

NZ Oracle Users Group Conference, Rotorua, 16 March 2010

# A case study on implementing the Oracle project management applications in a large and complex organisation

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Stu Keast - Asparona

# This presentation

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*NIWA are implementing major step changes to project and financial processes and tools to improve delivery in research & consultancy*

- NIWA and its business
- Business drivers
- Moving to a new system
- The Oracle solution
- Project status



# Who is NIWA?

- National Institute of Water & Atmospheric Research
- A Crown Research Institute - 1992
- NZ's leading science provider in the water and atmosphere area... "Leading environmental science to ensure the sustainable use of natural resources for New Zealand and the planet"
- Taihoro Nukurangi



# Pan - NZ coverage

Revenue \$120M

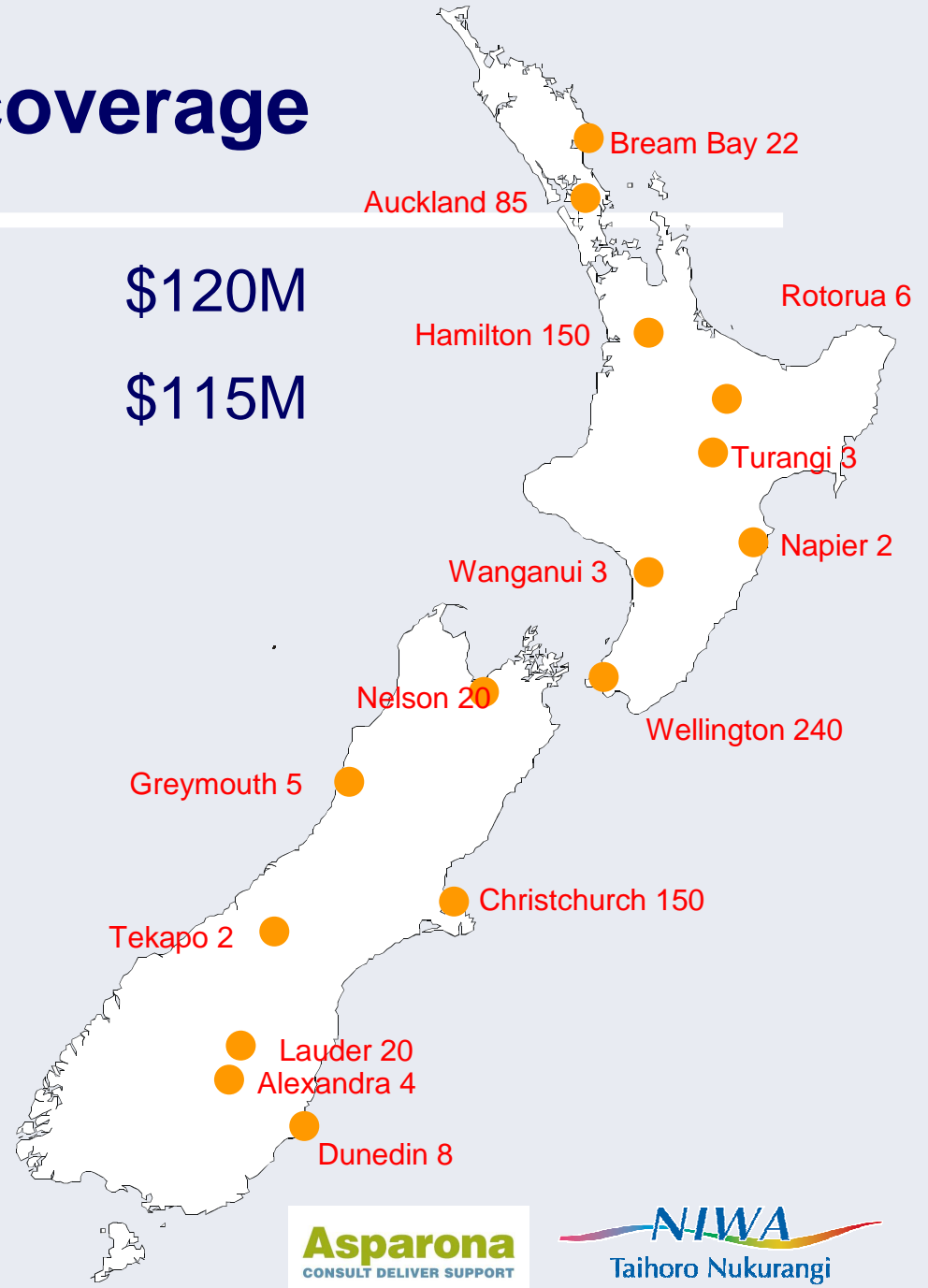
Assets \$115M

750 employees

4 main sites

- Auckland
- Hamilton
- Wellington
- Christchurch

11 smaller sites







# National Science Centres

Atmosphere

Natural Hazards

Climate

Freshwater

Coasts

Oceans

Fisheries

Biodiversity & Biosecurity

Aquaculture & Biotechnology

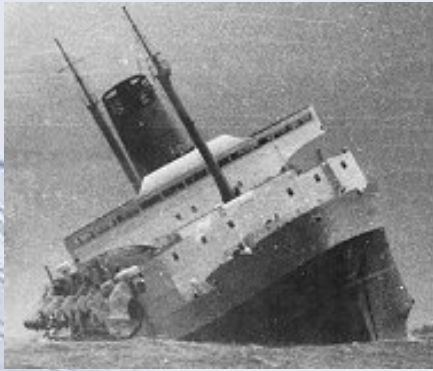
Maori Development

Energy

**Asparona**  
CONSULT DELIVER SUPPORT

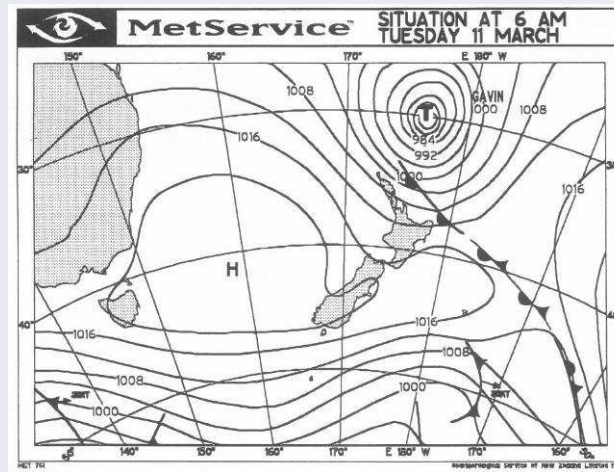
**NIWA**  
Taihoro Nukurangi

Preventing drowning and injury at New Zealand Beaches



# Coastal hazards

*Making New Zealand communities more resilient to weather driven, and coastal and marine geological hazards, now and in a changing climate.*



DATE

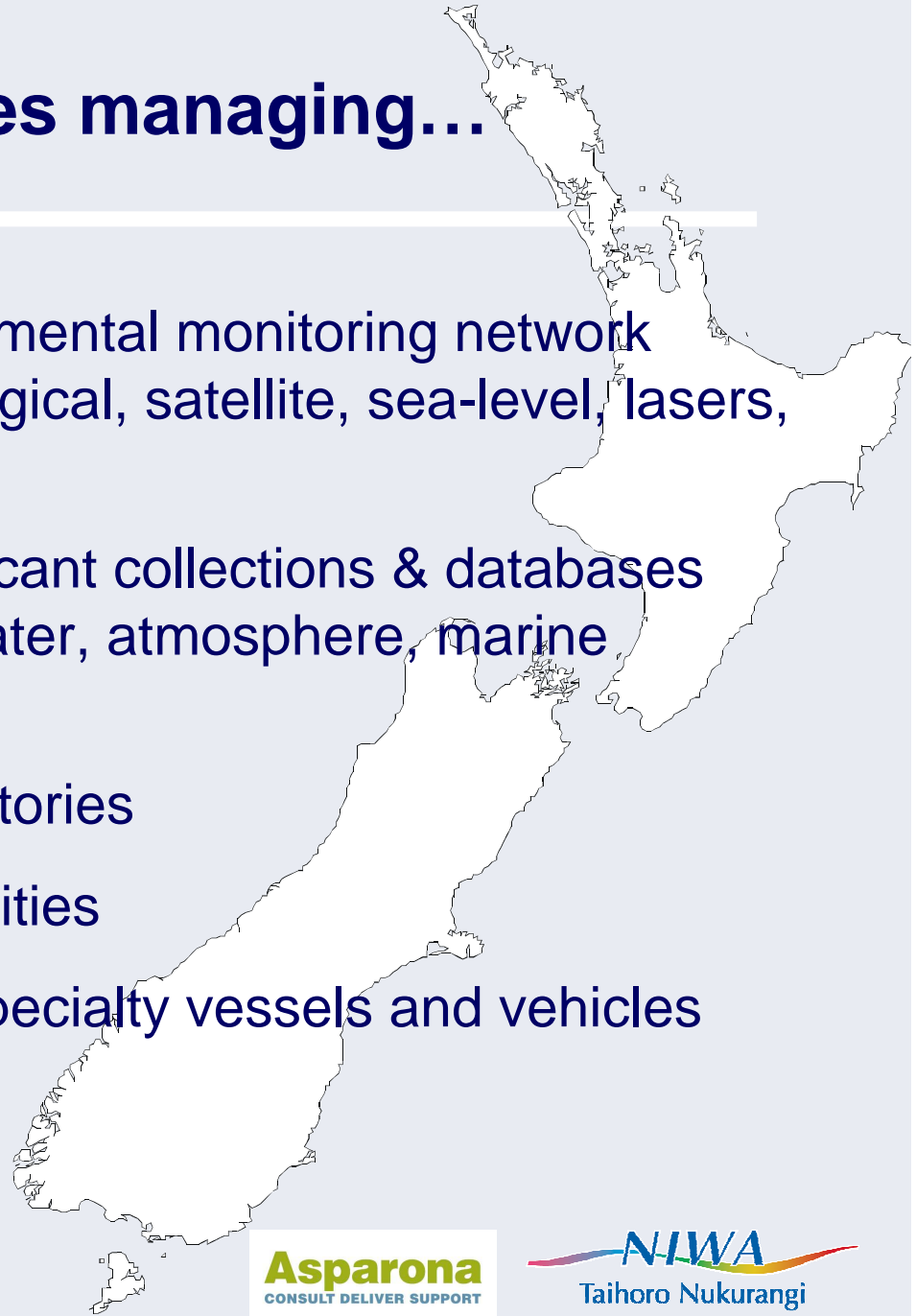







## Work includes managing...

- National environmental monitoring network (climate, hydrological, satellite, sea-level, lasers, balloons)
- Nationally significant collections & databases (e.g., climate, water, atmosphere, marine invertebrates)
- Specialist laboratories
- Aquaculture facilities
- Large array of specialty vessels and vehicles





# Large project diversity & volume

- Knowledge based business
- Earn revenue selling time – Resourcing information is a key business metric
- 1600 projects, 1000's of tasks and milestones and deliverables to track...
- Project budgets.... several \$K to several \$M

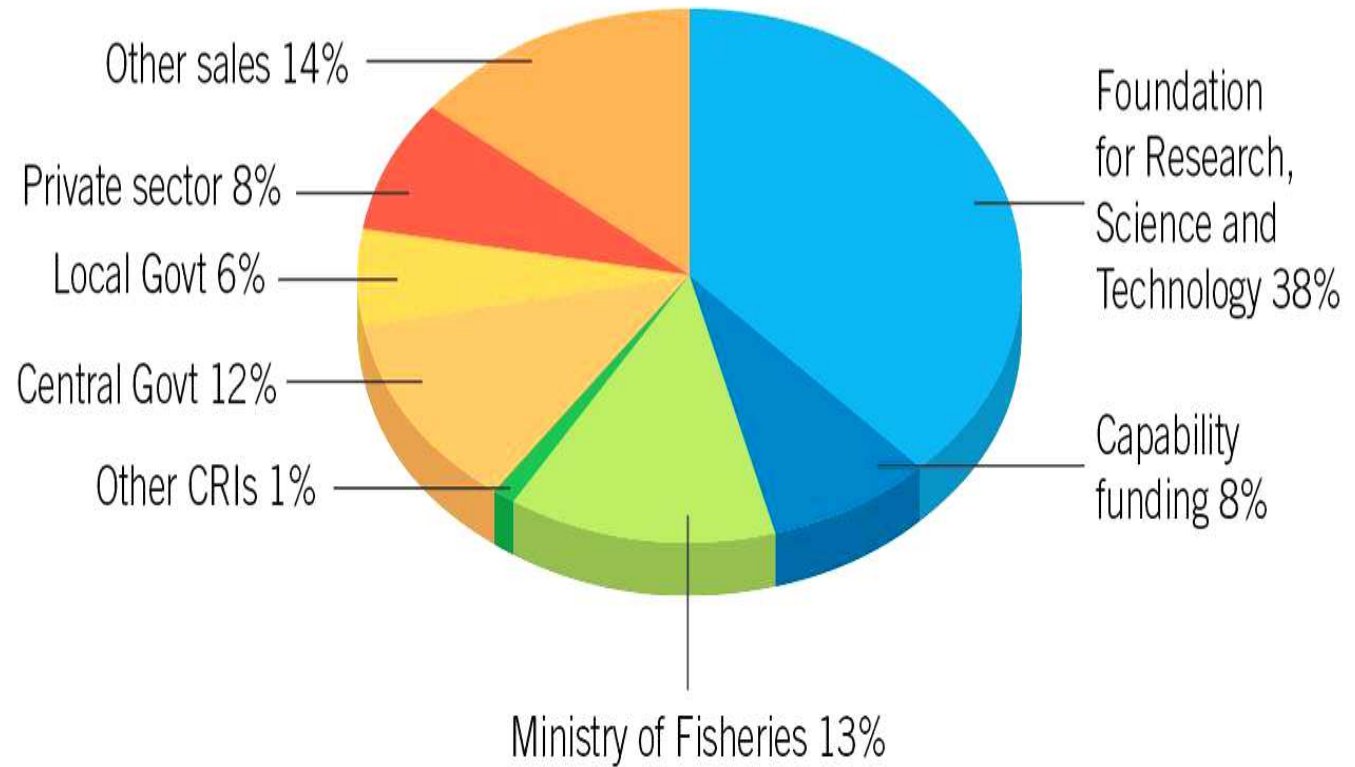




# Large project diversity & volume

- Single and multi-year projects and programmes
- Multi-currency, multi-client, subies
- Multi-disciplinary & cross-region collaboration,
- Internal & external projects
- Research, consultancy, IT, Capex, monitoring
- Fog, Quest, Movie, Painting by numbers

# Varied client base



# How we handle projects now

## NIWA Project Management Manual

The screenshot displays two main components of the software interface:

- Project Definition & Checklist - PMS1:** A form with fields for Project Number (ABC0210), Project Type (Commercial, FBST, Capex), Client Name (Māori Council), and Client Address. It includes sections for Client Contact, Client Phone, and Client E-mail.
- Project Plan/Gantt Chart - PMS3:** A spreadsheet with columns for Objectives and Tasks, Progress, and various resource allocation metrics. It includes a 'Personnel Total' row at the bottom.

\*15 year old paper based system supported by...

- Oracle costing and billing
- Spreadsheets and word docs
- File storage

\*Also used to manage H&S, Performance

\*Project Admin Teams + 400 PMs



# What we want to integrate...

The collage features several overlapping windows and documents:

- Oracle E-Business Suite:** A central window showing the Oracle Applications Home Page with a Navigator menu listing various project management and resource management tools.
- Project Definition & Checklist - PMSI:** A form for defining project details such as Project Number (ARC09218), Project Type (Commercial), and Project Title (Community Knowledge Network Model - Phase II).
- Project Gantt Chart - PMSI:** A Gantt chart showing project tasks and their durations over time.
- Project Management Dashboard:** A dashboard with a table of project metrics.
 

Project Name	Progress	Actual	Budget
AUR10201 TW - WATER IMPROVEMENT	15%	67	45
BEN200705 RISK ASSESS EFFECTS ON C	11%	67	45
BOP10216 TAURANGA HA	31%	100	69.5
CACC092 COIN802: COASTAL ADAPTATION TO CLIMATE CHANGE ADAPTATION 0910	27%	13.5	50
CACC102 COIN802: COASTAL ADAPTATION TO CLIMATE CHANGE ADAPTATION 0910	20%	20	20
CF105113 NATIONAL CENTRE - COASTS	no actual	10	10
EF105268 NUTRIENT CONCENTRATIONS IN NZ ESTUARIES	no actual	15	15
ELF10242 TOOLS - COASTAL HAZARDS	15%	4	9
FRSTSUB SOCIETY'S READINESS & RESPONSE TO HAZARDS	no actual	40	40
FRSTSUB SOCIETY'S READINESS & RESPONSE TO HAZARDS AND SOCIETY DEPOSITION IN KAIPARA	no actual	34	34
FRSTSUB SOCIETY'S READINESS & RESPONSE TO HAZARDS AND SOCIETY DEPOSITION IN KAIPARA	no actual	2	2
FRSTSUB SOCIETY'S READINESS & RESPONSE TO HAZARDS AND SOCIETY DEPOSITION IN KAIPARA	14%	2.5	28.5
FRSTSUB SOCIETY'S READINESS & RESPONSE TO HAZARDS AND SOCIETY DEPOSITION IN KAIPARA	28%	149.50	529.00
FRSTSUB SOCIETY'S READINESS & RESPONSE TO HAZARDS AND SOCIETY DEPOSITION IN KAIPARA	28%	190	136
FRSTSUB SOCIETY'S READINESS & RESPONSE TO HAZARDS AND SOCIETY DEPOSITION IN KAIPARA	58%	650	215
FRSTSUB SOCIETY'S READINESS & RESPONSE TO HAZARDS AND SOCIETY DEPOSITION IN KAIPARA	7%	840.00	351.00
FRSTSUB SOCIETY'S READINESS & RESPONSE TO HAZARDS AND SOCIETY DEPOSITION IN KAIPARA	7%	1,369.00	730.50
FRSTSUB SOCIETY'S READINESS & RESPONSE TO HAZARDS AND SOCIETY DEPOSITION IN KAIPARA	7%	142.5	1,550.00
- NIWA Accident / Incident / Near Miss Report Form:** A detailed form for reporting safety incidents, including sections for Particulars, Incident Description, and The Incident.
- Register of Contact with Iwi or Maori Organisations:** A table for tracking interactions with local iwi and Maori groups.
 

Project Number	Project Title	Project Leader	Client	Project description (c 5 lines)	When	How	Where	Details of contact	Notes
- NIWA Project Management Manual:** A document titled "NIWA Project Management Manual" with the NIWA logo.
- File Explorer:** A Windows Explorer window showing a directory structure for project files, including folders for "Projects on Hand" and "Projects on Hold".
- Task List:** A table listing tasks with columns for Objective and Task Description, Personnel, and Time (Days/Hours).
- Calendar:** A calendar view showing dates and task assignments.





# Business drivers

*We have a complex and large business that is not well served by our 1994 paper-based system*

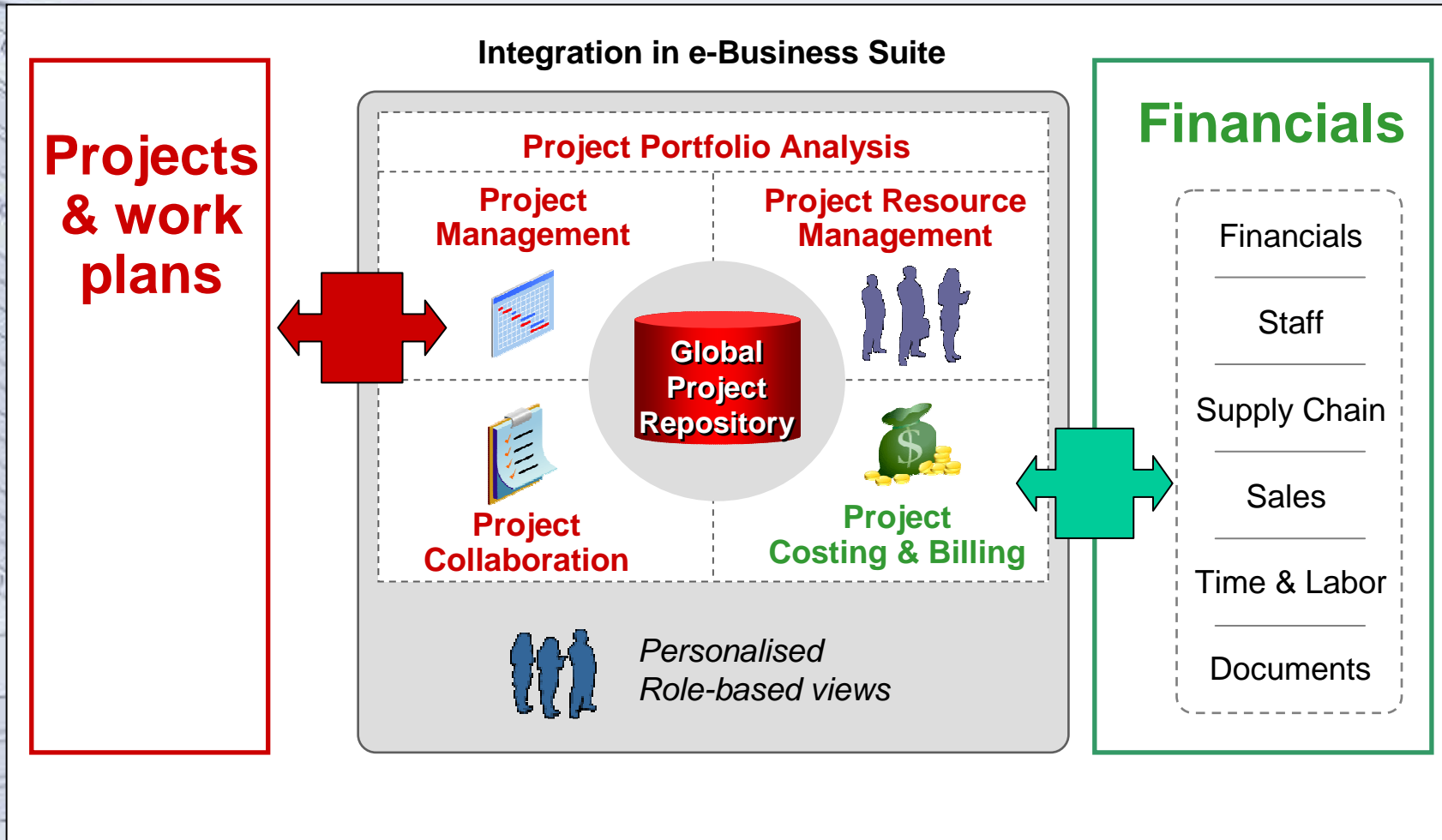
- Deadlines, budgets, scope, deliverables
- Integrating 'financial plans' & 'work plans'
- Sharing staff workloads across NIWA
- Pan-NIWA visibility of opportunities
- More visibility for management
- Increasing need for up-to-date info
- Managing COI situations
- Managing compliance and audit requirements



# Moving to a new system

- Evolution of existing processes
- Building on reviews of the last 2 - 3 years of our project management needs
- Implemented Oracle financial upgrade 10.5.9 to 12.0.6 ...web configured interfaces (e.g., MyProjects)
- Licensing
- NIWA intranet upgrade - options for on-line supporting documents and tools
- NIWA Team...Scoping Study...Pilot Implementation
- People, Processes and Tools

# The NIWA Solution (Pilot)



# Project Management

- Plans, forecasts, budgets
- Progress
- Issues, deliverables and actions
- Performance reporting
- Exception management
- Fully integrated with the current Oracle system
- Secure – role based



# Resource Management

- Manager and staff visibility of scheduled work/availability
- Planning on a project using staff and other resources
- Fully integrated with current staff records
- Competencies and resumes included

# Project Collaboration

- Team Member / Manager visibility of projects and work
- Integrated with the other project based systems
- Personalisable user interface/ views
- Email and desktop notifications


# Fit to requirements

- ✓ Integrated with financials and project costing
- ✓ Flexible user interface
- ✓ Visibility of all projects and status
- ✓ Role based security
- ✓ Full project management functionality
- ✓ Staffing resource management
- ✓ Manage by exception
- ✓ Program and portfolio management



# Gaps

- ✓ Project status workflow
- ✗ Integration with personal calendar
- ✓ Collect information on Maori interactions – “Status report”
- ✓ Staff approval workflow
- ✓ Email alerts



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# *Look & Feel*

# Individuals - Home page

ORACLE® E-Business Suite

Diagnostics Logout Preferences Help

Logged In As SERVICES

Oracle Applications Home Page

Navigator

Personalize

- Application Diagnostics
- Project Manager, Vision Services (USA)
- Projects SU, Vision Services (USA)
- Projects, Vision Services (USA)
- Resource Manager, Vision Services (USA)
- Team Member, Vision Services (USA)

Please select a responsibility.

Favorites

Personalize

- My Own Schedule
- My Staff Schedule
- Search for Projects
- NIWA Team Member Home (Basic)
- NIWA Team Member Home(Super user)
- Update Resume
- Actions
- Issues
- Notifications
- Deliverables

# Resource details

Resource Details

Name **Marlin, Ms. Amy** Organization **Services-East**  
 Job **PCN500.Principal Consultant** Email **nobody@localhost**

[Cancel!](#) [Add Administrative Assignment \(1\)](#) [Add Delivery Assignment \(2\)](#) [Apply](#)

**Schedule** Candidacy List Competencies Work Information Resume Utilization

Display  List  Timeline  Weekly Schedule [Go](#)

[Previous Month](#) [Previous Week](#) Time Scale  [Go](#) [Next Month](#) [Next Week](#)  
 ⏪ Previous 1-16 of 16 Next ⏩



■ Overcommitted 
 ■ Administrative 
 ■ Confirmed 
 ■ Provisional 
 ■ Available



# My resources

My Resources

Display  List  Timeline

[Previous Month](#)  
[Previous Week](#)

Time Scale

[Next Month](#)  
[Next Week](#)

⏪ Previous 1-13 of 13 Next ⏩



⏪ Previous 1-13 of 13 Next ⏩

■ Overcommitted 
 ■ Administrative 
 ■ Confirmed 
 ■ Provisional 
 ■ Available

The displayed statuses are grouped representations of user statuses. They are categorized as follows:

Timeline Status	User Status
Confirmed	Confirmed
Provisional	Proposed, Provisional

# View – user definable

**ORACLE Projects** Diagnostics Home Logout Preferences Help

Project List


TIP Unless specified otherwise, all amounts are in Project Functional Currency, Global Calendar (Accounting (Month)) Actions Create Project

**Views**

View

Select Projects:  |

[Select All](#) | [Select None](#)

NIWA Opportunity Select Report	Overall Performance Status	Project Name	Project Number	Status	Organization	Project Type	Project Manager	Customer	Project Start Date	Opportunity Value with Project Currency	Probability (%)	Overview	Status Reports	NIWA Portfolio
<input type="checkbox"/>		<a href="#">Opportunity NIWA HD</a>	<a href="#">srk test 5 shared copy</a>	Opportunity in Progress	Services-East	Time and Materials	<a href="#">Marlin, Ms. Amy</a>	Hilman and Associates	01-Jun-2009	USD 2,500,000.00	90	○○	○○	Oceans
<input type="checkbox"/>		<a href="#">srk test</a>	<a href="#">srk test</a>	Opportunity in Progress	Services-East	Time and Materials	<a href="#">Marlin, Ms. Amy</a>	Hilman and Associates	01-Jul-2009	USD 2,500,000.00	20	○○	○○	Maori Development
<input type="checkbox"/> 		<a href="#">Opportunity ABC</a>	<a href="#">NIW009</a>	Opportunity in Progress	Services-East	Time and Materials	<a href="#">Marlin, Ms. Amy</a>	Hilman and Associates	01-Mar-2003	USD 2,500,000.00	95	○○	○○	Coasts
<input type="checkbox"/>		<a href="#">Opportunity ZZZ</a>	<a href="#">NIW017</a>	Opportunity in Progress	Services-East	Time and Materials	<a href="#">Marlin, Ms. Amy</a>	Hilman and Associates	01-Jan-2009	USD 180,000.00	90	○○	○○	Coasts
<input type="checkbox"/>		<a href="#">srk test 2</a>	<a href="#">srk test 2</a>	Opportunity in Progress	Services-East	Time and Materials	<a href="#">Marlin, Ms. Amy</a>	Hilman and Associates	01-Jun-2009	USD 2,500,000.00	20	○○	○○	Fisheries

# Views - 'Gantt'

**ORACLE® Projects**  
Project A NST Phase 2 Prelim Field (NIW001)

Project List Diagnostics Home Logout Preferences Help

Project Resources Workplan Control Financial Reporting Supplier

Tasks Deliverables Resource Usage Setup

Latest Published Version

Tasks

Display  Hierarchy  List  Gantt

Actions Update Current Working Version

Show Workplan Details

Style General  Tasks All Tasks

Time Scale Entire Project  Start Date

TIP date format example: 28-Oct-2009

Focus Outline Number	Task Name	Scheduled Start	Scheduled Finish	2007		2008				2009	
				Qtr 3	Qtr 4	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Qtr 1	
<input type="checkbox"/> 0	Copy: NST Phase 2 Prelim Field Inves	01-Oct-2007	19-Feb-2009	0%	[Gantt bar]						
<input type="checkbox"/> 1	NST Phase 2 - Preliminary field investigations	01-Oct-2007	19-Feb-2009	0%	[Gantt bar]						
<input type="checkbox"/> 1.1	Project establishment	01-Oct-2007	31-Oct-2008	0%	[Gantt bar]						
1.1.1	Proposal preparation	02-Oct-2008	03-Oct-2008					0%			Cochran, Mr. Bob,Expense
1.1.2	Review	03-Oct-2008	03-Oct-2008					0%			
<input type="checkbox"/> 1.1.3	Contract	01-Oct-2007	31-Oct-2008	0%	[Gantt bar]						
<input type="checkbox"/> 1.1.3.1	999Sampling in fish processing sheds	01-Oct-2007	30-Sep-2008	0%	[Gantt bar]						
<input type="checkbox"/> 1.1.3.2	999To age stargazer otoliths collected during the 2007 trawl survey	01-Oct-2007	30-Sep-2008	0%	[Gantt bar]						
<input type="checkbox"/> 1.1.3.3	999To develop a stock assessment model for STA 7	01-Oct-2007	30-Sep-2008	0%	[Gantt bar]						
<input type="checkbox"/> 1.1.3.4	999Monthly Reports and Data Archiving	01-Oct-2007	31-Oct-2008	0%	[Gantt bar]						
<input type="checkbox"/> 1.2	Survey preparation	21-Oct-2008	22-Oct-2008					0%			
1.2.1	Coordination	21-Oct-2008	21-Oct-2008					0%			

# Exceptions

## Project List

 TIP Unless specified otherwise, all amounts are in Project Functional Currency, Global Calendar (Accounting (Month))



Actions

### Views

View

Select Projects:  |

[Select All](#) | [Select None](#)

Select Customer	Project Name	Project Number ▲	NIWA Portfolio	Financial	Schedule	Health	Issues	Overview
<input type="checkbox"/>	<a href="#">Professional Services</a>	<a href="#">A101</a>					ⓘ	ⓘ
<input checked="" type="checkbox"/>	<a href="#">ABC-Financials Implementation</a>	<a href="#">ABC</a>	Coasts				ⓘ	ⓘ
<input type="checkbox"/>	<a href="#">ABC HR Implementation</a>	<a href="#">ABCHR101</a>					ⓘ	ⓘ
<input type="checkbox"/>	<a href="#">Bottom-up Services</a>	<a href="#">Bottom-up Services</a>					ⓘ	ⓘ
<input type="checkbox"/>	<a href="#">Construction with Retainage</a>	<a href="#">Construction Design</a>					ⓘ	ⓘ
<input type="checkbox"/>	<a href="#">Cost Reimbursable</a>	<a href="#">Cost Reimbursable</a>					ⓘ	ⓘ
<input type="checkbox"/>	<a href="#">Enviro Opportunity 001</a>	<a href="#">ELF003</a>	Coasts				ⓘ	ⓘ
<input type="checkbox"/>	<a href="#">ELF005</a>	<a href="#">ELF005</a>	Freshwater				ⓘ	ⓘ
<input type="checkbox"/>	<a href="#">Fixed Price</a>	<a href="#">FP101</a>					ⓘ	ⓘ
<input type="checkbox"/>	<a href="#">Feasibility Study-Imaging</a>	<a href="#">Feasibility Study</a>					ⓘ	ⓘ



# User defined attributes

ORACLE® Projects  
Project OAKLEY STREAM MONITORING (BEC10102)

Home Logout Preferences Help

Project Resources Workplan Financial Reporting


Home Overview Setup Attachments

Project: Setup >


NIWA Required Information (Comm'l)

Cancel Apply

## NIWA Required Information

\* NIWA Primary Portfolio    
Select the primary portfolio from the list- Compulsory

\* NIWA Activity  





NIWA Secondary Portfolio    
Select the secondary portfolio



TGRI

## NIWA Iwi information

Is there Iwi or Maori contact involved?    
If you select yes then you must complete the Iwi registration of contact form (enter as a "Status Report")

## NIWA Business Risk Questions

\* Is the output, dataset or model something that NIWA might want to use again?    
\* Is there any reliance on 3rd party providers incl. subcontractors?    
\* Is the client new to NIWA?    
\* Are any consents or approvals required to do the work?    
(e.g. RMA, Animal ethics, Fish and Game?)

\* Does the project involve work overseas?    
\* Will the project involve adding to existing NIWA datasets, models or software?    
\* Is there any reliance on 3rd party IP?    
(i.e. using other party's data sets, models, software or images etc.)

Cancel Apply

Privacy Statement

Project Resources Workplan Financial Reporting Home Logout Preferences Help

Copyright (c) 2008, Oracle. All rights reserved.

**Asparona**  
CONSULT DELIVER SUPPORT

**NIWA**  
Taihoro Nukurangi

# Review and publish

Workplan | Financial | Reporting

ons | **Status Reports**

Reporting: Status Reports > Maintain Status Reports >

**Review and Submit: Iwi Register of Contact**

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**Project Information**

Project Name	<input type="text" value=""/>	Project Manager	<input type="text" value=""/>
Project Number		Start Date	<b>01-Jul-2009</b>
Organization		Finish Date	<b>30-Jun-2010</b>
Customer		Project Value	<b>80,000.00 NZD</b>
Project Type	<b>FIXED PRICE (COMM'L)</b>	Status	<b>Active</b>

---

**General Progress**

Reported Status	<input checked="" type="checkbox"/> <b>On Track</b>	Report Start Date	<b>03-Mar-2010</b>
Publish Date and Time		Report End Date	<b>03-Mar-2010</b>
Reported by	<input type="text" value=""/>		

---

**Published Reports**

**TIP** The table below displays the last five published reports.

Report Start Date	Report End Date	Reported Status	Brief Overview	Reported By	Publish Date and Time
22-Feb-2010	22-Feb-2010	<input checked="" type="checkbox"/> <b>On Track</b>		<a href="#">SYSADMIN, Mr.</a>	22-Feb-2010 13:39:25

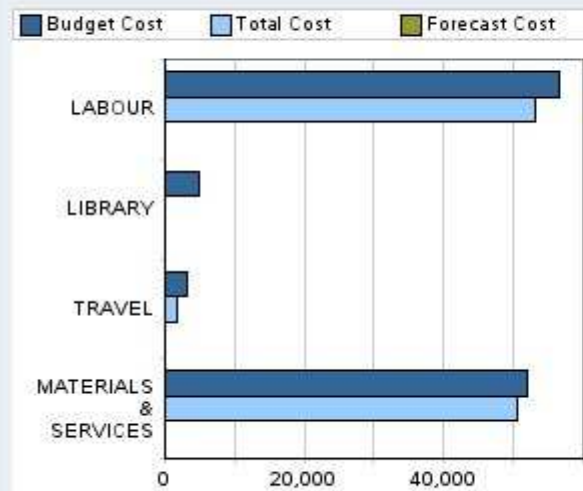
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**Iwi Register of Contact**

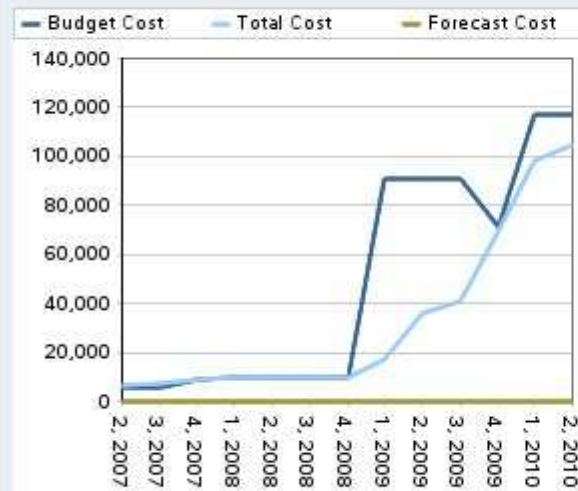
Location of planned work	<b>Big Bay, Manukau Harbour</b>
Environment (Primary)	<b>Estuary</b>
Environment (Secondary)	<b>Catchment</b>
Access required across Maori land or near sensitive area	<b>Yes</b>
Name (s) of water body (ies)	<b>Little Creek</b>
Have Iwi been contacted?	<b>Yes</b>
Contact details of Iwi	<b>Mr Oswell Ph 021 734 221</b>
Is field work/sampling planned	<b>Yes</b>
Date (s) of planned work	<b>July10</b>
Additional Notes (Recommendations)	<input type="text" value="The plans is to do a study of juvenile fish my netting at night time over several nights&lt;br/&gt;There will be a team of 6 NIWA persons&lt;br/&gt;We would like to involve iwi in the field work&lt;br/&gt;We will need to discuss this with the appropriate persons"/>

# Performance reporting

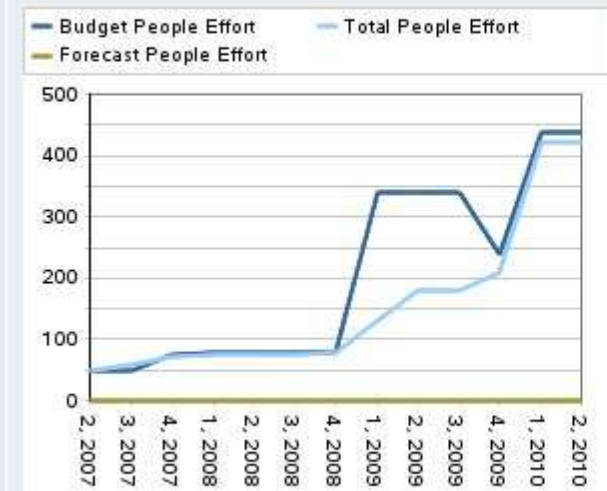
Actual Cost By Resource



Cumulative Actual Cost \$



Cumulative Actual Effort (Hrs)



# Project status

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- Oracle product challenges
- Where the project is at



# Acknowledgements

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NIWA project team -  
Terry Hume, Janine Irvine, Paul  
Sticovich, Kate Thomson



Asparona project team -  
Stu Keast, Darren Wenham,  
Anthony Daniel, Jeremy Cope

