



### Conference Highlights:

- Dynamic Grid Case Study
- Driving User Adoption
  - Panel Discussion
  - At Northeastern Univ.
  - STV Case Study
- Product Roadmap
- Cost Module Update

### NEWS: KFA Expands to New York City

KFA is delighted to introduce Rich Miesemer, our man in New York. Rich joined KFA in July to provide e-Builder consulting to the New York City Department of Environmental Protection. Rich is no stranger: we first met him 15 years ago when he worked for Citadon, the vendor of the first SaaS project management system KFA implemented for the Chicago Transit Authority.

Rich brings to KFA over 30 years' experience creating, managing, designing, deploying and supporting software solutions. He has helped project teams in the U.S. and abroad deploy cloud-based solutions to streamline business processes for project management and document control and to effectively collaborate with suppliers, contractors, engineers, regulators and other external parties during project execution. He has also helped hundreds of users through the change management process of using a new software application.

### Dynamic Grids = Dynamic Uses

Speakers: Martin Aztiazararain, e-Builder  
Matt DeMarco, HDR, Inc.

At last year's e-Builder User Conference, KFA VP Peter Urban, PMP, presented a session entitled "Advanced Automation for Workflow Processes." He described the high degree of automation he achieved in configuring an e-Builder process to manage the 60 time-critical PennDOT design reviews for each of the 558 bridge projects included in PennDOT's Public-Private Partnership (P3) Rapid Bridge Replacement (RBR) project. [Click here](#) for a summary of that presentation.

This year, e-Builder users heard from HDR, Inc., designer of those 558 bridges, about how they used e-Builder to automate and speed their response to design review comments received from PennDOT. The e-Builder tool they used was Dynamic Grids, coupled with custom coding by e-Builder.

For each design review for each bridge, HDR received one spreadsheet with the consolidated design review comments (60 reviews x 558 bridges = 33,480 spreadsheets total). HDR needed multiple engineers within their firm to see and respond to those comments within 7 days. Depending on the bridge and the design review type (e.g.: structural calculations vs. signing and pavement marking plans), these would be different individuals. If the HDR engineers disagreed with a review comment, then the issue needed escalation and additional routing.

e-Builder provided customization that automatically loaded the comment spreadsheets into e-Builder Dynamic Grids. This allowed for multiple simultaneous responders, who would indicate in the Grid whether they agreed with or dissented from each comment. The completed response Grid was automatically evaluated as to whether there was any dissent. If so, escalation rules kicked in. At the end of response process, e-Builder automatically recreated the PennDOT review spreadsheet, with HDR's responses filled in.

HDR estimates that they achieved a whopping savings of 80 -120 administrative hours **PER DAY** through this e-Builder automation. In addition, they have a bullet-proof audit trail of the source, content and timeliness of their responses.

### Cost Module Update

Summary by Rich Miesemer

E-Builder recently introduced Account Level Funding and Master Commitments as part of their cost module enhancements.

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### Driving User Adoption Panel Discussion

Panel: Greg Bush, VP, KFA Illinois Tollway Team  
Carol Cohn, KFA Illinois Tollway Team  
Gary Younger, Director, Program/Project Controls, Northeastern University, Boston  
Luke Van Santen, e-Builder System Administrator, Metcouncil, Minneapolis

#### How do you align everyone and maintain positive energy in a large scale implementation?

**Gary Younger:** Communicate to users that the organization has to adapt to a new business model and that their commitment to improving processes is key to overall success. Demonstrate that there is something in the effort that will help them and be sure to follow up and show the benefit. Do not focus solely on the software but show that it is just one key component to achieving excellence in project delivery. Value and respect the human aspect of the implementation. Implement the system as ours and not mine. Value feedback both positive and negative and act on what can be changed for the better. Make the system part of the process, not a back feed system because it is a requirement; if vendors want to get paid or need a change order it must go through the system when being requested.

**Greg Bush:** It is important to identify the correct stakeholders early in the implementation and keep them engaged through the entire delivery. For example, stakeholders with expertise in their current methods and tools must be engaged in the implementation process. An example is the stakeholder who has developed an Excel spreadsheet that has been utilized successfully by one organizational group. The e-Builder analyst must understand the inputs and outputs of the spreadsheet and implement them in e-Builder to ensure adoption of the e-Builder process that will replace it. The stakeholder can then maintain his/her pride of ownership for the new process.

#### With owners utilizing creative delivery methods for their capital programs, such as Design-Build, rather than the traditional Design- Bid- Build project delivery method, how do you ensure user adoption when there are many variants of a single workflow such as the RFI and Nonconformance process workflows?

**Greg Bush:** Due to the very advanced process design and configuration that e-Builder provides, we are able to build logic into workflows for diverse capital programs that use both D-B and D-B-B delivery methodologies. We can create complex yet flexible workflows that are easy for users. (Greg gave examples of how to build one process to manage both D-B and D-B-B workflows by utilizing conditional logic.) Also, we train on usability concepts, e.g. details/comments/documents tabs, logical field names, etc. By training concepts, no matter the process, the user will know what to do

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## Driving User Adoption—cont'd. from p. 1

regardless. Also, an e-newsletter goes out to all users monthly. Back issues are stored in the program-wide project. We disseminate the newsletters by using folder subscriptions to automatically alert users when a new issue is published.

### How do you handle hurdles to user adoption related to computer and language skills?

**Carol Cohn:** It is important to identify as many hurdles to adoption for every rollout in order to then be able to make plans to mitigate them. Hurdles to user adoption can include things like:

- Lack of experience with the internet and/or browser-based applications
- Poor keyboarding skills
- Non-native English users, especially from language backgrounds not using Latin alphabet
- Low English reading and/or writing skills

A number of techniques can help these users become successful e-Builder users:

- Training sessions targeted at these target groups
- Task-based hands-on training to provide opportunities for practice
- Training sessions that allow enough time for the “slowest” learners
- Handouts and job aids aimed at these users (e.g. screenshots with callouts for vocabulary). Videos covering basic topics to be used as refresher training, and for newly launched processes video can be used in lieu of live training in person or via webinar.

### How do you monitor user adoption progress?

**Luke Van Santen:** Use Process History to get listings of who Took Action, then process it outside e-Builder (Excel) to find out who is **not** acting.

**Greg Bush:** We use various ball-in-court reports. We spot-check the utilization of new processes that we roll out to make certain that users are following the work instruction. Support requests such as emails and phone calls allow us to monitor user adoption. We then adjust training and create materials that will support any shortcomings in the user adoption. We use our newsletter and email blasts to communicate to users when there is a clarification or significant communication to users that affects adoption of a process.

### What can we do to ensure cross functional communication and dissemination of training information?

#### Whole Panel:

- Training should be continuous and repetitive.
- Use the Announcements section of e-Builder home page along with an e-Builder Weekly Happenings email.
- Have a bi-monthly update meeting that discusses enhancements that project controls has made or will be making.
- Highlight the successes of the division to demonstrate progress and encourage future usage.
- Communicate tips and tricks and friendly reminders to reinforce good practices.
- The goal should be to provide as many avenues as possible to make as much information as possible accessible. These include:
  - A separate e-Builder “project” for documentation. All users of your e-Builder account are added to this project and all program-wide documentation is stored here.
  - User manual PDFs created and tailored to the specific usage of the program. Manuals can cover basics like using the document module or how processes work. There can also be separate manuals for each process.

## e-Builder Roadmap & Product Strategy

Speaker: Brian Nasson, Director of Product Management

### Product enhancements over the last year:

- Move to Amazon Web Services (AWS) has improved uptime (100%) and performance
- Cost Module: Introduction of Master Contract concept that allows a Single Contract to be applied across Multiple Projects
- BIM Module introduction
  - Visualize federated BIM
  - View embedded data
  - Take snapshots of 3D views to incorporate in RFIs, etc.
  - Use Oculus Rift glasses for immersive VR experience
- Business Intelligence Reporting
  - Advanced reporting features
  - Includes map visualization
  - Benchmarking and Predictive Analysis
- Time Tracking Module: Time-Phase Budgeting & Resource Management
  - People: Project team’s future labor hours estimated & billing rates applied
  - Time: Hours are associated with schedule activity
  - Cost: Schedule activities are linked to budget line items and invoices are created
  - Reports: Labor and non-labor costs married in reporting for an overall forecast view
- Q3 2016 Enhancement Release
  - Submittal Module:
    - Add to package when creating
    - Make fields required
    - Sort all columns for item and package details
    - Title search feature
    - Force spec section to CSI code
    - Separate role and user selection on CC
  - Dynamic Grids: Text wrapping in display headers
  - Calendar Module: Display subject first in notifications
  - Documents Module: Drag & Drop indicator

### Coming Soon

#### Q4 2016 Feature Targets:

- Contacts module: create Distribution Groups
- Copy File Options
- Drag & Drop to File Field for Upload
- Funding Transaction Custom Fields
- Lock Funding Source Fields
- Lock Bid Tabulation Export File

#### Q1 2017 Feature Targets:

- Document Library Search
- Streamline File Upload
- Attached Documents Search
- Send Docs from Multiple Folders
- Homepage Project Filter
- Enhance Submittal History
- Submittal Button Consistency

## Project Concept to Completion – Manage the Entire Project Life Cycle with e-Builder Northeastern University Case Study

Speaker: Gary Younger, Director, Program/Project Controls Northeastern University

Training and Adoption were the main topics of this presentation. Best practices include:

- Express training sessions of 30 minutes on specific topics twice per week. Never run over 30 minutes to respect attendees' time.
- Bi-monthly update meetings with e-Builder users that last no more than 30 minutes.
- Weekly happenings email with helpful reminders.
- e-Builder Lab once per week where anyone can attend and ask any e-Builder questions they have.

Adoption metrics used by Northeastern University include:

- User login activity by month and quarter
- New user accounts by month and quarter
- Storage used by month, quarter and years
- Processes initiated by month and quarter.

Northeastern University uses all modules of e-Builder from project planning through closeout and has implemented over 24 processes. A Client Survey is performed as part of closeout to gauge satisfaction.

## e-Builder Roadmap & Product Strategy, cont'd. from p. 2

### System Architecture Direction:

- Improved Performance
- Improved Quality
- Faster Feature Delivery
- Modern, Intuitive API
- Enhancing Integrations:
  - Build
  - Deploy
  - Manage

## Cost Module Update – Account Level Funding and Master Commitments—cont'd. from p. 1

### Account Level Funding

One use case for implementing account level funding is a university system receiving lump sum allocations from their state and having responsibility for managing the allocation across all of their campuses. Account Level Funding can act as a cost control mechanism in tandem with regular cost controls:

- Easily track “colors of money”
  - Aggregate dollars allocated to projects
  - Individual fund dollars allocated to projects
  - Fund dollars remaining to be allocated to projects
- Gain program-level overview of funding

### Master Commitments

One use case would be managing a single professional services contract across multiple projects, which involves:

- Cost controls at the Project and Contract level
- All Contracts managed at the Master Commitment level
- Contract Managers vs. Project Managers
- One invoice for the Master Commitment rather than individual project-level invoices

A second use case would be a program-level agreement to provide PM/CM services on multiple projects. In this case, the Master Commitment could be broken out into a schedule of values: PM Services, CM Services, Controls, Procurement and Contract Admin, Design Management, etc. Project Commitments draw down the broken-out Master Commitment values.

### Dynamic Cost

- Functionality utilized in workflow processes
  - Create dynamic cost processes to create estimates and forecasts, track/log PCOs, or even perform phased budgeting
- Can be displayed in e-Builder Admin-defined columns of the Cost Module
  - Dynamic columns can be included in standard reports
- Can be enabled for:
  - Dynamic Budget lines
  - Dynamic Commitment lines

Master Commitment- and Project-level Cost Controls can be applied in e-Builder. Tolerances can be assigned, for example:

### Funding Controls

- Total Master Commitments cannot exceed approved funding
- Total Master Commitment invoices cannot exceed funding

### Master Commitment Controls

- Total of Project Commitment Line Item values cannot exceed Master Commitment Line Item value (0% Tolerance)
- Project Commitment Line Items invoiced cannot exceed Master Commitment Line Item value (0% Tolerance)

### Project Commitment Controls

- Project Commitment Line Items invoiced cannot exceed Project Commitment Line Item value
  - 25% tolerance for Construction contracts
  - 0% tolerance for Consultant contracts

### Project Budget Controls

- Total Project Commitments cannot exceed Total Project Budget
  - 10% Tolerance

*TechNotes* is a publication of Kristine Fallon Associates, Inc.

Editorial and business office:

11 E. Adams Street, Suite 1100  
Chicago, IL 60603  
Tel: (312) 360-9600  
www.kfa-inc.com

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KFA combines incomparable credentials in Building Information Modeling (BIM), project collaboration and management, and facility/asset management technologies with information technology vision to help clients position their products, services and work processes for competitive advantage. We also assist our clients in planning, budgeting and implementing IT projects.