

**Oracle® Project Portfolio Management  
Integration Pack for Primavera P6 and Oracle®  
E-Business Suite 3.1 - Release Notes**

Release 3.1

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# About Oracle Project Portfolio Management (PPM) Integration Pack for Primavera P6 and Oracle E-Business Suite

This section provides an overview of the value proposition that is associated with the new features and enhancements that are planned for Oracle PPM PIP for Primavera P6 v8 and Oracle E-Business Suite. It is a roadmap that is intended to help you assess the business benefits of Oracle PPM PIP v3.1 and plan your projects and investments.

The new features and enhancements that are planned for this release are grouped according to licensed product. This document describes new or changed functionality only. Existing functionality from prior releases is not described.

Our goal is to ensure that you leverage technology to its fullest to increase the efficiency and effectiveness of your operations. Please note that the final release may not have every feature that is discussed in this document, and a specific feature may become a part of a different application or have a product name that is different from those cited in this document.

This preface discusses:

- Oracle release information publications
- Additional resources

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# Oracle Project Portfolio Management (PPM) Integration Pack for Primavera P6 and Oracle E-Business Suite Release Notes

Organizations that rely on successfully completed projects to create value, need an enterprise-class solution that streamlines their key project-based business processes and ensures projects adhere to committed budgets and timeframes. This Oracle PPM Integration Pack is an open, standards-based framework and solution that delivers pre-built integration between Oracle Projects and Primavera P6. It bridges the gap between ERP and project management to deliver Enterprise Project Portfolio Management (PPM). This enables organizations to assemble the optimal project portfolio and follow organizational best practices for budgeting, resource management, cost control, project scheduling and execution, risk mitigation, and change management.

The Oracle PPM Integration Pack helps organizations in their Enterprise PPM efforts to overcome fragmented processes that lead to lack of business alignment, low predictability in project execution and performance, and inconsistency in business decision-making.

This PIP helps organizations achieve the following advantages:

- Structured alignment between organizational strategy, project execution, and results
- Administration of project costs and financial management
- Governance over project-related decisions
- One location for the organization's projects, programs, and portfolios.

The Oracle PPM Integration Pack for Primavera P6 and E-Business Suite focuses on the following key areas:

- Pre-built, flexible integration to enable Enterprise Project Portfolio Management
- Synchronization of project information between E-Business Suite Projects and Primavera P6
- Customizable framework to meet unique integration requirements and business processes

The primary benefits of this integration are as follows:

- Delivers a single version of the truth about the organization's projects, programs and portfolios
  - Eliminates inconsistency in project-related reporting from financial and project management systems
  - Reduces project risks by ensuring all stakeholders are making decisions with the same information
- Overcomes fragmented business processes across applications and departments
  - Participants use the application that makes sense for their role in the organization and within projects, while information flows freely across applications
- Provides value for time invested and lowers total cost of ownership of the integration

- Standardize and simplify with a global business platform
- Future-proof, sustainable integrations simplify upgrading to new versions of E-Business Suite Projects and/or Primavera P6

Oracle's Application Integration Architecture replaces traditional enterprise application integration with flexible, pre-built, standards-based business process integration solutions. As an Application Integration Architecture offering, the Oracle PPM Integration Pack includes all the necessary business process models, objects, and Web services that customers need to orchestrate an end-to-end Enterprise PPM solution. They can quickly and easily customize the level of integration that joins the financial, resource, and schedule business processes across all the projects and programs in an enterprise. In addition, the AIA adaptable framework enables them to extend the integration to accommodate specific business needs.

# Oracle Project Portfolio Management Integration Pack for Primavera P6 and Oracle E-Business Suite 3.1 Features

This is the second release of the Oracle PPM Integration Pack for Primavera P6 and Oracle E-Business Suite. The functionality encompasses the following areas:

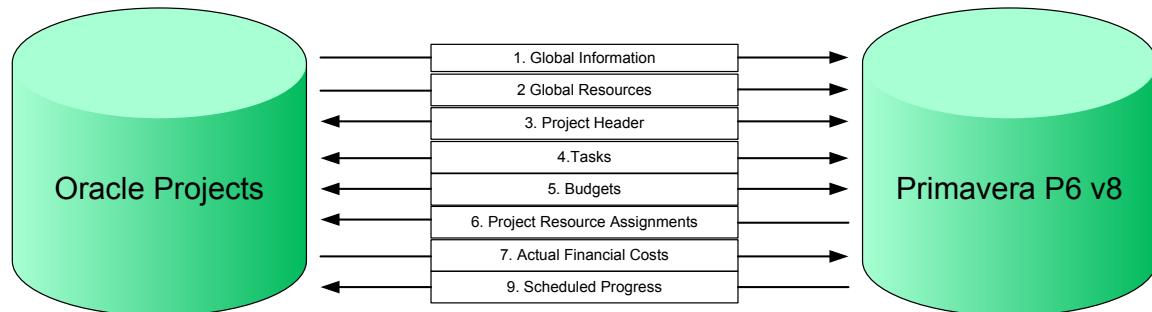
1. Customize how information is shared between Oracle Projects and Primavera P6
2. Synchronize projects, structures, budgets and actuals
3. Project Status Process: Integrate detailed project work plans, resource assignments, and progress
4. Summarize project work plans from Primavera P6 to Oracle Projects

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## Customize How Information is Shared Between E-Business Suite (EBS) Projects and Primavera P6

There are numerous options for customizing how information is shared between EBS Projects and Primavera P6. This enables organizations to match the integration options to their unique business processes, determine which applications “own” different types of project data, and specify which projects are synchronized and how often that synchronization takes place. Organizations may synchronize project data as often as needed, depending on the nature of their business and importance of the projects.

The following graphic shows the information flow between the two applications:



### Information flow between Oracle Projects and Primavera P6 v8

Key integration options:

- Specify which projects are synchronized
- Determine which information is moved between the applications and at what intervals
- Synchronize global system information and resources (typically from EBS Projects to P6)

- Synchronize the financial plan and work plan structure
  - Send the work breakdown structure (WBS) from EBS Projects to P6 or from P6 to EBS (determines which application “owns” the WBS)
  - Send the budgets from EBS to P6 or from P6 to EBS Projects (determines which application “owns” the budget)
  - Specify what type of budget is integrated: current baselined budget or current working budget
- Synchronize the detailed project work plan, including WBS, resource assignments, and activities; alternatively, synchronize only a summarized view of project details
- Synchronize ongoing financial information from EBS Projects to P6
  - Send actual costs
  - Send forecasted cost to complete

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## Synchronize Planning Resources and Rates

This process synchronizes high-level information between EBS Projects and Primavera P6, and ensures that global system and resources information, such as resource rates, is consistent in both applications. This information typically applies across projects and should be kept up to date. This integration process ensures that project managers using Primavera P6 are always working from the current global information before they perform any detailed project planning. Any changes made to global information in P6 will be overwritten the next time global information is synchronized from EBS Projects.

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## Synchronize Projects, Structures, Budgets and Actuals

This process synchronizes budgets between EBS to Primavera, and creates a Primavera P6 budget change log to track changes to the budget following synchronization. The budget, most likely “owned” by EBS Projects, is stored as the current budget in P6. This process ensures that the organization’s top-down budget process provides current budget information to the project, which can then be easily compared to bottom-up project details to ensure alignment.

This process is also used to update actual costs from EBS Projects for the Primavera P6 project, WBS, and resource assignments. Project managers are equipped with current cost information to determine whether their projects are performing within the prescribed budget. In addition, you can use this information to make informed decisions for bringing the project costs back on track.

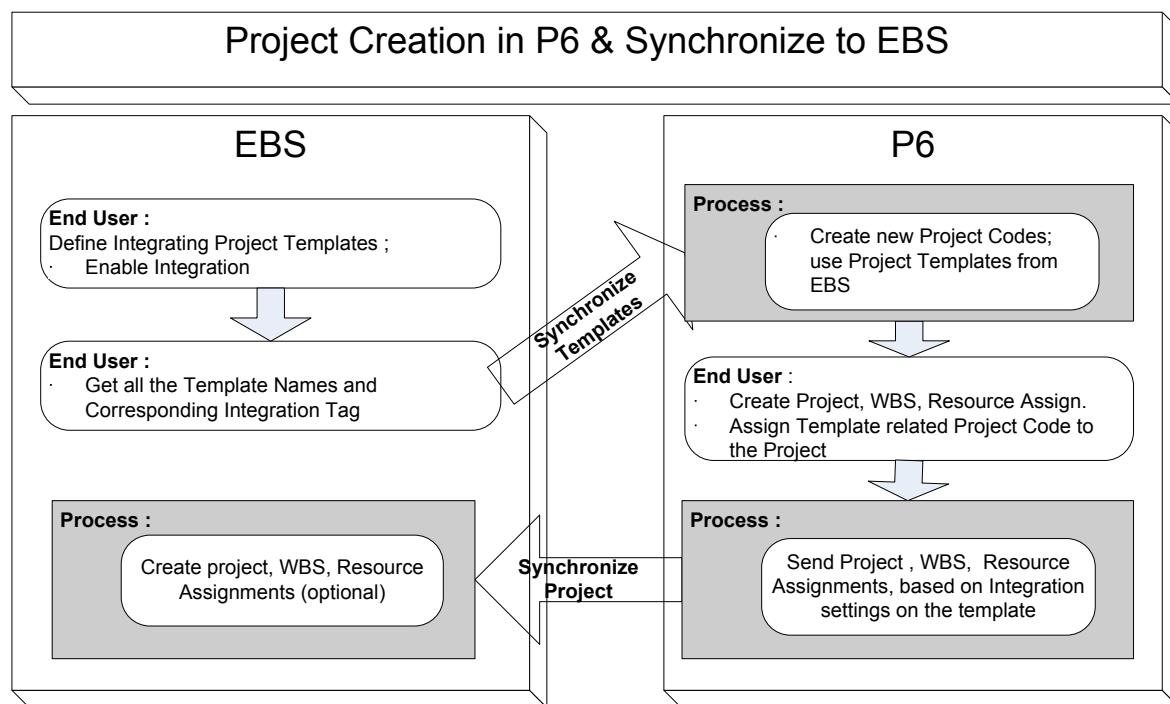
When a project is closed in EBS, this synchronize process is used to set the Primavera P6 project to inactive status, initiating any project close out procedures that need to be performed by the project manager. Projects can also be set to inactive in Primavera P6, which in turn notifies EBS of the change in project status.

## Project Status Process: Integrate Detailed Project Work Plans and Resource Assignments

Based on the integration customization settings, the Project Status process synchronizes changes to projects, WBS, activities, and resource assignments from Primavera P6 to EBS Projects. This provides visibility for the EBS users into the current project details so they may see how changes to the project schedule may impact their responsibilities. For example, an employee responsible for procurement of equipment for a project may adjust the purchases according to the project budget. To perform better cost management, the employee can ensure that the equipment is received at the beginning of the project. Similarly, project information is summarized and included on enterprise dashboards, providing transparency into what is happening on projects across the enterprise.

This process is also used to manage progress information, such as estimate to complete and estimate at completion costs.

The following chart shows how project plan information flows between Primavera P6 and Oracle Projects under the scenario where a project is created in Primavera P6:



Project creation in Primavera P6 and synchronize to EBS Projects

## Summarize Project Work Plans from Primavera P6 to EBS Projects

The Project Status process includes the option to send detailed Primavera P6 project activities and resource assignments to EBS Projects, or to send only a summarized view of the project based on the WBS. This alternative is useful for simplifying the amount of information that flows into the financial system from highly detailed project plans.

# Additional Resources

There are additional resources that can help your organization learn more about this release.

Resource	Navigation
Process Integration Pack Implementation Guides	Oracle Technology Network: <a href="http://www.oracle.com/technetwork/index.html">http://www.oracle.com/technetwork/index.html</a>
Foundation Pack Guides	Oracle Technology Network: <a href="http://www.oracle.com/technetwork/index.html">http://www.oracle.com/technetwork/index.html</a>
Installation and Upgrade Guide	Oracle Technology Network: <a href="http://www.oracle.com/technetwork/index.html">http://www.oracle.com/technetwork/index.html</a>

Visit the [My Oracle Support/Oracle Metalink website](#) frequently to keep apprised of ongoing changes.

For other sources of documentation, visit [Oracle Technology Network: Oracle Documentation](#).

For training opportunities, visit [Oracle University](#).