the “low hanging fruit” that adds incredible value at a low price.

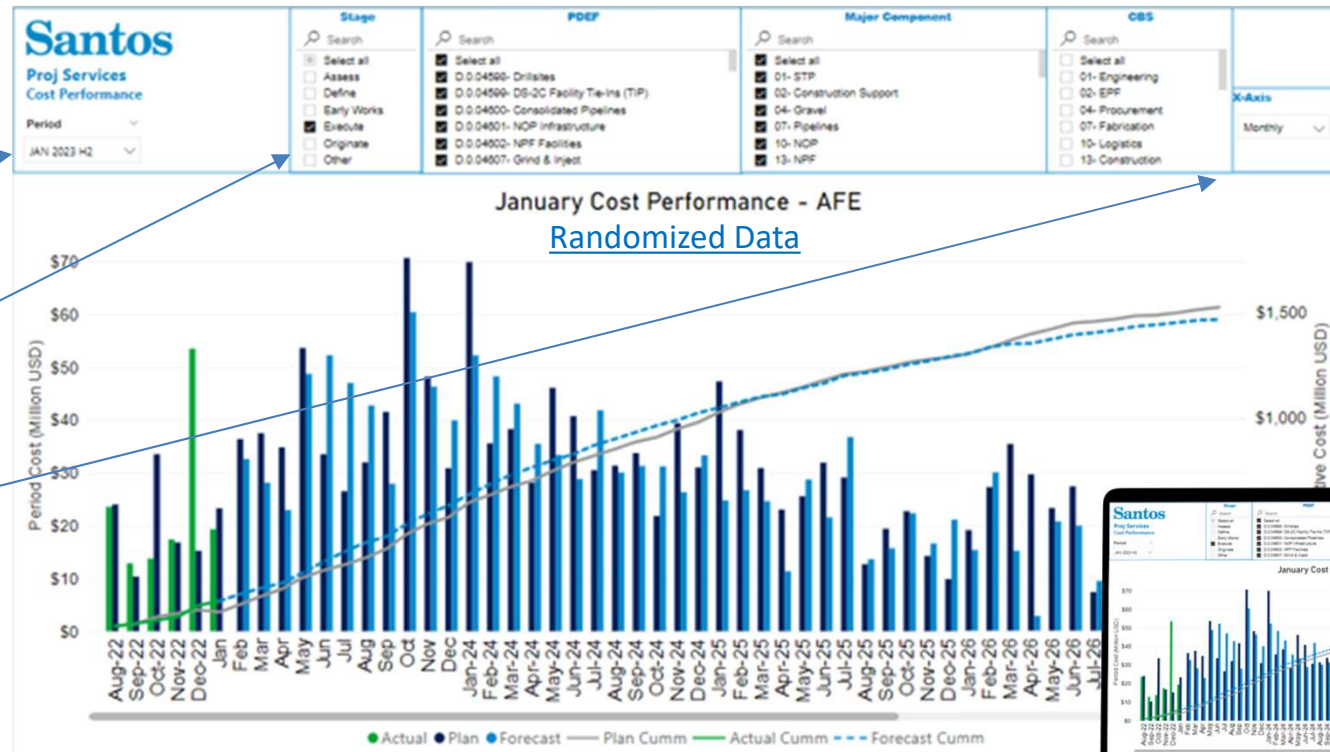
Visuals



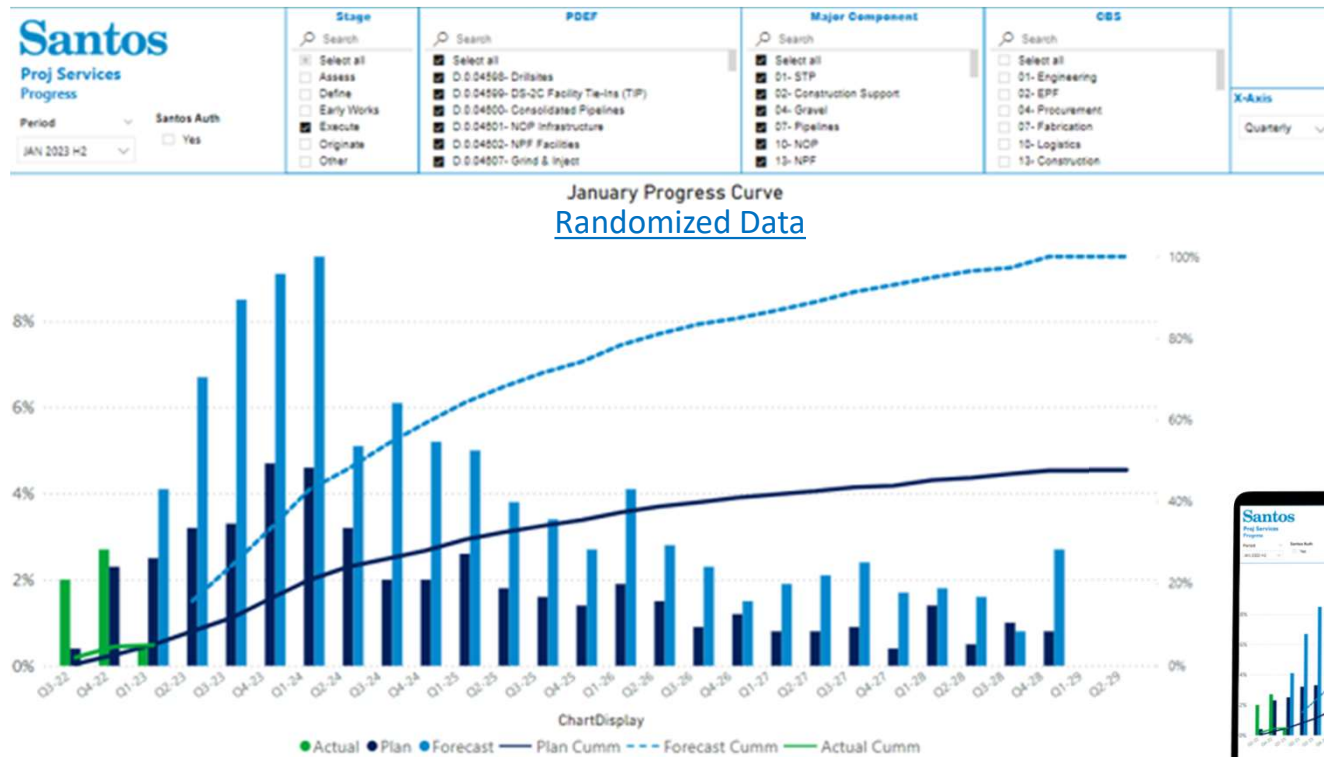
Cost Performance

Features

- Choose your data set (Period ID)
- Filters driven by WBS
- Dynamically choose between Month, QTR, and Year



Progress



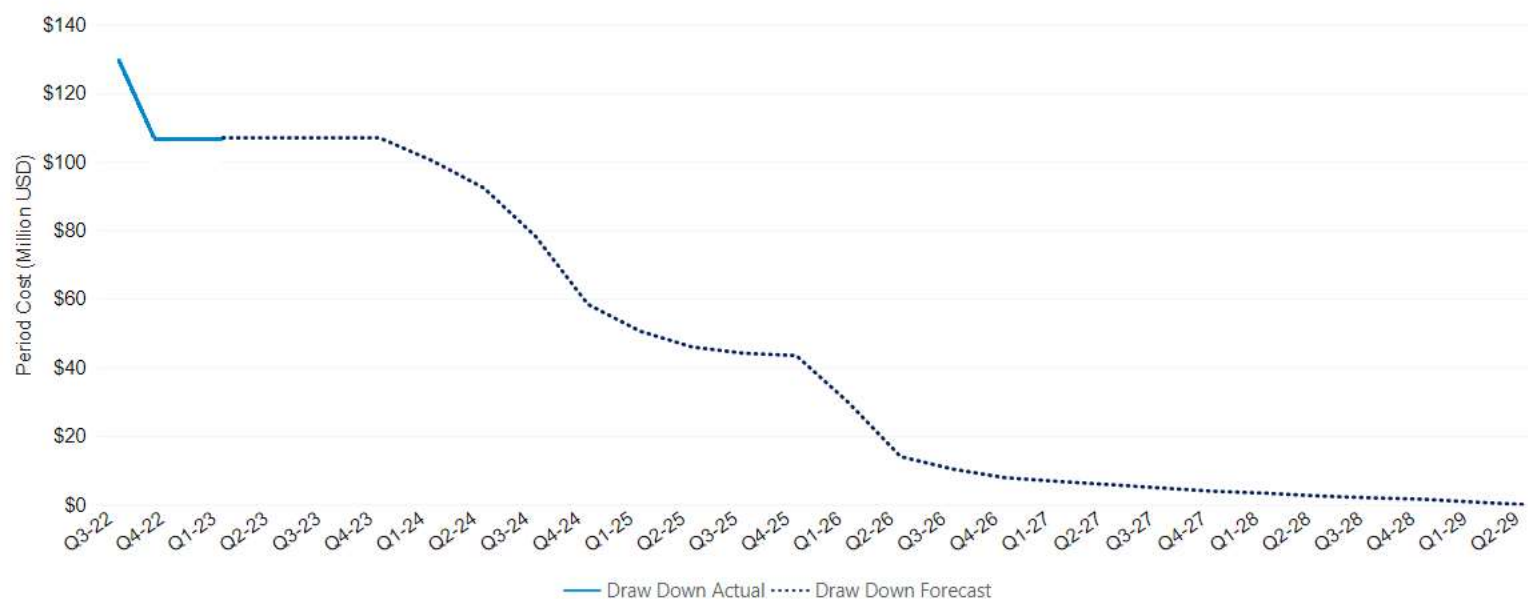
Showing Data by Quarter



Contingency Draw Down Curve

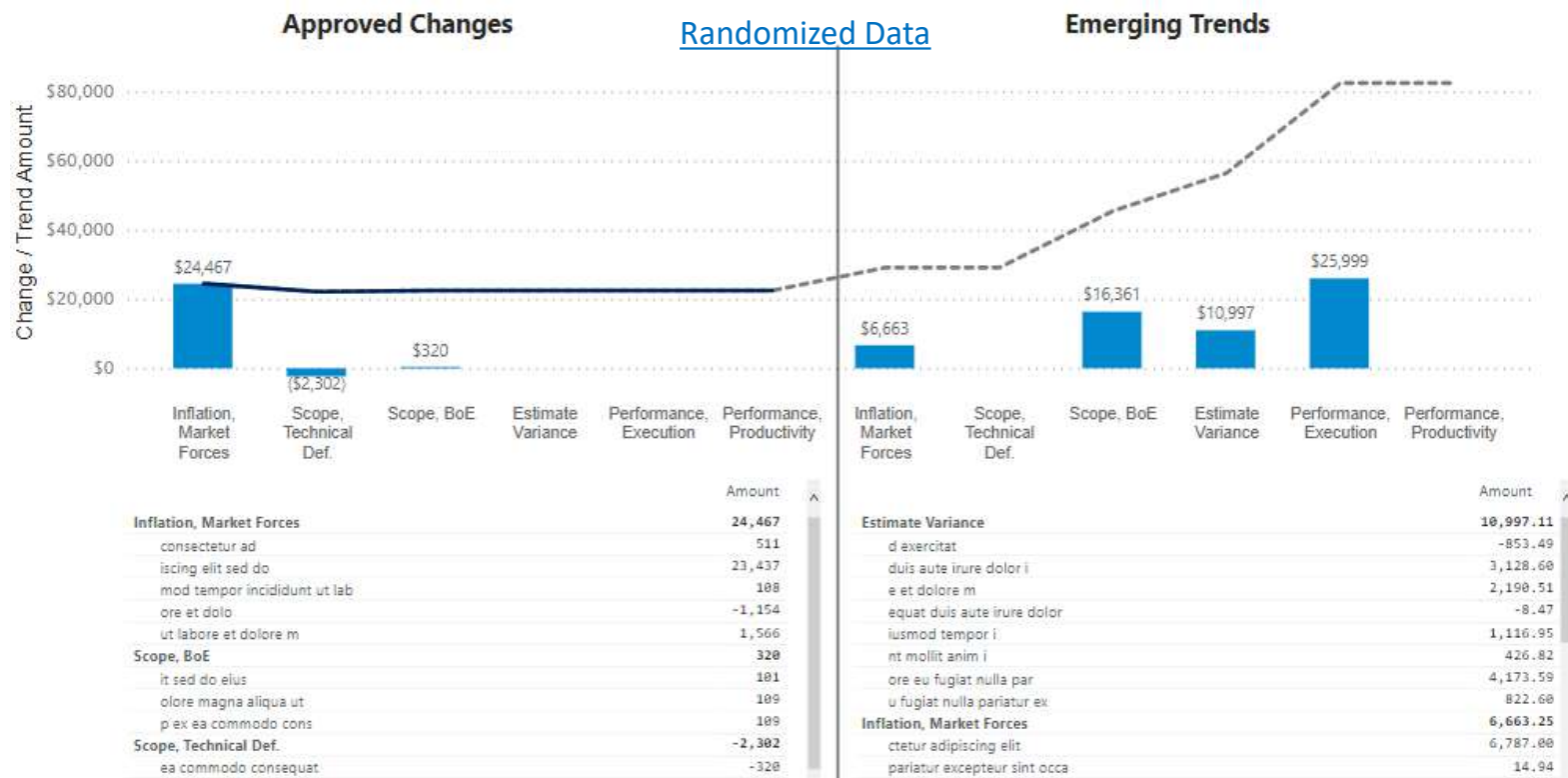
Randomized Data

Contingency Draw Down Curve



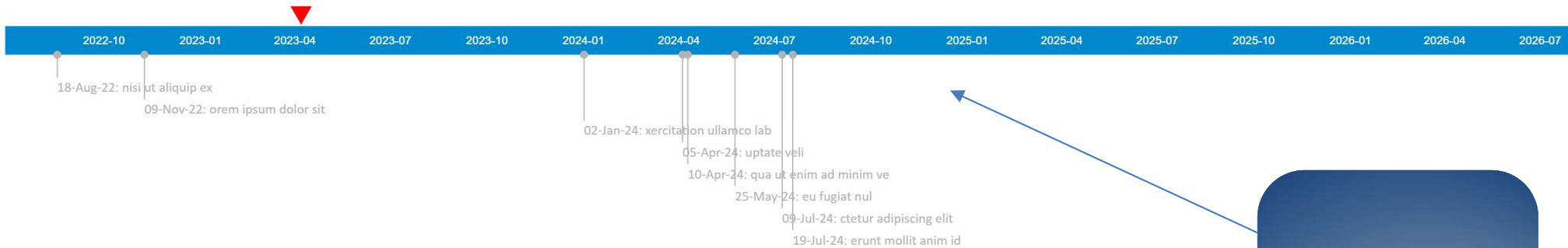


Changes & Trends (Risk)



Schedule

Randomized Data



Randomized Data

Activity ID	Key Schedule Milestone	Plan	Fcst/Actual	Float	Critical Path
RND29680	Engineering: Start Detail Design	07-Oct-24	19-Jul-22 A	-	-
RND29681	Engineering: Finish Detail Design	12-Dec-23	19-Sep-24	> 30	✓
RND29682	Fabrication: Start Fabrication	30-Apr-26	04-Dec-29*	-86	✗
RND29683	Fabrication: Finish Fabrication	12-Apr-24	02-Jun-29	> 30	✓
RND29684	Construction: Start Tie In	02-May-28	25-Sep-26	<= 30	⚠
RND29685	Commissioning : Start Tie In Commissioning	04-Apr-26	28-Oct-27	> 30	✓
RND29686	Construction: Finish Tie In Construction	07-May-28	26-Jul-29	> 30	✓
RND29687	Commissioning : Finish Tie In Commissioning	21-Jul-26	17-Jul-28	> 30	✓

- Milestones timeline used for key milestones
- Detailed table for activities with indicators for Critical Path and Float.



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Conclusion



Conclusion

Integrated Reporting



-  Focus on setting up the business first. Create the right environment to enable integrated reporting.
-  Process before tool - Avoid the temptation to look for fancy tools to skip steps.
-  Stay discipline, focus on the goal and you'll make it there. It took 12-24 months to set all these pieces in place.



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Action Plan



Action Plan

Take a self-assessment



<https://www.queryon.com/ProjControlSummit2023>

Questions?

FOLLOW-UP QUESTIONS AFTER THE PRESENTATION:

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Thank You For Joining This Session

Orion Matthews & Tonya White

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