



Project Wizard

Benefits

- Easy to use and customize
- Configures itself to your system setup
- Close to zero implementation effort
- Cuts down data entry time
- Eliminates re-keying errors
- Correct errors quickly

Project Wizard allows you maintain your Oracle Projects from Excel. Forget about manual data entry when you harness the power of MS Excel. Use Excel to download your Project Information as the basis for new projects, to make changes or to simply populate Project information into Excel for analysis.

Enjoy the smoothest integration from your desktop to Oracle Projects.

Feature Overview

- Based on MS-Excel
- Can create or maintain single or multiple projects
- Seven forms available to assist with data entry validation and error correction
- LOVs available
- Allows for Financial or Workplan Tasks
- Two way interface between Excel and Oracle
- Delete errors, correct and reload in minimal time

UNLOAD RESULTS	PROJECT NUMBER	PROJECT NAME	LONG PROJECT NAME	PROJECT DESCRIPTION	PARENT TASK	TASK NUMBER	TASK NAME	LONG TASK NAME	TASK DESCRIPTION	TASK ORGANIZATION	SERVICE TYPE CODE	...
Updated	Construction113	Construction113	Construction	Test project		1.0	Structure Asset	Structure Asset	Structure Asset	Executive Office	Build	...
						2.0	HVAC Asset 2	HVAC Asset 2	HVAC Asset 2	Executive Office	Build	...
						3.0	Project Manager	Project Manager	Project Manager	Executive Office	Build	...
						1.0	Foundation	Foundation	Foundation	Executive Office	Build	...
						1.2	Flaming	Flaming	Flaming	Executive Office	Build	...
						1.2.1	Flaming	Flaming	Flaming	Executive Office	Build	...
						1.2.2	Flaming	Flaming	Flaming	Executive Office	Build	...
Loaded	Feasibility Study2	Feasibility Study	Feasibility Study	Receiver project for		1.0	Design	Design	Design	Consulting-East	Consulting	...
						2.0	Develop	Develop	Develop	Consulting-East	Consulting	...
						3.0	Project Manager	Project Manager	Project Manager	Consulting-East	Consulting	...
						1.1	Req. Definition	Req. Definition	Definition of Proj	Consulting-East	Consulting	...
						1.2	Specifications	Specifications	Project Specific	Consulting-East	Consulting	...
						1.1.1	User Interviews	User Interviews	Interviewing proj	Consulting-East	Consulting	...
						1.1.2	Market Analysis	Market Analysis	Market Analysis	Consulting-East	Consulting	...
Loaded	Feasibility Study2	Feasibility Study	Feasibility Study	Receiver project for		1.0	Design	Design	Design	Consulting-East	Consulting	...
Updated	Fixed Price	Fixed Price	Fixed Price	Please use this Fi		1.0	Conduct Resea	Conduct Resea	Conduct Resea	Consulting-East	Consulting	...
						2.0	Publish Findi	Publish Findi	Publish Findi	Consulting-East	Consulting	...
						3.0	IC Tax Recor	IC Tax Recor	InterCompany T	Consulting-East	Consulting	...
						1.0	Design Survey	Design Survey	Design Survey	Consulting-East	Consulting	...
						1.0	Internal Resea	Internal Resea	Conduct Internal	Consulting-East	Consulting	...
						1.0	External Surv	External Surv	Conduct External	Consulting-East	Consulting	...

Architecture

- Compatible with Microsoft Excel 2000 and later versions
- R11i to R12
- Uses Oracle Applications function security
- XML Web-based Communication
- No client install
- Install and setup in minutes

Project Forms

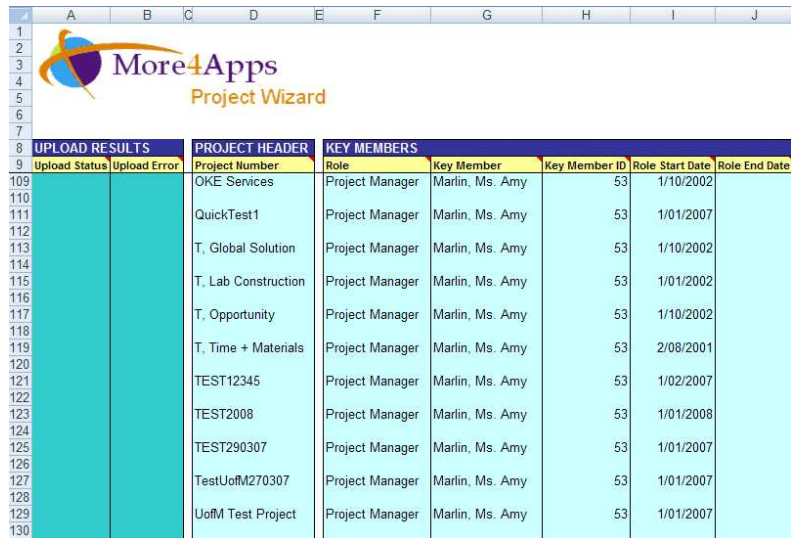
- Project Wizard forms include:
 - Project Template
 - Project Header
 - Classifications
 - Key Members
 - Tasks
 - Sub Projects
 - Transaction Controls
 - Bill Rate Overrides
 - Assets & Asset Assignments
- Pop-up calendars are available for dates
- Fields validated using LOVs
- Fields color coded to indicate if mandatory or optional
- Most fields are optional and can be deleted from worksheet.

Download

- Existing Projects can be extracted from Oracle Projects
- Allows the user to determine the type of data that will be downloaded (eg: just task, assets, etc)
- Information can subsequently be modified and re-loaded as updates to existing projects, or to create new projects.

Wizard Templates

- Wizard template sheets allow users to view only relevant information
- Specific data can be downloaded, changed and reloaded into Oracle Projects in minimal time (eg: changing a key member on projects)
- Project Wizard currently has eight templates available that show the following information:
 - All columns
 - Assets/Assignments
 - Bill Rate Overrides
 - Key Members
 - Project Header
 - Sub Projects
 - Tasks
 - Transaction Controls

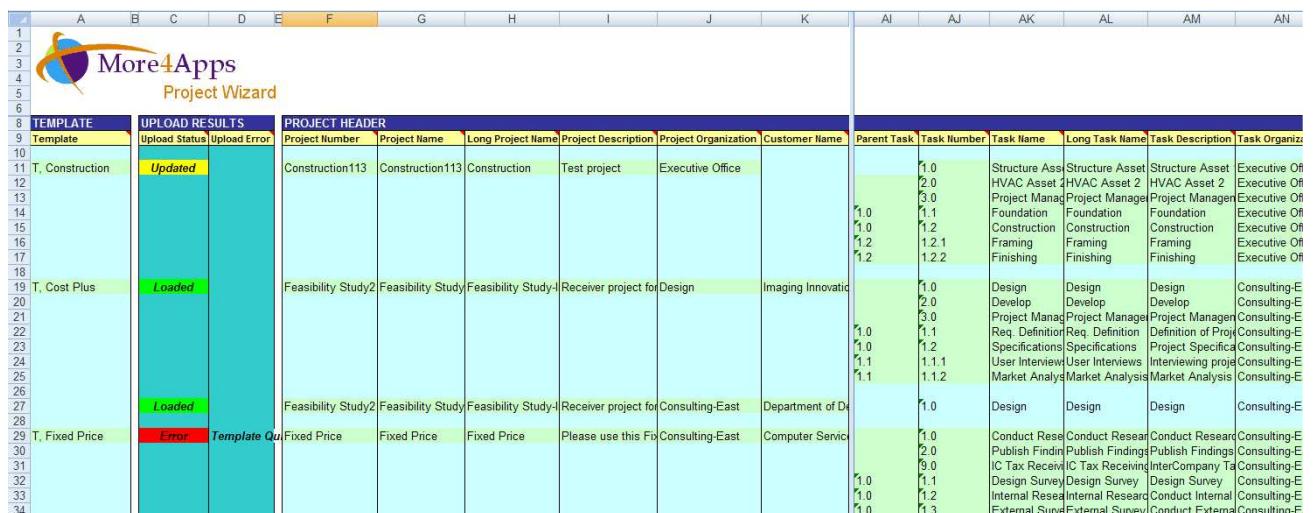


UPLOAD RESULTS		PROJECT HEADER		KEY MEMBERS			
Upload Status	Upload Error	Project Number	Role	Key Member	Key Member ID	Role Start Date	Role End Date
		OKE Services	Project Manager	Marlin, Ms. Amy	53	1/10/2002	
		QuickTest1	Project Manager	Marlin, Ms. Amy	53	1/01/2007	
		T. Global Solution	Project Manager	Marlin, Ms. Amy	53	1/10/2002	
		T. Lab Construction	Project Manager	Marlin, Ms. Amy	53	1/01/2002	
		T. Opportunity	Project Manager	Marlin, Ms. Amy	53	1/10/2002	
		T. Time + Materials	Project Manager	Marlin, Ms. Amy	53	2/08/2001	
		TEST12345	Project Manager	Marlin, Ms. Amy	53	1/02/2007	
		TEST2008	Project Manager	Marlin, Ms. Amy	53	1/01/2008	
		TEST290307	Project Manager	Marlin, Ms. Amy	53	1/01/2007	
		TestUoM270307	Project Manager	Marlin, Ms. Amy	53	1/01/2007	
		UoM Test Project	Project Manager	Marlin, Ms. Amy	53	1/01/2007	

Example Worksheet

Below is an example of the Project Wizard worksheet, showing several projects being loaded into Oracle Projects.

The status columns enable the user to quickly see the progress of the records. You can see that three projects have been successfully loaded and one has been rejected. The rejected row can be quickly corrected and loaded.



TEMPLATE	UPLOAD RESULTS		PROJECT HEADER					Parent Task	Task Number	Task Name	Long Task Name	Task Description	Task Organiz
Template	Upload Status	Upload Error	Project Number	Project Name	Long Project Name	Project Description	Project Organization	Customer Name					
T. Construction	Updated		Construction113	Construction113	Construction	Test project	Executive Office		1.0	Structure Ass	Structure Asset	Structure Asset	Executive Off
									2.0	HVAC Asset 2	HVAC Asset 2	HVAC Asset 2	Executive Off
									3.0	Project Manag	Project Manag	Project Manag	Executive Off
								1.0	1.1	Foundation	Foundation	Foundation	Executive Off
								1.0	1.2	Construction	Construction	Construction	Executive Off
								1.2	1.2.1	Framing	Framing	Framing	Executive Off
								1.2	1.2.2	Finishing	Finishing	Finishing	Executive Off
T. Cost Plus	Loaded		Feasibility Study2	Feasibility Study	Feasibility Study	Receiver project for	Design	Imaging Innovatic	1.0	Design	Design	Design	Consulting-E
									2.0	Develop	Develop	Develop	Consulting-E
									3.0	Project Manag	Project Manag	Project Manag	Consulting-E
								1.0	1.1	Req. Definition	Req. Definition	Definition of Proj	Consulting-E
								1.0	1.2	Specifications	Specifications	Project Specific	Consulting-E
								1.1	1.1.1	User Interview	User Interviews	Interviewing proj	Consulting-E
								1.1	1.1.2	Market Analyz	Market Analysis	Market Analysis	Consulting-E
T. Fixed Price	Error	Template Qu	Fixed Price	Fixed Price	Fixed Price	Please use this Fo	Consulting-East	Computer Serv	1.0	Design	Design	Design	Consulting-E
									2.0	Conduct Rese	Conduct Resear	Conduct Resear	Consulting-E
									3.0	Publish Findin	Publish Findings	Publish Findings	Consulting-E
									1.0	IC Tax Receiv	IC Tax Receiving	InterCompany Ta	Consulting-E
									1.1	Design Survey	Design Survey	Design Survey	Consulting-E
									1.0	Internal Resea	Internal Resear	Conduct Internal	Consulting-E
									1.0	External Surv	External Survey	Conduct External	Consulting-E

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