ORACLE'S PRIMAVERA PORTFOLIO MANAGEMENT

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FEATURES

PORTFOLIO MANAGEMENT

- Delivers value through a strategy-first approach to selecting the optimum set of investments
- Leverages consistent evaluation metrics, user-friendly forms, one click access to past or future data and graphical views of key criteria to improve portfolio performance
- Features intuitive Web-based wizards for flexible configuration of analytics and views as well as process flows and security.

PROPOSE

- Captures ideas using Web-based forms (anonymous submission optional) for portfolio analysis
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BRIDGE (INTEGRATION)

- Delivers adaptive portfolio management, leveraging out-of-the-box integrations from multiple instances of Primavera P6 Professional Project Management and Microsoft Project Server 2007

FAST TRACK

- Pre-configurations provide a starting point for applying governance processes, consistent metrics, and analysis for application and project portfolio management

Every organization faces critical enterprise 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 governmental agencies and some of the world's largest and most innovative companies.

Rely on Primavera for High Stakes Decision-Making

Analysts estimate that each year some 30 percent of the US$1-to-US$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 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.
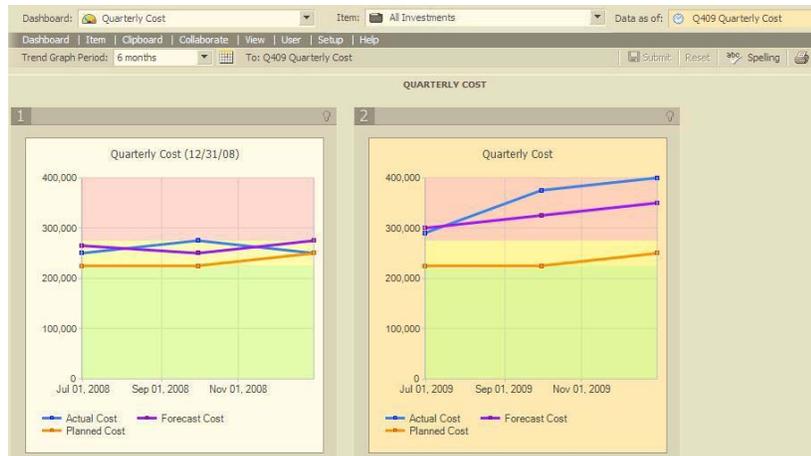
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A Proven Solution for Planning and Controlling Investments

Primavera Portfolio Management allows you to collaboratively 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

- 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 forms that enable faster data collection. These forms streamline information retrieval across departments that may be using disparate systems.

Figure 2. Intuitive data entry forms—easily configured for user familiarity—promote portfolio management adoption and simplify data collection and updating.

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.
- **My Processes:** Speeds the adoption of portfolio management by guiding you through step-by-step processes. These wizards can help you build a business case, rationalize a portfolio of applications, and develop best practices.
- **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.

Component Overview: 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 2007

- 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 Professional Project Management and Microsoft Office Project Server 2007

Bridges for Primavera P6 Professional Project Management and Microsoft Office Project (MSP) Server 2007 provide a tight, bi-directional user interface that allows data sharing between portfolio investments and the Primavera P6 Professional Project Management 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 Professional Project Management or MSP Server 2007. 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 Professional Project Management and/or MSP Server 2007.

Although both Bridges operate in a similar fashion, the Bridge for Primavera P6 Professional Project Management allows for data to be shared at the project level and at the work breakdown structure level just below the project with Primavera Portfolio Management project, dynamic list sub-items, and lifecycle phase elements. The Primavera Bridge for MSP Server 2007 supports data exchange with Primavera Portfolio Management lifecycle phase schedule elements and project-level data.

Fast Track for Primavera Project Portfolio Management and Oracle's Primavera Capital Planning and Investment Control Budgeting (used in the public sector by federal governments) provides 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.

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Primavera Portfolio Management offers world-class portfolio management solutions for both the private and public sectors, providing unmatched value in enterprise decision-making processes. Its patented features, scalability, configurability, and flexible user interface have delivered measurable results for some of the world's largest and most innovative companies.

RELATED PRODUCTS

- Primavera Capital Planning and Investment Control Budgeting
- Primavera P6 Enterprise Project Portfolio Management
- Primavera Risk Analysis
- Primavera Contract Management

Fast Track for Project Portfolio Management and Fast Track for Application Portfolio 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 2007. This summarized data supports project tracking, health monitoring, and project value realization.

Contact Us

For more information about Oracle's Primavera Portfolio Management, please visit oracle.com or call +1.800.ORACLE1 to speak to an Oracle representative.

Oracle is committed to developing practices and products that help protect the environment

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