

# ORACLE PROJECT MANAGEMENT

**ORACLE**  
E-BUSINESS SUITE

## KEY FEATURES

### WORK MANAGEMENT

- Define the workplan and associated resources; publish and maintain versions
- View your schedule, critical path, and costs as a hierarchy, list, or Gantt chart

### EFFORTLESS BUDGETING AND FORECASTING

- Define budgets at any level, in multiple currencies, on-line or imported from external systems
- Generate budgets and forecasts from your workplan resources, staffing plan, or financial plan

### TIMELY COMMUNICATION OF PROJECT STATUS

- Define global status report layouts, including predefined content
- Enforce standardized reporting cycles and reminders
- Route reports for approval and define the audience for published reports
- Send scheduled XML based reports via e-mail

### PROJECT PERFORMANCE MANAGEMENT

- Assess the health of your project; automated visual indicators identifying potential trouble spots
- View and compare budget, actual, commitment, revenue, and earned value amounts

### ISSUE AND CHANGE MANAGEMENT

- Create issues and changes; assign actions, and notify when actions are due
- Define change impacts and include team members in an auditable approval process

*Oracle® Project Management provides project managers the visibility and control they need to deliver their projects successfully. All elements of the project lifecycle including planning budgets and forecasting costs and revenue, managing issues and change requests, and managing project performance, are integrated and stored in one repository, enabling project managers to operate more efficiently and effectively. Oracle Project Management is an integrated part of Oracle Projects, a comprehensive set of solutions that can help you predictably and successfully deliver global projects by integrating, managing, and providing insight into enterprise project information. Oracle Projects is part of the Oracle E-Business Suite, an integrated set of applications that are engineered to work together.*

### **Enable Integrated Project Initiation and Planning**

Oracle Project Management provides an integrated solution to manage your projects to successful deliveries with less effort. From setup to closure, you have access to tools to view the health of your projects, gather information quickly, and create your workplan.

### **Simplified Project Setup**

Use project templates to simplify project setup and enforce organizational best practices and standards. Project templates define the information required to manage the project lifecycle. This data ranges from project classifications, project members, and the work breakdown structure (WBS) to financial aspects such as burden schedules, billing schedules, and the budgeting and forecasting structure.

### **Manage Multiple Projects with Program Management**

Oracle Project Management supports a multi-level hierarchy of projects linked into a program. Program managers view aggregated information at the program-level and can drilldown to the child projects.

### **Manage the Information Required for your Project**

Project Managers can drill down to access detailed information for their projects using Project Home (Figure 1), a configurable dashboard that provides access to commonly used functions. Project Home also displays key project information comprising Key Performance Indicators (KPIs), earned value graphs, effort, and financial information on cost, revenue and profitability.

- Implement the impact of change orders into the approved budget
- CENTRALIZED DOCUMENT REPOSITORY
- Manage, categorize, and access documents
  - Integrate with document repositories, including Oracle Files
- INTEGRATION
- Seamless integration with the Oracle Projects suite

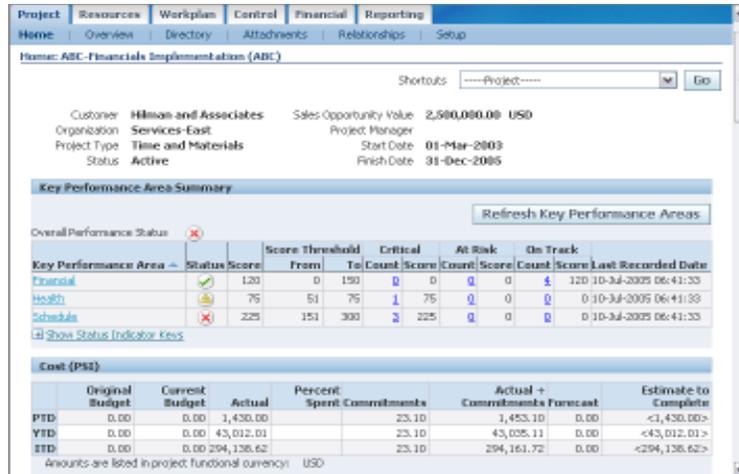


Figure 1: Project Home page

### Intuitive Workplan Management

Plan your project work as an unlimited work breakdown structure of tasks with as much detail as needed. Create your workplan from scratch, from a project template, an existing project or a portion of the WBS, or by integrating with a scheduling tool. Track the project’s planned effort and work units, milestone and phases, schedule, and critical path information.

Oracle Project Management captures task schedule and baseline dates as well as dependencies (finish-to-start, start-to-start, finish-to-finish, and start-to-finish) within and across projects. Resources assigned to tasks, including people, equipment, material items, and financial resources can be tracked for detailed schedule information, progress to date, and cost over time. The workplan tasks can be viewed as a hierarchy, list, or in a Gantt chart, identifying the schedule dates, dependencies, progress, and resource assignments (Figure 2).

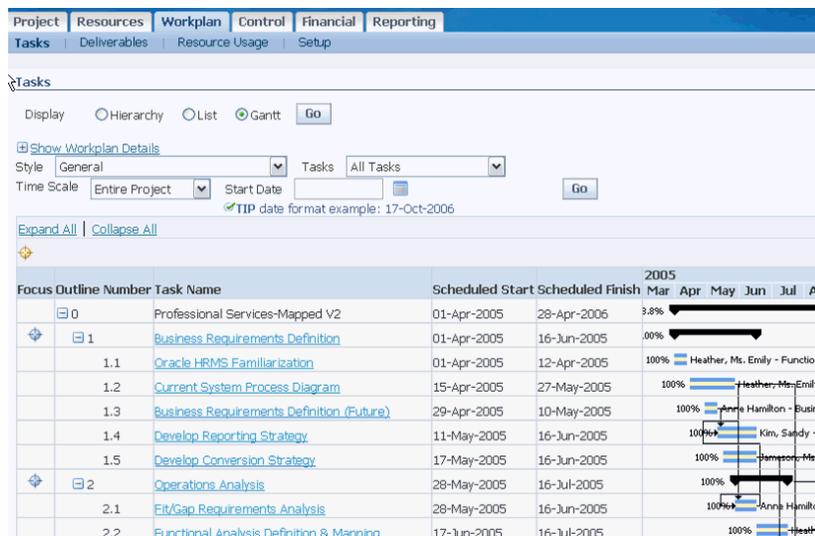


Figure 2: Gantt Chart Workplan View

**Managing Workplan Versions**

Capture and manage changes to your workplan and compare to prior versions to identify trends such as schedule slippage. Hold multiple iterations of your current plan to test different planning scenarios, and then route your finalized workplan through your business approval process. Once approved and published, project stakeholders and team members receive a notification of the availability of the latest plan for them to review or enter any new progress against.

**Alternate Structures for Workplan and Financial Management**

You have flexibility in how a project's work execution relates to the planning and tracking of project finances. You can plan work, cost, and revenue against a single structure of tasks, or you can define separate project structures. This flexibility allows project managers to manage work at the level of detail they require while still supporting the needs of the finance organization for cost collection and budgeting.

**Efficient Deliverables Management**

Schedule and track deliverables for a project, defining the actions and owners required to meet each deliverable and any associated documentation. Use deliverables to support the complete project management flow; integrating into other business functions such as manufacturing scheduling, shipping, supply chain planning, purchasing, and project billing.

**Effortless Budget and Forecast Definition, Versions, and Approvals**

Track multiple types of financial plans such as budgets, forecasts, and estimates at any level of your financial structure; the costs being derived from actual or planning rates, burdened and automatically extended across your financial periods. Enter your budgets online, derive them from existing financial plans, the staffing plan, or workplan, or import them from external systems such as Microsoft Excel and Microsoft Project. Finally, model alternative planning scenarios before routing the result through your approval cycle to generate new budget and forecast baselines.

**Integrate with your Scheduling Tool**

Combine the strength of the Oracle Projects solution with your project scheduling tool. You can leverage the enterprise definitions, templates, business rules, security, and centralized project repository provided through Oracle Projects, and utilize detailed project scheduling, resource leveling, and the disconnected capabilities of your scheduling tool. Oracle Project Management delivers out of the box, bi-directional integration to Microsoft Project 2003 or 2007 while integration to other scheduling tools is facilitated with the use of standard public interfaces.

**Enable Synchronized Project Execution**

Oracle Project Management provides the platform to collaboratively manage document updates and progress collection across your team member community.

**Centralized Document Repository**

Use a simple Web interface to manage and access a centralized repository of documents, and provide access to all project members within the context of your

project. Attach files, URLs, and text to your projects at the project or task level, and control updates to attachments.

### **Flexible Progress Management**

Reduce the administrative effort needed to record accomplishments by allowing decentralized progress collection and rollup. Task managers and the resources assigned to work on tasks can report information such as actual effort and cost, estimate-to-complete effort and cost, estimated and actual completion dates, and physical percent complete. Alternatively, the project manager can centralize the process by enabling progress collection for all tasks.

### **Achieve Coordinated Project Control**

With Oracle Project management, control your projects with workflow-based issue and change management and provide users access to information relevant to their duties to keep project activities on schedule.

### **Effectively Manage Issues and Changes**

Project managers and team members can quickly and easily create and manage issues, and changes. Workflow ensures tracking and progressing from initial capture through the review and approval process to closure and – in the case of change orders – controlled implementation of impacts. Issues and changes, accessible to the project team through Project Home can be prioritized using critical information such as status, priority, required by date, and classification.

### **Project Security and Access**

The role-based security model of Oracle Projects provides a low maintenance mechanism to define global project roles. Because users may perform different duties across projects, access and functions are further controlled by the roles project members are assigned to on each project.

### **Controlling Allowable Project Actions**

Manage the business processes allowed at various stages of a project by defining the actions permitted for a given project status. These actions include the ability to create and adjust transactions, generate revenue, generate invoices, and capitalize assets. A workflow-based approval controls the transition between project statuses..

### **Manage Project Performance and make Better Decisions in Real Time**

Timely and accurate information allows project managers to make better decisions concerning their projects. With Oracle Project Management, project managers will have easy access and visibility into actual cost, revenue, and invoicing information processed in Oracle Project Costing and Oracle Project Billing.

### **Relevant, Timely Communication of Project Status**

Streamline the creation and communication of accurate and timely status reporting. Define the format, content (such as KPIs and exceptions, issues, and change orders), reporting cycle, and recipients. The audience, determined by their role on the project, has online access or receives their report as a workflow-driven email. To

**KEY BENEFITS**

Oracle Project Management offers the following benefits:

- Intuitive Web-based interfaces and navigation
- Integrated Project Initiation and Planning
- Synchronized Project Execution: Manage project documents and progress on workplan tasks.
- Coordinated Project Control: Manage issues and changes in one central location
- Real Time Project Performance Monitoring: Gives timely and accurate information to allow project managers to make better decisions.

**RELATED PRODUCTS**

Oracle Project Management is part of the Oracle Projects family of applications

- Project Collaboration
- Project Costing
- Project Billing
- Project Contracts
- Daily Business Intelligence for Projects
- Project Portfolio Analysis
- Project Resource Management

**RELATED SERVICES**

The following services are available from Oracle Support Services:

- Oracle E-Business Suite Accelerators
- Oracle Application Solution Centers
- Oracle University
- Oracle Consulting

ensure timely updates, automated reminders can be sent to project team members.

**Project Performance Reporting**

Gain valuable insight into your project performance with an online comparison of budget to actuals for cost, revenue, and margin. Standard pages display information on effort, cost, revenue, profitability, billing and collections, backlog, and earned value, spread across time by tasks and resources. Drilling down to the source systems such as Oracle Payables, Oracle Purchasing, and Oracle Receivables provides the detailed labor costs, expenses, commitments, and invoices.

**Project Manager's Reporting Pack**

Take control over your report distribution and content by using the reporting pack. The reporting pack allows users to send pre-defined or custom XML reports via e-mail to interested parties. It also allows you to create schedules for sending the reports as well as receiving the information whether you are connected to the system or not and you choose whether you receive it in PDF, HTML or RTF format.

**Performance Exceptions Reporting**

View a summary of problems and issues on a project through visual status indicators including, critical, at risk, and on track that denote exceptions, and understand the root cause of problems and issues. Take corrective actions in real-time to manage exceptions on the project. Exceptions are shown for key metrics, and are further rolled up to determine the status for key performance areas on the project.

**Oracle E-Business Suite—The Complete Solution**

Oracle E-Business Suite enables companies to efficiently manage customer processes, manufacture products, ship orders, collect payments, and more—all from applications that are built on a unified information architecture. This information architecture provides a single definition of your customers, suppliers, employees, and products—all aspects of your business. Whether you implement one module or the entire Suite, Oracle E-Business Suite enables you to share unified information across the enterprise so you can make smarter decisions with better information.

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