



ADMINISTRATION COMMITTEE

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Agenda Report

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Agenda Item No: 13.

FROM: Robert Thompson, General Manager
Originator: Wally Ritchie, Director of Finance

SUBJECT:

MIGRATE PRIMAVERA P6 PROFESSIONAL TO PRIMAVERA P6 ENTERPRISE PROJECT PORTFOLIO MANAGEMENT

GENERAL MANAGER'S RECOMMENDATION

RECOMMENDATION:

- A. Approve a Purchase Order Contract to Mythics VIII, LLC for the purchase of Primavera P6 Enterprise Project Portfolio Management software licenses, utilizing the cooperative OMNIA Contract No. 180233-002 for a total amount not to exceed \$112,728;
- B. Approve a Purchase Order Contract to Mythics VIII, LLC for Phase II Primavera Migration Services utilizing the cooperative OMNIA Contract No. 180233-002, for a total amount not to exceed \$121,599;
- C. Approve a Purchase Order Contract to Carahsoft Technology Corp., for Phase III Primavera P6 Enterprise Project Portfolio Management system integrations utilizing Naspo ValuePoint Master Contract AR2472-CAR001-101, for a total amount not to exceed \$101,271; and
- D. Approve a 10% contingency for each contract.

BACKGROUND

Primavera is a project management software used by Orange County Sanitation District (OC San) since 2007 to plan, track, and manage capital improvement projects. OC San is migrating from Primavera P6 Professional to Primavera P6 Enterprise Project Portfolio Management (EPPM) to improve integration with OC San's financial system, JD Edwards, and streamline project data management. EPPM offers a more modern platform that allows improved automation and data synchronization, enhances reporting, and improves financial tracking.

RELEVANT STANDARDS

- Ensure the public's money is wisely spent
- Maintain a culture of improving efficiency to reduce the cost to provide the current service level or standard

PROBLEM

OC San's current use of Primavera P6 Professional requires significant staff effort to manage project data and maintain integration with OC San's financial system, JD Edwards. The existing process relies on manual data transfer and reconciliation, leading to inefficiencies, potential data discrepancies, and increased administrative workload for project controls staff. This labor-intensive approach limits the ability to focus on higher value tasks and increases the risk of errors in financial tracking and project reporting.

PROPOSED SOLUTION

Migrate from Primavera P6 Professional to EPPM. This process will include configuring the EPPM environment, setting up user roles and access controls, migrating project data, and integrating EPPM with JD Edwards using modern integration solutions. The transition will also involve system testing, user acceptance testing, deployment, and post-implementation support to ensure a smooth cutover and operational stability.

TIMING CONCERNS

Delaying the migration to EPPM prolongs the inefficiencies associated with manual data integration and reconciliation, requiring continued staff effort to maintain project and financial data separately. Moving forward with the transition now will accelerate automation, reducing administrative workload and allowing project controls staff to focus on higher-value tasks such as project analysis, risk management, and process improvements.

RAMIFICATIONS OF NOT TAKING ACTION

If OC San does not migrate to EPPM, project controls staff will continue to spend significant time manually transferring data between JD Edwards and Primavera P6 Professional. This ongoing effort increases the risk of data inconsistencies, errors in financial reporting, and inefficiencies in project tracking. The reliance on outdated processes may also limit the ability to scale operations effectively as project volume grows. Additionally, maintaining the current system could lead to higher long-term support and maintenance costs, as Primavera P6 Professional lacks modern automation and integration capabilities. Without migration, OC San will miss the opportunity to streamline workflows, improve accuracy, and reallocate staff efforts to higher-value tasks.

PRIOR COMMITTEE/BOARD ACTIONS

N/A

ADDITIONAL INFORMATION

The County of Maricopa, Arizona negotiated OMNIA Contract 180233-002 for Oracle Products, Services, and Solutions on behalf of all states, local governments, and other government agencies in the United States of America.

The State of Utah negotiated Naspo ValuePoint Master Contract AR2472-CAR001-101 for Cloud Services Solutions, on behalf of all states, local governments, and other government agencies in the United States of America.

Staff recommend approving multiple Purchase Order Contracts utilizing OMNIA Contract 180233-002 to cover licenses and services for this integration and Naspo ValuePoint Master Contract AR2472-CAR001-101 for system integrations and Cloud Services Solutions.

CEQA

N/A

FINANCIAL CONSIDERATIONS

This request complies with the authority levels of OC San's Purchasing Ordinance. This item has been budgeted (Budget FY 2024-25 and 2025-26, Section 8, Page 50, Information Technology Capital Program) and the budget is sufficient for the recommended action.

ATTACHMENT

The following attachment(s) may be viewed on-line at the OC San website (www.ocsan.gov) with the complete agenda package:

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