

# ORACLE'S PRIMAVERA PORTFOLIO MANAGEMENT



Every organization faces critical investment decisions. Making these decisions is among your most pressing challenges. You must constantly choose from an array of potential investment choices and supporting projects. If the decision-making process is flawed, the result can severely affect profitability or, at the very least, derail your case for funding. Oracle's Primavera Portfolio Management provides unmatched value for your enterprise decision-making processes. Its patented features, scalability, configurability, and flexible user interface have delivered measurable results for government agencies and some of the world's largest and most innovative companies.

## KEY BUSINESS BENEFITS

- Ease the selection of the optimum portfolio of investments.
- Maximize productivity by working on the most important investments.
- Redirect wasteful spending by eliminating non-strategic or redundant investments.
- Keep portfolio health on track
- Highlight potential adjustments to reach portfolio goals more rapidly.
- Measure ROI on all investments to determine actual value.

## Rely on Primavera for High Stakes Decision-Making

Analysts estimate that each year some 30 percent of the US\$1-to\$2 trillion spent on IT deployments in North America is wasted. The primary reason for this is that most current decision-making processes do not effectively capture and analyze the data required to link strategic objectives to execution plans. That's where Primavera solutions can help. By combining repeatable governance processes, and consistent evaluation metrics with the ability to capture and analyze all your relevant data, Primavera Portfolio Management helps you achieve your strategic goals and deliver value. From automating workflow and approval processes, choosing investment proposals, funding strong business cases, performing "what if" scenarios, and analyzing performance progress, Primavera Portfolio Management guides you to strategically prioritize, plan, and execute your enterprise portfolios. Primavera Portfolio Management will ensure that you continue to increase productivity and on-time delivery—adding value, strengthening your performance track record, and ultimately improving your bottom line results.

## A Proven Solution for Planning and Controlling Investments

Primavera Portfolio Management allows you to collaboratively create automated workflow and approval processes that support your ability to propose, plan, and control your investment portfolios. The highly configurable solution can be adapted to meet the needs of your organization as your processes change. Primavera Portfolio Management is the hub of an effective six-step planning and control process that allows you to:

- Clarify key strategic objectives by presenting them in measurable ways
- Propose initiatives that align with the organization's strategy and mission
- Prioritize and select investments with strong business case justification that realistically incorporate funding and staffing

**KEY FEATURES**

- Delivers value through a strategy-first approach to select the optimum investment set.
- Leverages consistent metrics and user-friendly forms to improve portfolio performance.
- Easy configuration of analytics, views, workflows and security.

- Track the state of activities and communicate the latest performance results of your investments
- Review portfolio performance in real time and compare current to past or future data to identify investment gaps and potential problems
- Adjust course as a result of portfolio reviews—increasing, decreasing, or withdrawing investment funding where appropriate

**Get Instant Visual Feedback on Your Portfolio Mix**

Primavera Portfolio Management features Investor Maps and dashboards to analyze key strategic decision-making data and metrics simultaneously. These essential metrics can also be used as the basis for “what if” scenarios planning in Investor Maps to determine your optimal portfolio mix.



Figure 1. Graphical analysis provides a rapid evaluation and understanding of portfolio performance, speeds decision-making, and increases confidence in achieving strategic goals and value.

**Enjoy Faster Data Sharing Throughout the Enterprise**

Primavera Portfolio Management also provides workflows that help streamline processes and approvals and forms that enable faster data collection. Workflows accelerate your time to value by guiding your organization swiftly through their work efforts and critical decisions. The forms streamline information retrieval across departments that may be using disparate systems.

The screenshot displays the Oracle Primavera Portfolio Management interface. The main window is titled 'NEW BUSINESS CASE' and shows a form for 'CRM Implementation'. The form includes fields for 'Item Name', 'Description', 'Status', and 'Funding Status'. A 'Schedule' table shows a forecast from July 14, 2008, to June 26, 2009. To the right, a 'Key Metrics' table lists various indicators like Strategy Score, Risk Score, and NPV. Below this, a 'Metric Details' table provides a breakdown of costs and benefits over time.

Forecast	Start	End
Planned	Jul 14, 2008	Jun 26, 2009

Key Business Drivers	Value	Indicator
Strategy Score	81	▲
Risk Score	58	
Year Funding Initiated	2008	
NPV	338,362	★
IRR (for multi-year items)	51.36	▲
Business Priority	0.76	
Expected Value	221,593	★
Mandatory/Force Ranked		
Force Ranked		

Strategies -- Support for:	Risks	Planned Financials	Expense	Capital	Total Cost	Benefit
External Customers	Mandatory	2008	20,000	122,000	142,000	
Stakeholders	Strong	2009	55,000		55,000	50,000
Increased Productivity	Very Strong	2010				100,000
Reducing Costs	Very Strong	2011				100,000
Competitive Advantage	Very Strong	2012				250,000
		Total	75,000	122,000	197,000	700,000

Figure 2. Intuitive data entry forms are easily configured to simplify data collection, while workflows promote user adoption and increase productivity.

## Get a Comprehensive View of Your Portfolio

Primavera Portfolio Management provides additional functionality that allows you to attain a complete view of your portfolio.

- **Scorecards:** Analyze all of your investments with comprehensive sets of metrics to gain a greater understanding of investment performance.
- **Workbooks:** Quickly and accurately communicate investment progress using high-level Gantt charts, status reporting, etc.
- **Workflows and Processes:** Speeds the adoption of portfolio management by guiding you through step-by-step workflows and processes. These workflows and processes help speed decision making and increase productivity.
- **Investment dependencies:** Lets you associate dependent investment relationships and specify factors and variables that influence your investments. For example, you can track every aspect of your applications, including upgrades, support strategies, servers for each application, and resources.
- **Easy access to historical and future data:** Streamlines and increases the speed at which organizations can check progress against past performance/future milestones, improving accountability and the success rate of delivering on expected returns.
- **Information protection:** Meets federal standards for cyber security by employing intrusion detection; audit logging; and security of metadata, objects, configuration information, and system data.

## Build More Value into Managing Your Portfolios

The Primavera Portfolio Management solution further strengthens your portfolio decision-making with the inclusion of the following components:

- Propose
- Bridges (integrations) to Primavera P6 Professional Project Management and Microsoft Project Server
- Fast Track pre-configurations of project and application portfolio management processes

## Propose

Propose enables organizations to capture ideas, surveys, or requests across the enterprise via Web forms and then automatically sends them to the appropriate portfolios for scoring, analysis, and action. Proposals are analyzed to determine if they merit moving to the next stage, such as business case development. Examples of these proposals are enhancement requests, project requests, corporate suggestion boxes and new product ideas. Proposals can be submitted anonymously, requiring no user identification.

## Bridges for Primavera P6 and Microsoft Office Project Server

Bridges for Primavera P6 and Microsoft Office Project (MSP) Server provide a tight, bi-directional user interface that allows data sharing between portfolio investments and the Primavera P6 or Microsoft projects that support them.

Portfolio managers can propose, inventory, prioritize, and select initiatives in Primavera Portfolio Management and then manage their implementation efforts in Primavera P6 or MSP Server. Typical data that's summarized for use in portfolio decision-making from these systems includes schedule, cost, and resource data. In addition, the robust architecture of the Bridges allows for the federation of multiple instances of Primavera P6 and/or MSP Server.

The Bridges allow for data to be shared at the project level and at various levels of the work breakdown structure level (based on mapping method deployed) with Primavera Portfolio Management project, dynamic list sub-items, and lifecycle phase elements.

Fast Track for Primavera Project Portfolio Management and Oracle's Primavera Capital Planning and Investment Control Budgeting (used in the public sector by the U.S. federal governments) provide a comprehensive set of data field mappings. Alternatively, custom mappings can be created for any Primavera Portfolio Management configuration. After the mappings are established, you can leverage the powerful features of the Bridges.

## Fast Track for Project Portfolio Management and Fast Track for Application Management

Fast Tracks are designed to give you a one-time head start in application and project portfolio governance, accelerating your time to value. They include preconfigured processes and analytics using scorecards, Investor Maps, dashboards, and data entry forms and can be modified to fit your specific processes.

Fast Track for Application Portfolio Management keeps your focus on analyzing and making decisions about your portfolio of applications to deliver significant financial savings. After capturing and analyzing relevant data on your existing applications and making remediation decisions, you can use Fast Track for Project Portfolio Management to execute on the projects to transform your applications. With this process, you manage and make continuous adjustments to optimize your application portfolios.

Fast Track for Project Portfolio Management guides you in managing your project portfolios from concept to completion using evaluation techniques that culminate in selecting the best projects based on strategic alignment, risk, schedule, and return on investment metrics. The selected projects are often managed leveraging summarized

detailed data from various sources such as Primavera P6 Professional Project Management or MSP Server. This summarized data supports project tracking, health monitoring, and project value realization.



#### CONTACT US

For more information about Primavera Portfolio Management, visit [oracle.com/primavera](http://oracle.com/primavera) or call +1.800.423.0245 (North America) or +44.0.870.8.768711 (EMEA) to speak to an Oracle representative.

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