How to Implement Oracle Project Management in 60 days

NorCal OAUG Training Day 2009

Timothy Cronin
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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 Projects Intelligence

Oracle Project Management
Oracle Project Collaboration
Oracle Time and Labor
Oracle Project Portfolio Planning
Oracle Project Resource Management
Oracle Project Billing
Oracle Project Costing
Oracle Project Foundation
Oracle Project Contracts
Oracle Project Manufacturing
Global Project Repository

Personalized Role-Based Views/Security
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...

- Patching
- Roles and Responsibility
- Upgrade Projects to FPM
  - Load Project Performance
  - Personalizations
  - MS Integration
  - Status Reporting
  - Team Member Page
  - Exception Reporting

Day 0  Day 5  Day 10  Day 15  Day 20  Day 25  Day 30  Day 35  Day 40  Day 45  Day 50  Day 55  Day 60

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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
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

Personalize "Program Reporting"

Shared structures
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
Upgrading Projects...

Upgrade Budgets

Configuration Steps:

- This concurrent process will migrate your budgets from forms to HTML.
### Upgrading Projects...

**Upgrade Budgets**

**Configuration Steps:**

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

---

<table>
<thead>
<tr>
<th>Select Plan Type</th>
<th>People Effort</th>
<th>Equipment Effort</th>
<th>Cost</th>
<th>Revenue</th>
<th>Margin</th>
<th>Margin %</th>
<th>Maintain</th>
<th>Version</th>
<th>View</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approved Budget</td>
<td>4,280</td>
<td>5,230</td>
<td>566,500</td>
<td>650,000</td>
<td>189,500</td>
<td>35</td>
<td><img src="icon.png" alt="icon" /></td>
<td><img src="icon.png" alt="icon" /></td>
<td></td>
</tr>
<tr>
<td>Estimate</td>
<td>4,300</td>
<td>5,400</td>
<td>600,000</td>
<td>650,000</td>
<td>180,000</td>
<td>35</td>
<td><img src="icon.png" alt="icon" /></td>
<td><img src="icon.png" alt="icon" /></td>
<td></td>
</tr>
<tr>
<td>Forecast</td>
<td>4,514</td>
<td>5,340</td>
<td>413,340</td>
<td>574,368</td>
<td>161,029</td>
<td>35</td>
<td><img src="icon.png" alt="icon" /></td>
<td><img src="icon.png" alt="icon" /></td>
<td></td>
</tr>
<tr>
<td>Replan for IT Portfolio</td>
<td>4,280</td>
<td>5,230</td>
<td>566,500</td>
<td>650,000</td>
<td>189,500</td>
<td>35</td>
<td><img src="icon.png" alt="icon" /></td>
<td><img src="icon.png" alt="icon" /></td>
<td></td>
</tr>
</tbody>
</table>

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

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![Oracle Projects](image.png)

![Oracle Budgets](image2.png)
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

<table>
<thead>
<tr>
<th>Amount Entry</th>
<th>Enable Workplan Costs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amount Reporting</td>
<td>Resource Breakdown Structure</td>
</tr>
<tr>
<td></td>
<td>Report Cost Using</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Rounding Factor</td>
</tr>
<tr>
<td>Setup</td>
<td>Planning Resource List</td>
</tr>
</tbody>
</table>
# Upgrading Projects...

## Enable Financial Plan Settings

### Configuration Steps:
- Setup the Financial Plan

### Edit Planning Options

<table>
<thead>
<tr>
<th>Plan Settings</th>
<th>Currency Settings</th>
<th>Rate Schedules</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Display</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Resource Breakdown Structure</td>
<td>Plan Amounts in Multiple Currencies</td>
<td>Organization Resource Rollup</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Cost Plan</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Planning Level</td>
<td>Project</td>
<td>Resource List</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Revenue Plan</strong></td>
<td>Use Cost Plan Options for Revenue</td>
<td>Planning Level</td>
</tr>
</tbody>
</table>

---

*Image Source: Cronin Business Solutions*
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 Project Management standard MS Excel Integration**

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

<table>
<thead>
<tr>
<th>Column A</th>
<th>Column B</th>
<th>Column C</th>
<th>Column D</th>
<th>Column E</th>
<th>Column F</th>
<th>Column G</th>
<th>Column H</th>
<th>Column I</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Name (Number)</td>
<td>Plan Type</td>
<td>Version Name (Number)</td>
<td>Description</td>
<td>Plan Version Id</td>
<td>Record Version Number</td>
<td>Period Mask Record Version number</td>
<td>Run Id</td>
<td>Tip: Specifying a new task, planning resource, or currency will result in a new line. Lines marked for deletion are deleted during upload.</td>
</tr>
<tr>
<td>TEST_TIM1(TESTM_I1)</td>
<td>FPM BASELINE COST BUDGET</td>
<td>V11()</td>
<td>1892851</td>
<td>9</td>
<td>1</td>
<td>10728</td>
<td>TEST_TIM1(TESTM_I1)</td>
<td>FPM BASELINE COST BUDGET</td>
</tr>
<tr>
<td>Tip: This is not the end of the Template. Unprotect the sheet and insert as many rows as needed.</td>
<td>Up</td>
<td>Delete</td>
<td>Task Number</td>
<td>Task Name</td>
<td>Planning Resource</td>
<td>UOM</td>
<td>Amount Type</td>
<td>Currency</td>
</tr>
<tr>
<td>1</td>
<td>1</td>
<td>Task 1</td>
<td>Financial Elements</td>
<td>Currency</td>
<td>Burdened Cost Rate</td>
<td>USD</td>
<td>Raw Cost Rate</td>
<td>USD</td>
</tr>
<tr>
<td>1</td>
<td>1</td>
<td>Task 1</td>
<td>Financial Elements</td>
<td>Currency</td>
<td>Total Burdened Cost</td>
<td>USD</td>
<td>Total Quantity</td>
<td>USD</td>
</tr>
<tr>
<td>1</td>
<td>1</td>
<td>Task 1</td>
<td>Financial Elements</td>
<td>Currency</td>
<td>Total Raw Cost</td>
<td>USD</td>
<td>Total Quantity</td>
<td>USD</td>
</tr>
</tbody>
</table>
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
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

Resource Summary

Display Amounts  Project  Program

Show Details and Parameters

Cost  Profitability

View  Cost PTD & ITD

Select Project or Resource: View

Expand All  Collapse All

ABC-Financials Implementation (502752)
Oracle Project Management provides extensive personalization functionality.
Exception Reporting
Oracle Project Management provides extensive Exception Reporting features.

Key Performance Area | Performance Rule | Measure | Exceptions Status | Value | Threshold From | Threshold To | Weighting Included in Scoring | Last Recorded Date
--- | --- | --- | --- | --- | --- | --- | --- | ---
Financial | Cost Performance Index | 0.97-99999 | 0.98 | 75 Yes | 01/05/2004 11:45:56
Financial | Percent Spent Higher | 1.1 | 1.1999999 | 50 Yes | 01/05/2004 10:45:56
Financial | ELM Value < 2 | 1.65-99999 | 2.00 | 40 Yes | 01/25/2004 11:41:56
Financial | Unbilled Cost Exceptions | 0.66-0.35 | 999998 | 35 Yes | 01/25/2004 03:45:56
Financial | Forecast Cost Variance | 2.95% | +2% | +5% | 20 Yes | 01/25/2004 10:45:56
Financial | ITD Revenue Variance | -1.4% | -2% | +2% | 20 Yes | 01/25/2004 10:45:56
Financial | Billable | 0.80-0.75 | 0.65 | 10 Yes | 01/27/2004 03:45:56
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
Project: ABC - Financials Implementation (502752)

Status Report: Team Report

Project Name: ABC - Financials Implementation
Project Number: 502752
Organization: Northeast Apps
Project Type: Time and Materials

Project Manager: Amy Marin
Start Date: 24-Feb-2004
Finish Date: 25-Jul-2004
Status: Active

Report End Date: 24-May-2004
Last Updated By: Pat Stock

General Progress
Report Start Date: 25-Apr-2004
Reported by: Amy Marin
Reported Status: At Risk
Brief Overview: Critical resource needed to replace customer/partner resources
Summary: Operation analysis completed
Issue: Solution design for data migration completed
Accomplishments: Test environment setup completed. Some issues due to NT port which are now resolved

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

<table>
<thead>
<tr>
<th>Outline Number</th>
<th>Phase</th>
<th>Current Phase</th>
<th>Task Status</th>
<th>Progress Status</th>
<th>Scheduled Start</th>
<th>Scheduled Finish</th>
<th>Task Manager</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Business Requirement Definition</td>
<td>In Progress</td>
<td>On Track</td>
<td>24-Feb-2004</td>
<td>12-Apr-2004</td>
<td>Amy Marin</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Operation Analysis</td>
<td>In Progress</td>
<td>On Track</td>
<td>01-Apr-2004</td>
<td>26-Apr-2004</td>
<td>Amy Marin</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Solution Design</td>
<td>In Progress</td>
<td>At Risk</td>
<td>08-Apr-2004</td>
<td>07-Jun-2004</td>
<td>Amy Marin</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Build</td>
<td>Not Started</td>
<td>At Risk</td>
<td>20-May-2004</td>
<td>26-Jul-2004</td>
<td>Emily Heather</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Production</td>
<td>Not Started</td>
<td>At Risk</td>
<td>26-Jul-2004</td>
<td>26-Jul-2004</td>
<td>Amy Marin</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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...

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

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

Team Member Home

Welcome, Emily Heather, to Team Member Home.

Assigned Actions

<table>
<thead>
<tr>
<th>Project</th>
<th>Class Reference</th>
<th>Priority</th>
<th>Action Summary</th>
<th>Due Date</th>
<th>Requested by</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABC - Financial...</td>
<td>1525</td>
<td>Normal</td>
<td>Final Draft of Strategy Document</td>
<td>25-Jan-2004</td>
<td>Peter Cheng</td>
</tr>
<tr>
<td>ABC - Financial...</td>
<td>1526</td>
<td>High</td>
<td>Additional testing time necessary</td>
<td>25-Jan-2004</td>
<td>Amy Mark</td>
</tr>
<tr>
<td>May Construction...</td>
<td>1527</td>
<td>Normal</td>
<td>Additional testing time necessary</td>
<td>28-Jan-2004</td>
<td>Pat Skoell</td>
</tr>
<tr>
<td>ABC - Financial...</td>
<td>1528</td>
<td>Low</td>
<td>Additional testing time necessary</td>
<td>30-Jan-2004</td>
<td>Amy Mark</td>
</tr>
</tbody>
</table>

Managed Work

<table>
<thead>
<tr>
<th>Project</th>
<th>Type Reference</th>
<th>Subject</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABC - Financial...</td>
<td>Task</td>
<td>System Integration Testing for modules A through Z</td>
</tr>
<tr>
<td>ABC - Financial...</td>
<td>Issue</td>
<td>Lack of Resources for requirements</td>
</tr>
<tr>
<td>ABC - Financial...</td>
<td>Task</td>
<td>Parallel Preparation</td>
</tr>
<tr>
<td>ABC - Financial...</td>
<td>Deliverable</td>
<td>Prototype Design</td>
</tr>
<tr>
<td>ABC - Financial...</td>
<td>Change Request</td>
<td>Changing Project Scope</td>
</tr>
</tbody>
</table>

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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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