

CASE STUDY

New Evergy Project Portfolio Management System Delivers Single Source of Truth for Annual Capital Planning

For many years, Evergy has relied on a spreadsheet-based project development workbook (PDW) system for planning, budgeting, prioritizing and managing large capital projects. Thanks to a talented Evergy support team, the PDW had long provided exceptional functionality for this large Midwestern utility, but it was time for an updated project management system.



Challenge

Evergy's large fleet of generation assets provides power to a bistate transmission and distribution network serving more than a million customers. Maintaining essential reliability for this fleet requires millions of dollars in annual capital investment.

For many years, Evergy had relied on the functionality provided by its project development workbook (PDW) system to manage these capital projects. Though the PDW had performed well, it relied on a number of manual processes for the quantitative inputs needed for the budgetary process of documenting, cost-justifying and ranking capital projects.

The PDW spreadsheet had evolved over time to provide the functionality needed by users. But the drawbacks were

obvious. In addition to the staff time required for manual data entry, there were limitations on shared folders and minimal controls over the information being provided. A new application was needed that would drive toward an enhanced level of standardization and process optimization.

Solution

With the objective of improving and streamlining the entire project management, prioritization and budgeting process, a conversion to Oracle Primavera Portfolio Management (OPPM) was selected as the preferred solution. As a single source of truth for crucial data needed for project management, OPPM enables accessibility and enhanced integration with other programs.

The six-month project began with preplanning on a process for recoding so that all existing data residing within the PDW system could be converted to the new application. The two primary goals were to:

1. Centralize all budget items.
2. Establish a mechanism to prioritize which projects need to be funded and in what order.

Though the OPPM could have been developed as a cloud-based application, Evergy specified that it be placed on its on-prem server, so it would be protected by its own firewalls. This pathway required that the first phase, requiring mapping and configuring data from the PDW system, be performed on an 1898 & Co. development server, with later phases performed on Evergy servers.

This initial phase of development involved mapping all components of the PDW into new form fields. Given the vast amount of project data housed over many years, this mapping conversion proved to be a heavy lift. Many calculations had been built into the previous spreadsheet application and thus had to be pulled over to the OPPM. With a large number of these calculations programmed into the system over time, it was important that these be mapped into the new application so that familiarity and ease of use were preserved.

This one-to-one mapping served as the basis for new calculations needed to automatically populate certain form fields. For example, the data that created graphical tables and charts under the PDW application would now feed into creation of similar charts and tables in the OPPM application.

The main entry portal on the OPPM enables users to begin at the project entry form and then follow prompts guiding them through a series of fields with drop-downs for entry of information such as cost, materials, equipment and other specifics. The new system logic enables data management that prevents and corrects any data entries that may be invalid or inconsistent with previous entries.

Moving to Client Hosted Environment

Once existing data was migrated from the previous application, the project could be moved over to Evergy servers for further development and testing of the customized software.

At this point the project required in-depth training of the primary Evergy data stewards. This training program overlapped configuration work, so that the Evergy team would have hands-on experience in continually updating the system.

At this phase, a scorecard feature also was developed for the project prioritization process. This feature is based on all the inputs that are entered into the system upstream of this function. The setup included converting multiple calculations that had been used to drive the previous ranking system. This step was important, enabling the new process to closely mimic that of the previous system.

The ease-of-use functionality allowed many users besides the two main data stewards to quickly familiarize themselves with the new application. By not having to undergo an intensive retraining process, users can simply sit down and enter all the same project details they previously entered.

As one of the final closeout items for the project, an archival system was set up to house all historical records of completed projects. This historical context meant that new projects could be checked and verified against existing data, a feature that meant future budget cycles would not start with a blank slate. Another final project feature included single sign-on functionality to enable users to avoid having to log in multiple times when moving between applications while logged on to the network.

Honoring a Legacy

This data project was completed under budget and before the original contracted deadline, giving Evergy access to the new system in time for its budget planning process. As a final element, the new project management system was named PrimaDonna, as a tribute to the many years of service and contributions provided by the employee who had built and managed the previous PDW system.

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