Oracle Prime Portfolio

Oracle Prime Portfolio Cloud Service provides a portfolio-based view of project information, including the proposed project pipeline, estimated budgets and capital spend requirements. Portfolio managers can evaluate scenarios and arrive at an optimal plan to allocate financial budgets and other resources across multiple projects that are in line with strategic goals. Users can monitor portfolio health, track performance and balance portfolios via alignment with corporate strategic goals.

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TODAY'S KEY SOLUTION ADVANTAGES

Oracle Prime Portfolio enables portfolio planners, executives, stakeholders, and project managers to propose, inventory, prioritize, and select projects in a collaborative fashion and take corrective action when necessary. The solution provides comprehensive, long-range tools for capital planning and budget approval across project portfolios. Configurable performance scorecards monitor the lifecycle of portfolios based on key measures.

PORTFOLIO PLANNING

- Oracle Prime Portfolio helps portfolio managers determine which projects to undertake during a planning cycle.

- In the planning phase, projects can be submitted either as project proposals and routed through configured workflows or created as active projects.

- Organization-wide KPIs and prioritization metrics can also be identified and created during the planning phase.

- Depending on your budget planning needs, organizations can set up capital plans for portfolios using configurable time horizons.

- Project stakeholders can estimate project costs and define multi-year capital budgets for their projects as part of this process.

Oracle Prime Portfolio is an integrated, cloud-based solution built on Oracle Red Stack technology. The product platform is mobile ready, offers embedded analytics on the cloud and has built-in workflows for long-range capital planning.

KEY BENEFITS

- Consistently evaluate projects based on your business criteria

- Align proposed and active projects to strategies or other business drivers

- Create multi-year, long-range capital plans with annual budget planning and rolling forecast support

- Prioritize investments to maximize return

- Compare key financial information and KPIs side-by-side for each scenario.

- Gain faster agreement on project budgets during planning

- Share performance improvement results with key business stakeholders using online performance scorecards

- Complete more, higher-value projects sooner

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Figure 1. Top-down portfolio prioritization for project ranking and selection

PORTFOLIO PRIORITIZATION AND PROJECT SELECTION

- Oracle Prime Portfolio displays projects and proposed projects on interactive, editable listing pages with full grouping and sorting capability, enabling the portfolio manager to slice and dice project data for evaluation purposes.

- Simple measures can assist with maximizing project benefits and minimizing costs, risks and effort across the portfolio.

- Extensive "what if" scenario modeling tools, including sophisticated water-lining and linear programming options, can be used to evaluate and arrive at an optimum portfolio mix for capital plans.

- The preferred capital plan can be saved and approved as part of the capital planning cycle.
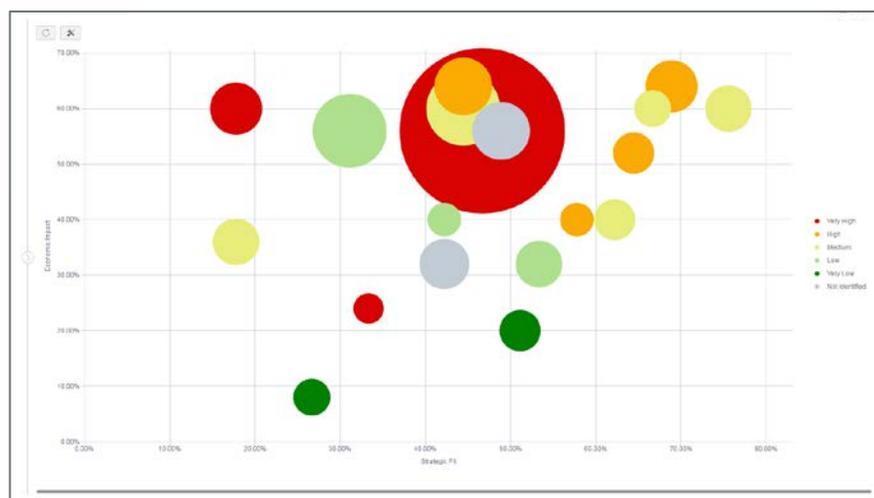
Figure 2. Investor map capability for project portfolio evaluation

Key Features

- Secure, scalable and configurable cloud-based solution

- Rich, query-based portfolio filtering capability

- Portfolio-level prioritization capability with investor maps (bubble charts) to visually compare projects

- Strategic alignment hierarchy to link projects with business drivers and monitor progress toward goals

- Role-based portfolio-level capacity planning

- Integrated project portfolio and capital plan management

- Multiple funding sources allocation to projects via a portfolio

- "What if" scenario planning, optimization and water-lining capability

- Real-time efficient frontier options to visualize portfolio options

- KPI monitoring via customizable measures formulae allow for ongoing monitoring of portfolio performance

- Configurable workflow and approvals with notifications

PROJECT EXECUTION

- Oracle Prime Portfolio allows customers to capture, baseline and report on portfolio level measures or KPIs throughout the project lifecycle.

- Typical data that's summarized for use in portfolio monitoring during project execution includes schedule information, project costs, and resource data.

- Integration with Oracle's Primavera P6 Enterprise Project Portfolio Management (EPPM) can be enabled to manage detailed project scheduling and cost breakdowns.
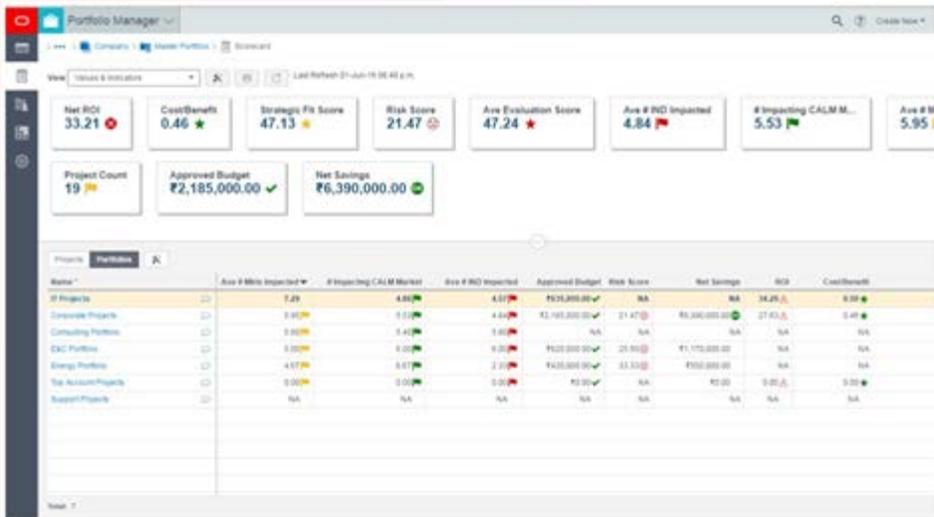

Figure 3. Build scorecards to track and monitor business-specific measures

PORTFOLIO MONITORING

- Rich portfolio filtering and KPI monitoring via customizable measures formulae allow for ongoing monitoring of portfolio performance.

- Project portfolios can be monitored by displaying portfolio measures on flexible performance scorecards, either at the project level or as a summary across similar portfolios within a workspace.

- Budget analysis views such as capital planning scorecards and spending plans allow planners and stakeholders to review spending over time to identify budgets variances and make the necessary adjustments to the plans.

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