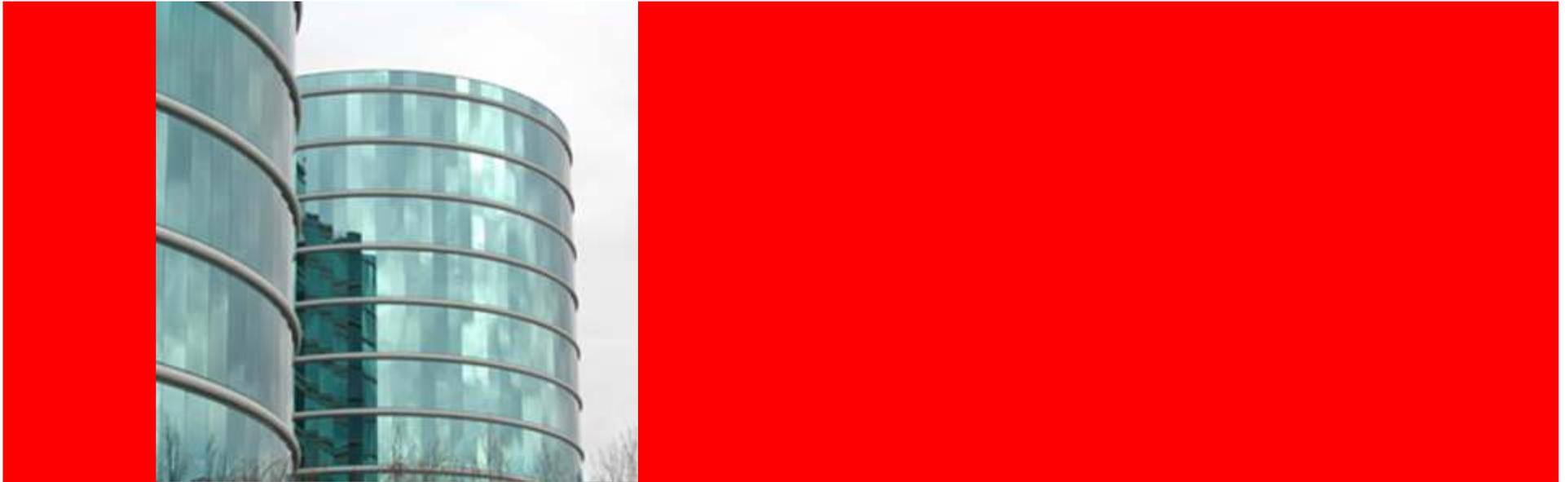ORACLE®

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Program Management with EBS Projects:
Integration to Microsoft Project Server and Primavera

Barbara Fox, Director Product Strategy, Oracle EBS Projects
Dr. Stefan Frank, Director Product Management, Impress Software

Agenda

- Project Management Business Needs
- New Integration Solution Announcement
- Oracle EBS Project & Portfolio Management
- Impress for Projects
  - Impress Overview
  - Product Solution
  - Customer Case Study
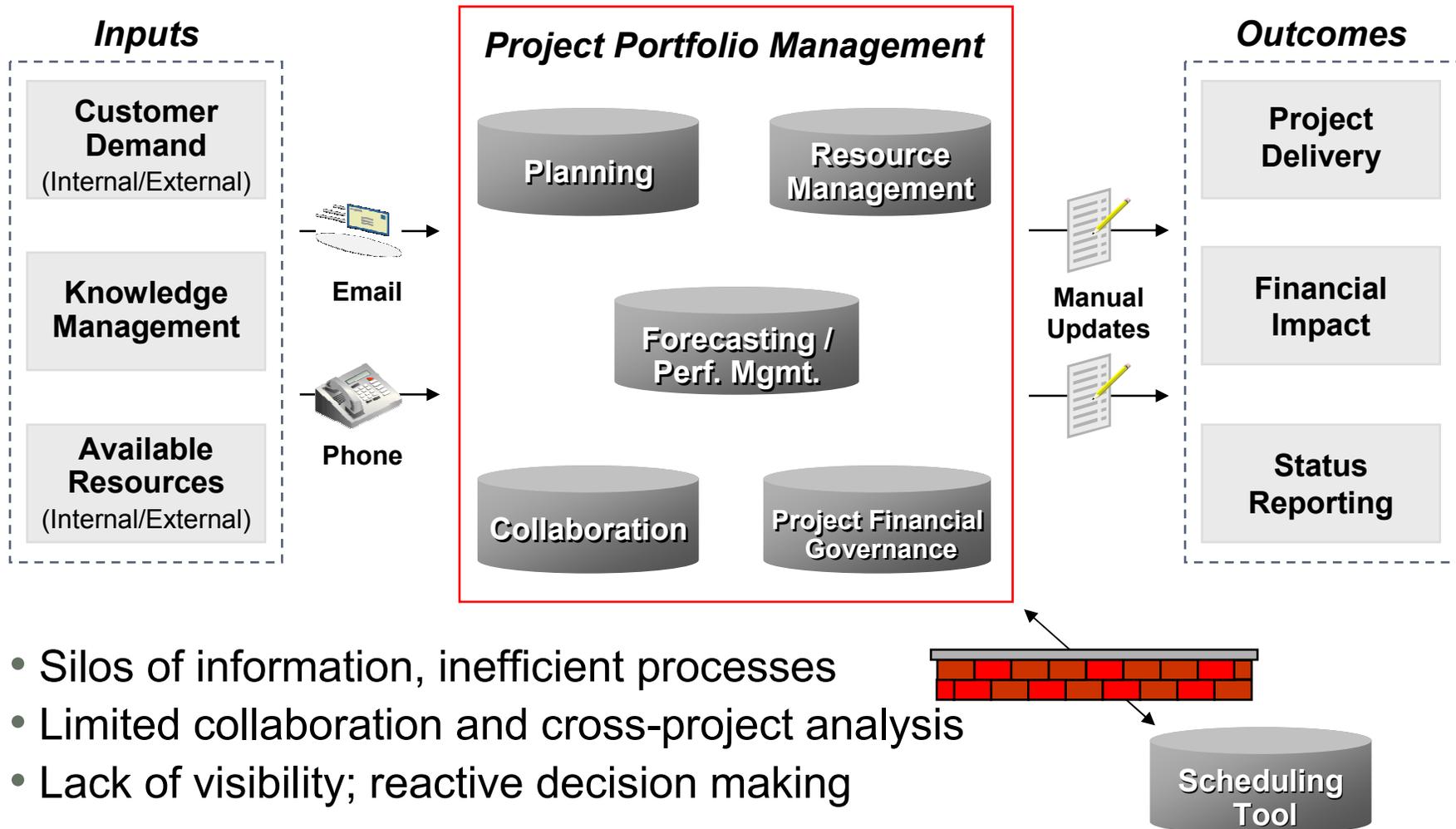 - Product Demonstration
- Q&A

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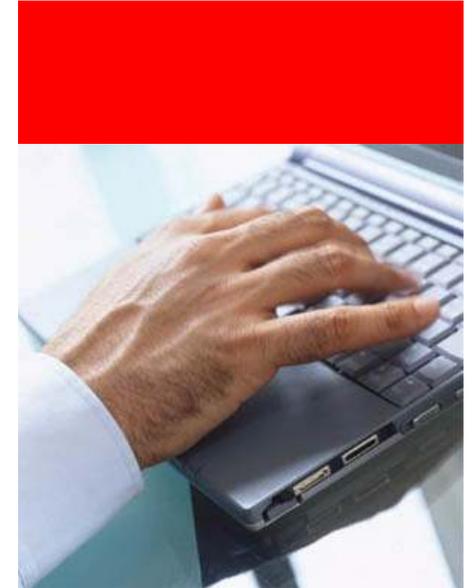
The following is intended to outline our general product direction. It is intended for information purposes only, and may not be incorporated into any contract. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions.
The development, release, and timing of any features or functionality described for Oracle's products remains at the sole discretion of Oracle.

Project Management
Business Needs

Customer Operational Challenges

Inputs

Customer Demand
(Internal/External)

Knowledge Management

Available Resources
(Internal/External)

Email

Phone

Project Portfolio Management

Planning

Resource Management

Forecasting / Perf. Mgmt.

Collaboration

Project Financial Governance

Manual Updates

Outcomes

Project Delivery

Financial Impact

Status Reporting

Scheduling Tool

- Silos of information, inefficient processes
- Limited collaboration and cross-project analysis
- Lack of visibility; reactive decision making

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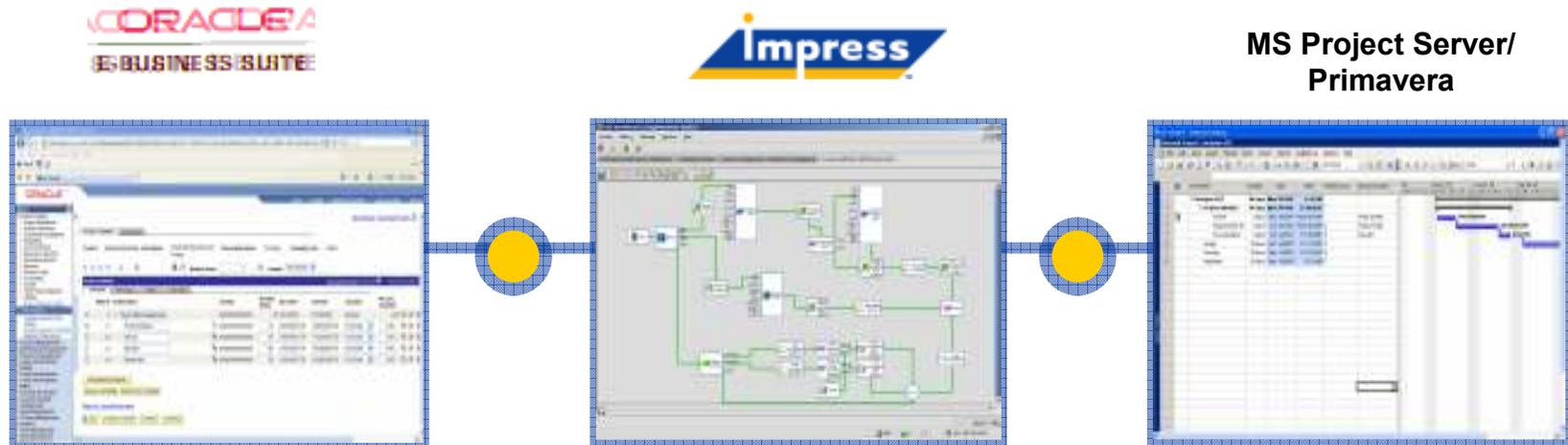# Impress for Project Portfolio Management
Overview

- Enables fully integrated project management for Oracle EBS with Microsoft Project Server or Primavera, allowing organizations to optimally plan, schedule, perform and account for projects

- By combining the program management capabilities of Oracle with the project scheduling and execution capabilities of Microsoft Project Server or Primavera, project and service-intensive organizations are able to more efficiently execute projects while maintaining appropriate project control and visibility

- Allows these organizations to make the most of this powerful combination by automating critical cross-system business processes and data flows

Impress for PPM Benefits

- Fully supported solution from a strategic partnership between Oracle and Impress

- Synchronizes Oracle Projects with Microsoft Project Server or Primavera

- Built using Oracle Fusion Middleware for enhanced capabilities and shared efficiencies

- Shorter deployment times and faster integration for a lower total cost of ownership

- Adaptable solution provides a standardized, resilient integration
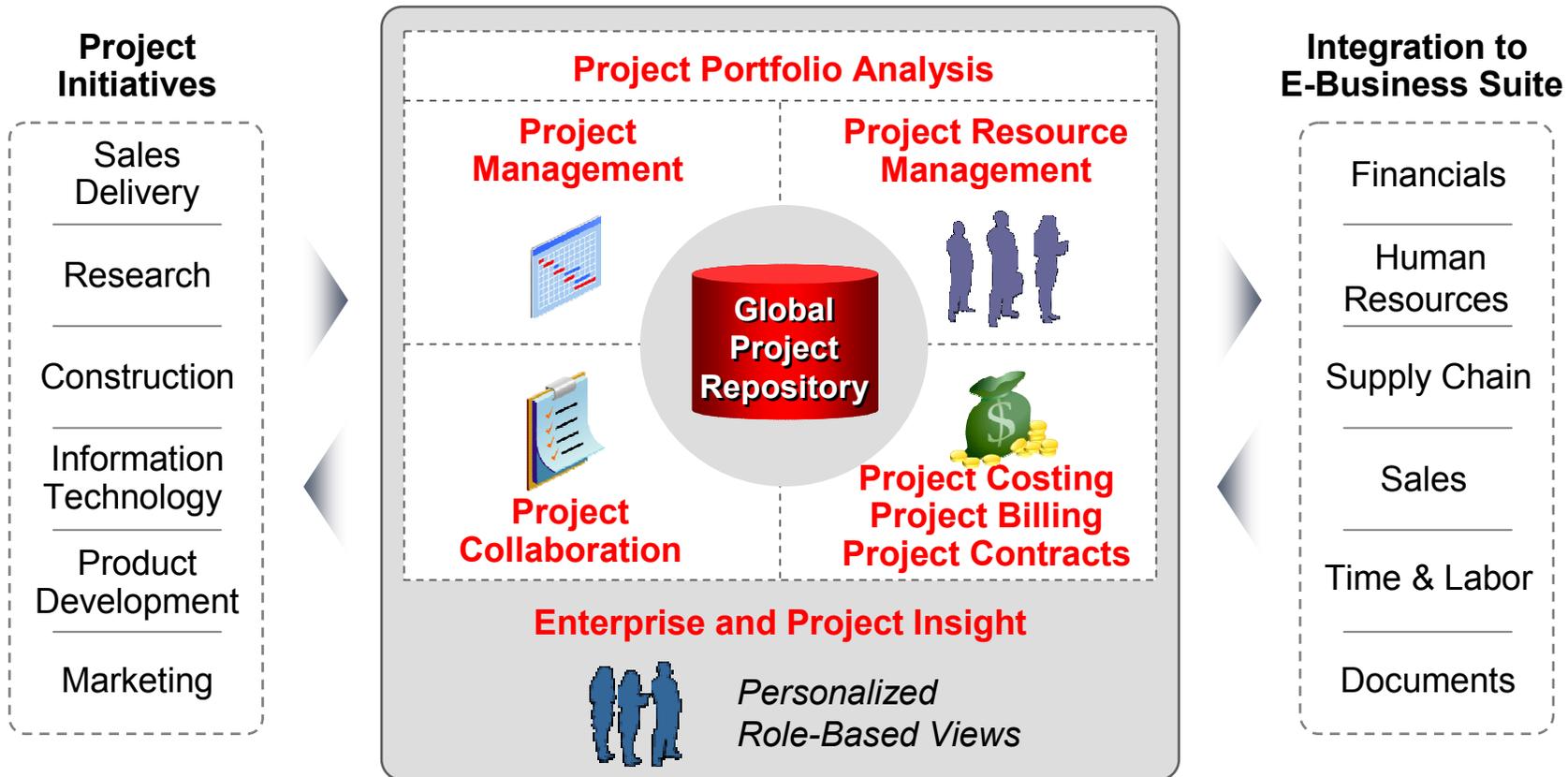
Impress-Oracle Partnership

- Early integration launch at Oracle Open World 2007
  - Joint specification from Impress & Oracle teams
  - Built on Fusion Middleware

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Oracle Project & Portfolio Management Application

Oracle Project & Portfolio Management

Support for the Project Driven Enterprise

Project Initiatives

- Sales Delivery
- Research
- Construction
- Information Technology
- Product Development
- Marketing

Project Portfolio Analysis

Project Management

Project Resource Management

Global Project Repository

Project Collaboration

Project Costing
Project Billing
Project Contracts

Enterprise and Project Insight

Personalized Role-Based Views

Integration to E-Business Suite

- Financials
- Human Resources
- Supply Chain
- Sales
- Time & Labor
- Documents

Oracle Project Management

Integrated Intelligence

Project Manager

Team Members

Executives

Role-Based Access

- Establish plan
- Assign resources
- Automatically create budget & forecast

Plan

- Complete deliverables
- Share documents
- Raise issues
- Update progress

Execute

Control

- View progress
- Manage changes
- Forecast at completion

- Manage performance & exceptions
- Communicate status

Financial Systems

HR System

Scheduling / Estimating Tools

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Impress for Projects

Dr. Stefan Frank
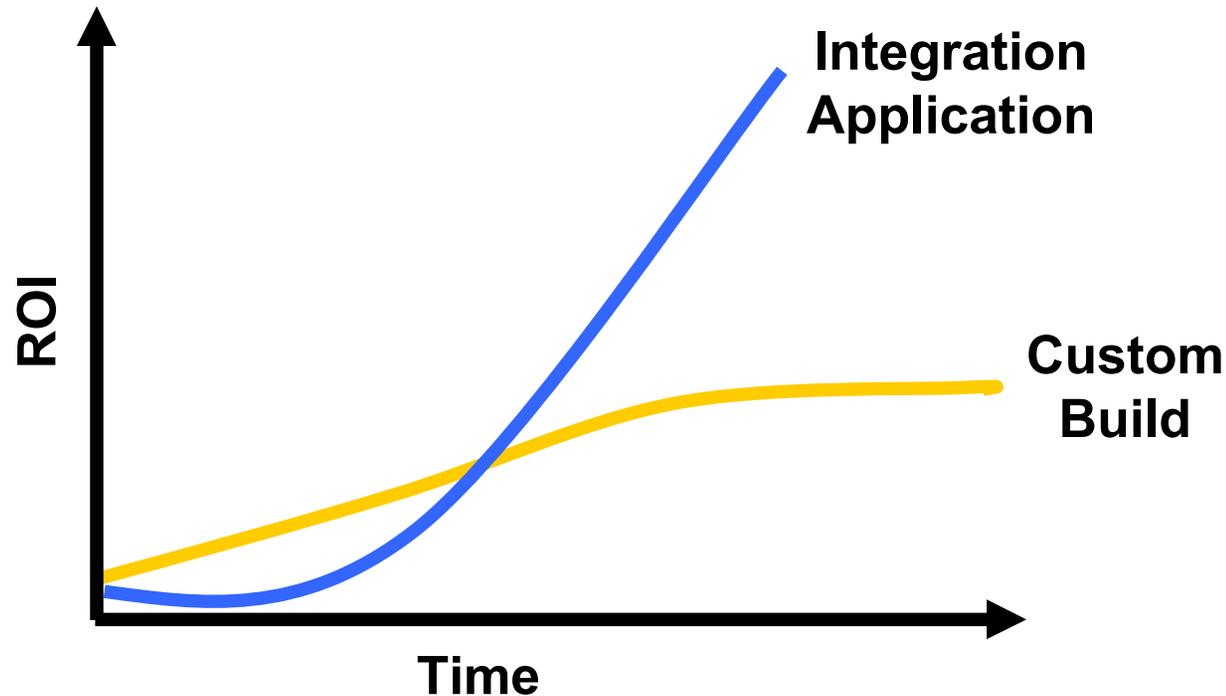Director Product Management

Impress Software, Inc.

Enterprise Software Company	• Delivering integration solutions since 1996 • Corporate offices in Waltham, MA and Hannover, Ger. • Developer of Packaged Integration Applications
Application Partners	ORACLE SAP Certified Integration MINER&MINER a Telvent company Microsoft CERTIFIED Partner PRIMAVERA TECHNOLOGY PARTNER ESRI
Market Focus	• **Enterprise Project Management** • **Enterprise Asset Management** • **Spatial Asset Management**
50+ Blue Chip Customers	PG&E Pacific Gas and Electric Company Rockwell Collins Consumers Energy Count on Us bp conectiv AOL. ONTARIO POWER GENERATION MARIN MUNICIPAL WATER DISTRICT

Integration Applications
The Smart Alternative to Custom Integration

- Off-the-shelf, supported and upgradeable software products
- Automate cross-application business processes
- Repeatable across a large number of organizations

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Benefits of Integration Applications

| **Business Owners**	▪ Speed deployment through "productized" best practices ▪ Make better decisions with more timely, accurate information

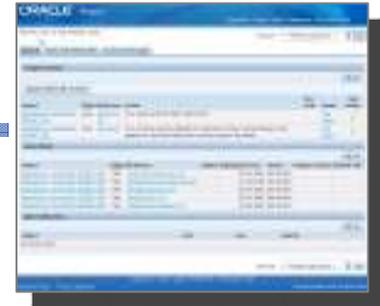| **IT Owners**	▪ Reduce the risk of runaway custom integration projects ▪ Avoid headaches associated with supporting custom builds

Finance Owners	▪ Minimize TCO with a supported, commercial software product ▪ Ensure accuracy of corporate data across enterprise systems

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Impress for Projects
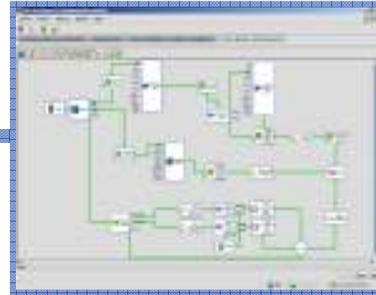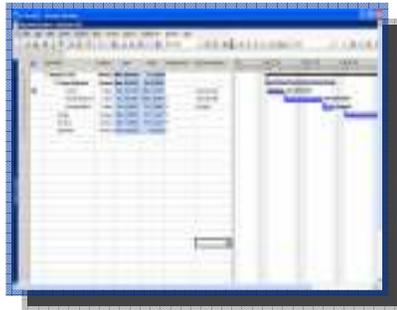
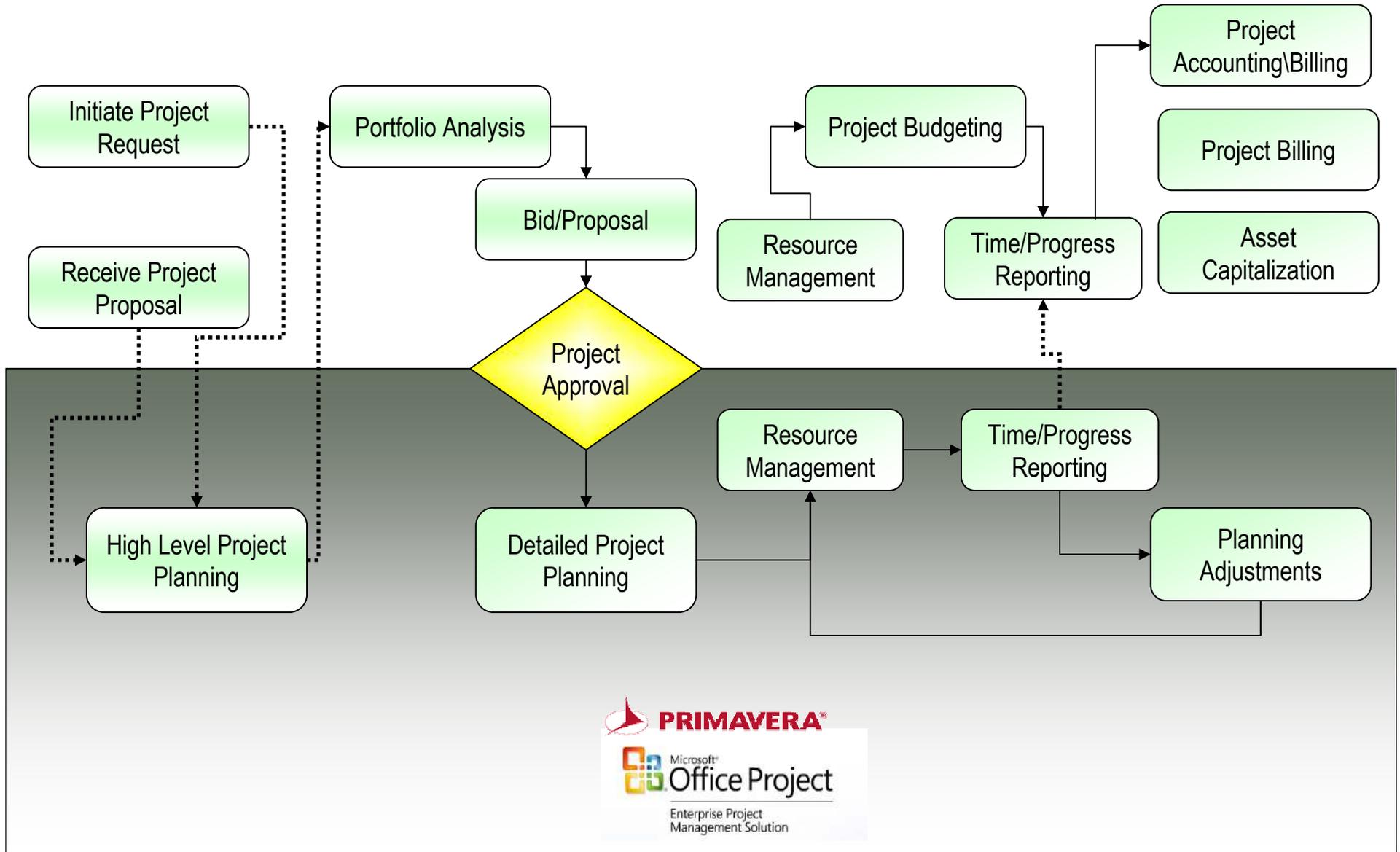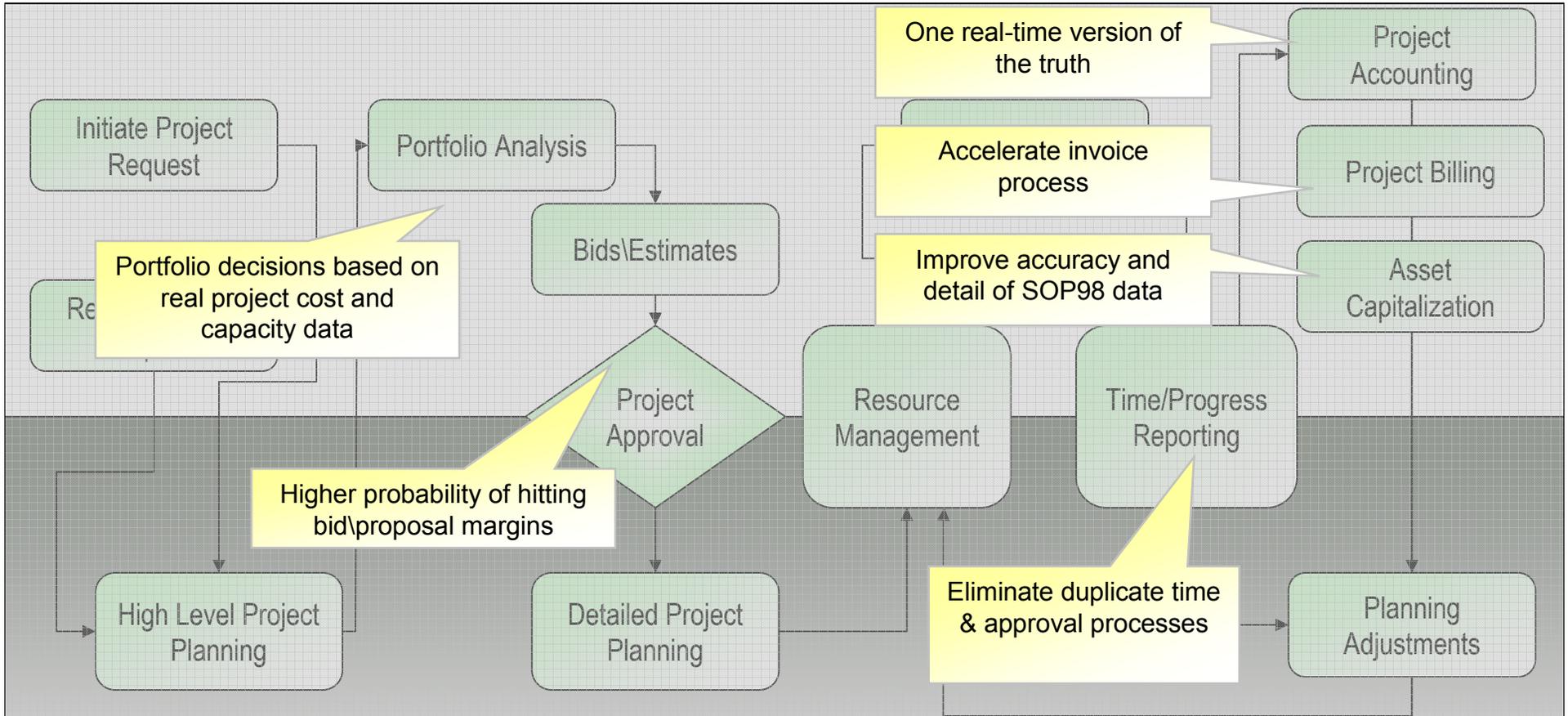Primavera / MS Project Server   Oracle Projects

- Introduced 2002 to integrate project execution with ERP
- 46 customers, 75+ deployed sites
- Project Scheduling: Microsoft Project Server, Primavera
- Integration launch at OOW 2007

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A Typical Project Lifecycle Process

```
Initiate Project          Portfolio Analysis                    Project Budgeting          Project
Request                                                                                    Accounting\Billing

                                                                                           Project Billing
Receive Project                   Bid/Proposal          Resource          Time/Progress
Proposal                                                Management        Reporting        Asset
                                                                                           Capitalization

                                  Project
                                  Approval

                                                        Resource          Time/Progress
High Level Project        Detailed Project              Management        Reporting        Planning
Planning                  Planning                                                         Adjustments
```

PRIMAVERA®

Microsoft®
Office Project

Enterprise Project
Management Solution

Impress Optimizes Your Project Lifecycle Process

Product Solution

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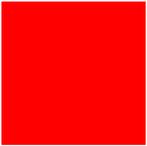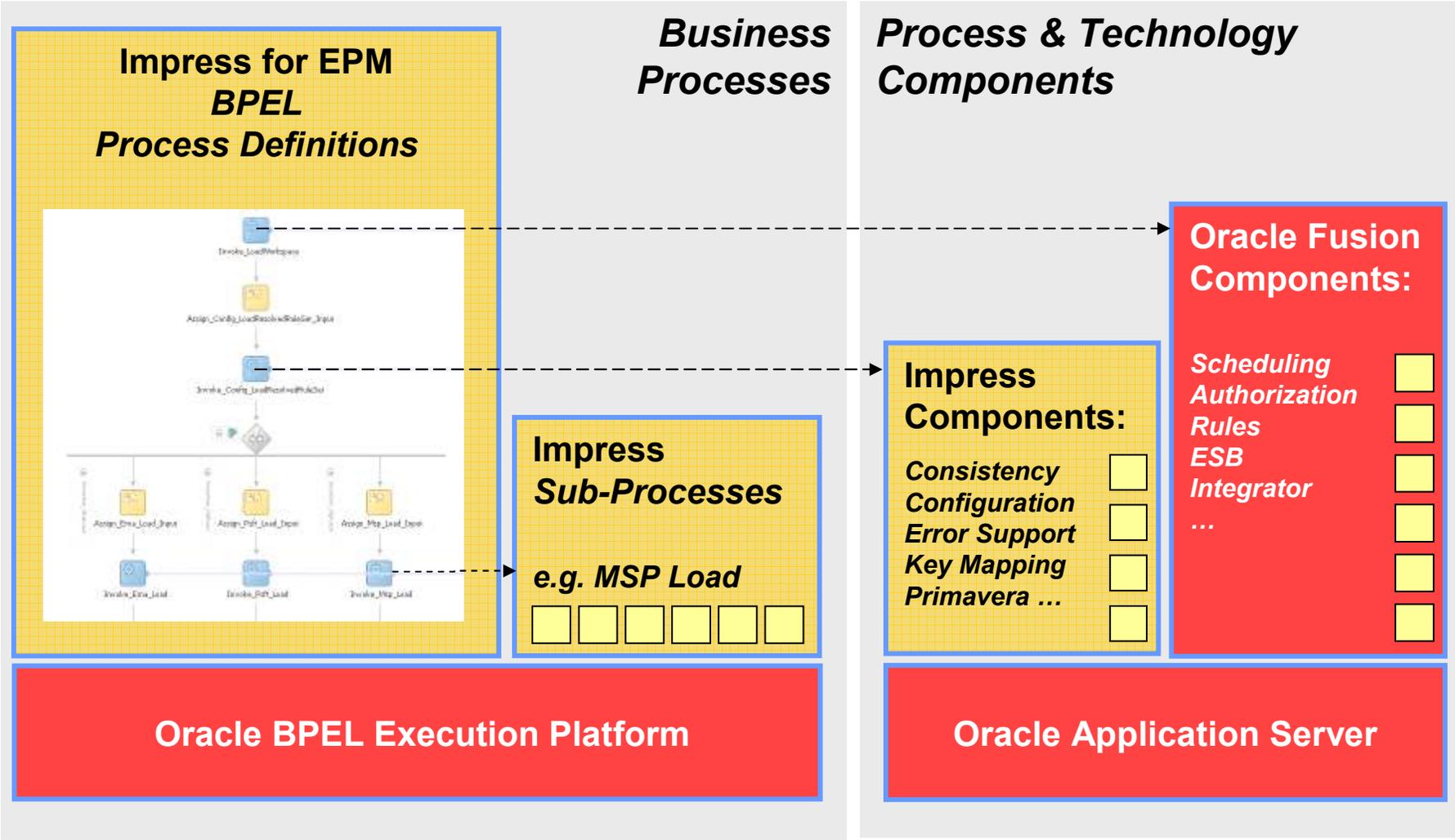
Impress for Projects

- An application deployed on the **Oracle Fusion Middleware technology stack**

- A set of **pre-defined integration processes** to synchronize Oracle Projects with Primavera (MS Project Server) in various stages of project management

- A set of **standard configuration points** where we see variations in the project management practice of companies

- A set of pre-defined **easily adaptable information mappings**

- **User interfaces** for manual information access and synchronization (MS Project Plug-In, Standalone AJAX, Portlets)
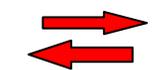
Impress for Projects
Fusion Architecture

Business Processes

Process & Technology Components

Impress for EPM
BPEL
Process Definitions

Oracle Fusion Components:

Scheduling
Authorization
Rules
ESB
Integrator
…

Impress Components:

Consistency
Configuration
Error Support
Key Mapping
Primavera …

Impress Sub-Processes

e.g. MSP Load

Oracle BPEL Execution Platform

Oracle Application Server

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Impress for Projects
A Packaged Solution to Handle All of This

Microsoft Office Project — Enterprise Project Management Solution

PRIMAVERA

Left		Right
• Resource Definition	➡	• Resource Definition
• Project Information	⬌	• Project Information
• WBS Structure & Activities	⬌	• WBS Structure & Activities
• Dependencies	⬌	• Dependencies
• Assignments (project team & activity)	⬌	• Assignments (project team & activity)
• Resource requests	⬌	• Resource requests
• Time & Expense	⬅	• Time & Expense
• Financials	➡	• Financials

- • Financials
  - – Budgets by budget item
  - – Actual costs by budget item

- • Financials
  - – Budgets by budget item
  - – Actual costs by budget item

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How is the Data Transferred?

Services Projects

RFQ arrives

Quote Creation

Internal Projects

Project Request

Cost Estimation

Project Awarded / Approved

Yes

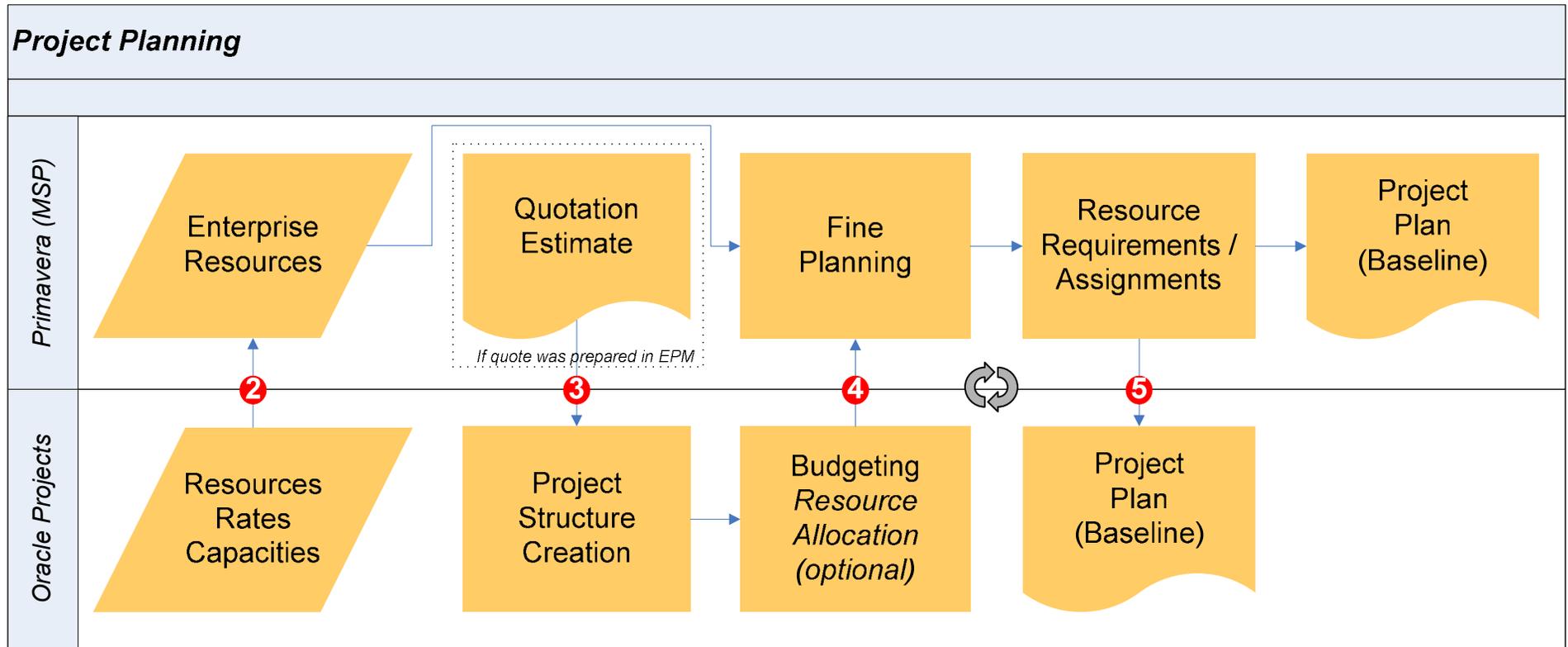Project Planning

Project Execution

Post Project Reporting

No

Project Ends
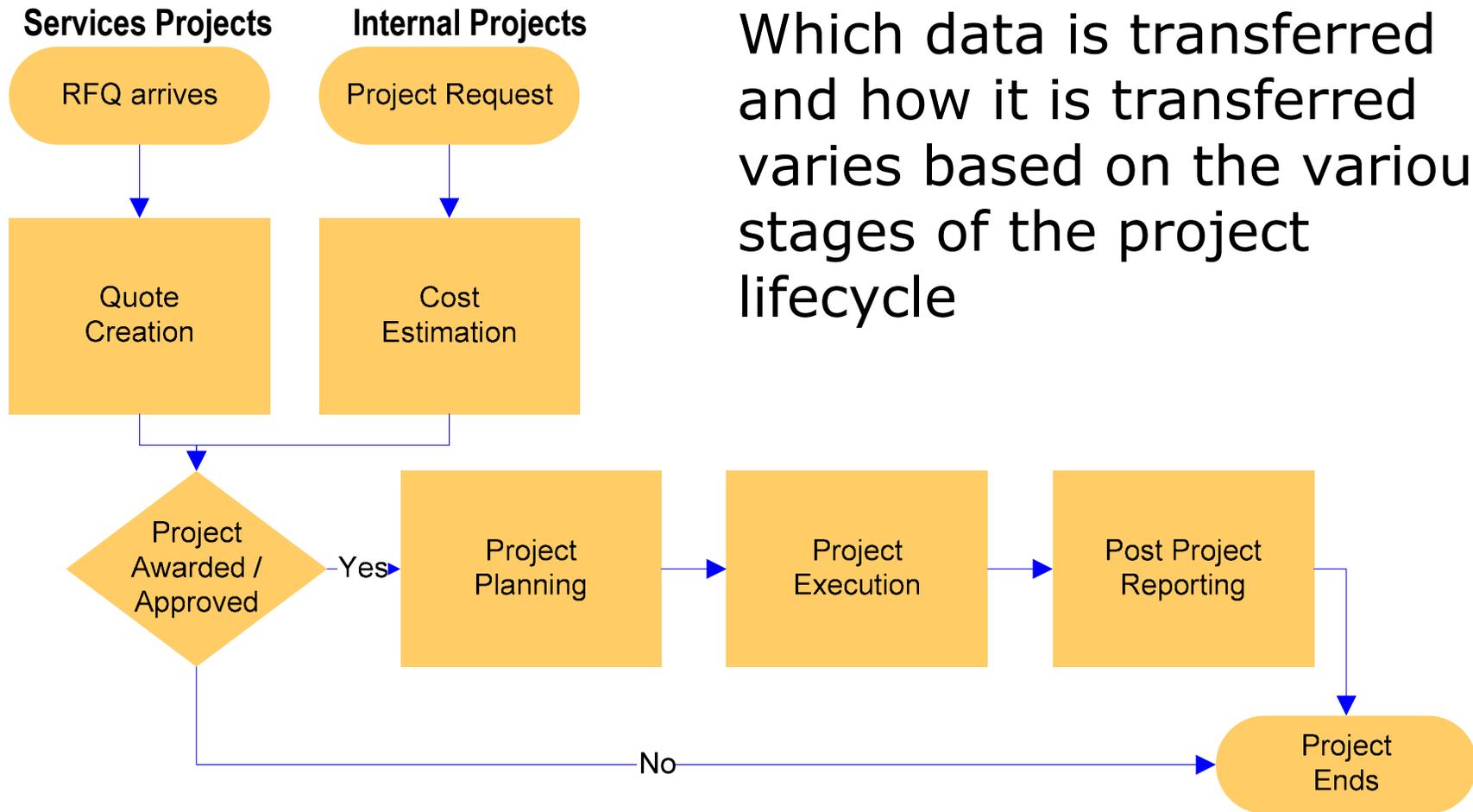
Which data is transferred and how it is transferred varies based on the various stages of the project lifecycle

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Process Interface Points

Phase 2 - Planning

Project Planning

Primavera (MSP)

- Enterprise Resources
- Quotation Estimate — *If quote was prepared in EPM*
- Fine Planning
- Resource Requirements / Assignments
- Project Plan (Baseline)

Oracle Projects

- Resources Rates Capacities
- Project Structure Creation
- Budgeting *Resource Allocation (optional)*
- Project Plan (Baseline)

Interface points: ② ③ ④ ⑤

IP4: Oracle Project Plan -> MSP Project Update
IP5: MSP Detailed Scheduled Plan -> Oracle Project Plan
IP2/3 as before

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Oracle Projects Project Plan to Scheduler

PRIMAVERA®

Microsoft® Office Project
Enterprise Project Management Solution

- Data Exchanged:
- WBS Structure
- Activities
  - Update data on all activities
  - Creation / deletion of activities above the accounting level limit (see major configuration)
- Resource Assignments
  - Approval state
  - Replacement of generic roles with named resources
  - Materials and assets
- Budget
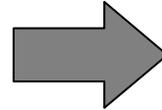
Resource Name	Booking Type	Type	Std. Rate	Max. Units
DBA	Committed	Work	$125.00/hr	100%
Henning	Committed	Work	$125.00/hr	100%
Project Manager	Committed	Work	$175.00/hr	100%
Senior Consultant	Committed	Work	$125.00/hr	100%
christian	Committed	Work	$125.00/hr	100%

Booking types are changed to committed when approved in Oracle

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Detailed Schedule Plan to Oracle Projects

- Data Exchanged
- Tasks
  - Update of Primavera / MSP driven fields
  - Creation / deletion of selected tasks
- Schedule
- Planned efforts (Cost)
- Project and task level resource assignments / requests
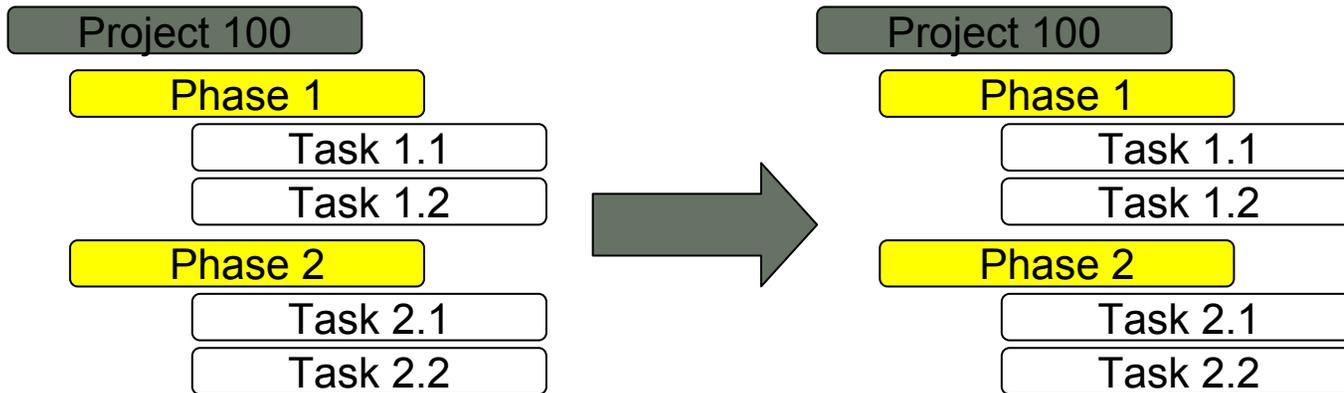 - see major variations
- Dependencies (optional)
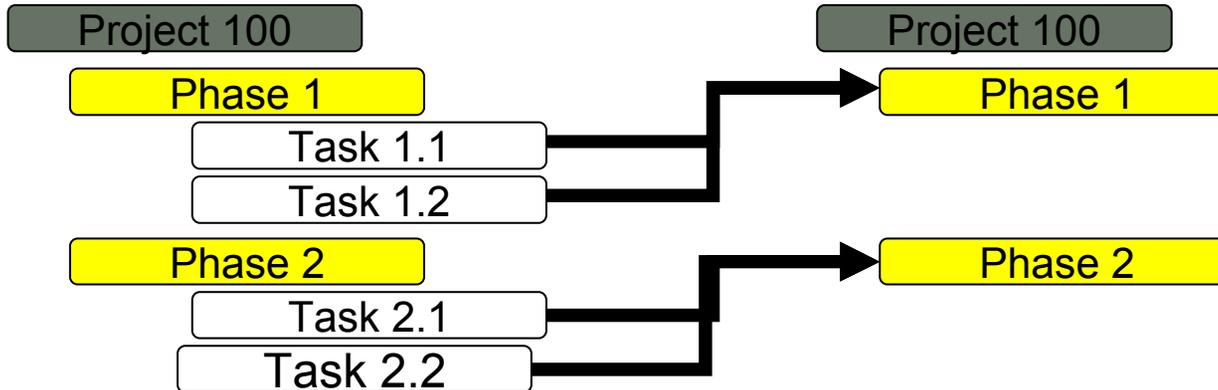
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Flexible Configurations
Granularity

Scenario 1:

Mirror

Project 100
- Phase 1
  - Task 1.1
  - Task 1.2
- Phase 2
  - Task 2.1
  - Task 2.2

→

Project 100
- Phase 1
  - Task 1.1
  - Task 1.2
- Phase 2
  - Task 2.1
  - Task 2.2

Scenario 2:

Rollup

Project 100
- Phase 1
  - Task 1.1
  - Task 1.2
- Phase 2
  - Task 2.1
  - Task 2.2

→

Project 100
- Phase 1
- Phase 2

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Other Common Configuration Examples

- Quotations
  - Where will the high level project estimate be derived from?
- Accounting Structure
  - What should happen if someone in Primavera or Microsoft changes the required accounting levels?
- Resources
  - Generic or named resources
- Assignments
  - Where will resource assignments be done?
- Rates
  - Standard rates, "burdened" rates, no rates
- Time Entry
  - Which system will handle time reporting?

Specific Configurations for Oracle Projects

- Financial Plan vs. Work Plan

- Typical Options:
  - Shared FP/WP in Oracle, Impress rolls up
  - Partially Shared FP/WP (roll-up) in Oracle
  - Non-shared FP/WP in Oracle, Impress to distribute from Primavera

Case Study: Distributed Infrastructure Network Operator

Company Overview

- Employees: 30,000+
- Infrastructure Project Budget: in excess of $5 billion annually
- Around 8000 active projects at any given time

Challenges/Opportunities

- Progress and cost reporting disconnected from the field
- Project planners spend to much time on reporting – project execution suffers
- Reporting does not include the "complete picture"
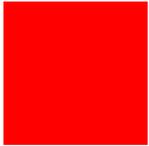- Deviation management needs a lot of manual intervention

Solutions

- Oracle EBS Project Management
- Oracle EBS Project Costing & Billing
- Oracle EBS Financials
- Oracle EBS Purchasing
- Oracle EBS HR & Payroll
- Primavera P3E 5.0 (Upgrading to P6)

Product Demonstration

The Impress Solution

QUESTIONS
ANSWERS

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Stop By…

Visit the Impress Booth #**1533**

- See a live demonstration
- Discuss best practices & additional features
    - Resource resolution / assignments
    - Microsoft Project Plug-in
    - Business Processes
    - Consistency Management
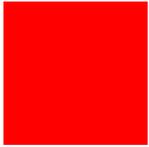   - Error Management

For More Information

search.oracle.com

| Oracle Project Portfolio Management | 🔍 |

or

oracle.com/applications/ppm

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THANK YOU

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