

Drilling Down to the Heart of the Task

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Sharing information and keeping track of a project's status amongst colleagues within one building is tough enough — but it gets even more complicated when a company has remote offices.

That was the situation Enbridge Pipelines (Saskatchewan) Inc. was facing last year, according to Dwayne Davidson, the firm's supervisor of engineering services. The Estevan, Sask.-based company, wholly owned by the Enbridge Income Fund (a trust managed by Calgary-based energy transporter and distributor Enbridge Inc.), owns and operates the Enbridge Saskatchewan System, a crude oil and liquids gathering system, as well as three other pipeline systems. It was the engineering team working on projects for the Saskatchewan system that was experiencing the effects of the inefficient collaboration methods they were using at the time, Davidson said.

"Like any company, we have a lot of people working together, trying to share information," he explained. "We share project status, construction schedules and status, and budget information amongst a number of people" at four field offices, all of them about 40 to 80 km apart.

The company is standardized on Lotus Notes and has an internal Lotus development team that created a custom database to help organize engineers' tasks. "But as far as a general communication tool to tell us peoples' statuses, we had various Excel spreadsheets and Word documents that people would fill out and circulate," Davidson said.

That method didn't quite cut it, he added. "We had no way to track whether people had completed their paper work, and no way of keeping track of different elements of the projects." It meant that a lot of project stakeholders weren't able to get up-to-date information on budgets and how all the work was progressing. "A regular Word document really doesn't have the tools in there for auditing and creating an authorization trail without putting another software package in," he said.

In November 2003 Davidson's team started talks with Tucson, Ariz.-based Automation Centre, which makes project collaboration software called Tracker Suite for Lotus Notes/Domino users, as well as a version for Microsoft Outlook/Exchange, TrackerOffice. The engineers



reviewed four other products but they determined that "because it was for the Lotus platform, (Tracker Suite) was the best selection" for them, and chose to implement Project Tracker, the project management application within the suite.

The solution includes tools for organizational and individual planning, scheduling, online documentation, process control, team management and access to current status reports, among other things. "What you end up with is this effect that I like to call the 'magic spotlight,'" said Automation Centre's CEO Steven Birchfield. "(The software) helps shine the light on an area where you are doing well, or shows you that this area needs some work."

Enbridge completed all the necessary software agreements by the end of 2003, and, in synchronization with the new budget year, completed the rollout by about mid-January 2004. It took some customization to make Tracker Suite do what Enbridge needed, Davidson noted.

"A lot of the general structure of the way it was laid out

was more geared toward an engineering consulting firm which would have customers, track billing hours and do reports around that," he said. "The way we do projects is not exactly like that — we don't have external customers, and when it comes to the way that we break down budgets, we have standardized codes that we use....So the biggest rework was to change the budgeting document."

The initial customization — about 90 per cent of total modifications necessary — took about five days, he said. If anything needed to be added or changed after the fact, Automation Centre was able to export changes remotely through a VPN, after first replicating the database, he added.

"That's one thing that Lotus is really good at.... (It) is very flexible from a modification and design point of view. It's a lot easier to do remote configuration work without screwing up local information or data." One of the biggest improvements to efficiency is with the time it takes to get documents signed off. Under the old method, documents would be circulated and approved by hand and if they had to go to a remote office, they would be sent using the company's internal mail system, which would take two to three days. "It was a small hope to run around and get that done in a day in the past," but now a one-day turnaround is a given, he said.

For IT managers interested in implementing similar software, Davidson recommended making sure they nail down the scope of work from their stakeholders. "With any type of IT project, the scope can gallop on you." Once people see what the software can do, he said, they have a tendency to ask for features that require more customization and therefore more dollars spent, which could make the project go way over budget.

The other thing he suggested is doing the customization in two phases to avoid unnecessary modifications that waste dollars. ♦