

Primavera Portfolio Management

Every investment decision shapes your organization's future. Often faced with competing priorities, leaders must determine which initiatives deserve funding and which projects will deliver the greatest strategic value. Poor decisions can lead to wasted resources, missed opportunities, and diminished business performance.

Oracle's industry-leading portfolio management solution 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.

Turn portfolio data into confident investment decisions

"Research from the Project Management Institute indicates that organizations waste approximately 10% of project investment—about \$2 trillion globally each year—largely due to ineffective strategy execution. This highlights the cost of prioritizing projects that are not tightly aligned with strategic objectives." The primary reason 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 Portfolio Management 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. It speeds decision-making and guides you to strategically prioritize, plan, and execute your enterprise portfolios. Automate workflow and approval processes, choose investment proposals, fund strong business cases, perform "what-if" scenarios, and analyze the progress of your portfolio. Primavera Portfolio Management ensures that you continue to increase productivity and on-time delivery—adding value, strengthening your performance track record, and ultimately improving your bottom-line results.

Key benefits

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

A proven solution for planning and controlling investments

Propose, plan, and control your investment portfolios by collaboratively creating automated workflows and approval processes tailored to your specific requirements. Adapt processes as needs change with this highly configurable solution. 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 your organization's strategy and mission.

- Prioritize and select investments with strong business case justification that realistically incorporate funding and staffing.
- 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 predicted 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

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

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.



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.

Share portfolio data with the people who need it the most

Primavera Portfolio Management provides workflows that help streamline processes and approvals as well as forms that enable faster data collection. Workflows accelerate your time to value by swiftly guiding your organization through their tasks 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. At the top, it shows the user 'System Administrator' and the current item 'Alt - Fixed Asset Mgmt (ERP)'. Below this, there are navigation tabs for 'General', 'Evaluation and Approval', 'Project Team - Governance', and 'Risk Register'. The 'Project Team - Governance' section is active, showing a table with columns for roles (A, R, C, I, V, D) and names of team members. The 'Project Team - Management' section is also visible below it.

Project Team - Governance		A	R	C	I	V	D
Executive/Physician/Owner/Sponsor/Champion(s):	Arthur Spence	▼	◆				
Administrative Owner/Sponsor(s):	Barry Gorman	■	●				
Oversight Committee/Group(s):	Bob Tronsky	★					
Oversight Committee/Group Sponsor(s):	Linda Mitchell	✱					
Required Committee Approval(s):							
Additional:							

Project Team - Management		A	R	C	I	V	D
Project Manager	System Administrator	▼	◆				
Business Analyst		■	●				
IT / Technical Lead							
Additional		✱					

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

Gain visibility and control of your entire portfolio with the following capabilities:

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, and more.

Workflows and processes: Get up and running faster with step-by-step guidance for portfolio management workflows and best practices.

Investment dependencies: Enables you to 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: Quickly check your progress against past performance/future milestones, improving accountability and the success rate of delivering on expected returns.

Information protection: Meets federal standards for cybersecurity by employing intrusion detection, audit logging, and security of metadata, objects, configuration information, and system data.

Get more value from every portfolio decision

Primavera Portfolio Management further strengthens your portfolio decision-making with the following three capabilities:

Propose

Propose enables you to capture ideas, surveys, or requests across your organization via web forms, and then automatically send 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

include enhancement requests, project requests, corporate suggestion boxes, and new product ideas. Proposals can be anonymously submitted, requiring no user identification.

Bridges for Primavera P6 Professional Project Management

Bridges for Primavera P6 Professional Project Management streamlines the flow of project, resource, and financial information with a tight, bidirectional user interface that allows data sharing between portfolio investments and the Primavera P6 projects that support them.

This prebuilt integration solution reduces manual data entry and synchronizes information sharing across systems, improving data accuracy, reporting, and project decision-making. Portfolio managers can propose, inventory, prioritize, and select initiatives in Primavera Portfolio Management and then manage their implementation efforts in Primavera P6.

Typical data that's summarized for use in portfolio decision-making includes schedule, cost, and resource data. In addition, the robust architecture of the Bridge allows for the federation of multiple instances of Primavera scheduling.

The Bridge allows 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 Portfolio Management and Fast Track for Primavera Capital Planning and Investment Control Budgeting

Fast Track for Primavera Project Portfolio Management and Fast Track for 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.

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 that can be modified to fit your specific processes.

Fast Track for Primavera 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 by leveraging summarized detailed data from various sources, such as Primavera P6 Professional Project Management. This summarized data supports project tracking, health monitoring, and project value realization. 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 bridge for Primavera P6.

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Integrated Cloud Applications & Platform Services

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