

PIC™ USER INTERFACE CASE STUDY

MICROSOFT® EXCEL BASED USER INTERFACE IN ACTION FOR PROFESSIONAL SERVICES

The Situation

Avenue A | Razorfish is one of the largest interactive marketing and technology services agencies in the world, with offices across the United States, and global operations in Australia, China, Germany, Japan, and the United Kingdom. The firm selected Oracle E-Business Suite Projects Applications to streamline their project based business. After using Oracle Project Costing and Oracle Project Billing to automate project financials in their business operations, they decided to implement Oracle Project Management to provide a robust project management tool for use by their Project Managers, and Oracle Project Resource Management to automate business operations for resource management. Project Partners LLC was selected as the Implementation Partner for this work.

Why PIC User Interface

Based upon Avenue A | Razorfish business requirements, as Oracle Project Management was being evaluated for deployment to Project Managers, Project Partners proposed the use of Project Information Center User Interface™ (PIC UI) to provide an alternate, disconnected user interface. Avenue A | Razorfish quickly warmed up to PIC UI which provides a Microsoft® Excel based interface with two-way interactivity to Oracle Applications and the ability to work in a disconnected mode.

The following functions were identified to be provided by PIC UI for Avenue A | Razorfish Project Managers

1. Price New Projects
2. Define Tasks
3. Define Budget
4. Define Staffing Plan
5. Complete Project Forecasts
6. Maintain Staffing Plan

Project Partners consultants worked closely with Avenue A | Razorfish users to develop two PIC User Interface worksheets which together fulfill all of the functions above.

Template for Pricing Model

The worksheet below fulfills the functions of Pricing New Projects and Defining Tasks.

Project Template		AARF CEN Pricing TP		Update Budget		Submit Budget					
Project Name (Number)		Fee	\$0.00	Cost	\$0.00	Margin	\$0.00				
Project Type		Margin %	0.00%								
Status											
Last Submit Date											
Approved Date											
Add Row Delete Row											
Full-Time Employees											
Task	Project Role	Team Role	Role Desc	Cost Rate	Bill Rate	Bill Rate Override	10.29 - 11.04.07	11.05 - 11.11.07	11.12 - 11.18.07	11.19 - 11.25.07	
Full-Time Employee Subtotal							-	-	-	-	
Contingent Workers											
Task	Subcontractor Project Role	Subcontractor Team Role	Role Desc	Cost Rate	Bill Rate	Cost Rate Override	Bill Rate Override	10.29 - 11.04.07	11.05 - 11.11.07	11.12 - 11.18.07	11.19 - 11.25.07
Subcontractor Subtotal Employee / Subcontractor Subtotal							-	-	-	-	
Expenses											
Task	Expenditure Type						10.29 - 11.04.07	11.05 - 11.11.07	11.12 - 11.18.07	11.19 - 11.25.07	
Expense Subtotal							\$ -	\$ -	\$ -	\$ -	

Template Selection



The worksheet above allows Project Managers to select a template and download task, labor and non labor resources and associated cost and bill rate information to build a pricing model prior to the project being created in Oracle.

Budget Entry

The same worksheet also fulfills the Budget Entry functions of Defining a Budget and Defining a Staffing Plan.

Cost Budget

Project Template: []
 Project Name (Number): PGUITEST926001 (15311)
 Project Type: []
 Status: Baselined
 Last Submit Date: 9.26.07
 Approved Date: 9.26.07

Add Row **Delete Row**

Update Budget **Submit Budget**

Fee	\$120,000.00
Cost	\$29,100.00
Margin	\$90,900.00
Margin %	75.75%

Task	Project Role	Team Role	Role Desc	Cost Rate	Bill Rate	Bill Rate Override	1.07 - 1.13.08	1.14 - 1.20.08	1.21 - 1.27.08	1.28 - 2.03.14
1.0 AO	Art Director	Art Director		\$ 50.00	\$ 99.00			40.0	40.0	
2.0 BI	Business Analyst	Business Analyst	Need Kevin Co	\$ 65.00	\$ 98.00			40.0	40.0	
Full-Time Employee Subtotal							-	80.0	80.0	

Task	Subcontractor Project Role	Subcontractor Team Role	Role Desc	Cost Rate	Bill Rate	Cost Rate Override	Bill Rate Override	1.07 - 1.13.08	1.14 - 1.20.08	1.21 - 1.27.08	1.28 - 2.03.14
Subcontractor Subtotal							-	-	-	-	
Employee / Subcontractor Subtotal							-	80.0	80.0		

Task	Expenditure Type	1.07 - 1.13.08	1.14 - 1.20.08	1.21 - 1.27.08	1.28 - 2.03.14
1.30 Expenses	Airfare		\$ 1,000.00		
2.40 NB-Expenses	Entertainment - Non-Employees		\$ 500.00		
Expense Subtotal		\$ -	\$1,500.00	\$ -	\$ -

Budget Entry

The Project Manager selects tasks, Project Roles and Expenditure Types to include on their projects from drop down lists. After selecting tasks and resources the Project Manager enters the quantities for labor and expenses. Bill rates can be overridden. During entry of the quantity information the margin amount and percent are automatically calculated based on the downloaded cost and bill rates. For fixed price projects after the budget is uploaded the opportunity value entered at project creation replaces the calculated Fee amount.

After creation of the budget the Project Manager selects the associated project from the Project Name drop down list and either uploads the budget for creating a working version or submission to workflow for review and approval (Baseline). The PIC-UI engine performs the following actions using Oracle's public APIs for Oracle Project Management (PJT)

- Create Tasks with all required attributes, i.e. Transaction Controls, Service Type, etc. (if template is used for new projects)
- Setup and define the budget
- Submit the budget for approval
- Setup Staffing plan
- Project Requirements for Roles with no specific person identified
- Submit requirements to resource managers for staffing
- Attach a copy of the spreadsheet to the project

If the budget needs to be updated, the project manager can simply make the changes to the worksheets stored on their local desktop or laptop and resubmit the data which would update and submit the current working version of the budget to establish a new baseline. Alternatively, if the PM has not retained the original worksheet, they can start a new Excel file and simply download the project and budget information once again and make changes as needed.

When the budget has been baselined, a forecast is automatically created from the approved cost budget and downloaded to the worksheet.

Forecast Entry

The second worksheet used by Avenue A|Razorfish is for Forecasts. It fulfills the functions of

- Entering Estimates to Complete
- Submitting Forecasts, and
- Terminating assigned resources or assigning new resources

Forecast Plan										Refresh Plan				Submit Plan			
Project Name (Number)		PGUITEST926001 (15311)						Fee		\$120,000.00							
Project Type		AARF Fixed Price						Cost		\$30,500.00							
Status		Working						Margin		\$89,500.00							
Last Import Date		10.31.07						Margin %		74.58%							
Last Submit Date		9.26.07															
Add Row								Delete Row									
Full-Time Employees																	
Task	Project Role	Team Role	Role Desc	Cost Rate	Bill Rate	Bill Rate Override	1.07 -	1.14 -	1.21 -	1.28							
1 10 AO	Art Director	Tweedie, Nathaniel Timothy		\$ 50.00	\$ 175.00		40.0	40.0	40.0	2.03.1							
Full-Time Employee Subtotal							40.0	40.0	40.0								
Contingent Workers																	
Task	Subcontractor Project Role	Subcontractor Team Role	Role Desc	Cost Rate	Bill Rate	Cost Rate Override	Bill Rate Override	1.07 -	1.14 -	1.21 -	1.28						
1 10 BI	Business Analyst	Cox, Kevin	Need Kevin Co	\$ 50.00	\$ 175.00	\$ 50.00		20.0	40.0	40.0	2.03.1						
Subcontractor Subtotal							20.0	40.0	40.0								
Employee / Subcontractor Subtotal							60.0	80.0	80.0								
Expenses																	
Task	Expenditure Type						1.07 -	1.14 -	1.21 -	1.28							
1 30 Expenses	Airfare						\$ 1,000.00	\$ 1,000.00									
2 40 NB-Expenses	Entertainment - Non-Emp						\$ 1,000.00	\$ 500.00									
Expense Subtotal							\$2,000.00	\$1,500.00	\$ -	\$ -							

Forecast Entry

Each Forecasting Period, the Project Manager downloads the latest information for their projects along with actual cost information (in disabled – greyed out – columns) from Oracle into the Forecast Entry spreadsheet.

As shown above fulfilled project roles will show the person assigned, employees in the employee section and contract personnel in the contingent worker section.

Project Managers then update the Estimate To Complete (ETC) columns. Existing resources are terminated by not entering any additional hours for them, and new rows are added for new resources. This activity can be performed in connected or disconnected modes. The Project Manager then submits the forecast. PIC-UI will take the submitted information and perform the following functions:

- Update the forecast and submit it for approval
- Update all existing assignments with new hours
- Terminate assignments with no future hours
- Create new resource requirements.
- Submit updated and new requirements for approval/staffing.

Summary

These PIC-UI based Microsoft Excel worksheets will be the primary interface used by Project Managers for interacting with Oracle Project Management and Resource Management. Avenue A | Razorfish management and IT staff are very confident of system acceptance from the Project Managers primarily because of the PIC-UI tools capability to provide their PMs with the Microsoft Excel interface that they are already very comfortable using and that allows them to work remotely from client sites and on the road without worrying about network connectivity.

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