



How to Implement Oracle Project Management in 60 days

NorCal OAUG Training Day 2009

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About Cronin Business Solutions...

Experts in the Oracle Projects suite...

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Agenda...

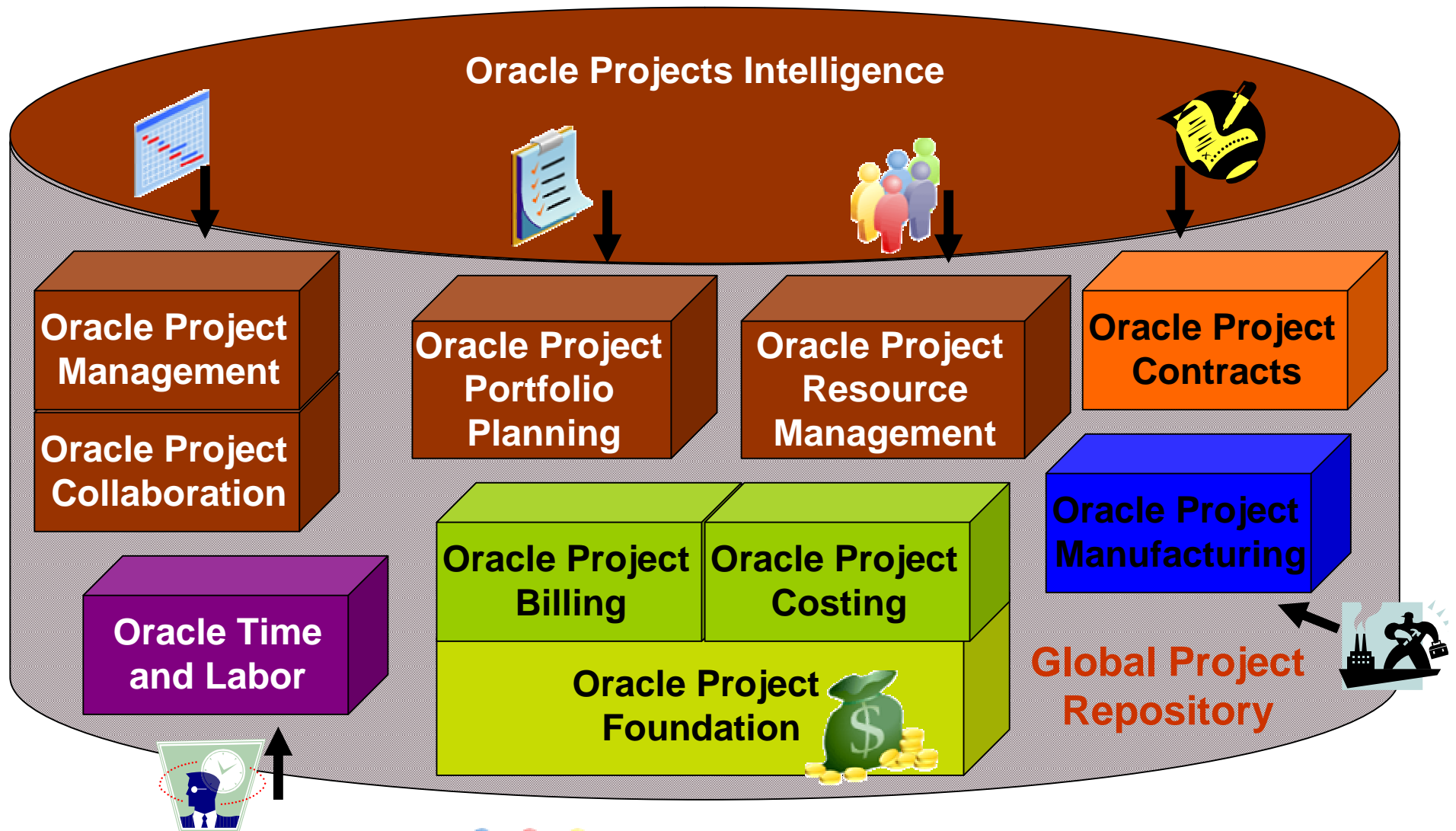
This presentation will address the following topics...

- Oracle Project Management Overview
- 60 Day Plan to Implement Project Management
- Configuration Considerations
- Pitfalls, Common Mistakes and Lessons Learned

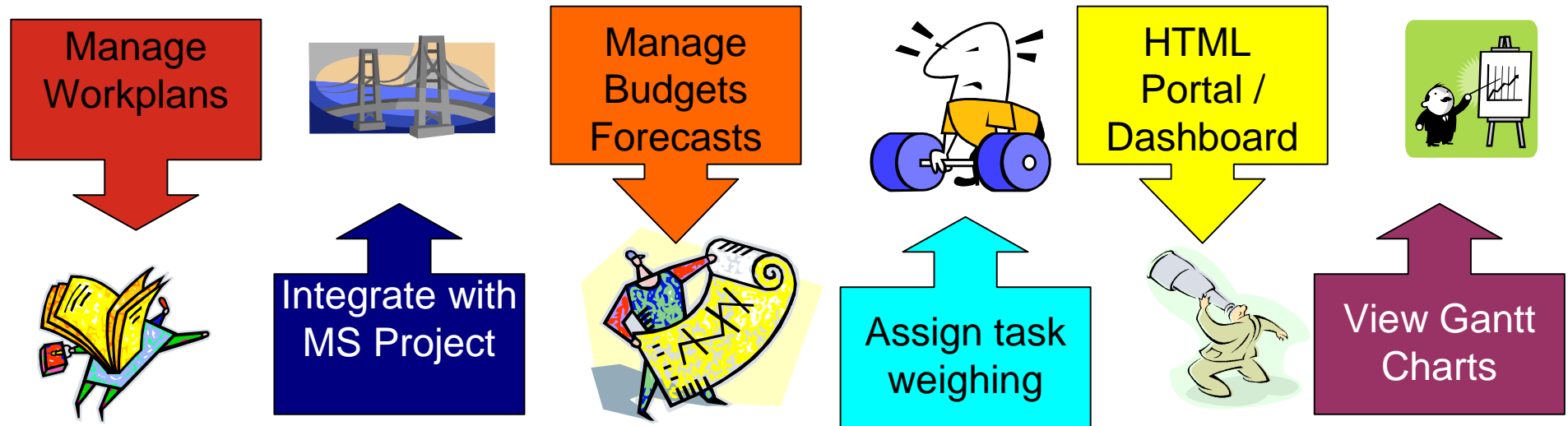


Overview

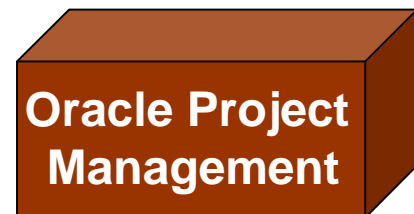
The Projects Suite...



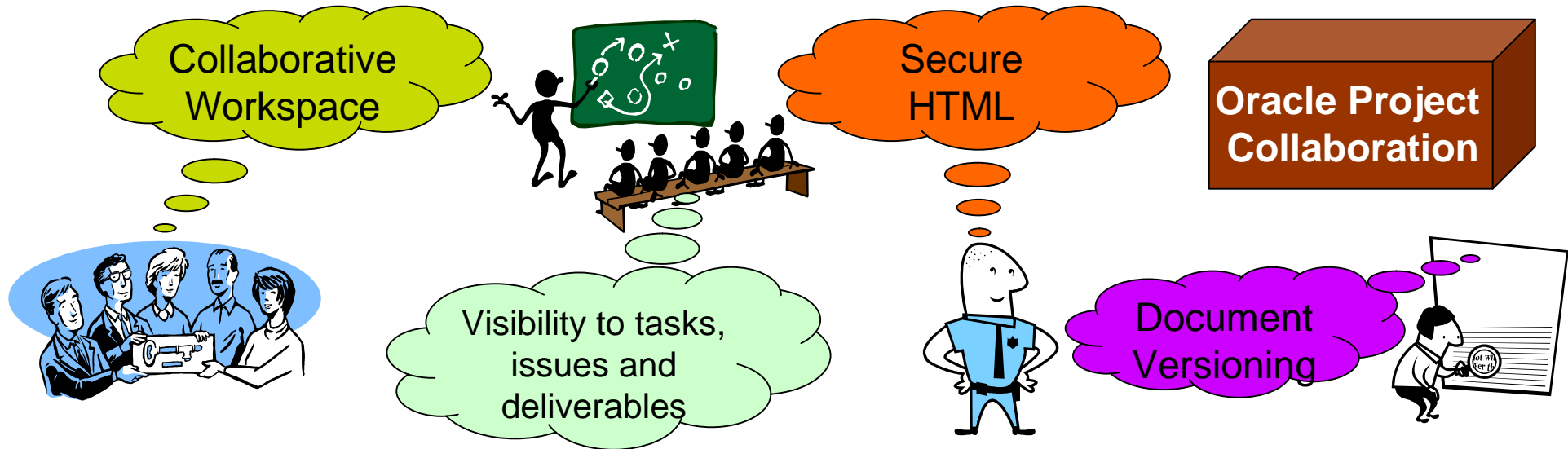
Oracle Project Management...



- Create, manage and version workplans
- Track progress against plan
- Integrate with MS Project
- Create budgets / forecasts to completion
- Provide real time project overview via a HTML portal
- Manage issues at a project or task level
- View Gantt charts
- Create work plan dependencies
- Manage change orders



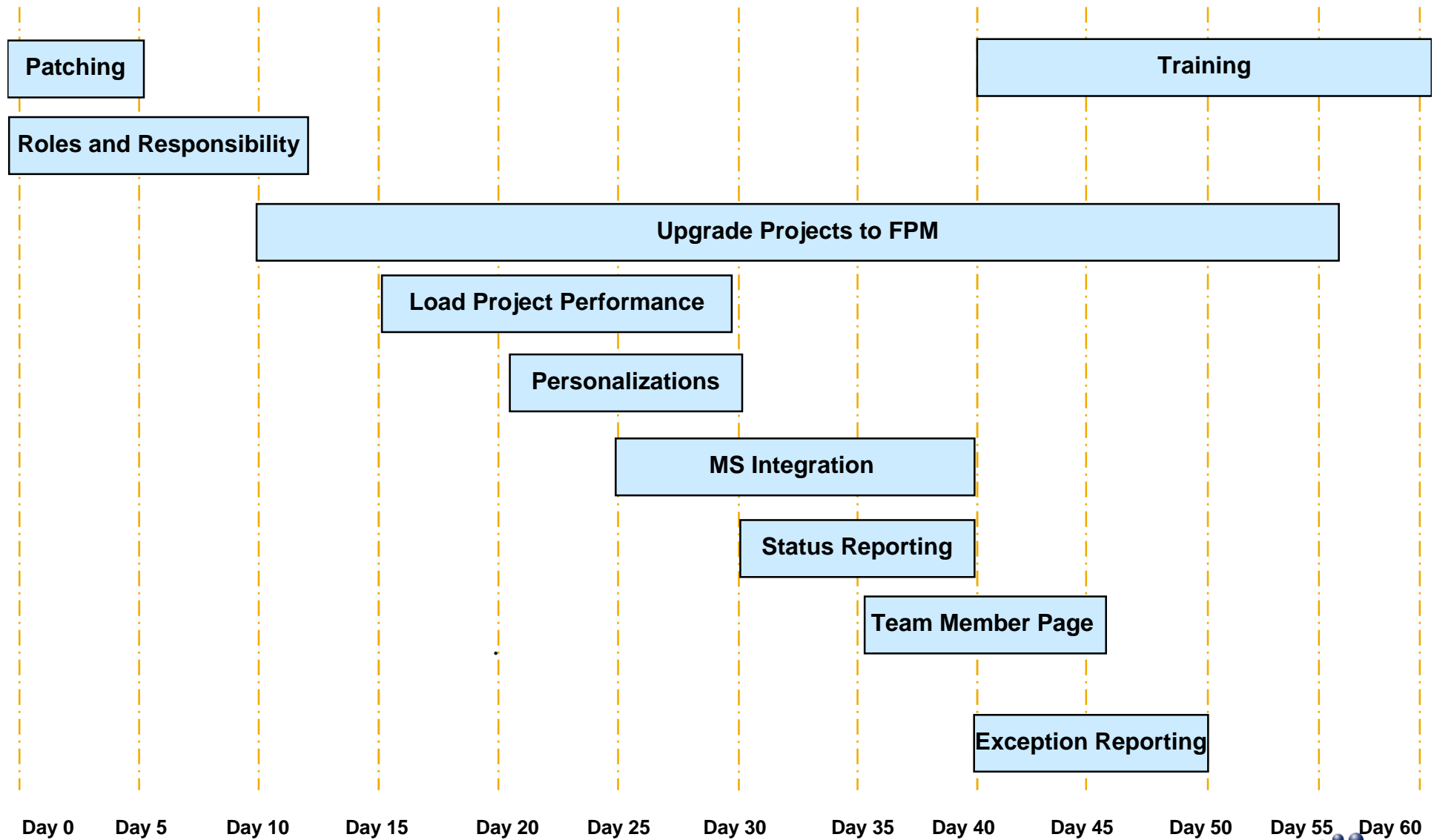
Oracle Project Collaboration...



- Provides a secure collaborative workspace
- Visibility to assigned tasks, issues and deliverables
- Single document repository with versioning capabilities
- Related to Oracle Project Management

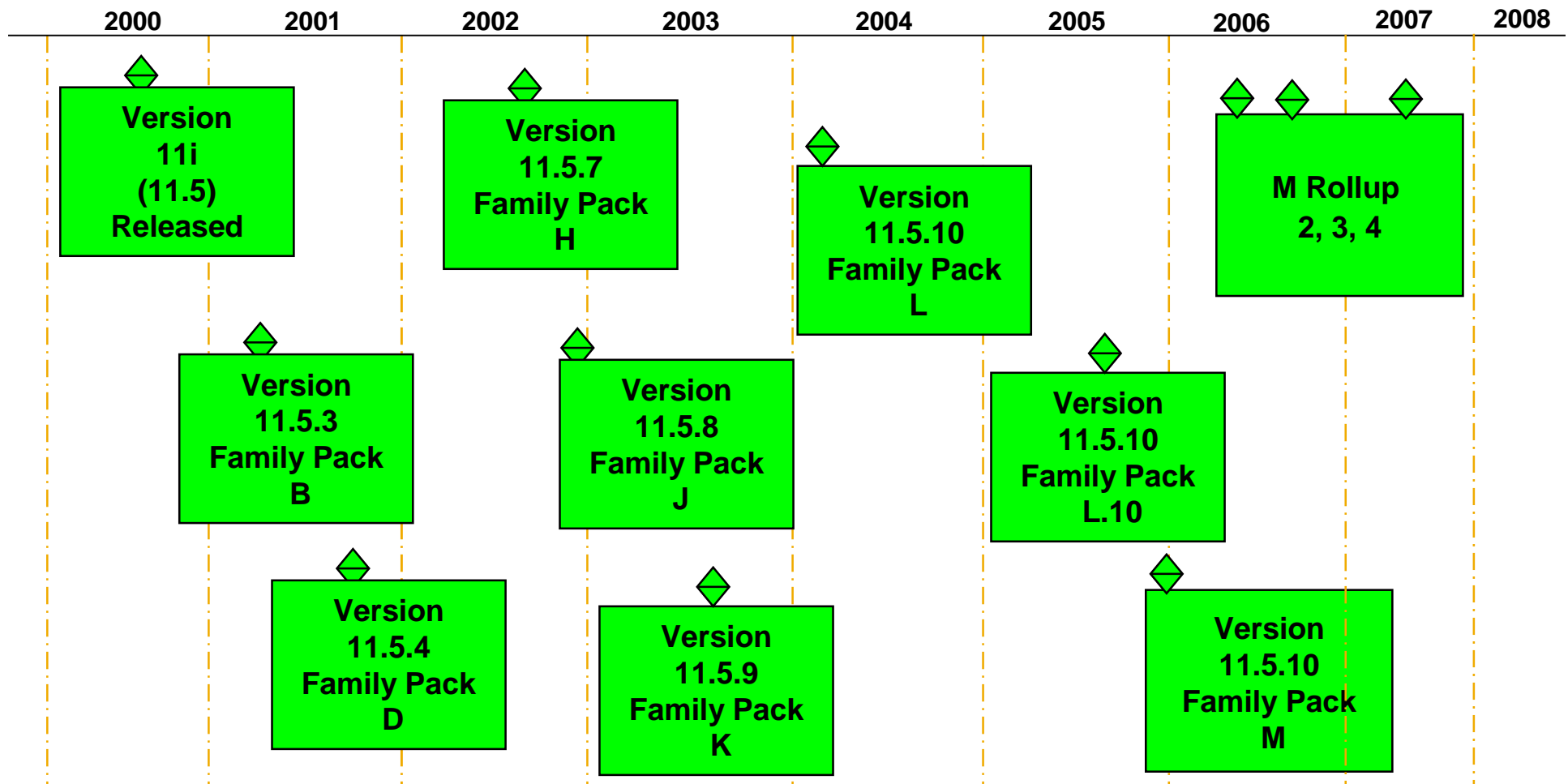
The 60 Day Plan

The 60 Day Plan: High-level plan...



Patches and Packs

Projects Suite Family/Maintenance Packs 11i...



Patches and Packs...

Apply the Family Pack M Patch – Rollup 4 to your instance

- Metalink note 302074.1 details the patches necessary to upgrade to Family Pack M
- Patch 5644830: Oracle Projects Rollup Patch 4 for Oracle Projects Family Pack M (11i.PJ_PF.M)
- Rollup 5 does not exist yet, however, there are a series of additional patches that may be needed to support targeted functionality

Responsibilities and Role Based Security

Responsibility Based Security...

The Oracle Projects Suite contains the following predefined responsibilities:

- **HTML Based**

- Project Super User
- Project Manager
- Project Administrator
- Resource Manager
- Staffing Manager
- Operations Manager
- Team Member

- **Forms Based**

- Project Costing Super User
- Project Billing Super User
- Projects Implementation Super User
- Project Manager (Non-HTML)

Role Based Security...

Role Based Security is a key component of Oracle Project Management's security functionality

- Role based security controls access based on the role the user plays on a project
- Access for a user can be different on each project
- Role based security overrides responsibility based security for individual users
- Provides additional features for specific modules such as Resource MGT and Contracts

Upgrading Projects

Upgrading Projects...

The following steps are necessary to upgrade projects for Project Management

Configuration Steps

- Set Licensing Profile Options
- Upgrade Resource Lists to Planning Resource Lists
 - UPG: Upgrade Resource List To Planning Resource List
- Enable Financial Plan, Workplan and Deliverable Structures for specific projects
- Assign yourself as a key member with an appropriate Role
- Upgrade Budgets
 - UPG: Upgrade Budget Types and Budget Versions
- Configure Workplan settings
- Configure Financial Plan settings

Upgrading Projects...

Upgrade Resource Lists to Planning Resource Lists

Configuration Steps:

- This configuration allows existing resource lists to be used as Planning Resource Lists and Resource Breakdown Structures

The screenshot shows a 'Submit Request' dialog box with a 'Parameters' sub-dialog open. The 'Submit Request' dialog has a section 'Run this Request...' with a 'Name' field containing 'UPG: Upgrade Resource List To Planning Resource List' (highlighted with a red box), a 'Language' field set to 'American English', and buttons for 'Copy...', 'Language Settings...', and 'Debug Options'. The 'Parameters' sub-dialog has a 'Resource List Name' field and buttons for 'OK', 'Cancel', 'Clear', and 'Help'.

Upgrading Projects...

Enable Structures

Configuration Steps:

- Setup with Workplan
- Navigate: Forms – Setup- Projects- Project Templates- Query Project - Structures

Structures

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

Personalize Table Layout: (WorkplanOptionsTop)

Enable ☒ Financial Structure
☒ Workplan Structure
☒ Deliverables

Personalize Flow Layout: (region2)

Workplan and Financial Structure Sharing

Shared structures

Personalize "Program Reporting"

Upgrading Projects...

Assign Key Members to Projects

Configuration Steps:

- Family Pack M grants access based on roles assigned in the Key Members form or the equitant HTML functionality
- Navigate: Forms – Setup- Projects- Project Templates- Query Project – Key Members

Employee Name	Number	Role	From	To
			01 JUN-2008	

<input type="checkbox"/>	Workplan Information	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Classifications	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Customers and Contacts	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Currency	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Cross Charge	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Key Members	<input checked="" type="checkbox"/>

Setup Quick Entry Detail

Upgrading Projects...

Upgrade Budgets

Configuration Steps:

- This concurrent process will migrate your budgets from forms to HTML

The screenshot shows a 'Submit Request' dialog box with the following configuration:

- Run this Request...**
 - Name: **UPG: Upgrade Budget Types and Budget Versions** (highlighted with a red box)
 - Language: **American English**
 - Buttons: Copy, Language Settings..., Debug Options
- At these Times...**
 - Run the Job: **As Soon as Possible**
 - Button: Schedule...
- Upon Completion** (tabbed view):
 - Mode: **Pre-Upgrade**
 - From Project Number: (empty)
 - To Project Number: (empty)
 - Budget Type: **All**
 - Budget Status: **All**
 - Project Type: (empty)
 - Project Status: **All**
 - Buttons: OK, Cancel, Clear, Help

Upgrading Projects...

Upgrade Budgets

Configuration Steps:

- This concurrent process will migrate your budgets from forms to HTML

ORACLE Projects Return to Project List Return To Portal Preferences Help Feedback Logout

Project: ABC-Financials Implementation (502752)

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

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

Budgets and Forecasts

Display Amounts: Current Working

Select Plan Type: Cost

Select Plan Type	People Effort	Equipment Effort	Cost	Revenue	Margin	Margin %	Maintain Versions	View
Approved Budget	4,280	5,230	356,500	550,000	193,500	35		
Estimate	4,300	5,400	360,000	550,000	190,000	35		
Forecast	4,504	5,340	413,340	574,369	161,029	28		
Replan for IT Portfolio	4,280	5,230	356,500	550,000	193,500	35		

☒ TIP Amounts are listed in project currency: USD. Effort is listed in Hours

[Project](#) | [Resources](#) | [Workplan](#) | [Control](#) | [Financial](#) | [Reporting](#) | [Return to Project List](#) | [Return To Portal](#) | [Preferences](#) | [Help](#) | [Feedback](#) | [Logout](#)

Budgets (AAI Corp OU)

Find Budget

Project Number:

Project Name:

Budget Type:

Draft Budget

Version Name: Status:

Change Reason:

Description: ☐ New Original ☐

Entry Options

Entry Method:

Totals

Labor

	UOM	Quantity
Draft	<input type="text"/>	<input type="text"/>
Current	<input type="text"/>	<input type="text"/>

Error This budget type has been upgraded to a plan type. You can create new versions only for the corresponding plan type.

Upgrading Projects...

Configure Workplan Settings

Configuration Steps:

- Navigate to your workplan in Family Pack M (HTML) – Setup:
 - Configure Settings
 - Configure Progress
 - Configure Workplan Structure Information

Project Resources **Workplan** Control

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

Workplan : Setup > Additional Workplan Options : Plan Settings

Additional Workplan Options : Plan Settings

Plan Settings Currency Settings Rate Schedules

* Indicates required field

Amount Entry

☐ Enable Workplan Costs

Amount Reporting

Resource Breakdown Structure

Report Cost Using ☒ Raw Cost ☐ Burdened Cost

Rounding Factor

Setup

* Planning Resource List

☐ Plan Amounts in Multiple Cur

* Time Phase

* Period Profile

* Current Planning Period

Upgrading Projects...

Enable Financial Plan Settings

Configuration Steps:

- Setup the Financial Plan
- Navigate: Forms – Setup- Projects- Project Templates- Query Project – Financial Plan - Settings

Edit Planning Options

Cancel Apply

Plan Settings | Currency Settings | Rate Schedules

Display

☐ Plan Amounts in Multiple Currencies

Resource Breakdown Structure: Organization Resource Rollup

Cost Plan

Planning Level: Project

Resource List: Organization by Employee

☐ Add Resources Automatically

Revenue Plan

☐ Use Cost Plan Options for Revenue

Planning Level: Project

Resource List: Organization by Employee

☐ Add Resources Automatically

Display Precision: 1

Rounding Factor: 1

Time Phase: None

Time Phase: None

Plan Settings | Currency Settings | Rate Schedules

MS Excel Integration

MS Excel Integration...

Oracle Project Management Provides standard MS Excel Integration via ADI

Users can build budgets in Oracle Project Management using MS Excel

- The integration is supported by standard functionality
- Ability to integrate:
 - Actuals
 - Quantity
 - Raw Cost
 - Burdened Cost
- The following patch is needed to support MS Excel Integration:
 - Patch 5367017

MS Excel Integration...

Oracle Project Management standard MS Excel Integration

Configuration Steps:

- Financial Plan – Budget Version – Export to Excel

ORACLE Projects

Project TEST_TIM1 (TEST_TIM1)

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

Financial: Budgets and Forecasts >

Warning

Low-level logging is currently enabled. Your application will not perform as well while low-level logging is on.

Edit Planning Options: FPM BASELINE COST BUDGET

Personalize Table Layout
Personalize Stack Layout: (planSettingsTopRN)

Plan Settings | Currency Settings | Rate Schedules | Generation Options | **Microsoft Excel Options**

Personalize Default Single Column: (MSXIOptionsTabRN)
Personalize "Cost Plan"

Cost Plan

Layout: Periodic Budget Layout

Available Amount Types

Selected Amount Types

Move, Move All, Remove, Remove All

ORACLE Projects

Project TEST_TIM1 (TEST_TIM1)

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

Financial: Budgets and Forecasts > Maintain Budget Versions >

Warning

Low-level logging is currently enabled. Your application will not perform as well while low-level logging is on.

Edit Budget: FPM BASELINE COST BUDGET

Cancel | Show Hierarchy | Submit | Save | Actions | View Budget | Go

Personalize Default Double Column: (versionRN)
Version Number 1 Last Generated
Version Name V1 Last Updated 04-Dec-2008

Budget Totals

Personalize "Budget Lines"

Budget Lines

Show Comparison Parameters
Personalize Query

Views

View: Revenue and Cost Budget Overview | Go | Personalize

Personalize Advanced Table: (BudgetTableRN)

Select Planning Elements: Adjust | Go | Calculate Budget | Add Tasks and Resources

Select All | Select None

Planning Element	Quantity	Raw Cost	Burdened Cost	Revenue
Project or				

Update Budget

MS Excel Integration...

Oracle Project Management standard MS Excel Integration

Microsoft Excel Interface:

- Note the “Oracle” menu plug-in that is added to Excel

The screenshot shows the Microsoft Excel interface with the 'Oracle' menu open. The menu options are: List of Values, Upload, Monitor, Download, and About. The 'Upload' option is highlighted. Below the menu, the spreadsheet contains a 'View context' section with project details and a table of task data.

View context

Project Name (Number) TEST_TIM1(TEST_TIM1)
Plan Type FPM BASELINE COST BUDGET
Version Name (Number) V1(1)
Description
Plan Version Id 1892851
Record Version Number 9
Period Mask Record Version number 1
Run Id 10728
Tip : Specifying a new task, planning resource, or currency will result in a new line.
Lines marked for deletion are deleted during upload.

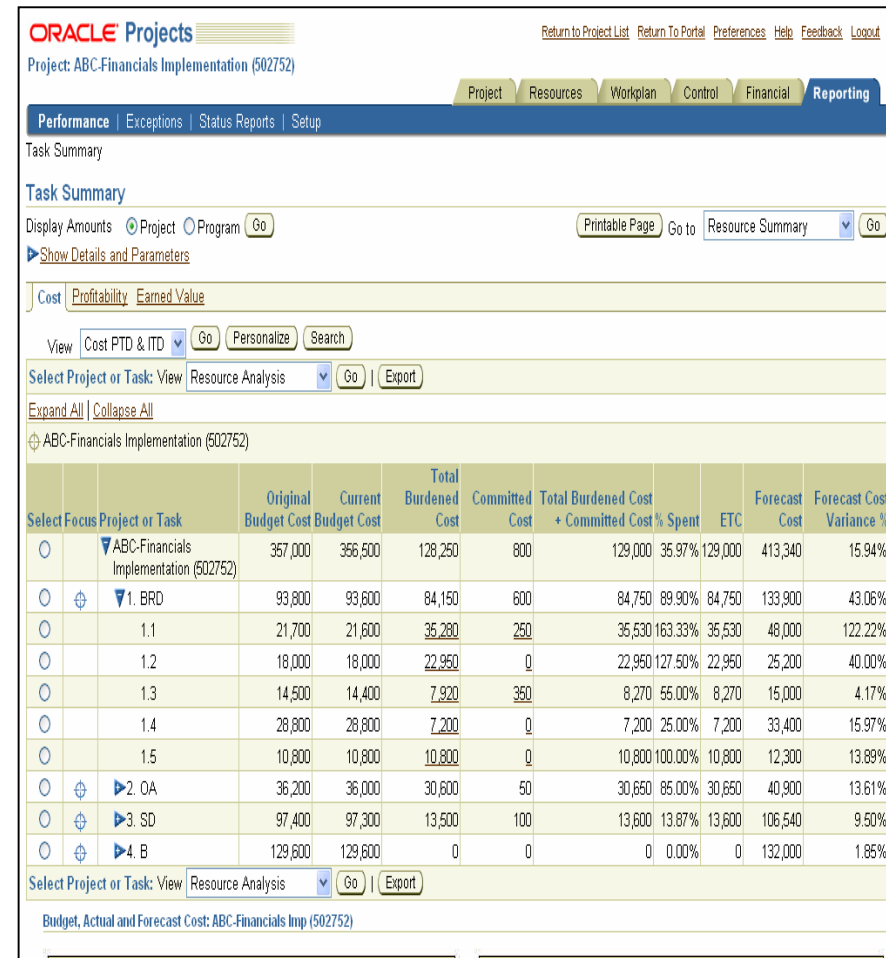
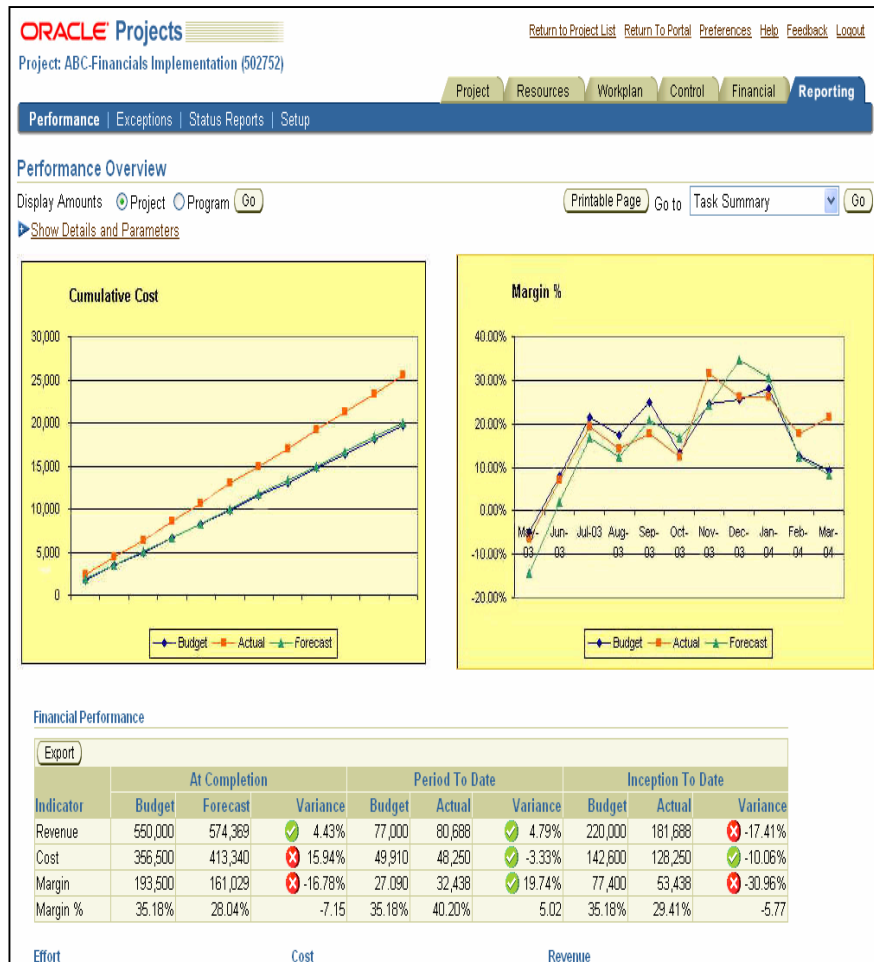
Upl Delete	Task Number *List	Task Name *List	Planning Resource List	UOM	Amount Type *List	Currency *List
	1	Task 1	Financial Elements	Currency	Burdened Cost Rate	USD
	1	Task 1	Financial Elements	Currency	Raw Cost Rate	USD
	1	Task 1	Financial Elements	Currency	Total Burdened Cost	USD
	1	Task 1	Financial Elements	Currency	Total Quantity	USD
	1	Task 1	Financial Elements	Currency	Total Raw Cost	USD

Tip: This is not the end of the Template. Unprotect the sheet and insert as many rows as needed.

Project Performance Reporting

Project Performance Reporting...

Project Performance Reporting is the next generation of PSI



Project Performance Reporting...

Project Performance Reporting is the next generation of PSI

Configuration Steps to Load Project Performance Reporting...

- PRC: Load Project and Resource Base Summaries
 - PRC: Load Project Performance Data
 - PRC: Update Project and Resource Base Summaries
 - PRC: Update Project Performance Data
-
- Refer to Metalink Note 364621.1 for a detailed Overview and FAQ for Project Performance Reporting
 - Ensure that you have adequate table space to perform the load
 - Refer to Metalink Note 311745.1 for table space suggestions

Revenue and Billing Summary

Revenue and Billing Summary...

Project Performance Reporting will also load a Revenue and Billing summary

Revenue and Billing Summary

– Navigate: Financial Tab – Billing

ORACLE Projects

Return to Project ListReturn To PortalPreferencesHelpFeedbackLogout

Project: ABC-Financials Implementation (502752)

ProjectResourcesWorkplanControlFinancialReporting

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

Billing

View ☒ Project Currency (USD) ☐ Project Functional Currency (EUR)

Summary

Revenue	Invoice Collections	Invoicing Status
Funding 550,000.00	Funding 550,000.00	Billable Cost 115,200.00
Accrued 212,500.00	Invoiced 175,000.00	Unbilled Cost 15,000.00
Backlog 337,500.00	Backlog 375,000.00	Unbilled Events N/A
Write-Off 2,500.00	Paid 168,000.00	Unbilled Retention 11,000.00
Unbilled Receivables 37,500.00	Due 7,000.00	Unapproved Invoices 124,454.00
Unearned Revenue 0.00		

Invoices

View

☐ Group by Customer

☒ **TIP** To view invoices grouped by customer, check the Group by Customer checkbox.

Draft Number	Customer	Invoice Date	Currency	Line	Tax	Amount	Due	Project Amount (USD)	Invoice Status	Credit Of	AR Number
7	ABC Corporation (1806)	09-Jun-03	USD	118,736.00		118,736.00	118,736.00	118,736.00	Unapproved		
6	ABC Corporation (1806)	09-Jun-03	USD	1,218.00		1,218.00	1,218.00	1,218.00	Unapproved		
5	Hilman and Associates (1608)	09-Jun-03	USD	4,500.00		4,500.00	4,500.00	4,500.00	Unapproved		
4	ABC Corporation (1806)	09-Jun-03	USD	<4,500.00>		<4,500.00>	<4,500.00>	<4,500.00>	Approved	2	
3	ABC Corporation (1806)	09-Jun-03	USD	4,500.00		4,500.00	400.00	4,500.00	Released		1033
2	ABC Corporation (1806)	09-Jun-03	USD	4,500.00		4,500.00	4,500.00	4,500.00	Released		1032
1	ABC Corporation (1806)	09-Jun-03	USD	4,500.00		4,500.00	4,500.00	4,500.00	Released		1031

☒ **TIP** Line, Tax, Amount and Due column values are in Invoice Currency. Amount column value is sum of the Line and Tax column values. To view the invoice details click on the draft number for the invoice.



Personalizations

Personalizations...

You can personalize views in Oracle Project Management using standard functionality

Most Project Management pages can be personalized using standard functionality

– Pages that can be personalized include:

- Workplan – Published
- Workplan – Working
- Deliverables
- Issues
- Change Requests
- Change Orders
- Financial Plan – Versions
- Percent Complete
- Tasks
- Task Summary
- Resource Summary

The screenshot shows the 'Resource Summary' page in Oracle Project Management. At the top, there's a section for 'Display Amounts' with radio buttons for 'Project' (selected) and 'Program', and a 'Go' button. Below this is a link 'Show Details and Parameters'. The main content area has tabs for 'Cost' and 'Profitability'. Under the 'Cost' tab, there's a 'View' dropdown set to 'Cost PTD & ITD', a 'Go' button, a 'Personalize' button (highlighted with a red rectangle), and a 'Search' button. Below the 'View' section, there's a 'Select Project or Resource: View' dropdown set to 'Periodic Analysis', with 'Go' and 'Export' buttons. At the bottom, there are links for 'Expand All' and 'Collapse All', and a tree view showing 'ABC-Financials Implementation (502752)'.

Personalizations...

Oracle Project Management provides extensive personalization functionality

ORACLE Projects

Project TEST_TIM1 (TEST_TIM1) [Diagnostics](#) [Home](#) [Logout](#) [Preferences](#) [Help](#) [Personalize Page](#)

Warning

Low-level logging is currently enabled. Your application will not perform as well while low-level logging is on.

Create View

Below is a list of attributes that can be edited to change the view and/or filter the data that is displayed in your table. [Cancel](#) [Revert](#) [Apply and View Results](#) [Apply](#)

* Indicates required field

General Properties

* View Name: Personalization View

Number of Rows Displayed: 10 Rows

Description: 10 Rows

Attribute Properties

Update the appropriate column attributes as desired. [Rename Columns /](#)

Columns Shown and Column Order

☒ Items with an asterisk cannot be removed but can be re-ordered.

Available Columns

Planning Element: Project or Task
Planning Element: Level
Planning Element: Budget Start Date
Planning Element: Budget End Date
Planning Element: Generation Source
Planning Element: Spread Curve
Planning Element: Currency
Quantity: Current Budget
Quantity: Change
Quantity: Plan 1
Quantity: Plan 2
Quantity: Original Budget
Quantity: Variance: Plan 1
Quantity: Variance: Plan 2
Quantity: Variance: Current Budget
Quantity: Variance: Original Budget
Quantity: Variance %: Plan 1
Quantity: Variance %: Plan 2
Quantity: Variance %: Current Budget
Quantity: Variance %: Original Budget
Raw Cost: Current Budget

Columns Displayed

Planning Element: Project or Task
Quantity: Total
Planning Element: Resource
Raw Cost: Total
Burdened Cost: Total
Edit
Details
Spread Curve
Planning Element: UOM

Attribute Properties

Update the appropriate column attributes as desired. [Rename Columns / Totaling](#)

Columns Shown and Column Order

☒ Items with an asterisk cannot be removed but can be re-ordered.

Available Columns

Planning Element: Level
Planning Element: Budget Start Date
Planning Element: Budget End Date
Planning Element: Generation Source
Planning Element: Spread Curve
Planning Element: Currency
Quantity: Current Budget
Quantity: Change
Quantity: Plan 1
Quantity: Plan 2
Quantity: Original Budget
Quantity: Variance: Plan 1
Quantity: Variance: Plan 2
Quantity: Variance: Current Budget
Quantity: Variance: Original Budget
Quantity: Variance %: Plan 1
Quantity: Variance %: Plan 2
Quantity: Variance %: Current Budget
Quantity: Variance %: Original Budget
Raw Cost: Current Budget

Columns Displayed

Planning Element: Project or Task
Quantity: Total
Planning Element: Resource
Raw Cost: Total
Burdened Cost: Total
Edit
Details
Spread Curve
Planning Element: UOM

Exception Reporting

Exception Reporting...

Oracle Project Management provides extensive Exception Reporting features

ORACLE Projects [Return to Project List](#) [Return To Portal](#) [Preferences](#) [Help](#) [Feedback](#) [Logout](#)

Project: ABC-Financials Implementation (502752)

Project Resources Workplan Control Financial **Reporting**

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

Exceptions

[Show Key Performance Area Summary](#) [Refresh Key Performance Areas](#)

Key Performance Area: Financial
Performance Rule:
Included in Scoring: Yes
[Go](#)

Exception Status: All
Measure:

[Export](#) [Previous](#) [Next 25](#)

Key Performance Area	Performance Rule	Measure	Exceptions Status	Value	Threshold		Weighting	Included in Scoring	Last Recorded Date
					From	To			
Financial	CPI Monitoring	Cost Performance Index	✖	0.97	-99999	0.98	75	Yes	01/26/2004 11:45:56
Financial	Percent Spent Higher	Percent Spent Ratio	✖	1.1	1.1	9999999	50	Yes	01/26/2004 10:45:56
Financial	ELM Value < 2	ELM	✖	1.69	-99999	2.00	40	Yes	01/26/2004 11:41:56
Financial	Unbilled Cost Exceptions	Unbilled Cost Ratio	✖	0.56	0.35	99999	35	Yes	01/26/2004 03:45:56
Financial	Forecast Cost Variance	At Completion Cost Variance	⚠	2.99	+2%	+5%	20	Yes	01/26/2004 10:45:56
Financial	ITD Rev Variance Higher	ITD Revenue Variance	⚠	-1.4%	-2%	+2%	20	Yes	01/26/2004 10:45:56
Financial	Billable	Billable Cost Ratio	⚠	0.80	0.75	0.85	10	Yes	01/27/2004 03:45:56

[Show Status Indicator Keys](#) [Refresh Key Performance Areas](#)

[Return to Project List](#)

[Project](#) | [Resources](#) | [Workplan](#) | [Control](#) | [Financial](#) | [Reporting](#) | [Return to Project List](#) | [Return To Portal](#) | [Preferences](#) | [Help](#) | [Feedback](#) | [Logout](#)
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Exception Reporting...

Oracle Project Management provides extensive Exception Reporting features

Exception Reporting Considerations:

- Define and assign Key Performance Areas and Scoring Rules
- Optional: Create Custom Performance Rules
- Assign Performance Rules to your project or Template
 - Navigate to the Project Template or Project in HTML – Reporting Tab – Setup – Performance Rules
- Run PRC: PRC: Generate Performance Scores and Notifications

Exception Reporting...

Oracle Project Management provides extensive Exception Reporting features

Exception Reporting Considerations:

- Define and assign Key Performance Areas and Scoring Rules
- Optional: Create Custom Performance Rules
- Assign Performance Rules to your project or Template
 - Navigate to the Project Template or Project in HTML – Reporting Tab – Setup – Performance Rules
- Run PRC: PRC: Generate Performance Scores and Notifications



Status Reporting

Status Reporting...

Oracle Project Management provides robust status reporting functionality

ORACLE Projects

[Return to Project List](#) [Return To Portal](#) [Preferences](#) [Help](#) [Feedback](#) [Logout](#)

Project: ABC-Financials Implementation (502752)

ProjectResourcesWorkplanControlFinancialReporting

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

Status Report: Team Report

HistoryPrintable Page

Project NameABC - Financials Implementation

Project Number502752

OrganizationNortheast-Apps

Project TypeTime and Materials

Project ManagerAmy Marlin

Start Date24-Feb-2004

Finish Date25-Jul-2004

StatusActive

General Progress

Report Start Date25-Apr-2004

Reported byAmy Marlin

Report End Date24-May-2004

Last Updated ByPat Stock

Reported Status⚠ At Risk

Brief OverviewClient Issues Resolved

SummaryDefinition phase completed

IssuesOperation analysis completed

AccomplishmentsSolution design for data migration completed

PlansTest environment setup completed. Some issues due to NT port which are now resolved

Last Three Published Reports

Report Start Date	Report End Date	Reported Status	Brief Overview	Reported By	Publish Date and Time
25-Mar-2004	24-Apr-2004	⚠ At Risk	Critical resource needed to replace customer/partner resources	Amy Marlin	25-Apr-2004 12:00 PM
24-Feb-2004	24-Mar-2004	✅ On Track	Operation Analysis detailed layout.	Amy Marlin	25-Mar-2004 12:00 AM
24-Jan-2004	23-Feb-2004	✅ On Track	Requirement documentation scoped	Amy Marlin	24-Feb-2004 12:00 AM

Phases

CommentThe next phase of the project can start before the current phase is complete.

Outline Number	Phase	Current Phase	Task Status	Progress Status	Scheduled Start	Scheduled Finish	Task Manager	Details
1	Business Requirement Definition		In Progress	✅ On Track	24-Feb-2004	12-Apr-2004	Amy Marlin	
2	Operation Analysis		In Progress	✅ On Track	01-Apr-2004	26-Apr-2004	Amy Marlin	
3	Solution Design	✓	In Progress	⚠ At Risk	08-Apr-2004	07-Jun-2004	Amy Marlin	
4	Build		Not Started		20-May-2004	26-Jul-2004	Emily Heather	
5	Production		Not Started	⚠ At Risk	26-Jul-2004	26-Jul-2004	Amy Marlin	

Status Reporting...

Oracle Project Management provides robust status reporting functionality

Status Reporting Configurations:

- Optional: Define Status Report Sections
- Create and Assign a Status Report to your Project Template or Project
 - Navigate: Query Project or Template in HTML – Reporting Tab – Setup – Status Reports – Add Status Report – Define:
 - Effective Dates
 - Layout
 - Reporting Cycle
 - Approval Options
 - Reminder Rules
- Navigate: Reporting Tab – Status Reports – Create Status Report

| Team Member
| Home Page

Team Member Home Page...

The Team Member Home Page Provides a collaborative space for your project

Manage your project with the Team Member Home Page

- View Owned Work
- Manage Issues
- Review Assigned Actions
- Update Progress
- Manage Deliverables
- Manage Change Documents

ORACLE Projects [Return to Project List](#) [Return To Portal](#) [Preferences](#) [Help](#) [Feedback](#) [Logout](#)

Team Member Home

Welcome, Emily Heather, to Team Member Home. Shortcuts

[General](#) [Tasks and Deliverables](#) [Issues and Changes](#)

Assigned Actions

[Full List](#)

[Update Deliverable Actions](#)

Project	Class	Reference	Priority	Action Summary	Due Date	Requested by	Take Action
ABC-Financials Implementation (502752)	Change Order	CO (23)	Low	Additional work for requirement definitions to help client resources.	23-Jan-2004	Amy Marlin	
ABC-Financials Implementation (502752)	Deliverable	Transition Strategy Document (PM.010)	Normal	Final Draft of Strategy Document	25-Jan-2004	Peter Cheng	
A&A - Financials Upgrade (501035)	Issue	ISS (45)	High	Additional testing time necessary.	25-Jan-2004	Amy Marlin	
May Constructors-Fin & Proj Imp (504800)	Change Request	CR (45)	Normal	Additional archiving technology is requested.	28-Jan-2004	Pat Stock	
ABC-Financials Implementation (502752)	Deliverable	Business Requirement Document (BRD)	Medium	First Draft of Requirement Document	30-Jan-2004	Amy Marlin	

Owned Work

[Full List](#)

Project	Type	Reference	Subject	Priority	Due Date	Status	Progress Status	Update Progress
ABC-Financials Implementation (502752)	Task	System Integration Test 1 (SIT1)	System Integration testing for modules A through K	Low	06-Mar-2004	In Progress	At Risk	
Bullfrog - Fin & Proj Imp (508746)	Issue	Res (7)	Lack of Resources for requirements.	Normal	09-Mar-2004	Submitted to Review Board	At Risk	
LAC - Fin & HR Imp (510100)	Task	Parallel Preparation (PP)	Parallel Preparation	Medium	11-Mar-2004	Not Started	At Risk	
ABC-Financials Implementation (502752)	Deliverable	Prototype Design	Prototype Design		14-Apr-2004	In Progress	On Track	
Bullfrog - Fin & Proj Imp (508746)	Change Request	CR (54)	Changing Project Scope.	Normal	09-Mar-2004	Dev Review	In Trouble	

Team Member Home Page...

The Team Member Home Page requires limited configuration

If you have configured any of the following features, they will be available on the Team Member Home Page:

Deliverables

Issues

Progress

Change Documents

Owned Work

Etc...



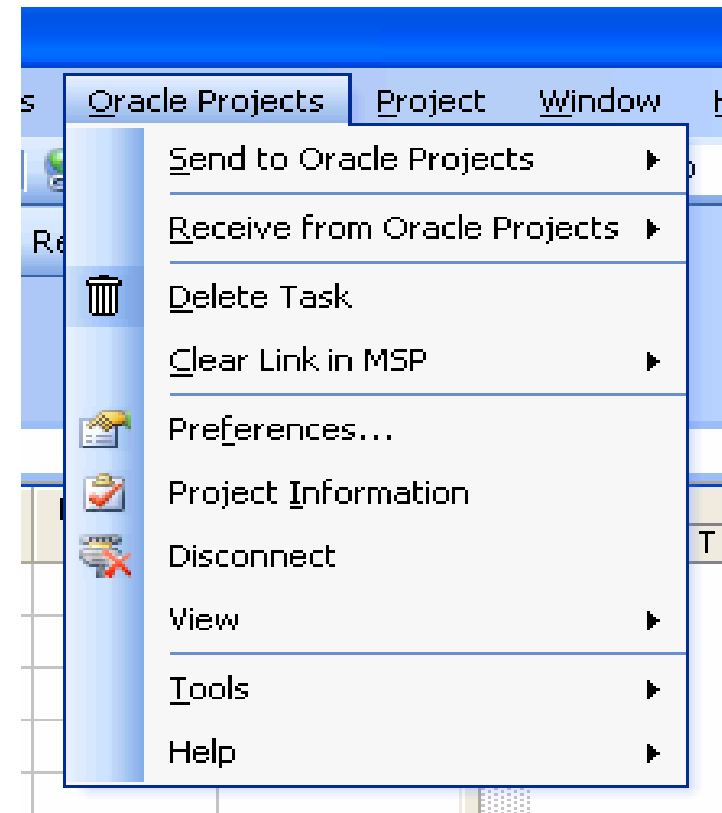
MS Project Integration

MSP Integration...

Oracle Project Management provides extensive Microsoft Project Integration

Microsoft Project Integration allows for extensive integration with Oracle Project Management

- Create Workplan Tasks
- Create Financial Plan Tasks
- Delete Tasks
- Manage Resources
- Manage Progress
- Interface actual Cost to Microsoft
- Integrate detailed schedule data
- Manage resource loaded plans
- Store plan versions
- Role Based Security



Please apply Patch 5367017 to support this feature

MSP Integration...

Oracle Project Management provides extensive Microsoft Project Integration

Configuration Considerations:

- Structures
 - MSP Integration works differently depending on the Structure assigned to the project
- Install MSP Integration
 - Navigate: Project Super User – Setup – Microsoft Project Integration Installation
- Complex Project Plans are exception prone
 - Detailed resource loaded schedule integration needs expertise with MSP and Oracle Project Management
- Recommended Integration Settings
 - Use MSP to define large numbers of tasks and interface to either the Workplan or the Financial Plan

Lessons Learned

Lessons Learned, Pitfalls and Common Mistakes...

Our experience tells us:

- Rollout Project Management slowly
 - This reduces risk and allows for a longer training period
- Ensure that there is adequate training
 - We recommend UPK (User Productivity Kit)
- Obtain Executive Buy in for the effort
- Advertise the benefits of Oracle Project Management
 - Collaborative Environment
 - Project Performance Reporting
 - Exception Reporting
 - MSP Integration
- Develop Super Users
 - A strong Super User community can reduce risk and improve implementation success

About Cronin Business Solutions...

Experts in the Oracle Projects suite...

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