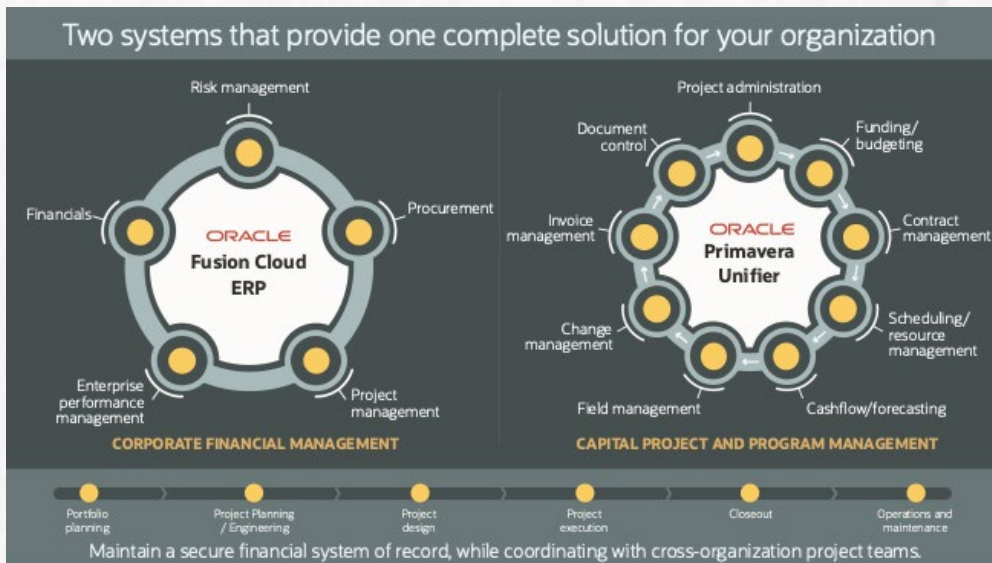


How ERP and project management information systems (PMIS) work together to improve capital project and portfolio outcomes for owner organizations

Oracle's project management information system, Primavera Unifier, integrates with Oracle Fusion Cloud ERP.

The integration can be adapted to any Primavera Unifier or Oracle Fusion Cloud implementation and uses Oracle's own middleware solutions including Oracle Integration Cloud (named as a market-leading middleware in the Gartner Magic Quadrant), Project Integration Framework (PIF), or can integrate with an organization's existing middleware.

Oracle has developed a best practice integration mapping between Primavera Unifier and Oracle Fusion Cloud based on hundreds of Primavera Unifier to ERP integrations. This can be adapted to any Primavera Unifier and Oracle Fusion Cloud implementation to reduce integration time, cost, and risk.



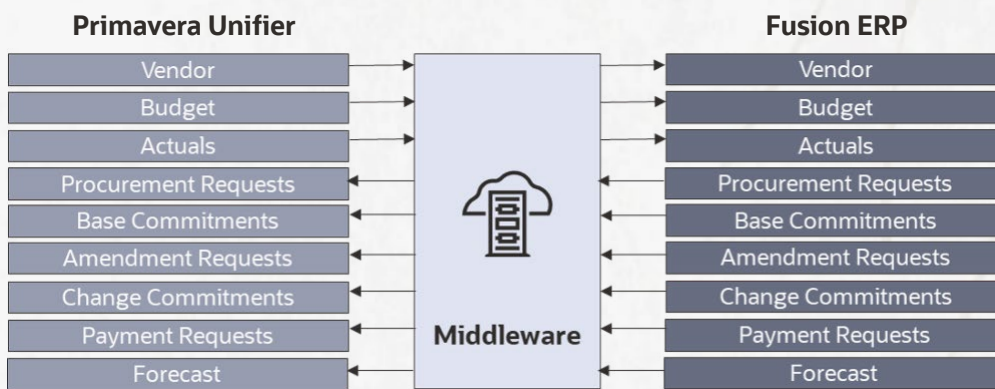
Cross-system data flow

The project teams can stay in their project tools where they can collaborate with contractors and other third parties to manage project processes including project budgets, potential change orders, RFIs, submittals, and approval cycles. The project team benefits from accessing forecasted and actual budget, contract, and payment information from the ERP system down to the line-item level in real time.

Primavera Unifier supports external collaboration and helps manage the uncertainty of proposed changes, updated forecasts, and ongoing retention fluidity outside the financial system of record.

The integration between Primavera Unifier and Oracle Fusion ERP lets organizations benefit from the complementary strengths of each solution, strong financial management in ERP across the organization, strong project and cross-project controls, cross-organization approval flows, and retention management in Primavera Unifier.

Imagine you are reviewing a proposed change to a commitment and want to check the amount of scheduled value remaining within that line item. A simple click of a button brings the up-to-date information you need into your approval screen. Users can easily access the right level of information they need when they need it to make informed decisions quickly and with confidence in the data.



Example use case: Both single and bi-directional integrations are supported between Primavera Unifier and Oracle Fusion ERP.

Benefits of integrating corporate and project systems

Integrating ERP and project systems provides more timely information and supports predictive analytics to improve project and portfolio outcomes.

Cost overruns, schedule delays, and safety incidents can be avoided by making proactive decisions informed by consolidated data and predictive insights to mitigate risks and improve outcomes.

Oracle Primavera Unifier, part of the Oracle Smart Construction Platform, is specifically designed to manage controls in a connected process environment at the project, portfolio, and organization levels. The Oracle Construction and Engineering solution allows project teams to manage proposed and potential cost impacts and collaborate with cross-organization project team members outside of the corporate financial ERP system of record. Key processes including requests for information (RFIs), submittals, risks, and potential change orders are managed, routed, and tracked in Primavera Unifier. Once a commitment is approved, that information flows seamlessly through the integration between Oracle Fusion Cloud ERP and Primavera Unifier to help prevent data lag, inconsistencies, and error-prone double entry, keeping project finance and accounting in sync with the project team. When the financial event is approved, the ERP is updated. When an organization defines the system of record for a given data set and supports that system of record through robust integrations, this results in improved data integrity and improved security.

Process examples leveraging Primavera Unifier and Oracle Fusion Cloud ERP integration

Project creation:

Projects are created in a single place and the organization can choose to create projects either in the ERP system or in Primavera Unifier. That project is then automatically created in the other system, reducing duplicate data entry, and synchronizing project information including header data.

Project information in Primavera Unifier is connected to the project financials in Oracle Fusion Cloud through a unique project identifier in each system that ties the two together. Project financials and project costs remain aligned throughout the life of the project.

The data within each system is synchronized. There is no need for the time consuming and challenging process of offline reconciliation between the systems. That synchronization or reconciliation is ongoing so there are no surprises after the fact.

Cost management:

The bi-directional data flow between Primavera Unifier and Oracle Fusion Cloud ERP helps organizations manage costs accurately and provides transparency between the projects and the finance teams. Budgets are broken down into cost codes in Primavera Unifier. This detail feeds into Fusion and aligns to the chart of accounts in the ERP system. All budget, forecast, and actual changes/adds are communicated between systems in this way so all roles have the up-to-date, accurate information they need to effectively do their jobs, keep projects on track, and help ensure accurate accounting and cash flow reporting.

Funding management:

Manage multiple funding sources to ensure funds are allocated properly, time periods are adhered to, and required reporting is accurate and in compliance.

Contract creation:

A contract “container” is created in Oracle Fusion Cloud ERP and can be tracked as a project contract or an enterprise contract. The relationship can be one-to-one or one-to-many between the enterprise and project contract. Requisitions against the contract are issued in Primavera Unifier. Upon approval, the requisition then turns into a commit. Because the tools are integrated, the commit is reflected in both the project system, Primavera Unifier, and the ERP system, Oracle Fusion Cloud. This keeps the project teams and the organization’s finance team on the same page.

Invoice/payment application management:

In Primavera Unifier the schedule of values, is tracked using a cost breakdown structure. Oracle Fusion Cloud ERP will receive, validate, and pay a payment application or invoice that comes in through Primavera Unifier. Retention per contract is tracked and managed within Primavera Unifier. Once the project approves the release of retention, the data from that approved payment application maps from Unifier to Fusion for the payment to be made. The dates and check numbers of the payments, along with the associated payment application information is sent from the Oracle ERP system to Primavera Unifier. Unique record numbers are sent from Primavera Unifier to Oracle Fusion ERP. The cost breakdown structure in Primavera Unifier provides the cost detail. There are many cost breakdown lines in Primavera

Unifier for each chart of accounts in the ERP system with each categorized by the type of expense.

Retention management:

Use past and current project data to inform the amount of retention needed. Automate retention management using Primavera Unifier’s connected cost and contract structure. Help ensure retention is released in a timely manner to be reallocated as risk windows pass. Gain insights across all projects in your portfolio by using a cross-project risk register.

Change management:

Change proposals, reviews, decisions/approvals, and reallocations, for example, moving funds from contingency are all managed in Primavera Unifier. Unifier also documents reasons for changes and connects all related processes and information. This includes the contract and associated drawings and documents, which become part of the project record and can support project-to-project learning and improvement.

Ready to learn more about Oracle Fusion Cloud and Primavera Unifier?
[Request a demo.](#)

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