

# Getting the most out of Oracle Project Management

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IT Convergence is a global provider of consulting, education, development and support services for Oracle Applications and Technologies. Since 1998, IT Convergence helped more than 600 companies in over 50 different countries improve their business processes through better use of technology.

IT Convergence runs its business on an Oracle E-Business Suite platform. Our 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

# Our PM Implementation Goals

- **Enforce PMO Standards across Company**
- Centralize Budgets and Forecasts generated from PRM Assignments
- Manage Deliverables and Project Status across company
- Decrease financial closing cycle time
- Report KPI's of Actual vs. Budget to Project Stakeholders
- Empower Stakeholders with improved visibility

# Business Needs

- **PMO standards varied from Project to Project**
- Project Manager's information was always outdated
- Oracle Project Accounting's core budgeting forms weren't used effectively nor updated
- We had to rely on Project Managers to manually track and report progress of key deliverables
- Spreadsheets were emailed back and forth

# Main Setups to focus on

- Structures
- Deliverables
- Microsoft Project Integration
- Key Performance Indicators
- Reporting

# Structures

- **Workplan Structures**
  - Tasks Structure and dependencies
  - Programs
  - Resources Assignments
  - Deliverables
  - Changes and Actions
- **Financial Structures**
  - Task Structures
  - Track Billing and Costing
  - Budgets and Forecast
  - Other Financial Informations

# Structures Integration

- Fully Shared Structures
- Partially Structures
- Non Shared – Task Based Mapping
- Non Shared – No Mapping

**ITConvergence** Projects

Project List | Diagnostics | Home | Logout | Preferences | Help

Home | Overview | Directory | Attachments | Relationships | Setup

Project | Resources | Workplan | Control | Financial | Reporting

Project: Setup >

**Structures**

Selecting and clearing these boxes may result in the deletion of tasks.

Enable  Financial Structure  Workplan Structure  Deliverables

Workplan and Financial Structure Sharing  Non-Shared: Task Based Mapping

**Program Reporting**

Setup Project as a Program

Allow linked projects to belong to multiple programs

Cancel Apply

# Workplan Tasks



Projects

Project List
Diagnostics
Home
Logout
Preferences
Help

Project
Resources
Workplan
Control
Financial
Reporting

Tasks | Deliverables | Resource Usage | Setup
Latest Published Version

**Tasks**

Display  Hierarchy  List  Gantt  Actions

[▶ Show Workplan Details](#)

View

[Expand All](#) | [Collapse All](#)

Focus	Outline Number	Task	Scheduled Start	Scheduled Finish	Planned Effort	Planned Cost	Resources	Predecessors	Update Details	Progress
	▼ 0	Copy: Copy: Copy: Copy: Broadridge-HRMS 11i project -V2 (6)	15-11-2007	28-05-2008	2190	174471.50				
	▼ 1	Definition (1.)	15-11-2007	30-11-2007	228	21180.00				
	1.1	Project Management Office (1.5)	23-11-2007	30-11-2007	44	5016.00	Busko, Karen Lee - Engagement Manager			
	▶ 1.2	Create Scope/Project Definition Documents (1.1)	15-11-2007	16-11-2007	40	3636.00	Beltran, Anthony Daniel - Functional Consultant			
	▶ 1.3	Create Business Requirements Document (1.2)	20-11-2007	20-11-2007	32	2784.00				
	1.4	Create and Document Shared HR to Full HR Strategy (1.3)	21-11-2007	23-11-2007	32	2784.00	Beltran, Anthony Daniel - Functional Consultant, Charles - Functional Consultant			
	1.5	Create Technical (RICE) Requirements Document (1.4)	26-11-2007	30-11-2007	80	6960.00	Beltran, Anthony Daniel - Functional Consultant, Charles - Functional Consultant			
	▶ 2	Elaboration (2)	16-11-2007	07-01-2008	582	47018.00				
	▶ 3	Build (3)	03-01-2008	15-02-2008	900	64513.50				
	▶ 4	Transition (4)	18-02-2008	07-03-2008	240	20880.00				
	▶ 5	Production (5)	12-03-2008	28-05-2008	240	20880.00				

TIP Effort is displayed in Hours and Costs are displayed in Project Currency

Actions

# Financial Tasks



- Project List
- Diagnostics
- Home
- Logout
- Preferences
- Help

- Project
- Resources
- Workplan
- Control
- Financial
- Reporting

Budgets and Forecasts | Billing | Percent Complete | **Tasks** | Setup

## Financial Tasks

Display  Hierarchy  List

Actions

### Views

View

[Expand All](#) | [Collapse All](#)

Focus	Outline Number	Task Number	Task Name	Organization	Task Manager	Details
	▼ 0	1	T-R-USA-CONS			
	1	1	<a href="#">Marketing</a>	Consulting - USA		
	2	2	<a href="#">Definition</a>	Consulting - USA		
	3	3	<a href="#">Elaboration</a>	Consulting - USA		
	4	4	<a href="#">Build</a>	Consulting - USA		
	5	5	<a href="#">Transition</a>	Consulting - USA		
	6	6	<a href="#">Production</a>	Consulting - USA		
	7	7	<a href="#">Closure</a>	Consulting - USA		
	8	900	<a href="#">Expenses</a>	Consulting - USA		
	9	999	<a href="#">Tax</a>	Consulting - USA		

Actions

# Deliverables

- A project deliverable is the output that must be produced to complete a project or task.
  - Products
  - Documentations (BR100, CR10, etc)
  - Prototypes



ITConvergence Projects

Project List Diagnostics Home Logout Preferences Help

Project Resources **Workplan** Control Financial Reporting

Tasks | Deliverables | Resource Usage | Setup

Deliverables

Actions Create Deliverable Go

View Personalizations

View All Deliverables Go Personalize Simple Search

Select Deliverables: Delete Copy Export

Select Deliverable	Owner	Due Date	Status	Progress Status	Physical % Complete	Completion Date	Update
<input type="checkbox"/> BR100(BR100)	Lapeme, Analia Rita	28-05-2008	In Progress	⚠ At Risk	20		
<input type="checkbox"/> CR010(CR010)	Lapeme, Analia Rita	28-05-2008	In Progress	✅ On Track	35		
<input type="checkbox"/> CR020(CR020)	Lapeme, Analia Rita	28-05-2008	Not Started				

# Deliverables – Main Features

- Association at project or task levels
- Set and assign Actions by deliverable
- Collect and Roll Up Deliverable Progress
- Manage Deliverables Collaboratively

# Deliverable Type Classes

- Documents
- Items
- Others

**ITConvergence**  
Projects

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[Deliverable Types](#) >

**Update Deliverable Type**

\* Indicates required field

\* Name

Description

\* Effective From    
(example: 28-02-2008)

Effective To  

Initial Deliverable Status

**Deliverable Type Class**

Enable Deliverable Actions

Enable Progress Entry

# Deliverable Creation Screen

**IT Convergence** **Projects**

Project List | Diagnostics | Home | Logout | Preferences | Help

Project | Resources | **Workplan** | Control | Financial | Reporting

Tasks | **Deliverables** | Resource Usage | Setup

Workplan: Deliverables >

**Create Deliverable**

Cancel | Add Another | Apply | Apply and Create Actions

**General** | Progress | Workplan Tasks

\* Indicates required field

\* Name

\* Short Name

\* Type

Owner

Description

Status

Due Date

(example: 28-02-2008)

**Attachments**

Search

Please enter the "Go" button to see the result. Note that the search is case insensitive.

Name

[Show More Search Options](#)

# Microsoft Project Integration

- Microsoft Project Integration links Microsoft Project and Oracle Projects, so that you can work with a project in both Oracle Projects and Microsoft Project.
- Based on fields mapping and functionalities, need to define which activities will be performed in each system.
- Be aware of risks to keep information consistent in both sides.

# MS Projects Installation

**ORACLE** Projects

## Microsoft Project Integration Installation

Microsoft Project Version

### System Requirements

- **Microsoft Project Integration** Microsoft Project 2000/2002/2003.
- **Browser requirements** Internet Explorer 5.5 or greater. Ensure your browser Option settings are enabled for ActiveX controls.

### Error

The following error has occurred

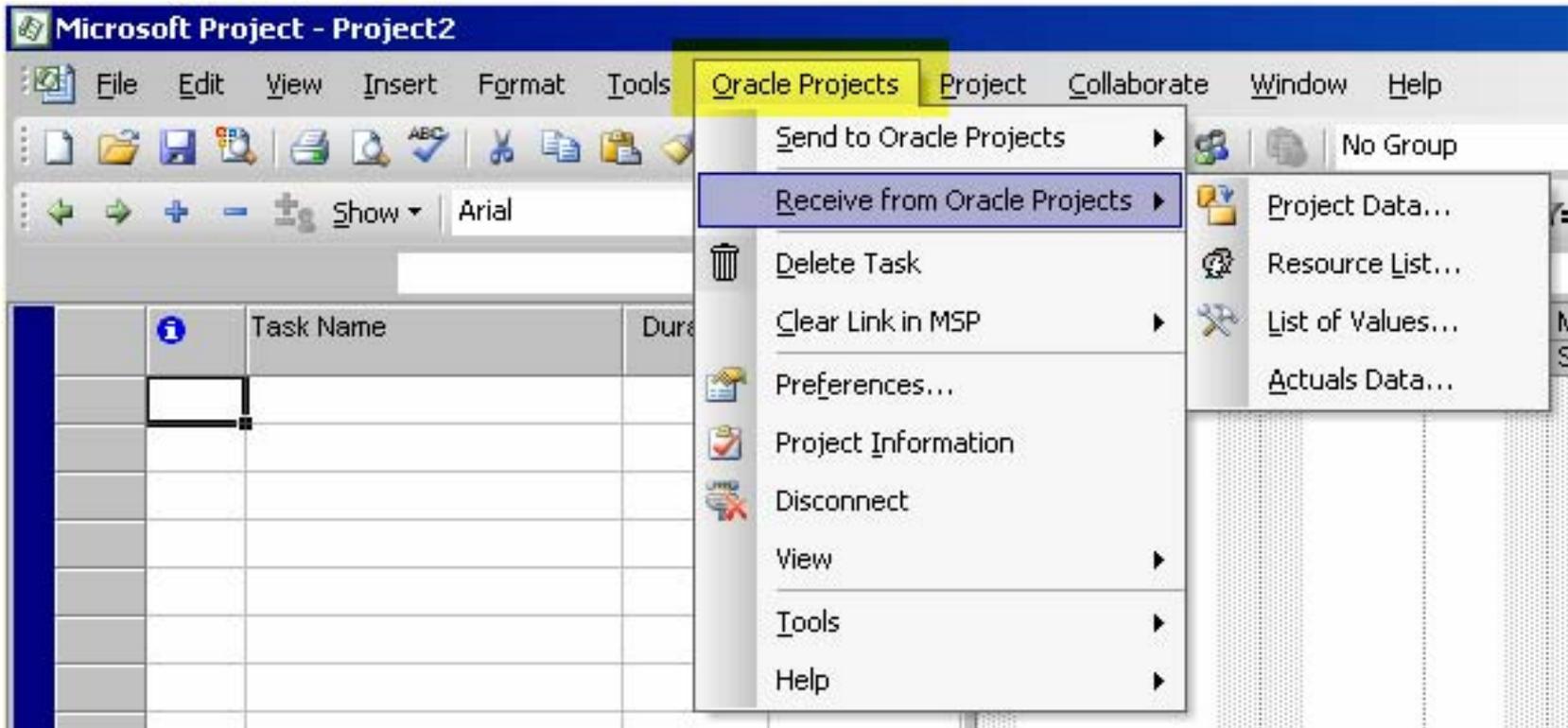
Exception Name: oracle.apps.bne.exception.BneFatalException

Cause: Microsoft VBScript runtime error: 429 - ActiveX component can't create object

Action: Assure is installed, and check your browser's security by navigating to the Internet Explorer Tools menu -> Internet Options -> Security tab. Make sure the correct Web content zone is selected and press the Custom Level button. Set "Initialize and script ActiveX controls not marked as safe" to "Prompt". Press the Return button on this page to restart the document creation process. Select "Yes" when prompted to accept an ActiveX control to complete the process.

Log File Bookmark: 74557

# MS Projects Installation



# Download Projects from Oracle

Microsoft Project Integration: Receive Project from Oracle Projects

**ORACLE** Projects

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**Receive Project: Enter Options**

Project Name **OAUG 2008** Structure **Workplan**

Project Number **500250** Version Name

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Include  Work Breakdown Structure  
 Resources  
 Task Numbers  
 Progress Information

Retain Link to Oracle Projects

**Information**

**Work Breakdown Structure** includes the task assignments and dependencies.

**Resources** are added to the resource sheet.

**Task Numbers** are stored in the Text5 column.

**Progress Information** includes Actual Effort, Actual Dates, Percent Complete, Task Status, Progress Status, Work Quantity, Overview, and Comments.

**Retain Link to Oracle Projects** will allow you to send updates to the same project later.

# Key Performance Areas

They are indicators that help track performances in different areas related to the same project.

Oracle provides following predefined areas to allow creating your own scoring rules:

- Financial
- Schedule
- Health

The screenshot shows the 'IT Convergence Projects' application interface. At the top, there is a navigation bar with icons for Diagnostics, Home, Logout, Preferences, and Help. Below this, the page title is 'Key Performance Area Scoring Rules'. There is a search bar with a dropdown menu for 'Key Performance Area' (set to 'All') and a text input for 'Scoring Rule'. A 'Go' button and a 'Create Scoring Rule' button are also present. The main content is a table with the following data:

Key Performance Area	Scoring Rule	Description	Effective From	Effective To	Update	Delete
Financial	Financial KPA	Use for contract project type	01-01-2006			
Financial	Project Margin		01-01-2007			
Health	Health - KPA	Use for contract project type	01-01-2006			
Schedule	Schedule KPA	Used for contract project types	01-01-2006			

At the bottom right of the table, there is another 'Create Scoring Rule' button.

# Project Health View



Projects



Project Resources Workplan Control Financial **Reporting**

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

## Exceptions

Save Search

Refresh Key Performance Areas

### Key Performance Area Summary

Overall Performance Status ✔

Key Performance Area <sup>▲</sup>	Status	Score	Score Threshold		Critical		At Risk		On Track		Last Recorded Date
			From	To	Count	Score	Count	Score	Count	Score	
Health	<span style="color: green;">✔</span>	10	0	150	0	0	0	0	1	10	12-02-2008 10:20:14
Schedule	<span style="color: green;">✔</span>	95	5	100	1	75	0	0	2	20	12-02-2008 10:20:14

### Search

Please enter your search criteria and select the "Go" button to see the result. Note that the search is case insensitive.

Views

Key Performance Area:  Exception Status:

Performance Rule:  Measure:

Included in Scoring:

Key Performance Area	Performance Rule	Measure	Exception Status <sup>▲</sup>	Value	Threshold		Weighting	Included in Scoring	Last Recorded Date
					From	To			
Schedule	<u>Schedule-Baseline Finish Variance</u>	Schedule-Baseline Finish Variance	<span style="color: red;">✘</span>	61	21	10000	75	Yes	12-02-2008 10:20:14
Health	<u>ITD Outstanding Receivables</u>	ITD Outstanding Receivables	<span style="color: green;">✔</span>	0	0	1000	10	Yes	12-02-2008 10:20:14
Schedule	<u>Schedule-Estimated Finish Variance</u>	Schedule-Estimated Finish Variance	<span style="color: green;">✔</span>	0	0	10	10	Yes	12-02-2008 10:20:14
Schedule	<u>Schedule-Prior Published Version Finish Variance</u>	Schedule-Prior Published Version Finish Variance	<span style="color: green;">✔</span>	0	0	10	10	Yes	12-02-2008 10:20:14

Show Status Indicator Keys

# Project Performance View

**ITConvergence** **Projects**

Project List | Diagnostics | Home | Logout | Preferences | Help

Project | Resources | Workplan | Control | Financial | **Reporting**

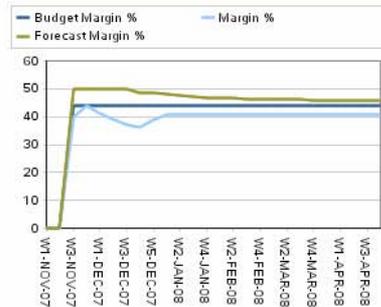
Performance | Exceptions | Status Reports | Setup

Performance Overview

Printable Page | View | Task Summary | Go

Show Details and Parameters

Cumulative Margin %



Cumulative Actual Cost



Financial Performance

Export

Indicator	At Completion			Period To Date			Inception To Date		
	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

# Status Reports History



Projects

- [Project List](#)
- [Diagnostics](#)
- [Preferences](#)
- [Help](#)
- [Close Window](#)

- [Project](#)
- [Resources](#)
- [Workplan](#)
- [Control](#)
- [Financial](#)
- [Reporting](#)

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

Reporting: [Status Reports](#) >

## Status Report History: Default Status Report

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

# Status Report



- 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	Finish Date	06-Mar-2008
Project Type	Status	Approved
Business Information Systems - ARG		
ITC ARG Cost Center		

### 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 <span style="border: 1px solid black; padding: 2px;">Report End Date</span>		

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

# Reporting

- Company Deliverables Status Report
- Compiled Project Status Report

# Conclusions

- Standard Methodology Enforcement
- Accurate Reporting
- Global Visibility
- Easy to Use Tool (Templates)
- Collaborative Tool

# Q & A

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