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AAI/Textron Oracle Project Management Overview and Lessons Learned

Karen Chandler, Applications Manager, AAI/Textron Timothy Cronin, President, Cronin Business Solutions Dean Herback, Oracle, Principal Product Strategy Manager 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.

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- PPM Product Leader
- PPM Market Share Leader
- Market Leadership in 40 Product or Market Categories
- The Most Investment in Enterprise Mission Critical Applications
- Protection of Customer Investments



Enterprise Project Portfolio Management

The most complete PPM offering in the market today



- Leverages your ability to address existing and new business challenges
- True visibility into worker productivity, project efficiency, and corporate performance
- Single source of truth into all critical areas of the business

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AAI/Textron Oracle Project Management Overview and Lessons Learned

Karen Chandler, Applications Manager, AAI/Textron Timothy Cronin, President, Cronin Business Solutions

Agenda

- About the Authors
- Overview of AAI/Textron
- Why Oracle Project Management
- Six Sigma and Business Process
- Feature Review
- Government Contracting Customization
- Reporting Toolsets
- Critical Success Factors
- Future Roadmap



About the Authors

Karen Chandler

- Karen Chandler is a Manager of Business Applications at AAI/Textron and the Solution Architect of the Oracle Project Management Implementation
- Karen has 20+ years of experience in information technology and 4 years with Oracle Applications

Timothy Cronin

- Timothy Cronin is the president of Cronin Business Solutions; a firm that specializes in the implementation of the Oracle Projects suite.
- Tim has over 15 years of consulting experience with the Oracle Projects modules.





Company Overview



AAI/Textron Overview



AAI's high-technology products and services for aerospace and defense include:

- •Unmanned Aircraft Systems
- •Training and Simulation Systems
- •Armament Systems,
- •Logistical, Engineering, and Supply Chain Services

AAI is an operating unit of Textron Systems, a Textron Inc. company.



Organization







AAI Locations





Unmanned Aircraft Systems (UAS)



Pioneer® is a registered trademark of Pioneer UAV, Inc. One System® is a registered trademark of the U.S. Army. Orbiter™ is a registered trademark of Aeronautics Ltd T-Hawk™ is a registered trademark of Honeywell International.



1±X11RON Systems

History of Oracle Apps at AAI/Textron

- AAI implemented Oracle Applications in 2005
 - Modules included:
 - General Ledger
 - Project Costing
 - Project Billing
 - Purchasing
 - Inventory

- Fixed Assets
- Project Contracts
- Accounts Payable
- Manufacturing
- MRO
- AAI implemented an additional set of modules in 2009
 - Modules included:
 - Oracle Project Management
 - Oracle Advanced Supply Chain Management
 - Oracle Business Intelligence/Analytics

AAI leveraged an existing Oracle footprint to implement Oracle Project Management (PJT)



Version Information

- AAI/Textron's Oracle Project Management implementation is on the following system version:
- E-Business Suite Version:
- Family Pack:
- Database Version:
- Operating System:
- Real Application Clusters-RAC:

11.5.10.2 FP.M, Rollup 4 10.2.0.3 64 bit Red Hat Linux Advanced Server 10.2.03 64 bit



AAI's Oracle Footprint (circa 2009)





1±X11RON Systems

Why Oracle Project Management



Why Oracle Project Management

- AAI selected Oracle Project Management for the following reasons:
 - Truly integrated system
 - Global visibility
 - Single source for Earned Value
 - Real-time access to project metrics
 - Cost Account Manager visibility/drill down access
 - Driving towards standardization
 - Scalable
- Prior to Oracle Project Management, much of this data was stored in disparate systems

Single source of the truth



Why Oracle Project Management

- With Oracle Project Management, all of this data is stored in a single database:
 - Actual Cost
 - Project Billings
 - Project Revenue
 - Project Status
 - % Complete
 - Cost Performance Reporting
 - Historical Proposal Information
 - Earned Value
 - Estimate to Complete
 - Latest Revised Estimates

- Cost Budgets
- Revenue Budgets
- Cost Forecasts
- Revenue Forecasts
- Forward Pricing Rates
 - Labor
 - Burden
- Multiple Burden Rates
- Labor Cost Rates
- Contract Details

All my data in one place



Six Sigma



Chanae

Management

Reduce

Variability

(TAP)

Grow &

Innovate

Lean

Enterprise

Eliminate Waste

What is Textron Six Sigma

- Six Sigma is a disciplined improvement methodology
 - Driven by the "Voice of the Customer"
 - es tron Six Sign Focused on Textron/AAI's top priorities
 - Linked to top level business metrics
- Elements include:
 - Lean Enterprise
 - Variation Reduction (DMAIC)
 - Transformation Acceleration Process (TAP)
- Grows talent with training focused on team skills and effective use of tools

Six Sigma was the guiding methodology for AAI's Oracle **Project Management Implementation**



Six Sigma Gates



Customer and Business Requirements Definition

Gather customer and business requirements, initiate the analysis of business opportunity ideas in terms of strategic importance, market, financial viability and technology feasibility.

Conceptual Design & Feasibility

Develop the conceptual design and assess feasibility in terms of technology, customer and business requirements.

Preliminary Design

Finalize system and sub-system architecture, design parameters and develop an integrated program/project plan.

Detail Design

Establish transfer functions for all CTQs, manage interfaces & coupling and optimize design.

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Pilot/Prototype

Creation of prototype/pilot and design demonstration development and optimization.

Product & Process Validation

Validate product, process and/or service design and production capability at low rate.

Transition

Transition to continuing operations.



Gate

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Gate

Business Process Focus



Business Process Foundation

- Business Processes were used as the foundation for many of our critical activities including:
 - Managing Requirements by Business Process
 - "To Be" Design by Business Process
 - Configuration mapped to Business Process
 - CRP, UAT and Training tied to Business Process

Business Process was a consistent thread across the Six Sigma gates



Business Process

- Our key top level business processes include:
 - 1.0 Project Management
 - 1.1Pre Request for Proposal
 - 1.2 Bid and Proposal
 - 1.3 Enter Contract
 - 1.4 Plan Project
 - 1.5 Execute Project
 - 1.6 Control Project
 - 1.7 Maintenance
 - 1.8 Close Project





Business Process Decomposition

- By Sub Process
- By Swim lane



Processes were decomposed to sub processes



Implementation and Approach



1±X11RON Systems

Project Milestones



Analysis Design Test Delivery



Staffing and Team Structure

- Staffing and Team Structure were critical to our success
- Our project team contained a comprehensive crossfunctional set of resources:
 - Executives
 - Project Managers
 - Financial Analysts

- Contract Administrators
- Technical Experts
- Consultants
- We designated our future SuperUsers early in the implementation

Establishing the correct staffing mix was an important element of our success



Training and Ongoing Education

- Oracle Project Management introduced a significant change to the organization
 - Upgrading from Forms based to HTML based user interface
 - Additional business processes were incorporated into Oracle
- Define a comprehensive Training and Ongoing Education approach:
 - Develop Strategy
 - Select a Training Tool
 - Identify/establish a dedicated training team

Invest in your training and ongoing education plan



User Productivity Kit

- Our project leveraged User Productivity Kit (UPK) for:
 - Training
 - End User Documentation
 - Testing and certification on the Oracle Project
 - Management Tool
- UPK Statistics
 - # of Modules: 7
 - # of Lessons: 31
 - # of Topics: 134

| Outline | Concept |
|--|---|
| Ovaline Ovaline <td< td=""><td>Concept The purpose of the User Productivity Kit is to aid and encourage user-based training. If you are unaware of which UPK topic to start with, first try using key words to search for a topic of interest (i.e. Create Tasks). You can also use the role link above the outline to select a specific role (i.e. Cost Account Manager, Project Manager, Financial Analyst) and view only the UPK topics that apply. While working through the topics keep in mind that some of the settings, links, and menu options available may have been changed or updated due to role and responsibility allowances, and final configuration. As a result, your view of a particular frame may be slightly different from what is shown in UPK. However, the steps within each UPK will serve as the most direct way to complete a particular productivity Kit will be updated accordingly. Nitroduction</td></td<> | Concept The purpose of the User Productivity Kit is to aid and encourage user-based training. If you are unaware of which UPK topic to start with, first try using key words to search for a topic of interest (i.e. Create Tasks). You can also use the role link above the outline to select a specific role (i.e. Cost Account Manager, Project Manager, Financial Analyst) and view only the UPK topics that apply. While working through the topics keep in mind that some of the settings, links, and menu options available may have been changed or updated due to role and responsibility allowances, and final configuration. As a result, your view of a particular frame may be slightly different from what is shown in UPK. However, the steps within each UPK will serve as the most direct way to complete a particular productivity Kit will be updated accordingly. Nitroduction |

Embrace UPK, the tool that keeps on giving



Conference Room Pilots

- Conference Room Pilots and User Acceptance Tests were an important proving ground during our implementation approach
- Develop a structured set of test/use cases
- Know your entrance and exit criteria
 - Define success and work towards acceptable metrics
- CRP/UAT Statistics:
 - 4 Conference Room Pilots (CRP)
 - 1 User Acceptance Test (UAT)

CRPs are a great way to engage your end users



Timely Decision Making

- Established a protocol for making critical decisions
 - Set agreed upon turn around times for critical decisions
 - Identified key decision makers and related approval hierarchies
- AAI/Textron's decision/approval hierarchy:
 - Steering Committee
 - Project Manager
 - Team Leads

Make timely decisions



Establish User Expectations

- Users should expect:
 - Significant learning curve during initial rollout
 - Adequate training on new tool and processes
 - Support from SuperUsers during transition
- Users are expected to:
 - Attend all scheduled role based training
 - Utilize transition labs and SuperUser support during transition
 - Utilize online training and help materials
 - Actively support transition of your projects to FP.M
 - Bring concerns and issues to the FP.M management team's attention as soon as possible

Set user expectations early



Rollout Approach

- AAI/Textron considered two approaches:
 - Big Bang
 - Phased Rollout
- AAI/Textron employed a phased rollout for our Oracle Projects Implementation
 - Minimized risk
 - Spread training and education over a longer period of time
 - Allowed for lessons learned from earlier rollout phases

Our Phased Rollout helped to manage risk



EXTRON Systems

Key Statistics

| Description | Statistic |
|--|-----------|
| # of Users using Oracle Project Management | 200+ |
| # of Operating Units | 2 |
| # of Divisions using Oracle Project Management | 4 |
| # of Project Managers using Oracle Project Management | 50+ |
| # of Financial Analysts using Oracle Project Management | 35+ |
| # of Projects leveraging Earned Value | 10+ |
| Average # of Tasks on a Project | 60 |
| Average # of Resources per Task | 5 |
| Average size of projects in Oracle Project Management | >\$1M |





Feature Review



Selected Configurations/Features

Foundation Setup

- Rate Schedules
- ADI Integration
- Burden Schedules
- HR/PA Job Mapping
- Calendar Definition
- Personalizations

Budget Setup

- Planning Resource Lists
- Financial Plan Definition
- Forecast Plan Definition
- Forecast Generation Options

Project Setup

- Structures

- Project Templates
- User Defined Attributes

Security Setup

- Role Based Security
- Responsibility Based Security
- Organization Based Security



ADI Integration

- Ability to create and manage your budgets in Excel
- Direct integration with Oracle via ADI (Application Desk Top Manager)
- Manage:
 - Baseline (Both Cost and Revenue)
 - Forecast (Both Cost and Revenue)
- Create budgets from the bottom up using actual and generic resources

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| Budgets and Forecasts Billing Percent Complete Tasks Setup | |
| inancial: Budgets and Forecasts $>$ Maintain Forecast Versions $>$ | |
| Edit Forecast: FPM FORECAST COST BUDGET | |
| Cancel | Show Hierarchy Submit Save Actions Edit in Excel |
| Personalize Default Double Column: (versionRN) | View Forecast |
| Version Number 1 Last Generated 01-Aug-2008 | |
| Version Name FORECAST AUG Last Updated 08-Dec-2008 | |
| VO | Edit Planning Options |
| ▶Forecast Totals | Case Disc Version Assessed |
| Personalize "Budget Lines" | Copy Flan Version Amounts |
| | Generate Forecast |
| Forecast Lines | |
| Show Comparison Parameters | Maintain Forecast Versions |
| <u>Personalize Query</u> | |
| Views | |

At AAI, ADI integration is the most popular feature provided by Oracle Project Management



Structures

- AAI/Textron uses a "Fully Shared Structure" configuration
- Ultimately plan to move towards "Non-Shared Task Based Mapping" after MSP Integration is implemented
- Tasks are managed in:
 - Forms
 - Financial Plan
 - Workplan

| Project FP FFG UPGRADE 06024 (06024) | Project Resources Workplan |
|--|--|
| Home Overview Directory Attachments | Relationships Setup |
| ▲ Warning | |
| Low-level logging is currently enabled. Your ap | plication will not perform as well while low-level logging is on. |
| Structures | |
| Selecting and clearing these boxes may result in the | e deletion of tasks. |
| Enable V Financial Structure | |
| Workplan Structure | |
| Deliverables | |
| Workplan and Financial Structure Sharing | Shared structures |
| Program Reporting | Non-Shared: No Mapping |
| Satur Project or a Program | Non-Shared: Task Based Mapping |
| | Partiality shared structures and choose lowest thancial tasks Shared structures |
| Allow linked projects to belong to mu | |

AAI currently uses a Shared Structures



Financial Plan Definition

- AAI/Textron has four financial plan types:
 - Baseline Cost Plan
 - Baseline Revenue Plan
 - Forecast Cost Plan
 - Forecast Revenue Plan
- Budgets are managed at different levels for different projects
 - Project
 - Top Task
 - Lowest Level

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Financial Plan definition is dependent on the project type



S System

Role Based Security

- AAI's Oracle Project Management implementation leverages Role Based Security
- The following roles have been defined with unique security characteristics:
 - Project Mgt. Executive
 - Project Manager
 - Contract Administrator
 - Program Finance
 - Project Team Member

Role Based Security helps to meet AAI's needs

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Effective Dates

Key GAPs and Resolutions

| Key GAP | Resolution |
|---|---|
| Forecast Generation requires a user to choose a spread curve | Patch 7282269 from Oracle option to honor user entered forecasts rather than a spread |
| Oracle PJT does not provide standard Cost Performance Reporting | Government Contracting Customization was developed |
| Financial % Complete form can be cumbersome | Custom solution (WIP) |
| Oracle PJT does not provide some common Earned Value Methods | Use Task Type and Custom Code to meet this requirement |

The ETC generation solution was critical



Key Integrations

 During the implementation a number of interfaces and tools were developed including:

Interfaces

- ProPricer Interface
 - ProPricer is a proposal tool. This interface sends a finalized ProPricer proposal and imports it into Oracle Project Management as a Financial Plan version

Loaders and Accelerators Tools

- Forward Pricing Rate Builder
 - Load Job rate schedules from Excel
 - Populate Employee rate schedules via a lookup
- Planning Resource List Loader

These integrations helped automate manual processes



Highlighted Patches/Fixes from Support

| Ιςςιρ | Upgrading Projects to FPM | ADI Export to Excel after upgrading to 10.2.0.3 from 9.2.06 | Project Performance Reporting Summarization Discrepancies |
|----------|--|---|--|
| Detail | Issues related to: •Project Contracts •Sub-Projects •Programs | Issues related to: •Export of Financial Plan Data to Excel | Issues Related to: •Program Rollups •EI and PPR differences |
| Solution | Received patch/data fix that resolved issues | Applied patch 8945613 | •Applied patches 5383936, 5507295, 6709058 That resolved the majority of the issue |



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Government Contracting Customizations



Earned Value Requirements

- AAI/Textron is a government contractor and has a series of related business requirements related to Earned Value including:
 - Contractual requirements requiring Cost Performance Reporting
 - Compliance with the 32 ANSI standards
 - Integration with third party tools including
 - WinSight
- Standard Oracle Project Management functionality did not meet all of these requirements.
 - Accordingly, customizations were needed

Earned Value is a way of life for AAI/Textron



Cost Performance Reporting

- AAI's custom CPR solution includes the following features:
 - Leverages standard Oracle tables for input data
 - Custom tables to store historical elements of the CPR
 - XML based report layouts
 - User Defined Attributes
 - Initiated via Concurrent Request
 - Integration with Excel

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AAI/Textron developed a custom CPR solution that leverages standard Oracle Project Management features



WinSight Integration

- In addition to the Cost Performance Reporting customization, AAI had a mandated requirement to export Earned Value reporting data to WinSight
- WinSight is a Earned Value reporting tool that performs the following features:
 - Formats/Summarizes Earned Value
 - Analyzes data and develop metrics
 - Reports Earned Value in multiple formats
- A custom interface was developed from Oracle Project Management to provide required source data to WinSight

A custom interface was developed from Oracle Project Management to WinSight



Reporting Toolsets



Reporting Solution

- AAI/Textron combines a number of standard reporting tools to perform project related reporting. Tools include:
 - Expenditure Inquiry
 - Project Status Inquiry
 - Project Performance Reporting
- In addition AAI/Textron has piloted Oracle Business Intelligence Enterprise Edition
 - However, Project Analytics is not yet implemented

AAI/ Textron leverages a series of tools for project based reporting



Forms Based Reporting Tools

- AAI/Textron continues to leverage existing Oracle Project Costing forms based reporting tools including:
 - Expenditure Inquiry
 - Project Status Inquiry



Forms based reporting continues primarily in the accounting and finance organizations



Project Performance Reporting

- Project Performance Reporting is available to all projects
- Primarily used by Project Managers and Financial Analysts
- Features include:
 - KPIs
 - Exception Reporting
 - Stored Measures
 - Custom Measures
 - Task Detail

| Project FPM JSECST LOT 5A (CRP2_6666A) | Project Resources Workplan Control Financial Reporting |
|---|--|
| Performance Exceptions Status Reports Setup | |
| Performance Overview | |
| | (Printable Page) View Task Summary 🛛 🔽 🕞 |
| Show Details and Parameters | |
| Personalize "Cumulative Margin %" | Personalize "Cumulative Actual Cost" |
| Cumulative Margin % | Cumulative Actual Cost |
| — Budget Margin % — Margin % | Budget Cost — Total Cost — Forecast Cost |
| - Forecast Margin % | 2,000,000 |
| 100 | |
| 80 | 1,600,000 |
| 60 | 1 200 000 |
| 40 | 1,200,000 |
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| -40 | 400,000 |
| -60 | |
| JUN-08 JUL-08 AUG-08 SEP-08 | IUN-08 IUL-08 AUG-08 SEP-08 |

Project Managers are the primary consumers of PPR



EXTRON SVS

OBIEE/Analytics

- AAI/Textron has implemented an OBIEE proof of concept that included:
 - Financial Analytics
 - Custom Project Accounting Models
- Goals of the pilot included
 - Single "source of truth"
 - Leverage standard KPI's
 - Multi-Layered reporting providing business context
 - Multiple data sources (Outside Oracle)
 - Project relevance
- Projects Analytics is slated for a future phase

Financial Analytics is live as part of a proof of concept



OBIEE Characteristics

- Attractive elements of OBIEE include:
 - Predefined/Consistent Metrics
 - Drill Down Capability
 - Graphical interface









OBIEE System Diagram

AAI/Textron's OBIEE system diagram









Lessons Learned and Future Roadmap



Critical Success Factors

- AAI/Textron has identified the following Critical Success Factors:
 - Management support early in the project
 - Mandate functional participation
 - Obtain dedicated resources
 - Create a good project plan
 - Leverage UPK
 - Identify SuperUsers during the early phases of your effort
 - Establish User and Team Member Expectations
 - Emphasize the need for common metric definitions across the organization
 - Develop a comprehensive Change Management strategy

Communication, Buy in and Training are critical



Future Roadmap/Next Steps

- Microsoft Project Integration
- Resource Management
- R 12.1+
- Business Intelligence for Projects (Project Analytics)
- Management Project Status Reporting (MPSR)
- Data standardization across business units

Moving towards a comprehensive Oracle solution



Where to find more information



ORACLE

Timothy Cronin, President, Cronin Business Solutions

- www.CroninINC.com
- tcronin@cronininc.com
- Experts in the Oracle Projects Suite

Visit us at booth: 442



Questions





PPM Session Schedule

| Session - Location | Day | Time |
|--|-----------|----------|
| E-Business Suite Projects Roadmap and Vision: 12.1 and Beyond; Moscone West 2006 | Wednesday | 10:15 AM |
| Putting It All Together: Using Oracle's Enterprise Project Management Suite; Westin Market St. Hotel (Metropolitan II) | Wednesday | 11:45 AM |
| Oracle Projects: You've Got Questions, We've Got Answers; Moscone West 2006 | Thursday | 10:30 AM |
| Oracle Project Management: Successfully Implementing Dynamic Business Requirements; Moscone West 2006 | Thursday | 1:30 PM |
| Primavera P6 and Oracle Projects: Oracle Application Integration Architecture Integration; Marriott Hotel (Salon 8) | Thursday | 3:00 PM |





Be sure to visit the PPM DemoPods below:

- E-Business Suite Projects: Managing the Project Portfolio S-059
- E-Business Suite Projects: Driving Efficient Project Management S-060

For More Information

search.oracle.com

project portfolio management

or

www.oracle.com/applications/ppm

For collateral, webcasts, podcasts, partner network, solutions catalog, white papers, etc.

