



Deriving Real Benefits from **E**nterprise **P**roject **P**ortfolio **M**anagement in the South African Industry

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*“Strategy without tactics is the
slowest route to victory.
Tactics without strategy is the
noise before defeat” – Sun Tzu*





The Business Problem

- Project-intensive organisations depend on delivering every project successfully and profitably, but...
 - Many organisations have no standardised project management practices
 - Many organisations have no enterprise level project management system in place



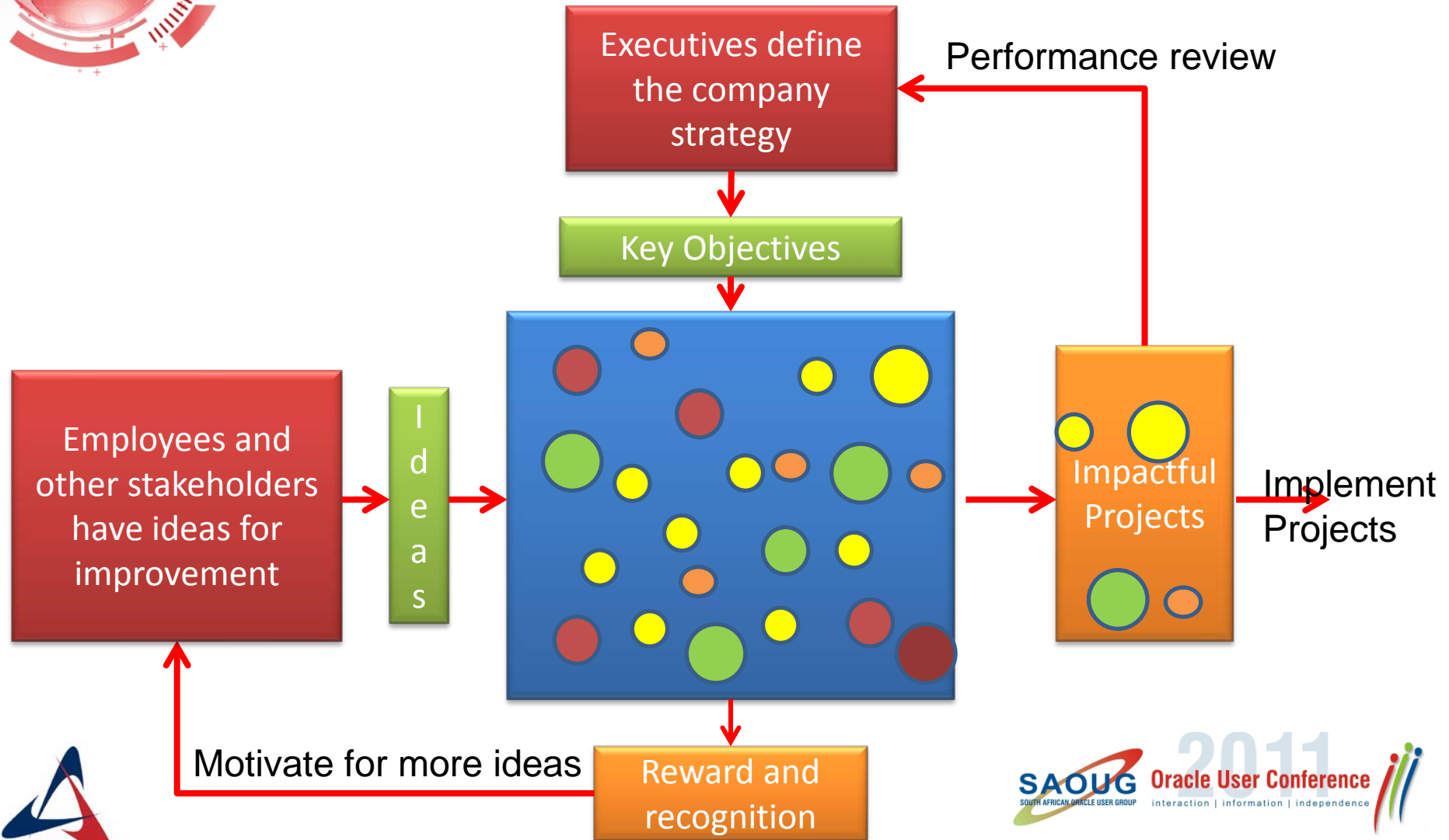
The Advantage of an EPPM System

- EPPM solutions can help organizations to:
 - **Enhance visibility** with accurate, real-time information for all decision-makers
 - **Accelerate performance** with standardised project management processes
 - **Reduce costs** through automation, consolidation and enterprise wide integration
 - **Drive productivity** by capturing and implementing best practices enterprise wide

The Big Six - EPPM Objectives

1. Choose the correct projects
2. Drive efficiency: Do more with less
3. Ensure informed decisions and governance
4. Extend best practices across your business
5. Anticipate change, risk and opportunity
6. Understand future resource needs

1. Choose the Correct Projects

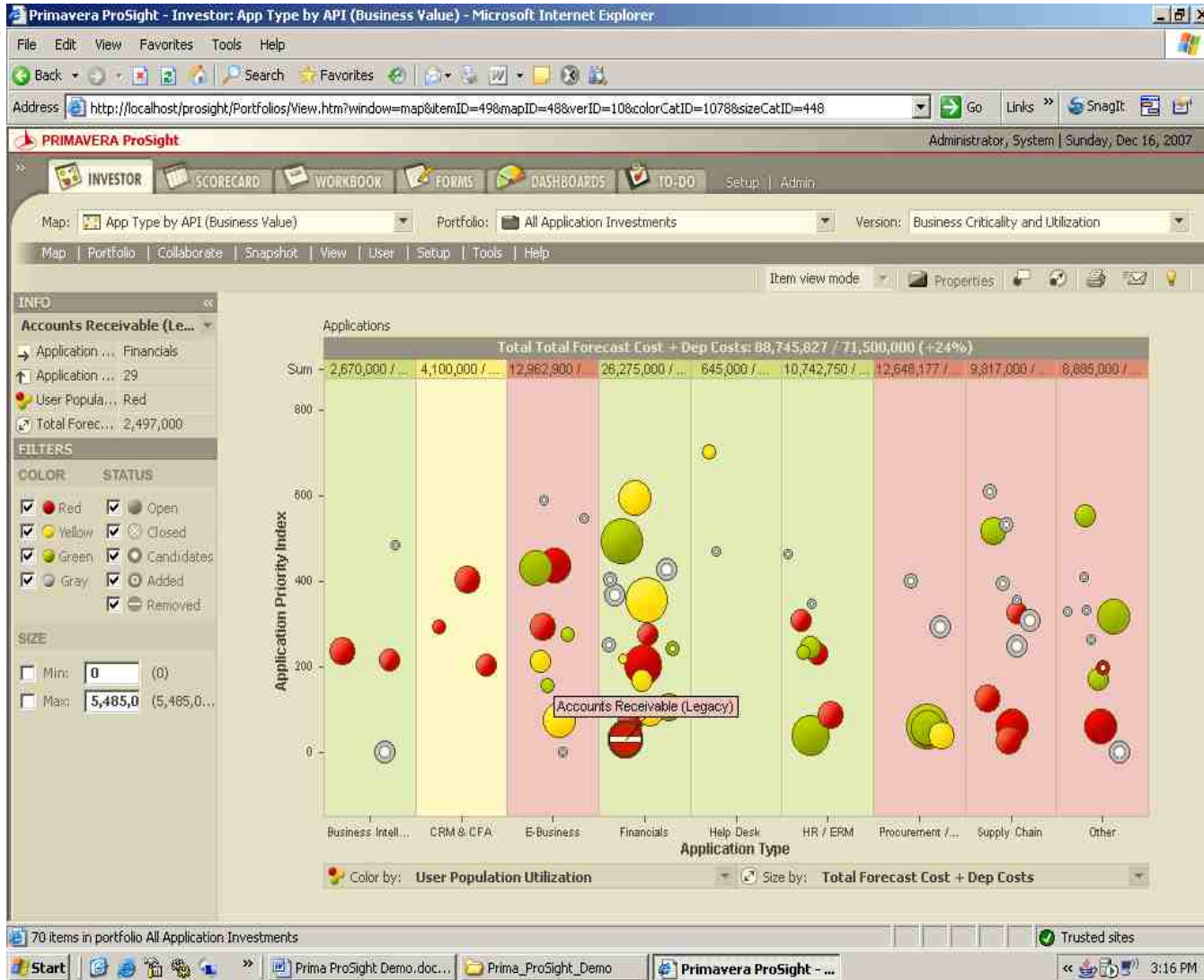




1. Choose the Correct Projects

- Portfolio Selection Requirements
 - Idea capture is important for innovation
 - Many ideas are required for a better portfolio
 - Ideas submission must be easy and simple
 - Ideas must be linked to strategy & objectives
 - Defined process for idea capture is required
 - Defines process for idea evaluation is required
 - Incrementally increase idea detail via a gated project process
- *Use Primavera Portfolio Management tool*

Primavera Portfolio Management





2. Drive Efficiency: Do More With Less

- *Money is a scarce resource in South Africa!*
 - *So get the best bang for your buck*
- EPPM derive benefits across the portfolio
 - Allocate funds to high impact projects
 - Also Benefit from low cost high impact projects
 - Cluster similar ideas, no repetition of work
- EPPM enables a PMO Approach
 - Consistent approach to project management
 - Continuous improvement over time
 - Automated workflows
- **Use Primavera P6 for Project Management and Control**

P6 Interface for Every Role

P6 EPPM (WEB)

- Intuitive to use
- All team members
- Management

P6 Professional

- Traditional P6 layout
- Power users
- Project "planners"

Support for LDAP (Single Sign-on)



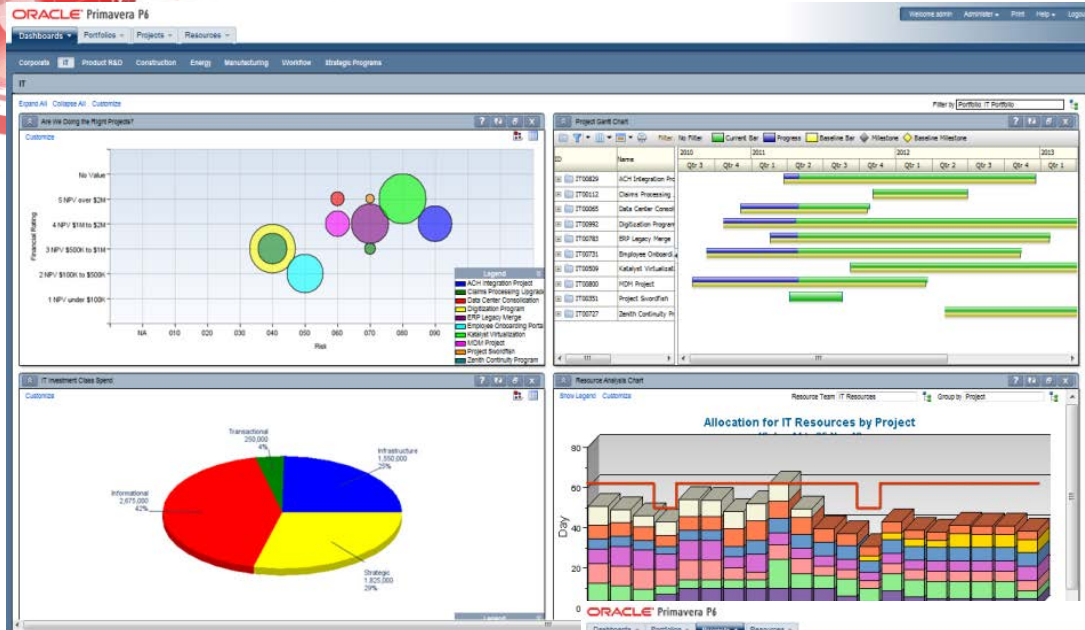
3. Ensure Informed Decisions and Governance Processes

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- *Information when you need it, how you need it*
- EPPM enables businesses to bring together all project collaborators, data points, and processes to provide a unified view of project, programme and portfolio status
- EPPM performance reporting informs strategy decisions
- Use **P6 Dashboards, P6 Analytics and Oracle BPM** to generate project performance information

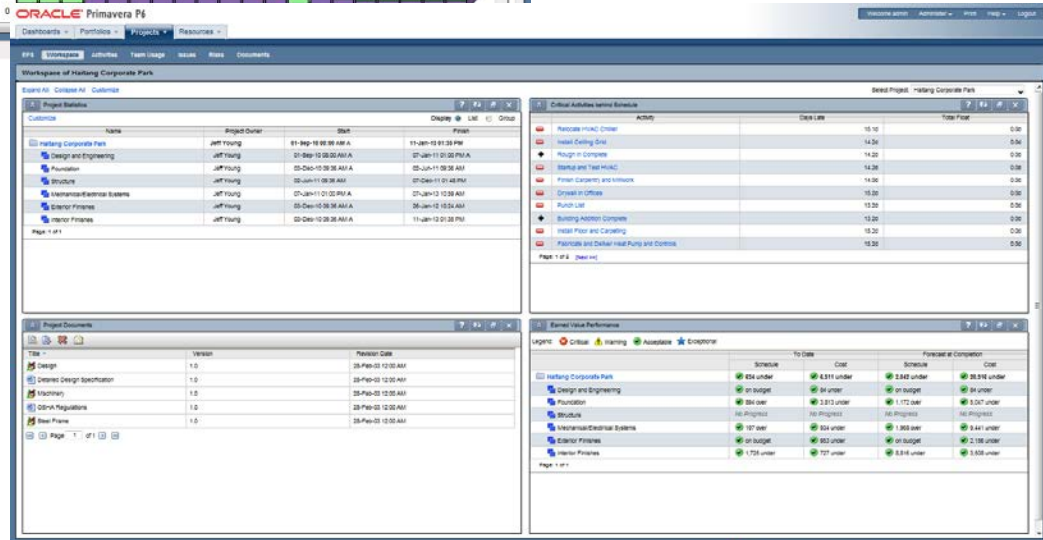


P6 Dashboards



- Role Specific Project Performance Information
- Not just for project planners

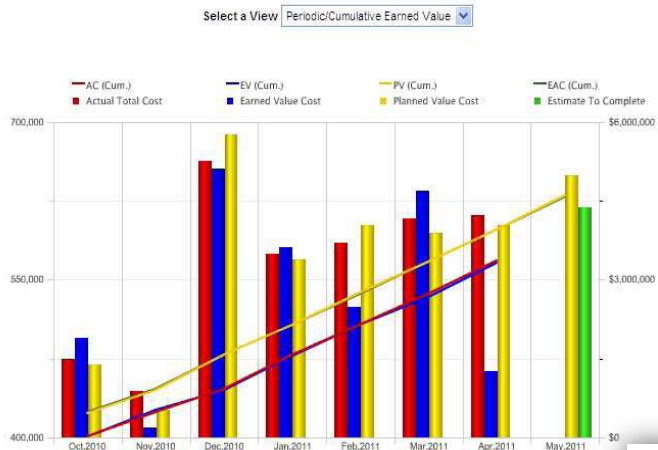
- Easy to Configure
- Direct from the Database
- Always up to date





P6 Analytics

- Pre-built Analytics for P6
- Deal with *BIG* Data
- Time-phased reports
- From Reporting Database
- Part of OBIEE



Year Name	Month Name	Planned Value Cost	Earned Value Cost	Actual Total Cost	Estimate At Completion Cost	PV (Cum.)	EV (Cum.)
2010	10-October	\$469,789	\$494,906	\$474,688	\$474,688	\$469,789	\$469,789
	11-November	\$426,773	\$409,817	\$444,084	\$444,084	\$896,561	\$896,561
	12-December	\$688,110	\$655,276	\$663,014	\$663,014	\$1,584,672	\$1,584,672
2011	01-January	\$569,535	\$581,502	\$574,645	\$574,645	\$2,154,207	\$2,154,207
	02-February	\$601,821	\$523,871	\$584,746	\$584,746	\$2,756,027	\$2,756,027
	03-March	\$594,932	\$635,204	\$608,352	\$608,352	\$3,350,960	\$3,350,960
	04-April	\$601,703	\$463,354	\$611,345	\$611,345	\$3,952,663	\$3,952,663
	05-May	\$649,547			\$618,776	\$4,602,209	\$4,602,209

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As of: 04/04/2011

Project Status Report for: **Project Swordfish** (IT00351)

SPONSOR	BUSINESS SEGMENT	PROJECT MANAGER	CURRENT PHASE	LOCATION	
Perry	1070100	Jones	Initiation	Europe	
DESCRIPTION					
The endeavor will utilize very innovative and new technologies and should prove to be a game-changer for us.					
START	FINISH	TARGET FINISH	% COMPLETE	ACTIVITIES COMPLETED	PROJECT SCORE
04/04/2011	08/17/2011			0 of 15	89
APPROVED BUDGET	COST TO DATE	AT COMPLETION	COST VARIANCE	LABOR TO DATE	LABOR VARIANCE
	\$0	\$188,031		0 h	

PRIORITY ISSUES

2 priority of 3 issues

Change in Sponsorship	
Need to clarify requirements	

OPEN RISKS

0 open of 7 risks

NOTEBOOKS

Recent Accomplishments	The business case was finalized last month. The project team held meeting last Wednesday to begin outlining the requirements analysis approach.
Sponsor Feedback	Congratulations to the team for coming up with an outstanding solution design. We were very impressed. Keep it up!

MILESTONES

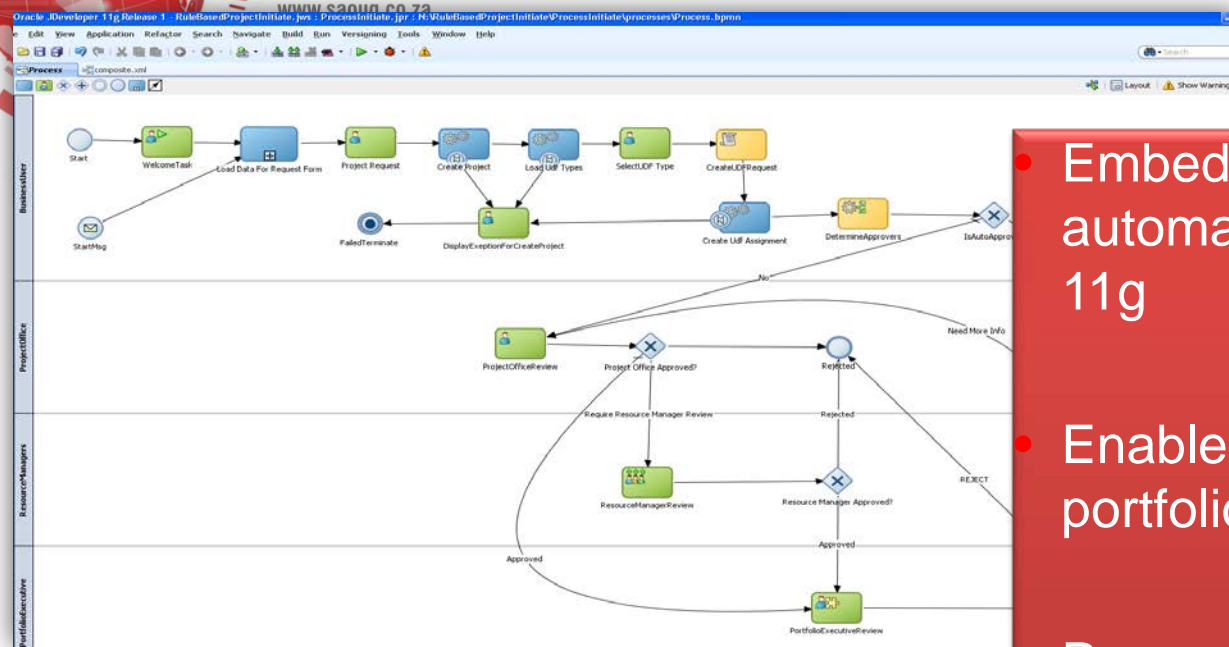
	Date	Status
Gate 1 - Project Funding Approved		Not Started
Gate 2 - Requirements Approved		Not Started
Gate 3 - Coding Complete		Not Started
Gate 4 - Ready for Implementation		Not Started
Project Complete Milestone		Not Started

- Project Status Reports
- Enable Earned Value
- Predictable Reporting
- Repeatable Reporting
- EXCEL FREE Process





Oracle BPM



- Embedded project processes automation capabilities with BPM 11g
- Enables end-to-end project to portfolio process integration
- Process/workflow participants can perform all actions from within P6
 - Launch
 - Act upon
 - & Monitor progress

4. Extend Best Practices Across Your Business

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- Limited number of good project managers available in South Africa
- EPPM provides a platform for good project management processes to be captured
 - Capture best practices in the EPPM system
 - Use EPPM configuration to guide project managers through the process
 - Use a gated project management process
- Enforce the process through Oracle BPM
- Use Primavera P6 Templates for repetitive projects



5. Anticipate Change, Risk and Opportunity

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- *Manage project risk, improve profit margin*
- The most successful organisations are those that can effectively anticipate change and mitigate risks by proactively preparing response and contingency plans.
- Use Primavera Contract Management
- Use Primavera P6 for Qualitative Risk Management
- Use Primavera Risk Analysis for Quantitative Risk Analysis

Primavera Contract Management

Multi-stage contract change management process in PCM

ORACLE Primavera Contract Management

School Addition-Automotive Center (DEMO)

Control Center > Cost Worksheet

Cost Worksheet | Select an action... | Expand All | Collapse All | Layout

05 (05 : Metals)		Original Budget	Approved Budget Revisions	Revised Budget
Cost Code	Title			
05.03200.S	Metal Joists	\$55,000.00	\$0.00	\$55,000.00
05.03200.S	Metal Deck	\$95,000.00	\$0.00	\$95,000.00
05.05400.S	Cold-Formed	\$90,000.00	\$0.00	\$90,000.00
05.03200.S	Metal Fabrica	\$85,000.00	\$0.00	\$85,000.00
Subtotals:		\$325,000.00	\$0.00	\$325,000.00
06 (06 : Wood and Plastic)		Original Budget	Approved Budget Revisions	Revised Budget
Cost Code	Title			
06.06100.S	Rough Carpe	\$550.00		
06.06400.S	Architectural	\$295.00		
Subtotals:		\$845,000.00		
07 (07 : Thermal & Moisture Protection)		Original Budget	Approved Budget Revisions	Revised Budget
Cost Code	Title			
Log Totals:		\$10,100,000.00		

Standard layouts and reports for contract cost management

ORACLE Primavera Contract Management

School Addition-Automotive Center (DEMO)

Control Center > Change Management

Change Management | Select an action... | Find

Customer Request (Reason)					
Title	Number	Dated	Status	Esti	
Additional Parking Required	00005	Aug 17, 2007	New Item		
Glazed Facing Tile	00007	Jun 7, 2007	New Item		
Construction Deficiency (Reason)					
Title	Number	Dated	Status	Esti	
Plugging Water line	00004	Aug 28, 2007	Approved		
Errors and Omissions (Reason)					
Title	Number	Dated	Status	Esti	
Underground Utilities	00002	Jul 7, 2007	Approved		
Inappropriate Concrete Mix	00006	Sep 12, 2007	New Item		
Field Conditions (Reason)					
Title	Number	Dated	Status	Esti	
Rock in Trenches	00003	Jul 11, 2007	Proceed		

Primavera P6 Risk Registers

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Welcome admin Administer Print Help Logout

Dashboards Portfolios Projects Resources

Enterprise Data

- Activity Codes - EPS
- Activity Codes - Global
- Activity Codes - Project
- Activity UDFs
- Cost Accounts
- Expense Categories
- Expense UDFs
- Step Templates
- Step UDFs
- Resources
 - Assignment UDFs
 - Rate Types
 - Resource Calendars
 - Resource Codes
 - Resource Curves
 - Resource UDFs
 - Units of Measure
- Risks
 - Risk Categories
 - Risk Scoring Matrices**
 - Risk Thresholds
 - Risk UDFs
- Issues
 - Issue Codes
 - Issue UDFs
- Documents
 - Document Categories
 - Document Statuses

Risk Scoring Matrices

Name	Matrix Size	Probability Threshold	Impact Thresholds	Tolerance Threshold	Risk Scoring Method
Harbour Pointe Risk Scoring Matrix	5 x 5	Harbour Pointe Probability Threshold	Harbour Pointe Schedule Threshold, Harbour...	Harbour Pointe Tolerance Threshold	Highest Impact
Cordova Risk Scoring Matrix	5 x 5	Cordova Probability Threshold	Quality Threshold (5 level), Cordova Cost Th...	Cordova Tolerance Threshold	Average Impact
Tech Projects Risk Scoring Matrix	3 x 3	Tech Projects Probability Threshold	Tech Projects Schedule Threshold, Tech Pro...	Tech Projects Tolerance Threshold	Highest Impact
Maintenance Risk Scoring Matrix	5 x 5	Maintenance Probability	Maintenance Cost Impact, Maintenance Sche...	Maintenance Tolerance	Average Individual Impact
New Risk Scoring Matrix	5 x 5	Maintenance Probability	Safety Threshold (5 level), Maintenance Cos...	Maintenance Tolerance	Highest Impact

Probability and Impact Diagram

Probability	Severity 1	Severity 2	Severity 3	Severity 4	Severity 5
Very High	6	12	18	36	72
High	4	7	14	28	56
Medium	3	5	10	20	40
Low	2	3	6	12	24
Very Low	1	1	2	4	8

- Configure for company specific process
- Risk Register by Project
- Portfolio Risk Information on Dashboard

Description Projects Probability and Impact Diagram Probability Impacts Tolerance





6. Understand Future Resource Needs

- Determine your current and future resource needs through the use of Roles and Resources
 - Use role planning for future capacity planning
 - Use named resources for current and near term planning
- Primavera P6 has a powerful Capacity Planning Module



P6 Capacity Planning

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Resource Management

ID	Name	Resource Type	Unit of Measure
E&C Resources	E&C Resources	Labor	
Product Dev	Product Development Resources	Labor	
IT	Information Technology Group	Labor	
MathsL	Lane Maths, COO	Labor	Full
RiceB	Barbara Rice, PMO Director	Labor	Full
AndersonG	Glen Anderson, VP Development	Labor	Full
CharlesM	Mondy Charles, VP IT Ops	Labor	Full
Material	Material Resources	Material	Cubic Yards

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General

Resource ID: E&C Resources
Resource Type: Labor
Unit of Measure:
Name: E&C Resources
Employee ID:
Title:
Active:
Parent Resource:
Email:
Resource ID:
Resource Type: Labor
Unit of Measure:
Name:
Employee ID:
Title:
Active:
Parent Resource:
Email:

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View Resource Analysis

Role Usage Resource Usage Resource Analysis

Group By: Resource Team
Chart Type: Stacked Histogram
Filter by: All Projects

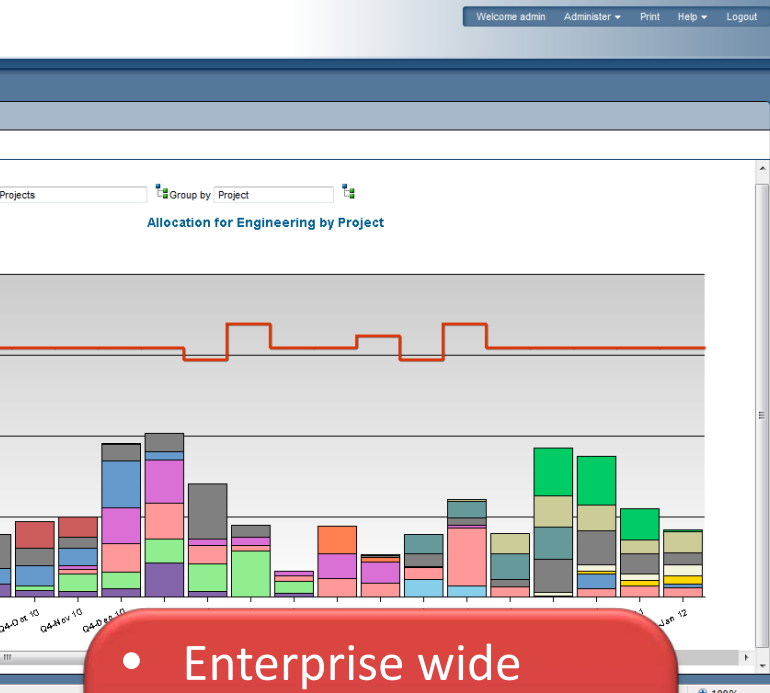
Allocation for Engineering by Project

Global Teams
Business Process PMO
Contractor Resources
Corporate Resources
E&C Resources

ORACLE Primavera P6

Assignments

Activity Name	Project Name	Planned Units/Time	Planned Duration	Planned Units	Actual Units	2011	2012
Amik Chopra				262.4d	159.34d	0.8%	
Design System	ADH Integration Project	50%	80.0d	40.00d	0.00d		
Develop System	ADH Integration Project	25%	90.0d	22.50d	0.00d		
Design System	Employee Onboarding Portal	50%	90.0d	49.00d	0.00d		
Develop System	Employee Onboarding Portal	25%	121.0d	30.25d	0.00d		
Test System	Employee Onboarding Portal	75%	22.9d	17.19d	0.00d		
Barbara Rice, PMO Director				301.0d	20.57d	5.8%	
Define Project Charter	ADH Integration Project	25%	25.0d	6.25d	5.00d		
Define Business Requirements *	ADH Integration Project	20.8%	38.9d	8.11d	0.00d		
Explore Opportunity	Zenith Continuity Program	18.8%	7.0d	1.31d	0.00d		
Define Project Charter	Zenith Continuity Program	25%	20.0d	5.00d	0.00d		
Carina Bennett				334.6d	179.38d	12.3%	
Define Project Charter	Claims Processing Upgrade	50%	7.7d	3.85d	0.00d		
Create Plans	Claims Processing Upgrade	75%	12.8d	9.61d	0.00d		
Define business Requirements *	Claims Processing Upgrade	50%	8.7d	4.36d	0.00d		
Define System Requirements	Claims Processing Upgrade	25%	19.3d	4.82d	0.00d		
Design System	Claims Processing Upgrade	50%	28.0d	14.02d	0.00d		
Develop System	Claims Processing Upgrade	25%	33.9d	8.38d	0.00d		
Test System	Claims Processing Upgrade	75%	5.1d	3.86d	0.00d		
Implement System	Claims Processing Upgrade	20%	34.0d	6.80d	0.00d		
Design System	Data Center Consolidation	50%	35.6d	17.80d	3.65d		



- Enterprise wide
- Resource teams
- Project teams
- Individuals

The Red Stack

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P6 Analytics / P6 ERD / BI / Reporting

Business Process Management

Portfolio Management

Risk Analysis
Quantitative Risk Analysis
Quantitative Risk Management

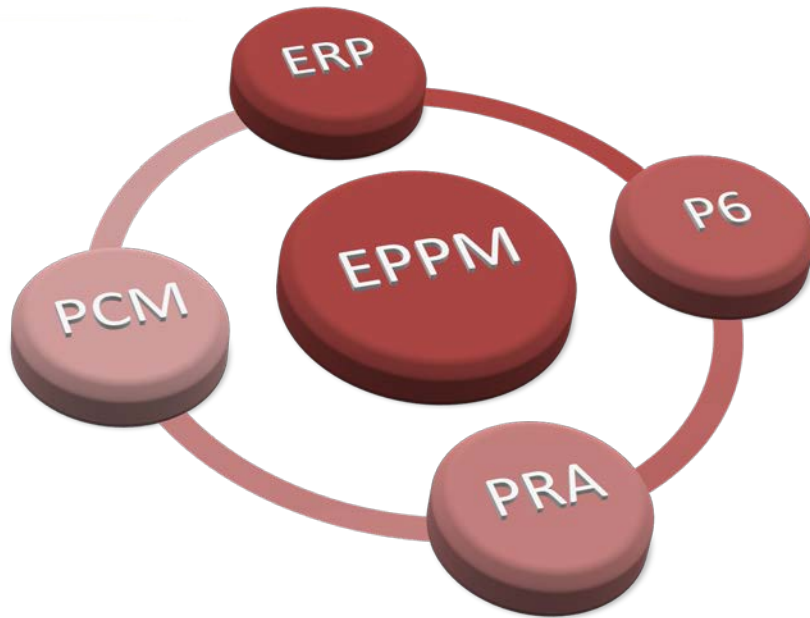
P6
Project Management
Risk Management
Project Scheduling
Resource Management

Contract Management
Change Management
Contract Management
Claim Management
Issue Management

Oracle Universal Content Management
(or other content management system)

Integration with other core Applications

I want it, How do I get it?



- Combine the transactional control of your ERP system with the project management functionality and flexibility of the Primavera Applications
- It is a journey, not an event

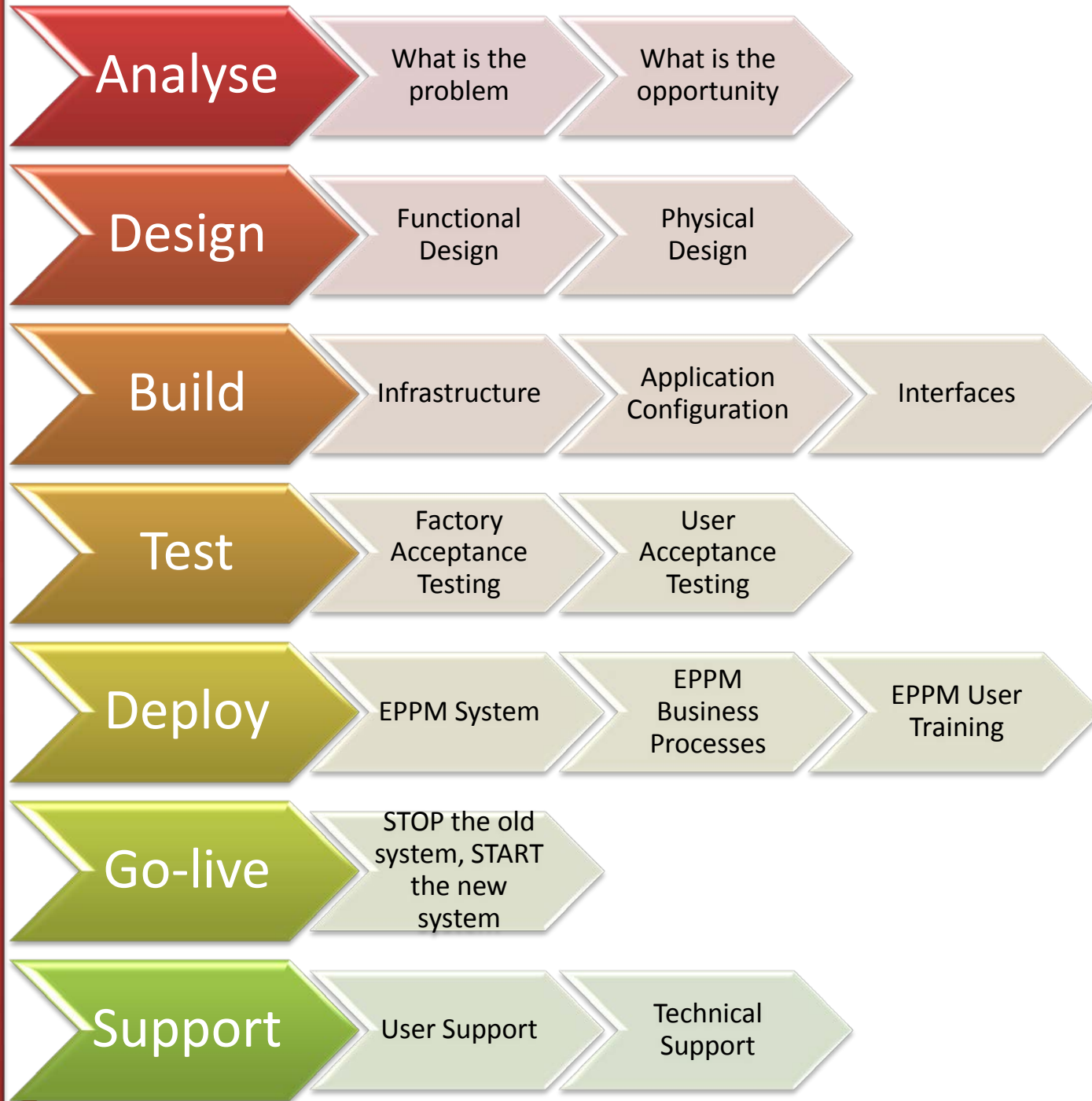


Integration Considerations

- What is the business process to enable?
- At what level of the WBS do we integrate?
- Ring fence application functionality
 - What is done where
 - Eliminate duplication of functions
- Which system owns the master / global data?
- ERP is for all transactional control
- What is the integration technology?
 - Standard integration packages from Oracle
 - Custom developed integration

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But we already have P6

- Talk to us about re-implementation of your current Oracle Primavera Applications
 - Eliminate standalone P6 Users
 - Improve ROI of your current investment
 - Set enterprise project management standards through an integrated solution
 - Accelerated P6 implementation solution for small and medium sized user groups



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