GETTING THE MOST OUT OF PROJECT MANAGEMENT

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IT CONVERGENCE

Abstract:

Project management theories abound, but Oracle Project Management is one of the few tools available that can integrate planning with actual transactions or events. For Project Management to be effective, it must be properly configured, and this session explains how to do that. Attendees learn to integrate Projects with robust project management methodologies to use it as a collaborative tool. After reading this paper, you'll know how to make realistic workplans and how to read information using the module's different view.

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An Overview of IT Convergence:

IT Convergence is widely recognized as a premier provider of global consulting, education, development and support services for Oracle Applications and Oracle Technologies. Since 1998, IT Convergence assisted more than 600 companies in over 50 different countries improve their business processes through better use of technology. IT Convergence is headquartered in San Francisco with offices in Chicago, New York, Madison, Buenos Aires and Shanghai.

IT Convergence's Needs:

IT Convergence's (ITC) global delivery needs continue to become more complex as project implementations cover further geographical, political and cultural boundaries. With a global workforce of over 400, ITCs outgrew its existing Portal based Project Management solution and, to meet these new challenges, Oracle Project Management was identified as the best solution. ITC is now able to standardize and enforce ITC´s Project methodologies and provide project reporting across the company.

ITC´s E-Business Applications:

IT Convergence's business systems strategy is to consolidate onto one platform to better improve its business processes and to simplify reporting for a true "One Source of Truth." This implementation strategy closely matches many of its clients and better helps ITC understand its client's needs. ITC began implementing the core Oracle E-Business Suite in 2004 with core Financials, Projects and Teleservice, to date ITC´s 11.5.10.2 footprint includes:

Oracle Financials, AP, AR, GL, i-Expense, PO, i-Procurement
Oracle HRMS: Core, SSHR
Oracle Projects: Costing, Billing, PRM, PM
Oracle CRM: Telesales, Teleservice, i-Support
Reporting: Oracle Portal/Noetix

ITC plans to implement Fixed Assets and Project Collaboration in the near future.

Project Setups

1. **Structures**

This is the most important set up to begin with, once the project is created. If Project costing or billing is installed, it is probably a known feature to break down transactions by tasks and sub-tasks.

Now, in PM, the task structures are not only for financial or budgeting purposes but also to help manage some other activities related to the same project that are not necessarily financials.

The very first difficulty we found when started implementing this module was to differentiate the two structures: Financial and work structures. Although the main concepts are the same, their uses are quite different.

In fact, Workplan tasks are to help managers and team members to plan, track and deliver projects in a collaborative and efficient way. Resources are assigned and schedule at project or task levels through the duration of each activity. Workplan structures can also be used as programs, grouping multiples projects in a given hierarchy.

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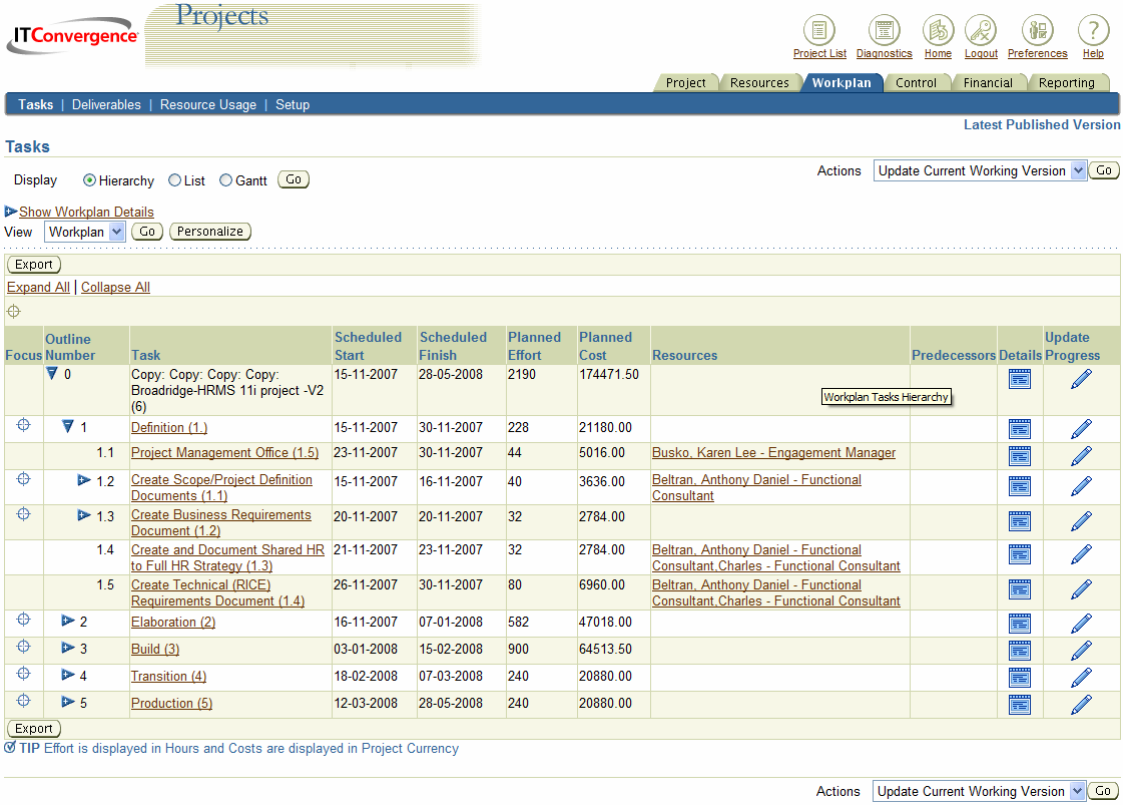
Financial Tasks Structures consists in grouping transaction criteria that work as buckets where all transactions (cost and revenue) are collected. They are also used for budgeting purposes and together with actual transactions are the bases for project analysis.



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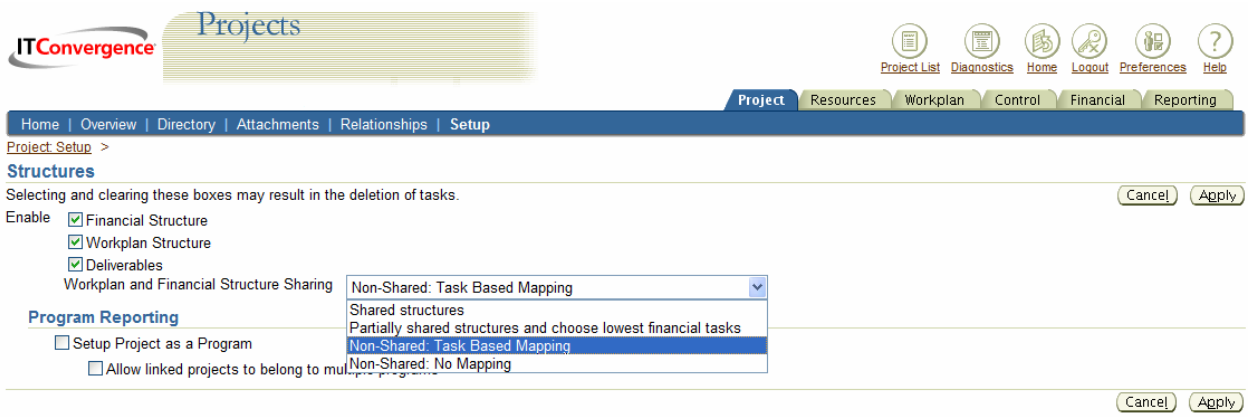
When a new project is created from a template, structures must be enabled. Usually Financials are enabled by default. Workplan and Deliverables must be enabled manually by projects or templates.

Structures Integration

When workplan and financial structures are enabled for projects or templates, It must be decided whether or not they are integrated, and if so, to what degree.

You do this by choosing one of the following options on the Structures setup page:



Fully Shared Structures

Workplan Structure		**Financial Structure**	
1	Task 1 WP	1	Task 1 FP
1.1	Task 1.1 WP	1.1	Task 1.1 FP
1.2	Task 1.2 WP	1.2	Task 1.2 FP
2	Task 2 WP	2	Task 2 FP
2.1	Task 2.1 WP	2.1	Task 2.1 FP
2.2	Task 2.2 WP	2.2	Task 2.2 FP
2.3	Task 2.3 WP	2.3	Task 2.3 FP
3	Task 3 WP	3	Task 3 FP
3.1	Task 3.1 WP	3.1	Task 3.1 FP
3.2	Task 3.2 WP	3.2	Task 3.2 FP
3.3	Task 3.3 WP	3.3	Task 3.3 FP
4	Task 4 WP	4	Task 4 FP
4.1	Task 4.1 WP	4.1	Task 4.1 FP
4.2	Task 4.2 WP	4.2	Task 4.2 FP

• "**Partially Shared Structures:** If you decide you want your project to have a partially shared workplan and financial structure, you start by creating your workplan structure first. When you are ready to set up the financial structure for your project, you identify which workplan tasks you want to share by determining the workplan tasks that will be the **lowest-level tasks** of the shared portion of the financial structure. When you identify the workplan tasks that you want to share, the system displays those tasks and the elements of the Workplan structure above them in the financial structure. The workplan tasks *below* the selected tasks are not present in the financial Structure."

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Partially Shared Structures

Workplan Structure		**Financial Structure**	
1	Task 1 WP	1	Task 1 FP
1.1	Task 1.1 WP	1.1	Task 1.1 FP
1.2	Task 1.2 WP	1.2	Task 1.2 FP
2	Task 2 WP	2	Task 2 FP
2.1	Task 2.1 WP	2.1	Task 2.1 FP
2.2	Task 2.2 WP	2.2	Task 2.2 FP
2.3	Task 2.3 WP	2.3	Task 2.3 FP
3	Task 3 WP		
3.1	Task 3.1 WP		
3.2	Task 3.2 WP		
3.3	Task 3.3 WP		
4	Task 4 WP		
4.1	Task 4.1 WP		
4.2	Task 4.2 WP		

• "**Non-Shared: Task-Based Mapping:** Enables you to map individual Workplan structure tasks to individual financial structure tasks. You can map workplan tasks to lowest-level financial tasks. You can also map multiple workplan tasks to a single financial task."

Partially Shared Structures

Workplan Structure		**Financial Structure**	
1	Task 1 WP	1	Task 1 FP
1.1	Task 1.1 WP	1.1	Task 1.1 FP
1.2	Task 1.2 WP	1.2	Task 1.2 FP
2	Task 2 WP	2	Task 2 FP
2.1	Task 2.1 WP	2.1	Task 2.1 FP
2.2	Task 2.2 WP	2.2	Task 2.2 FP
2.3	Task 2.3 WP	2.3	Task 2.3 FP
3	Task 3 WP	2	Task 2 FP
3.1	Task 3.1 WP	2.1	Task 2.1 FP
3.2	Task 3.2 WP	2.2	Task 2.2 FP
3.3	Task 3.3 WP	2.3	Task 2.3 FP
4	Task 4 WP	2	Task 2 FP
4.1	Task 4.1 WP	2.2	Task 2.2 FP

• "**Non-Shared: No Mapping:** Choose this if you do not want to integrate your project Workplan and financial structures in any way."

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Partially Shared Structures

Workplan Structure		**Financial Structure**	
1	Task 1 WP	A	Task A FP
1.1	Task 1.1 WP	A.A	Task A.A FP
1.2	Task 1.2 WP	A.B	Task A.B FP
2	Task 2 WP	B	Task B FP
2.1	Task 2.1 WP	B.A	Task B.A FP
2.2	Task 2.2 WP	B.B	Task B.B FP
2.3	Task 2.3 WP	B.C	Task B.C FP
3	Task 3 WP		
3.1	Task 3.1 WP		
3.2	Task 3.2 WP		
3.3	Task 3.3 WP		
4	Task 4 WP		
4.1	Task 4.1 WP		
4.2	Task 4.2 WP		

2. Deliverables

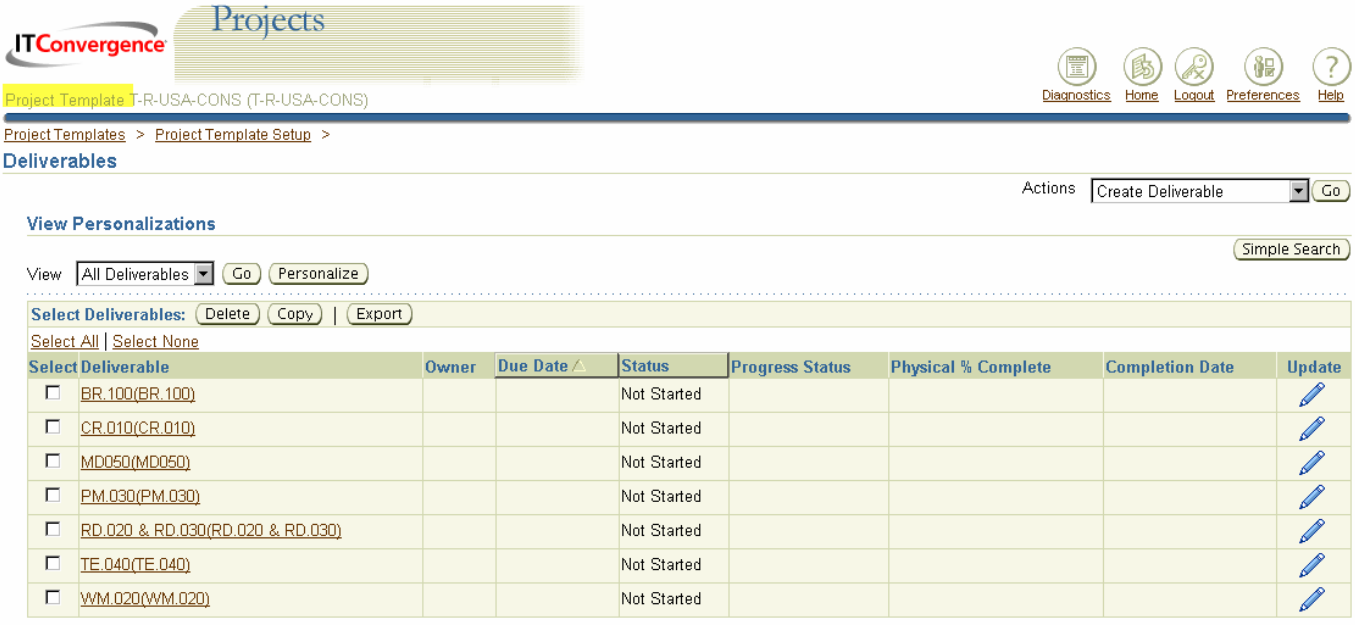
A project deliverable is the output that must be produced to complete a project or task. Basically is the product of the work.

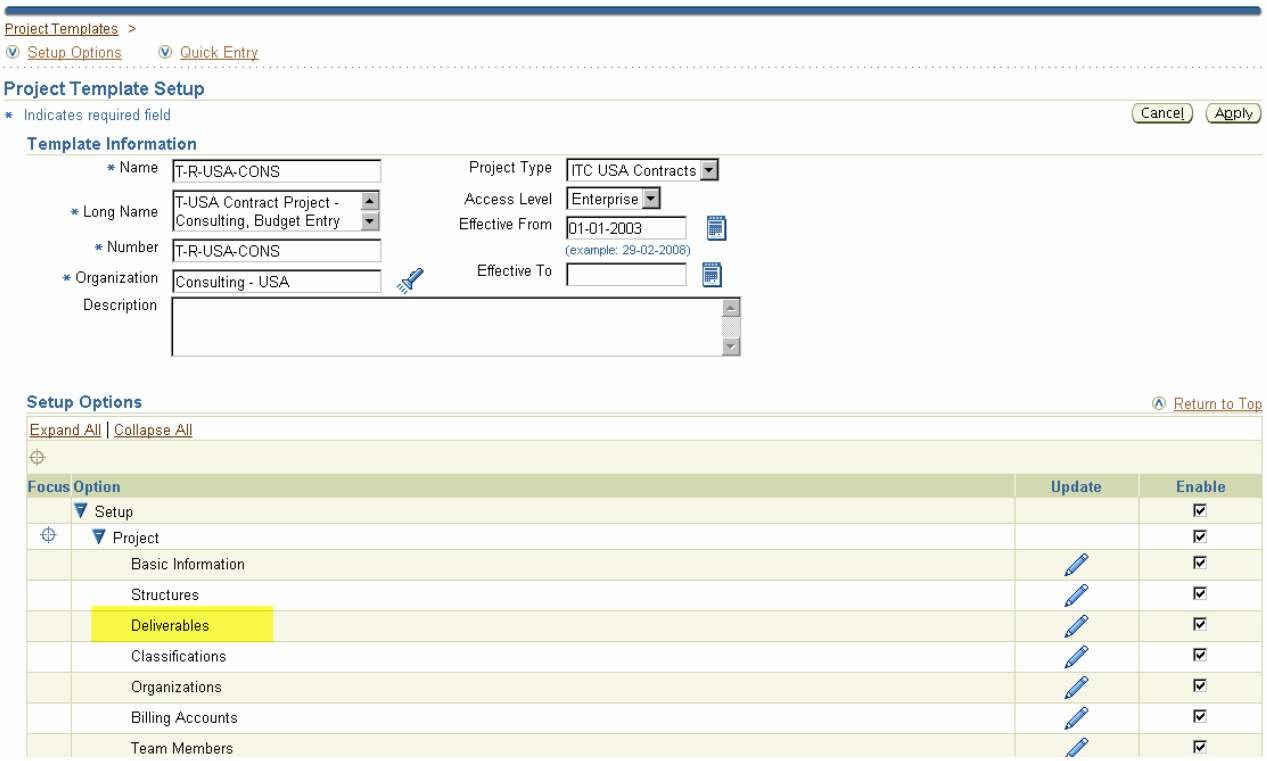
Then can be associated at project or task levels and they are classified as Items, Documents or Others.

For standard projects when activities are known in advance, Deliverables can be created in the templates so they came along when used to set up new projects. So, once the structure of the project is completed, Deliverables can be associated to its tasks.

To do it, using a responsibility that allows access to setups in project management (different than the one used in forms) navigate to Setup> Project Templates and then select the template you want to edit and select Deliverable.

In this screen you can add, copy and delete existing deliverables for this template.





In Addition, to each deliverable, Actions can be set to add even more detail to the work that needs to be done. An Action represent an specific activity tied to a Deliverable and can be managed separately and even assigned to a different resource than the deliverable.

As work is performed, Actions must be completed and deliverables must be updated with progresses that will finally impact in the progress of the whole Workplan

3. Integration with Microsoft Projects

Microsoft Projects is the most common tool used to track down projects, plan activities, assign resources, schedule tasks etc. Many people or companies use this tools as it is very well known by everyone and represents a simple activity.

However, this tool is not usually integrated with the main system of companies loosing valuable data to integrate such as actual transactions and budgeting tools.

Oracle Project Management made easier these activities by combining both tools and let create and update workplans in one or the other side, maintaining the integrity of the information, making really easy the hard work of creating and maintaining workplans.

To use this interface, it is necessary to install the functionality that is located under the setup menu, Microsoft Project Integration Installation

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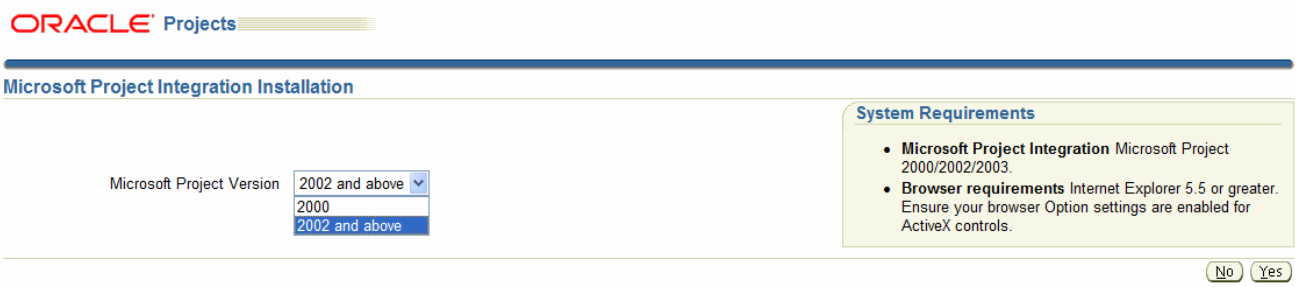
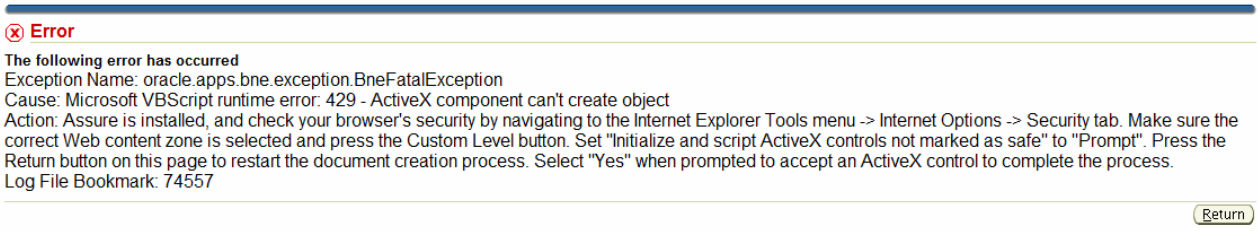
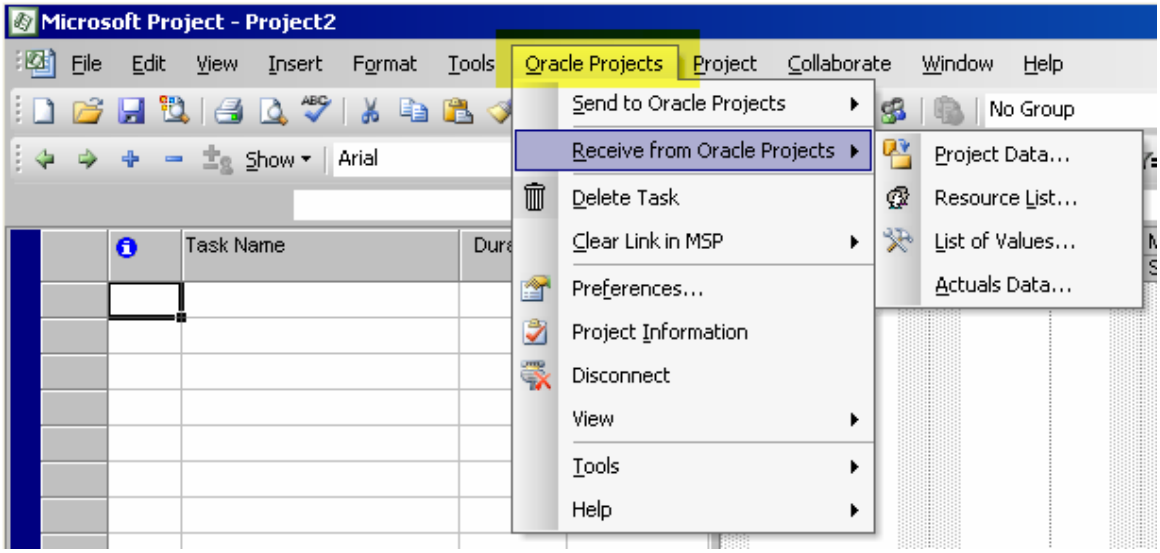


Once you selected the MS Project version you have installed in your PC, click ion Yes. Based on your browser (Recommend to use Internet Explorer 6) security profiles, you may get an error like this:



In this case, enable all ActiveX Controls in the security tab of the Options menu of IE and retry the installation

Once completed the installation, a new Menu will be added to your Microsoft Project as follows:



Attributes transferred back and forth

In the page 5.23 of the Project Management User Manual there is a list of attributes available to transfer from one system to the other and the direction they can be transferred.

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It is very important to take in consideration this list since it may have a huge impact in the way you use MS Project along with Oracle. New internal procedures must be written and communicated to all team members avoid misunderstandings that may affect the information already in the system.

The information in Oracle must have priority over any MS files and when uploaded, make sure you are not overlapping the current information (specially if you are not using Workplan versioning).

Actual Process to combine MS Projects and Oracle Project Management

The way ITC uses MS Projects is strictly to simplify the definition of the Workplan prior to load it to Oracle. Normally, when the project is not 100 % defined, lots of options are in considerations: What are the phases are to be used, what resources are to be assigned and what are the final products to be delivered.

In this stage is very helpful to share ideas (therefore MS Projects files) between all managers and members to finally define the best strategy to face the project.

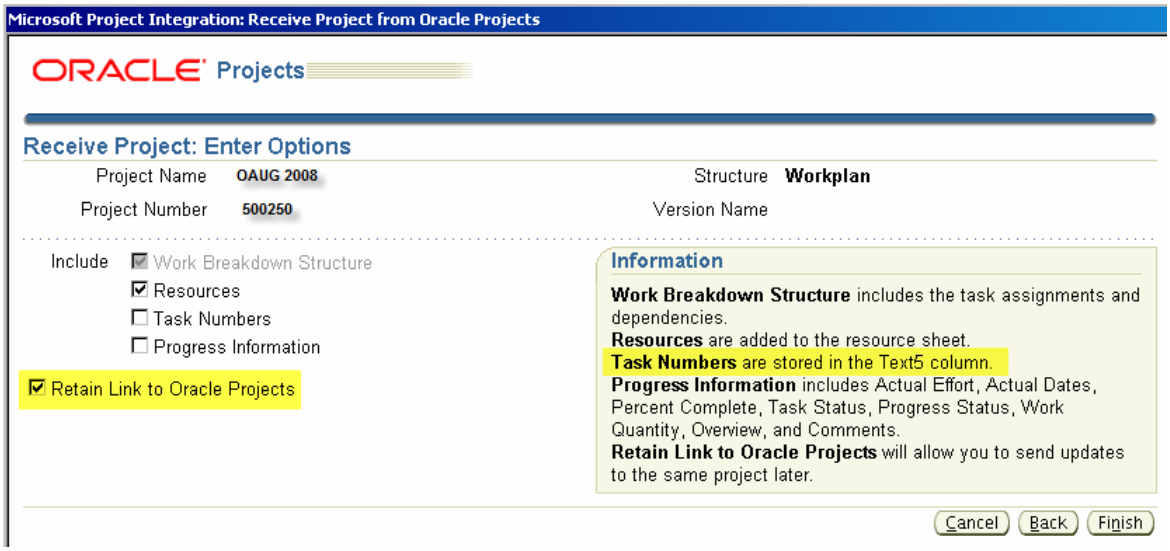
Then, the final MS file version can be uploaded to Oracle to finish the set up and baseline it.

After that, all progress are uploaded in Oracle despite the possibility to do it in MS Projects too.

Steps to Download project Information to MS Projects

A project can be uploaded to MS Projects from scratch by creating a new one from an existing template by selecting the menu Oracle Projects>Send to Oracle Project>Project Data. Then you will be prompted to login in Oracle and select a responsibility to proceed. When this is done, the link between the two systems remains in the MS file so it could be used later on for updates.

If the project exists in Oracle (i.e. defaulted by a template) and needs updates in the Workplan structure, then the information can be downloaded as follows:



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It is important to check the option Retain Link to Oracle Projects. Otherwise, it won't be able to upload back to Oracle.

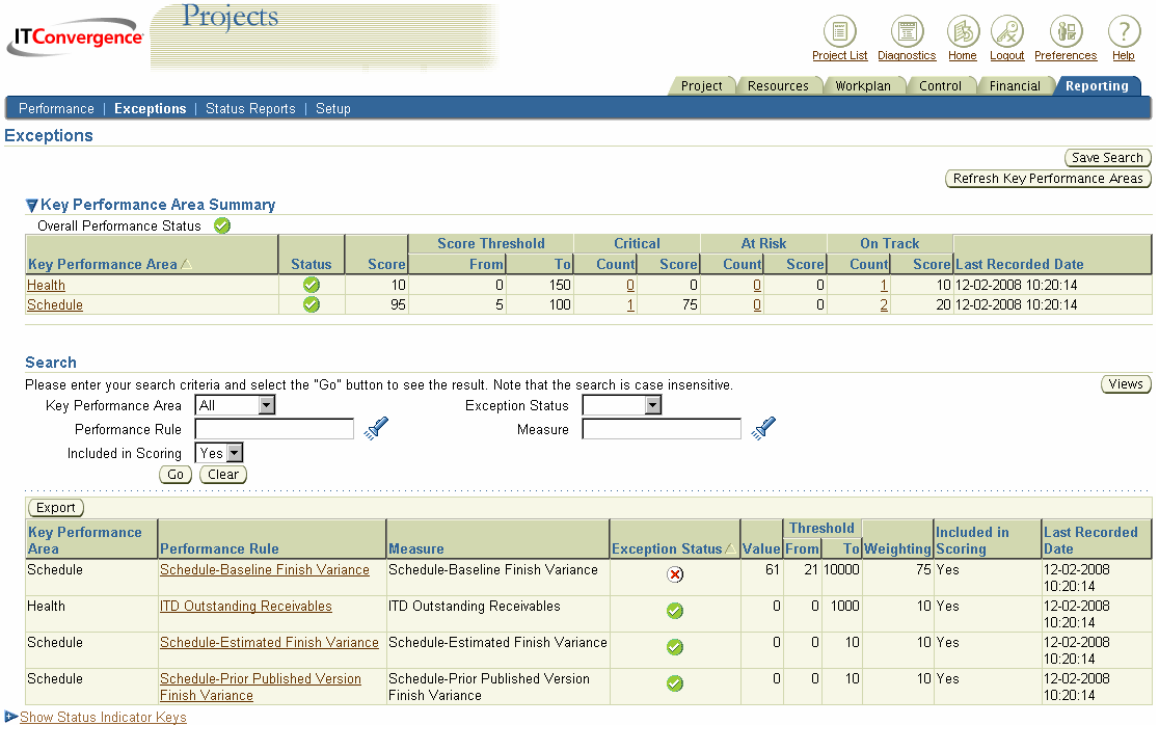
Another important note highlighted above is where the task numbers are being stored in Microsoft Projects. If the structure is being modified later on, this is the field you must use to edit the task numbers in MS Projects. There are also options for tasks numbering that are helpful too (such as tasks ids or task outline numbers). For more information related to task numbering options you can find it in the Oracle Project Management Users Guide page 5-20.

4. Project Performance Indicators

Once everything is set up, wokplan, tasks and deliverables are on-going it's tome to see how we are doing in multiple aspects:

We want to have an idea of the time (hours) invested in tasks/project, compare them with actual and analyze potential deviations. We also may want to know how we are doing with our budget and forecasts.

For all of these metrics, Oracle Project Management gives us the ability to put all these information in a way that makes easy to understand the health of the project as shown in the next screen.



During the implementation, all key areas must be identified and set up accordingly:

a. Identify the area to be evaluated: Financial, Health or Schedule

b. Set Score Threshold for each of them.

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c. Set the weighting each one of them

d. Define de meaning of each Threshold and Weighting (On track, In Trouble, At Risk)

e. Set notifications.

All of this must be defined within the Setup menu of the application and Key Performance Area Scoring Rules option

Once these Key Performance Areas are defined, then they must be assigned to the projects along with the notification policies.

Note that these numbers are not being updated on line so when the KPA are recently assigned or when new transactions exist, then the Refresh Key Performance Areas button must be clicked. This button launches the process *PRC: Generate Performance Scores and Notifications.*

Project Status Reports

In addition to these indicators, there are also some other screens where we can see valuable information related the status of each project: The main screen of the reporting tab and also the status report within it.

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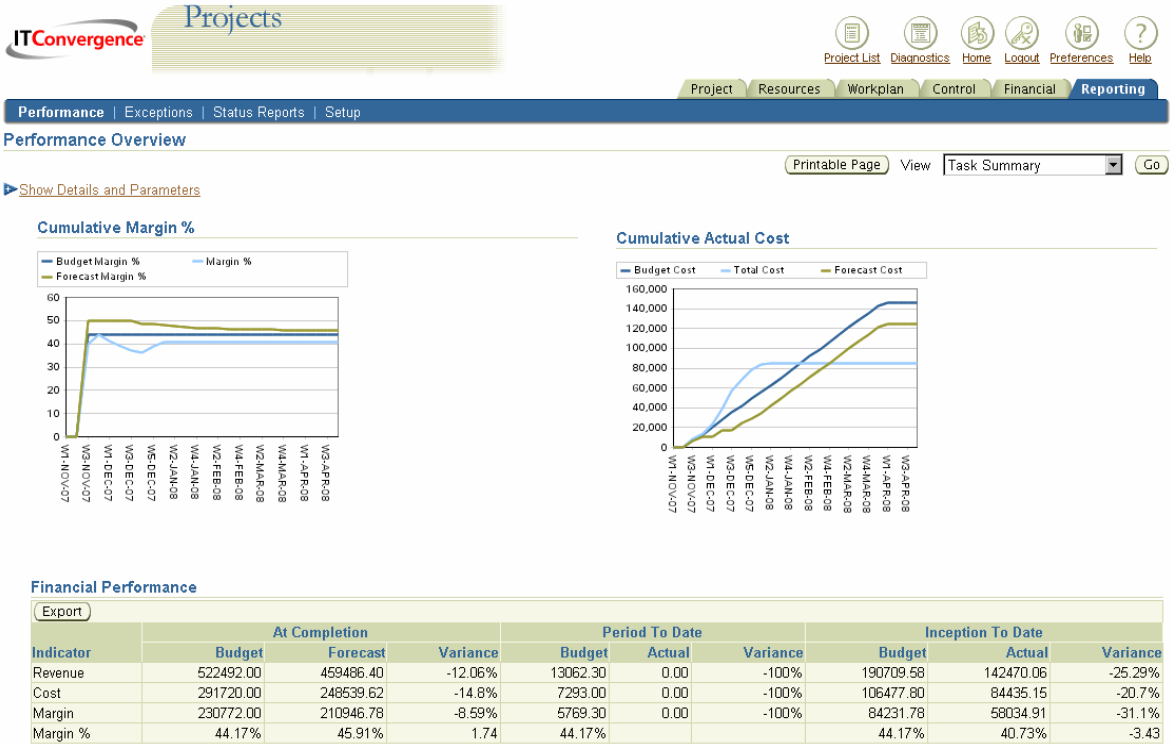
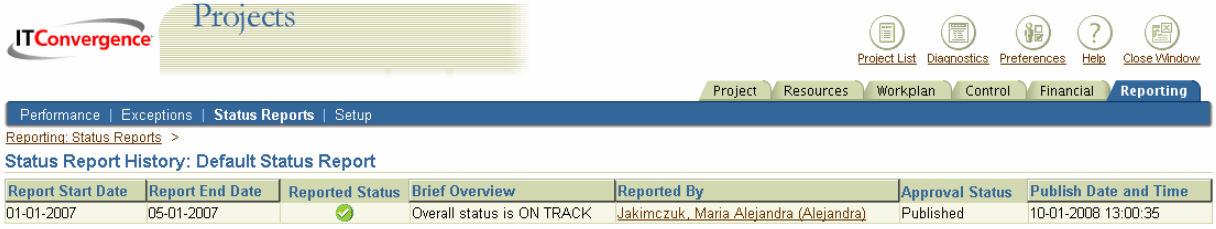


	At Completion			Period To Date			Inception To Date		
Indicator	Budget	Forecast	Variance	Budget	Actual	Variance	Budget	Actual	Variance
Revenue	522492.00	459486.40	-12.06%	13062.30	0.00	-100%	190709.58	142470.06	-25.29%
Cost	291720.00	248539.62	-14.8%	7293.00	0.00	-100%	106477.80	84435.15	-20.7%
Margin	230772.00	210946.78	-8.59%	5769.30	0.00	-100%	84231.78	58034.91	-31.1%
Margin %	44.17%	45.91%	1.74	44.17%			44.17%	40.73%	-3.43

This screen will show us financial information as updated from Project Costing or Billing (Actual Transactions) compared with Budgets and Forecasts. This information also can be drilled down for more details at task and resources levels.

Status Reports

In this screen you will be able to see all published reports where detailed information is described per main area of the project.
These status reports must be defined and assigned to each project setting also up the notification rules once they are published.



Report Start Date	Report End Date	Reported Status	Brief Overview	Reported By	Approval Status	Publish Date and Time
01-01-2007	05-01-2007		Overall status is ON TRACK	Jakimczuk, Maria Alejandra (Alejandra)	Published	10-01-2008 13:00:35

In these reports, project managers are forced to write about the project to support the information available at the moment. The reporting cycle may also defined, along with alerts to push this to happen in a periodic manner.

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ITConvergence Projects

Project List | Diagnostics | Preferences | Help | Close Window

Project | Resources | Workplan | Control | Financial | Reporting

Performance | Exceptions | **Status Reports** | Setup

Maintain Status Reports | History | Printable Page

Default Status Report

Project Information

Project Name		Project Manager	Jakimczuk, Maria Alejandra (Alejandra)
Project Number		Start Date	**16-Oct-2007**
Organization	**Business Information Systems - ARG**	Finish Date	**06-Mar-2008**
Project Type	**ITC ARG Cost Center**	Status	**Approved**

General Progress

Reported Status	On Track	Report Start Date	**01-Jan-2007**
Publish Date and Time	**10-Jan-2008 13:00:31**	Report End Date	**05-Jan-2007**
Brief Overview	**Overall status is ON TRACK**		Report End Date

Summary

Performed requirements gathering workshops.
Detected the need to print from Oracle PM some reports with ITC's look & feel. The reports are:
- Change Request Form
- Issue / Risk Form
- Change Request Log
- Issue / Risk Log
- Status Report

Issues

Accomplishments

Project Management:
Working on CR.010 Project Management Plan.
Finished Project Work Plan.

Project Execution:
CRP1 workshop for data gathering and requirements. We went through the following: work plan management, risk & issue management, change request management, budget management and security

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Conclusions

Oracle Project Management is a great tool for enforcing company based project management methodologies thru the use of project “Templates”. Templates are preconfigured with Basic Workplans that contain Milestones, Deliverables, Documents Templates and Status Reports based on the type of project to be delivered. This “Template” becomes a Toolkit for the project stakeholders giving them everything they need to get started with complex projects while having the ability to report progress across the Enterprise. By leveraging existing investments in Oracle’s Project Accounting modules this solution was easy to implement with no customizations required. Out of the box reports meet 95% of our Reporting needs with the latest information available.

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