

Ref:	NR/L3/INI/PG115/PS/004
Issue:	1
Date:	5 June 2010
Compliance date:	N/A

Guidance on the interface with contractor plans

Ref:	NR/L3/INI/PG115/PS/004
Issue:	1
Date:	5 June 2010
Compliance date:	N/A

Contents

1 Purpose	3
2 Scope	3
3 Background	3
4 Solutions	4
5 Solutions in detail	4
6 Considerations	17
7 Summary of recommendations	17
8 Summarisation of approach	18
Figure 1 – Typical four-weekly updating cycle	5
Table 1 – Summary of appropriate measures	3

Ref:	NR/L3/INI/PG115/PS/004
Issue:	1
Date:	5 June 2010
Compliance date:	N/A

1 Purpose

This Guidance Note forms part of the suite of documents comprising the Planning and Programme Controls standard.

The programme controls framework exists so that investment projects in Network Rail are delivered successfully to meet their time, cost and quality targets.

2 Scope

This Guidance Note provides guidance on method(s) of interfacing Network Rail Investment Project & Asset Management (Renewals) project plans and schedules with those of its contractors.

3 Background

Many of the projects in Network Rail II utilise contractors to deliver work on behalf of the project. The nature of these contracts varies from framework/minor works (in the form of call offs/target price) to fully competitively tendered.

At present, many of the plan updates to the Network Rail Primavera database in reality are no more than transcribing contractor progress into Network Rail II plans, with little or no planning or analysis performed. This Guidance Note identifies and reviews methods for porting this data into the Network Rail II Primavera database using the most appropriate method for the project.

The measure of what is appropriate will be based on a number of factors, but can be summarised in Table 1.

Project	Complexity	Risk	Type	Method
1	High	High	Competitively Tendered	Updates provided by Contractor
2	Medium	Medium	Framework/IMT	Joint Planning
3	Low	Low	Framework/IMT, no possessions	Uses Summary Plan/Joint Planning
4	Other	Other	Minor Works	N/A Don't Use Primavera, 13 Period Costs

Table 1 – Summary of appropriate measures

The assessment of which category a project fits into is based on the following:

- impact on the Company (safety or performance);
- Project Manager and Project Team competence of similar projects;
- use of new materials/working methods;
- involvement/funding by Third Parties;
- Environmental Consents/Issues;
- political issues;

Ref:	NR/L3/INI/PG115/PS/004
Issue:	1
Date:	5 June 2010
Compliance date:	N/A

- g) access (possession requirements)/location;
- h) cost/time (criticality).

4 Solutions

A number of potential solutions have been identified and the appropriate solution will depend on the assessment based on Table 1.

In all cases, the solution chosen should be agreed between all the relevant and interested parties as appropriate for the project and the business. Those parties include the business (Board, ERIP, etc.), the Programme Director, the Programme Manager, the project team and Project Management Governance.

These solutions are identified and detailed as follows:

- a) manual updates (current solution);
- b) importing data using Excel;
- c) importing data using Microsoft Project;
- d) importing data using More4Apps;
- e) importing data via Primavera Import;
- f) importing data from other Primavera products, P3 and Sure Trak;
- g) future use of scheduling capability in OP and transfer of data to Primavera;
- h) importing COWD data based on PCA input into OP, and application for Payments;
- i) using Primavera Web;
- j) use of Track developed ROST;
- k) use of Primavera Timesheets;
- l) combination of Manual/Stand Alone and Excel;
- m) combination of Stand Alone database(s) and Manual updates;
- n) Joint Database, use of Network Rail logins or Contractor Desktop, the contractor and Network Rail work as joint teams with a single plan held in the Network Rail database.

5 Solutions in detail

5.1 Manual updates (current solution)

This current solution involves the planners collecting data by various means and entering this data into the Network Rail IMS Production database. The data can be provided electronically from the contractors in Primavera .xer, P3, Sure Trak, Excel Spreadsheets or Microsoft Project formats or hard copy plan or spreadsheet output.

The planners feel that with this solution they are merely acting as data entry clerks putting the updated data into another tool, causing an overall feeling of dissatisfaction, a feeling that Primavera is being used to feed the OP beast and not

Ref:	NR/L3/INI/PG115/PS/004
Issue:	1
Date:	5 June 2010
Compliance date:	N/A

Primavera, the relevant data updated and the results re-imported back into Primavera.

This method imports only valid data into the IMS Production Primavera database. It may be possible for the Contractor to export data from their planning tool (particularly if it is Primavera) in the same format as required for importing via Excel to Network Rail IMS Production.

Advantages:

- a) No manual input of data.
- b) Level of detail maintained in Network Rail IMS production, whilst different from the Contractor, is controlled by NR.
- c) Contractors manage their own programme(s) of work.

Issues:

- a) The use of this method of input precludes the use of profiled resources, whereby a multiple resource assignment is made to an activity, both planned and actual, by financial period. Importing brings in only one instance of the resource, unless a Control Account is applied to each entry.
- b) Electronically exported data may be based on different parameters, e.g. Calendars, Relationship leads/lags.

Process:

- a) Export to Excel the activities/fields that require updating, these include Remaining Duration, Actual Start/Finish Dates, Relationships (including Leads/Lags), Resource Assignments and values (forecast and actual).
- b) Supply Excel spreadsheet to contractor, who updates the data in the spreadsheet as required, for those contractors using Primavera an export of the same data can be performed.
- c) Supply the updated spreadsheet to the Network Rail planner.
- d) Import the Excel spreadsheet into the Network Rail IMS Production database.
- e) Analyse the resultant schedule and apply corrective actions if/as appropriate.

Recommendation;

Can be used for simple projects with simple resource assignments, not multiple assignments per activity, but has to be done project by project. Not recommended on complex projects.

5.3 Combination of Manual/Stand Alone and Excel

Example/Process: