Unifier & Field Service Cloud

Milestone
Project Management Solutions

ORACLE

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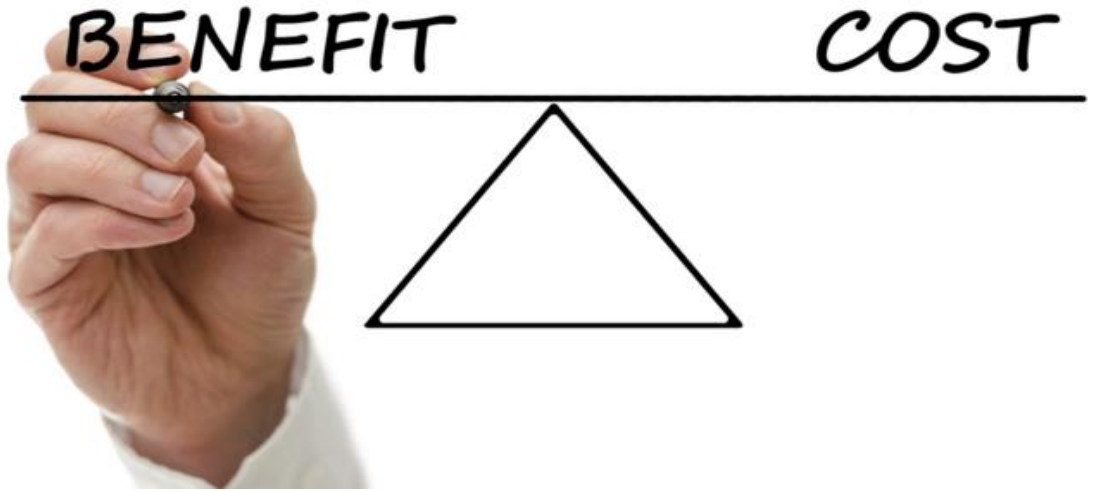
Typical FMRE Challenges

Disparate Systems

Cost Visibility



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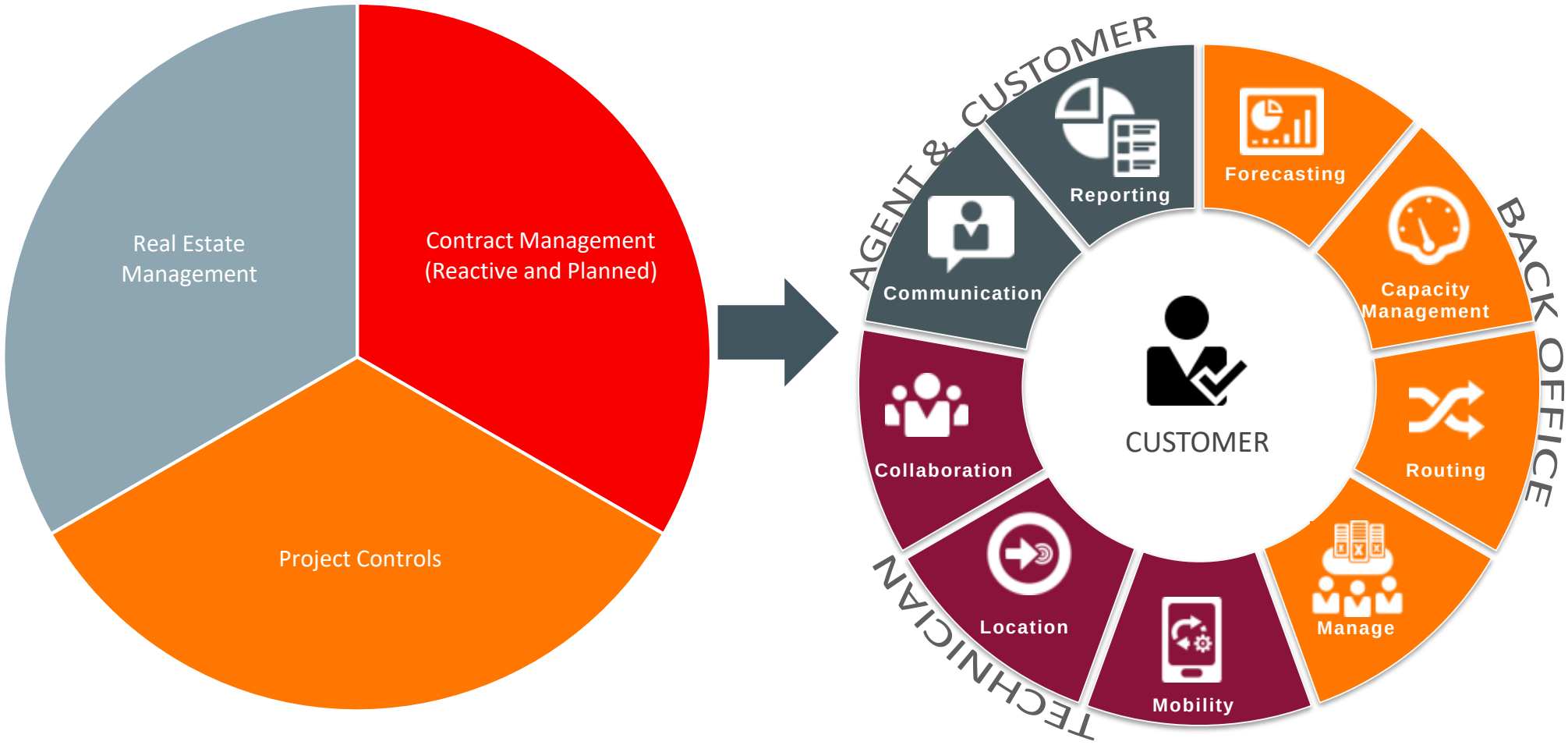
Our Solution

Unifier and OFCS



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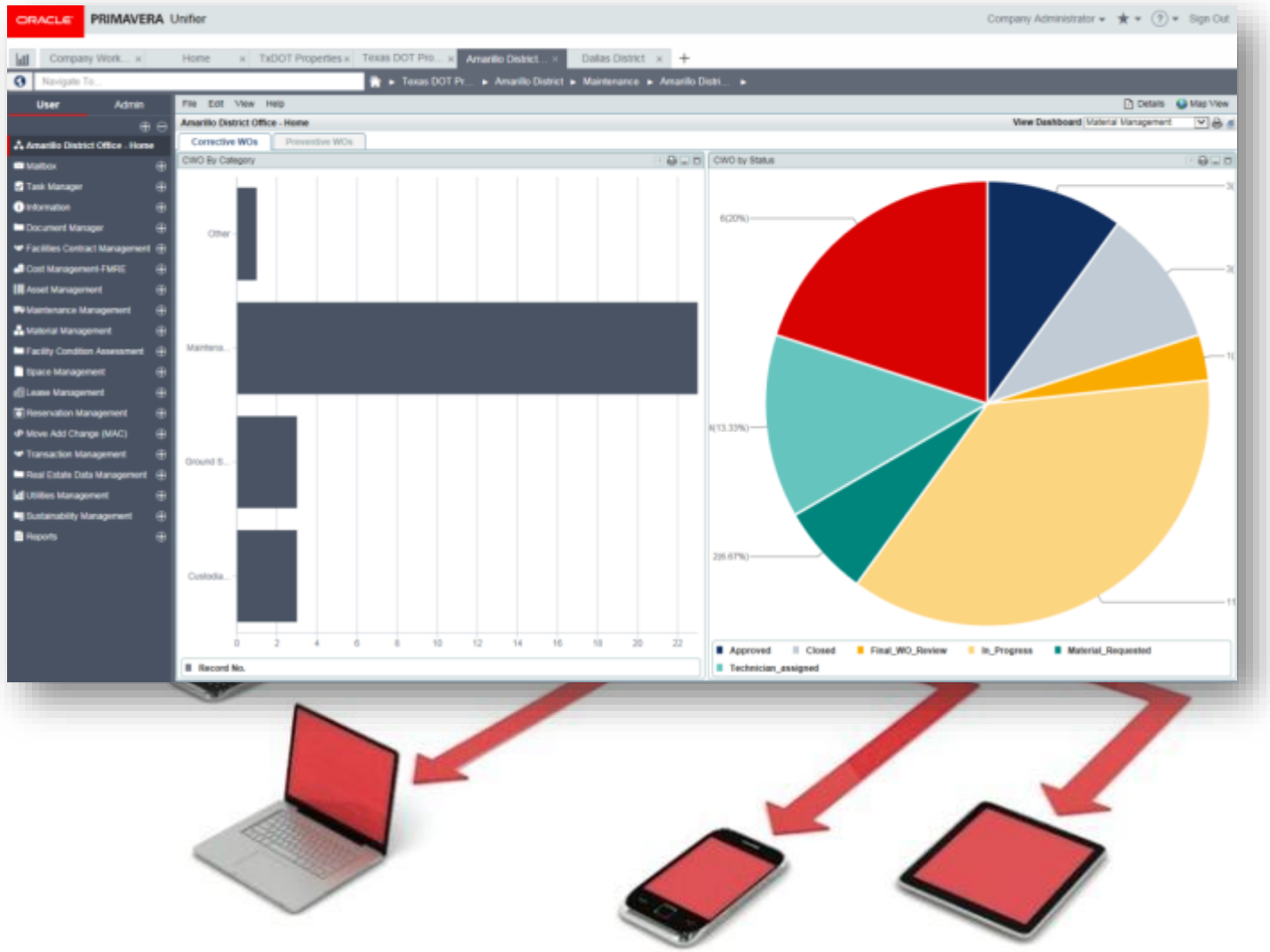
What is Unifier?

- Cloud-based, Integrated

  Asset Lifecycle Management.

- Configurable Business Process.
- Multi-Level Hierarchies.
- Robust Reporting.
- Easy Integration w/ ERPs.
- Intuitive user interface.



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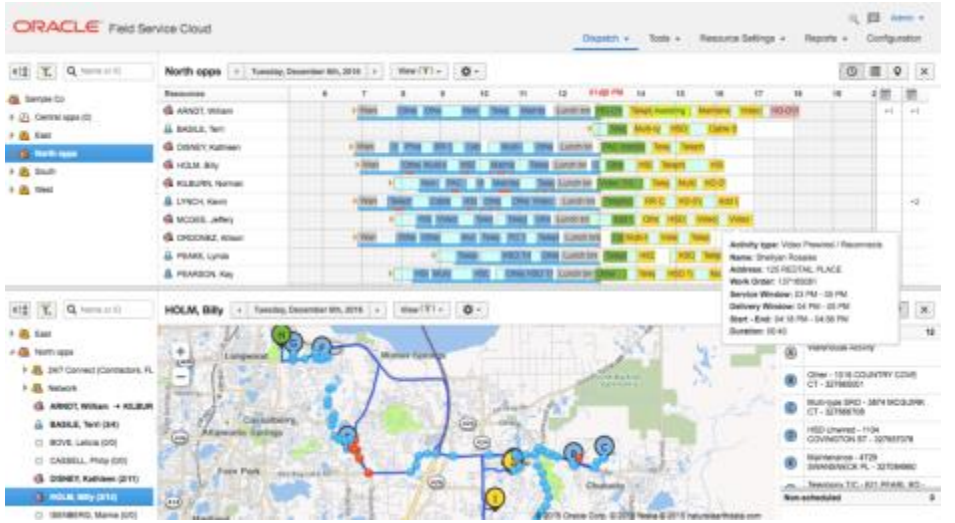
What is Field Service Cloud?



- Real time self learning
- Work scheduling & routing
- Customer notifications
- Mobile working and location tracking
- Internal social collaboration and help desk

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Virgin Media

"We have introduced Oracle Field Service Cloud with tremendous results… we've got much better productivity, our travel times have reduced, and we've got more time to spend with our customers"

Maurice Daw,

Executive Director

Challenge

- Improve accuracy in scheduling engineer visits and routing efficiency.
- Support a complex work mix including customer installation and repairs and network maintenance
- Narrow customer service windows and give consumers a choice of time slots most convenient for them.
- Empower field engineers to focus on the customer, not on managing their daily workflow.

OFSC Modules Deployed

- Capacity
- Core Manage
- Mobility
- Routing
- Communication
- Collaboration
- Smart Location

Results

- 15% reduction travel time
- 15% increase jobs per technician
- Substantial reduction office resources
- 97 percent on-time delivery
- 18 percent increase in customer satisfaction and loyalty ratings (NPS)

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Morrison Utility Services (MUS)

Morrison Utility Services operate across the UK providing services to blue chip utility companies *across the electricity, gas, rail, telecommunications and water sectors on the upgrade and maintenance of their infrastructure.*

MUS started using Oracle Field Service in 2012 and now have over 900 users.

Challenge

- Reinstate excavations sooner
- Reduce number of fines associated with SLA breaches
- Increase number of daily completed jobs
- Increase SLA compliance of complex, linked-task jobs over multi-day periods
- Increase efficiency of faults and maintenance work

OFSC Modules Deployed

- Capacity
- Core Manage
- Mobility
- Routing

Results

- Improved productivity of dispatchers, agents and teams in the field: 9-13 more jobs per day, 15% reduction in travel time
- Improved compliance with client expectations and SLAs, meeting notice/permit periods

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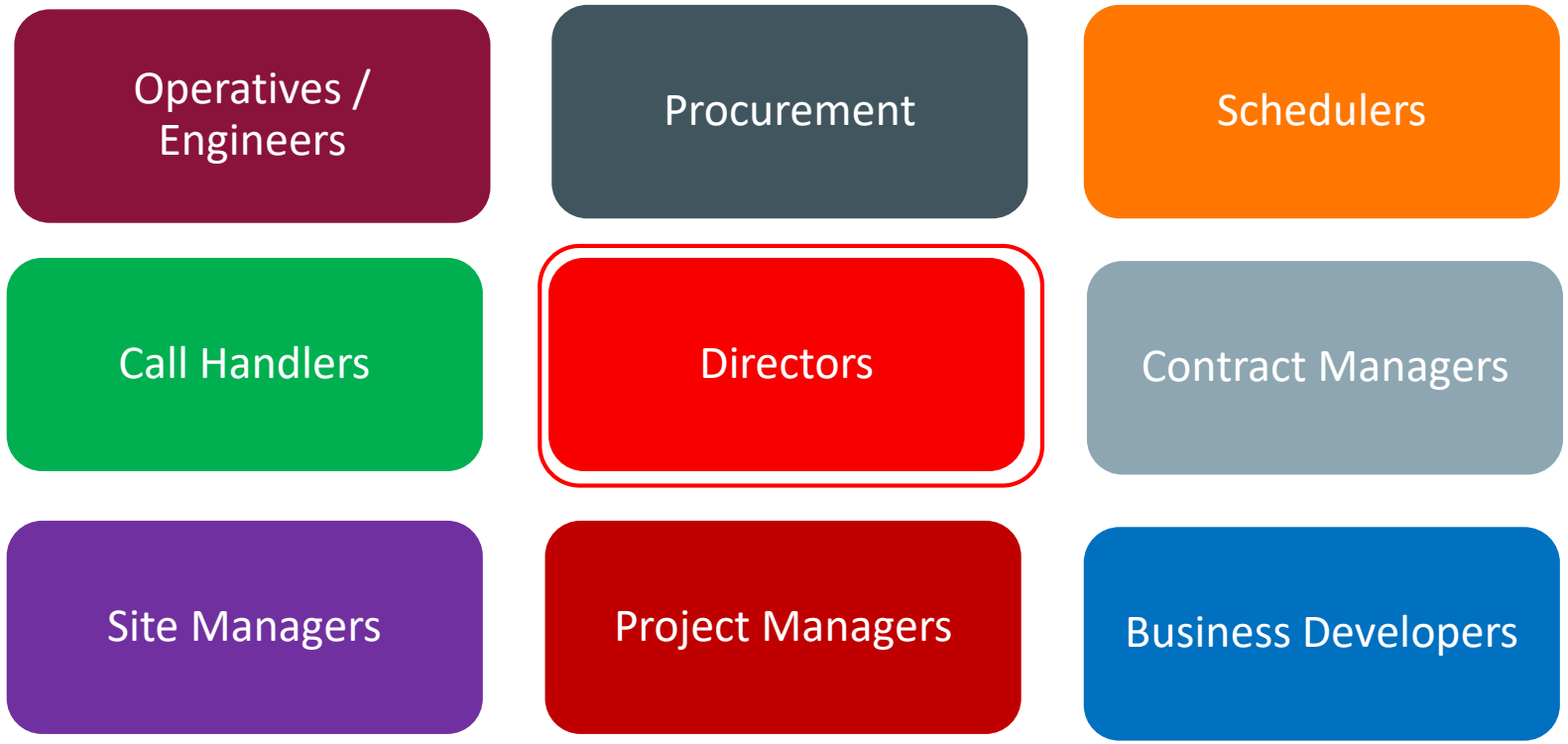
Roles



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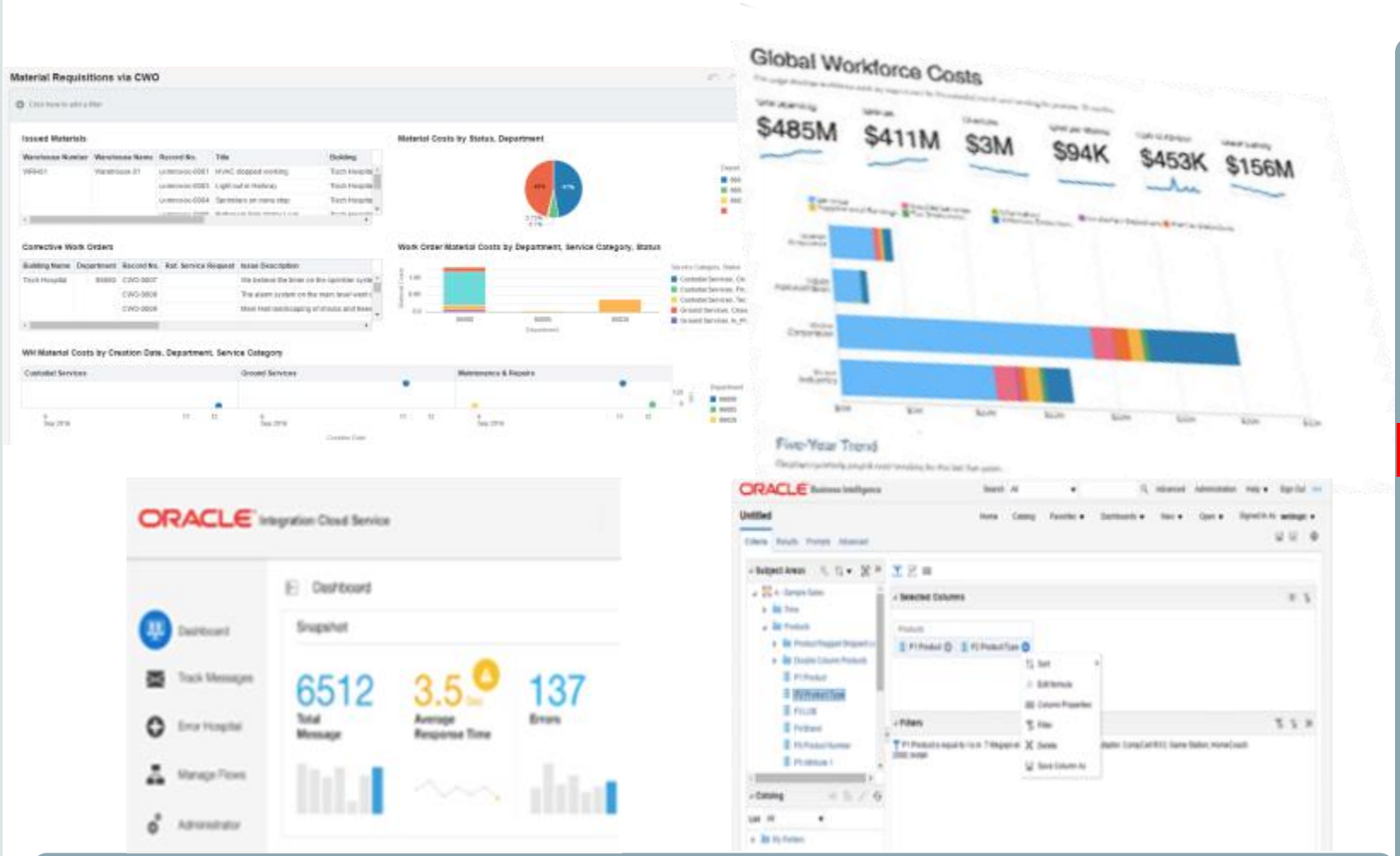
Analytics and Insight: BI data management and visualisation



Business Intelligence for field service

- Cloud based data warehouse and reporting analytics
- Automated feeds from field service data
- Standard Data Warehouse extracts can also feed other DW BI tools already in use
- Able to mix with other data sources
- Design 1, 2 and 3d report formats to clearly visual complex data

Benefits

- Ensuring field service data is able to support operational business and strategic management decision making

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Benefits

Improve Communication

Increase Transparency

Save Time

Reduce Costs

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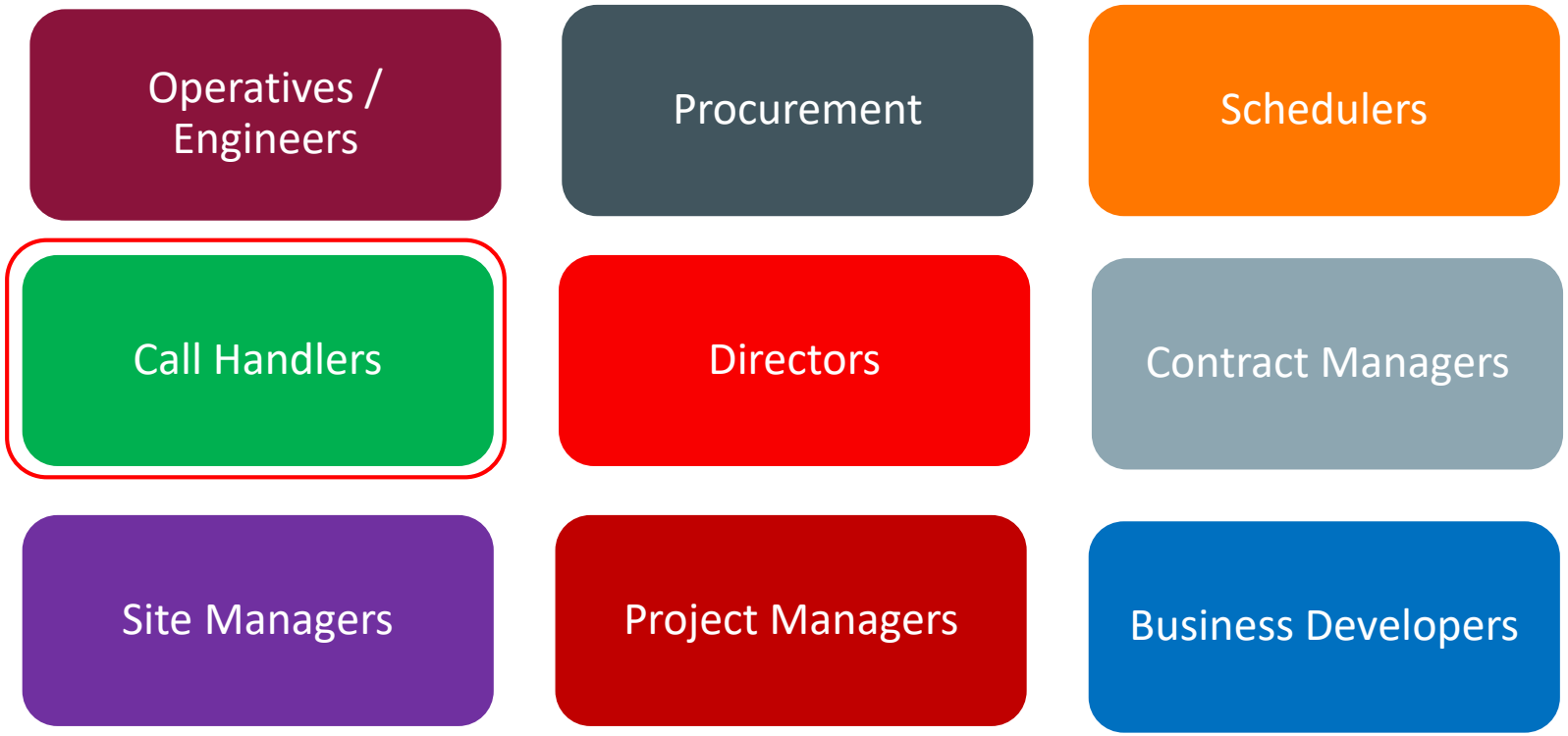
Roles



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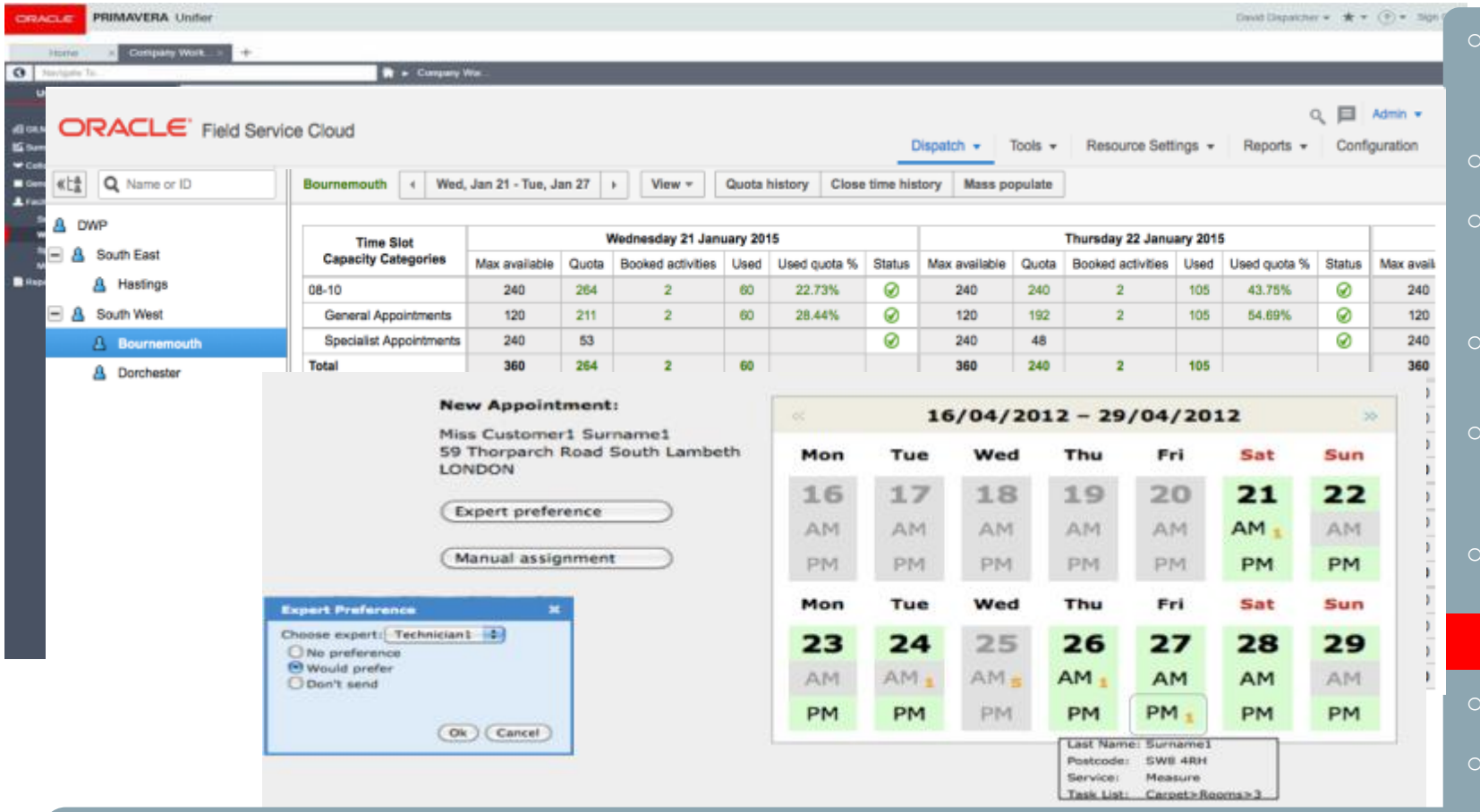
Capacity based appointments: Offering field resources according to available capacity



CSR and customer self service access to appointment booking

- Unique capacity based approach to offering time-slot based appointments to multi-channel booking systems
- Enables under/over booking akin to airline seats
- Enables planners to control appointment usage by skill or appointment type, eg limit repair work to ensure availability for installs etc.
- Open/close capacity by day and or work-zone to focus work in geographic areas to specific days
- Enables same day booking offering up time freed up by no-shows or early completions for customer utilisation
- Complex job booking support through "find-matching resource" API calls.

Benefits

- Real time self service appointment booking
- Maximises utilisation of field resources minimising white space
- Control over how resources are used to support business goals

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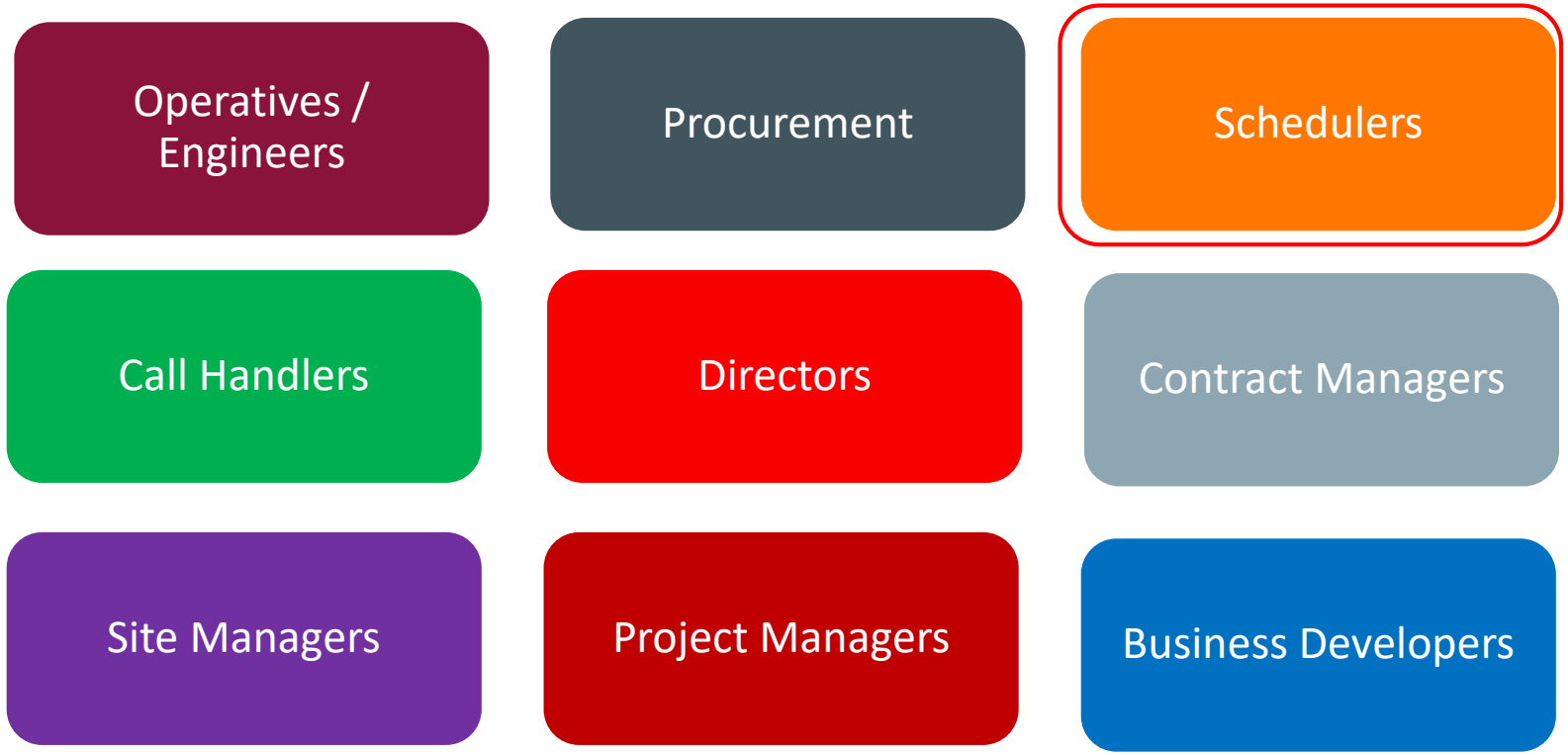
Roles



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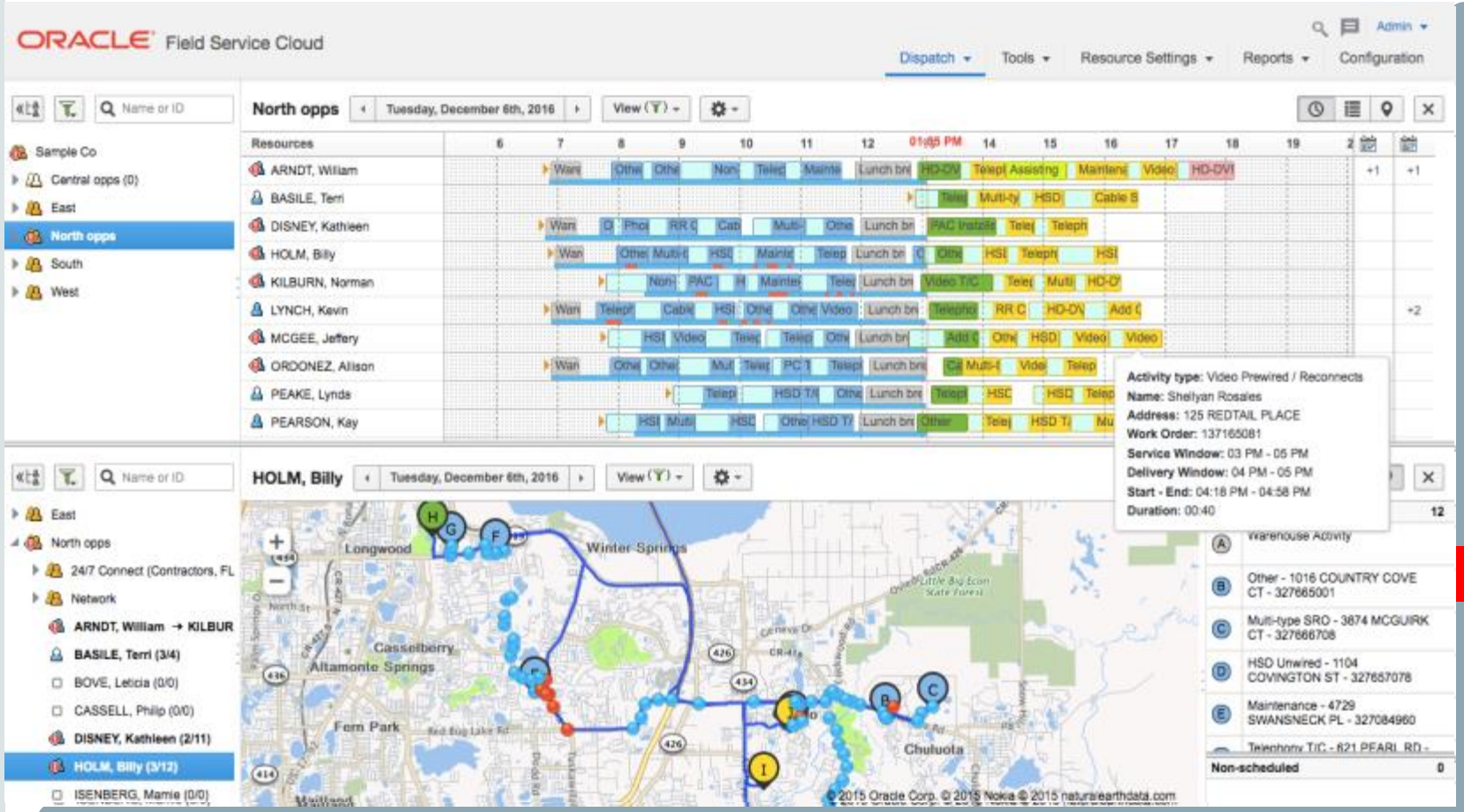
Air-Traffic-Control: For effective field service execution



An intuitive command center to give visibility and control to planning and executing field service visits

- Role based access including sub-contractors office and field workers
- Time, List, Map and Job detail views of Activities to be completed together
- Resources grouped into logical geographical and organisation tree structure
- Resources working calendar, skills levels and expire dates, starting/ending locations, work-zone preferences and on-hand inventory
- Unscheduled work visibility where it enters system at appropriate resource tree level
- Smart location identifies proximity compliance

Benefits

- Effective utilisation of field resources, maximising work completed, travel time and best allocation for skills/inventory
- Jeopardy management re-allocate based on real time progress updates
- Integrates internal and sub-contracted workforces
- Predictive arrival time for customer reminders

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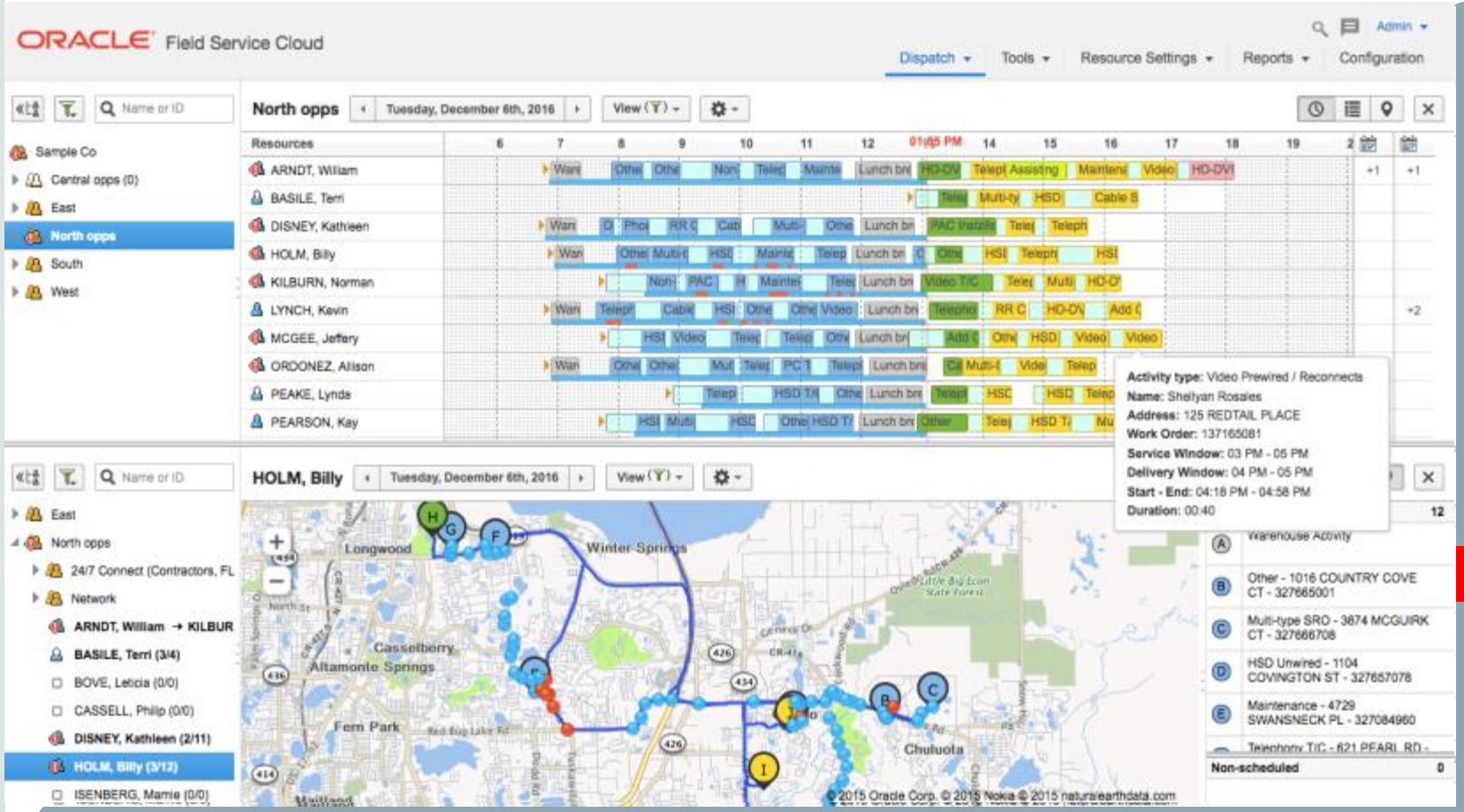

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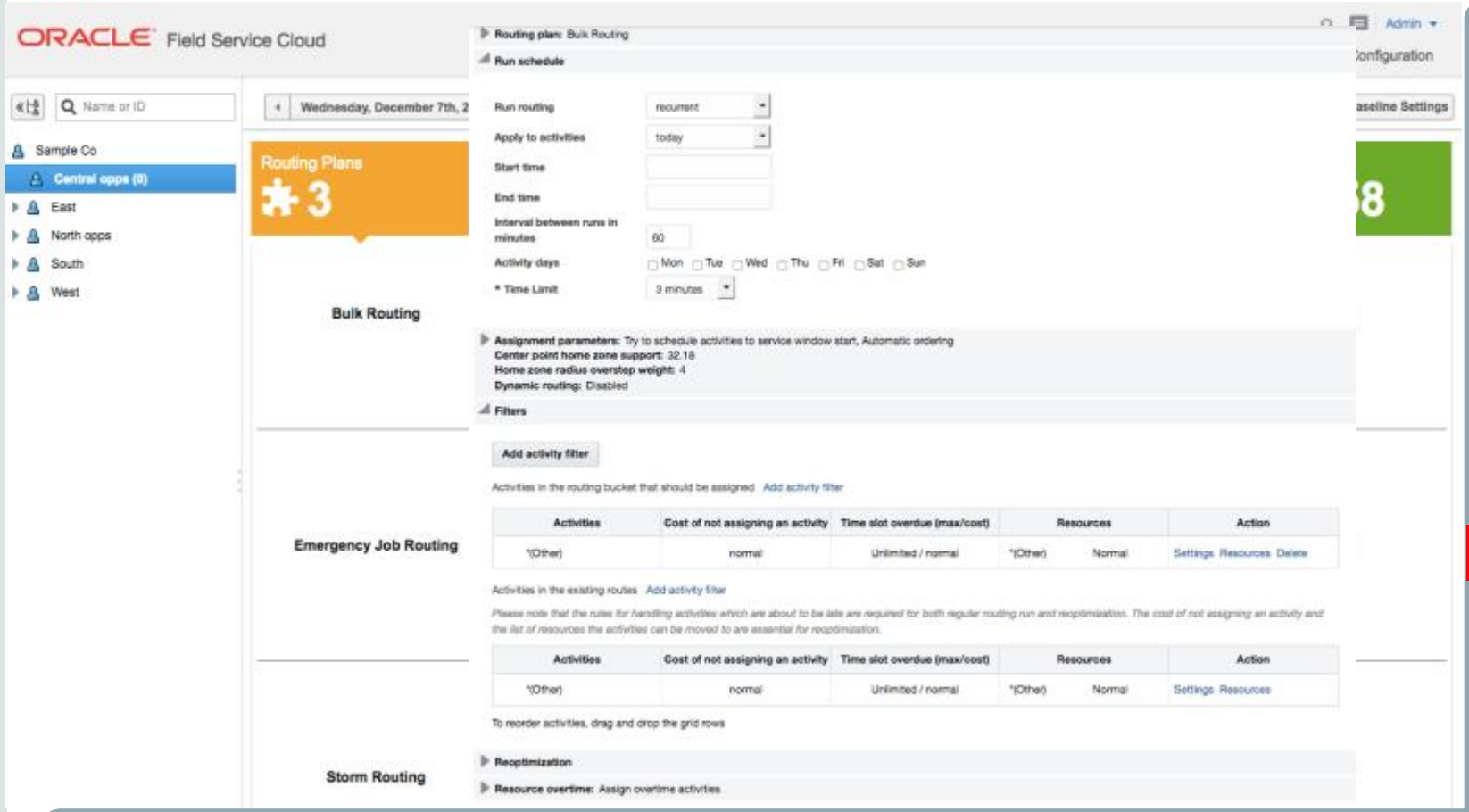
Routing Optimisation: Maximise work done with least travel



Configurable routing optimisation plans using a very fast Genetic Algorithm

- Business driven routing optimisation plans, highly flexibly while easy for specialist business owner to control
- Runs from Resource Tree bucket enabling different areas to have their own routing plans
- Manual, automated by time, continual running and linked plans provide control for wide range of optimisation demands
- Re-optimisation filters give fine grain control over making changes based on new situation
- Runs very quickly, 10,000 jobs in a few minutes

Benefits

- Puts scheduling rule control into the hands of the business instead of IT or vendors
- Easy to use but very powerful
- Can support range of in-house vs contractor models
- Blend break/fix or timed appointments with longer term SLA work for maximum effectiveness

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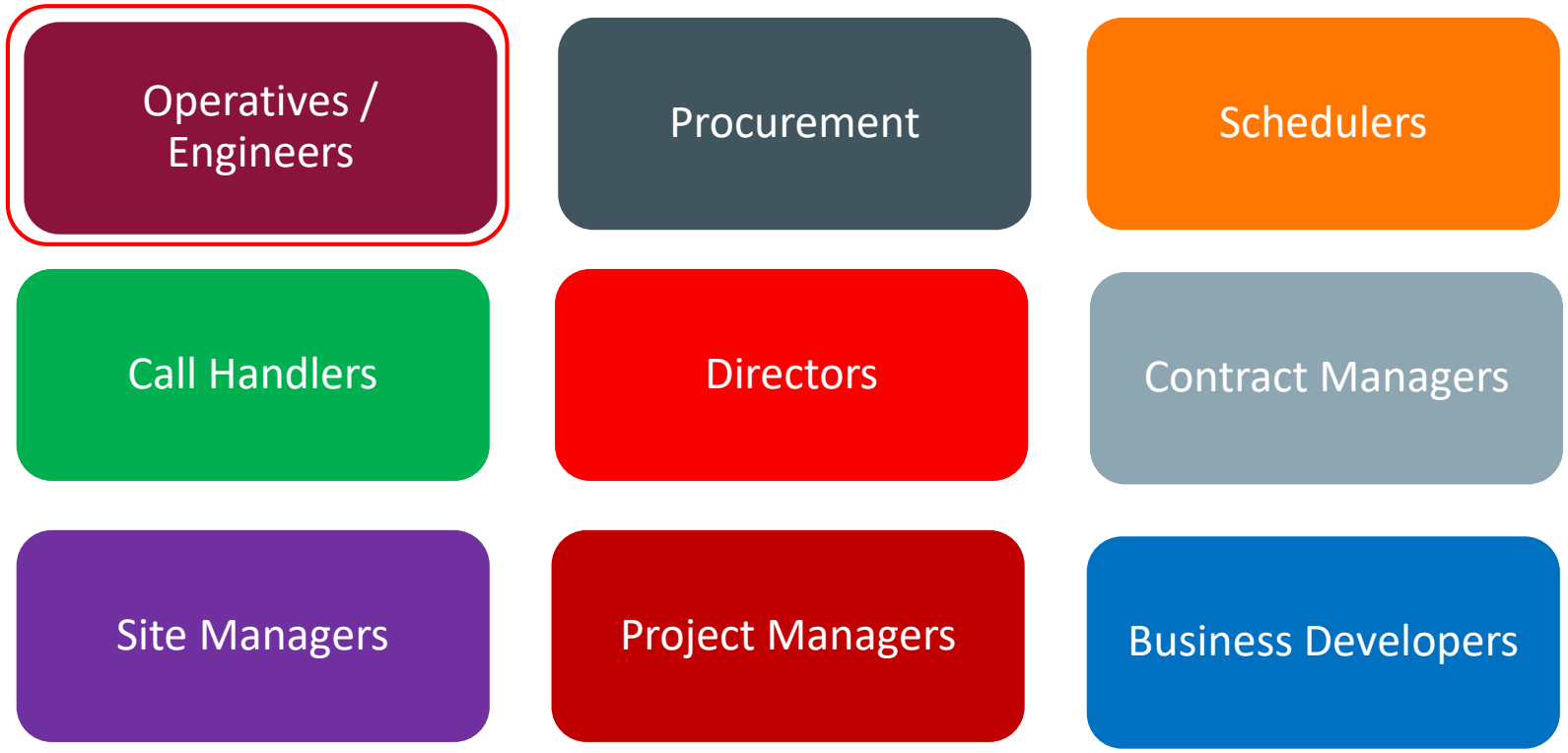
Roles



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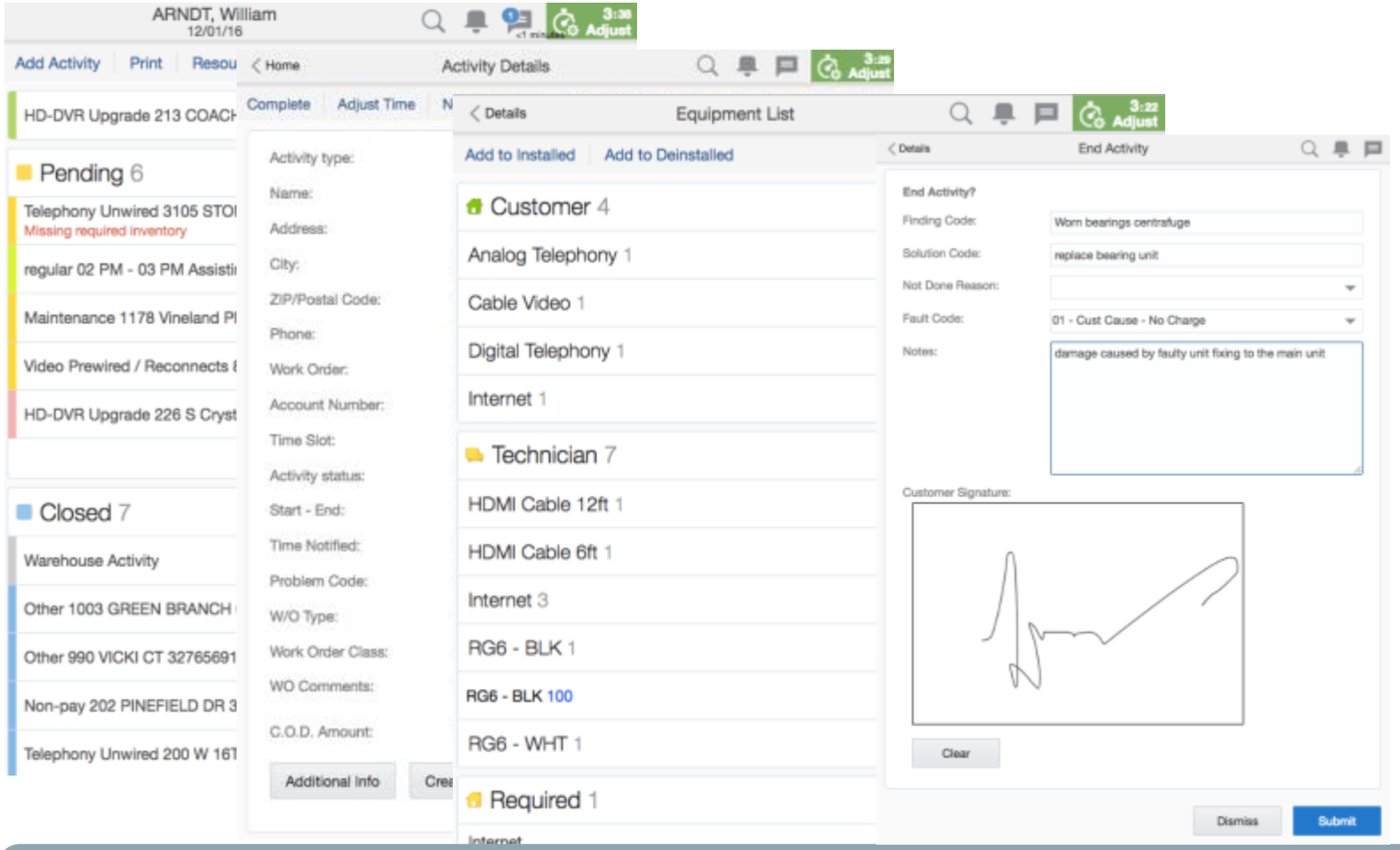
Mobility: Intuitive interface for field resources to complete work



Online/offline ability to view, progress, update and complete activities from mobile device

- Clear view of assigned activities by day
- Full details needed to complete the work, eg customer, site, contract, special instructions
- Supports attachments, photo capture, signature capture, new job entry
- Plug-in capability to embed context based URL's to enable user to "jump" to external web applications in context
- Collaboration and broadcast messaging
- Install/remove equipment on a job
- View and self assign nearby unscheduled work resource is skilled to complete

Benefits

- Eliminates manual data handling and transposition errors
- Real time data capture and follow on business process action
- Improved completion rates
- Field data capture of new work

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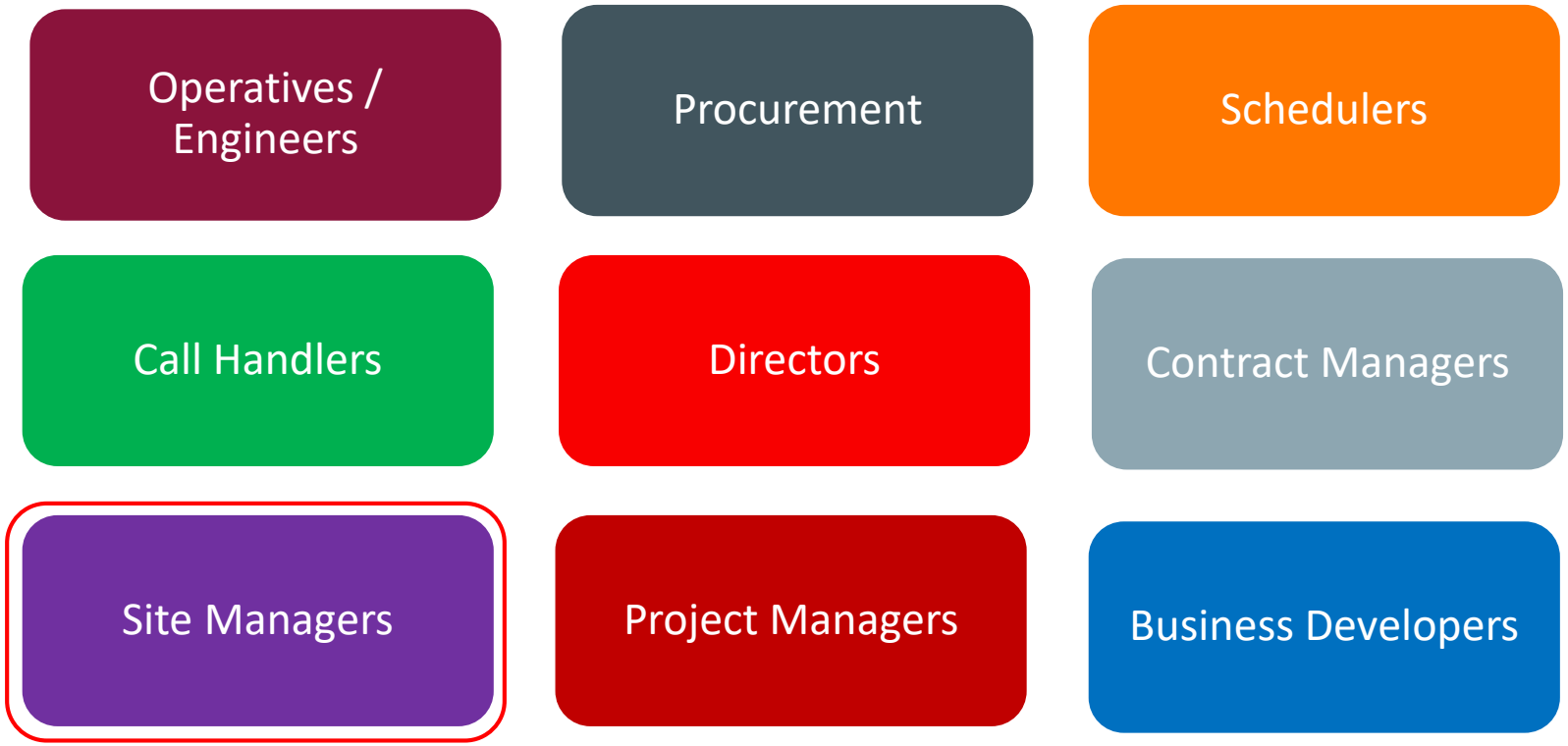
Roles



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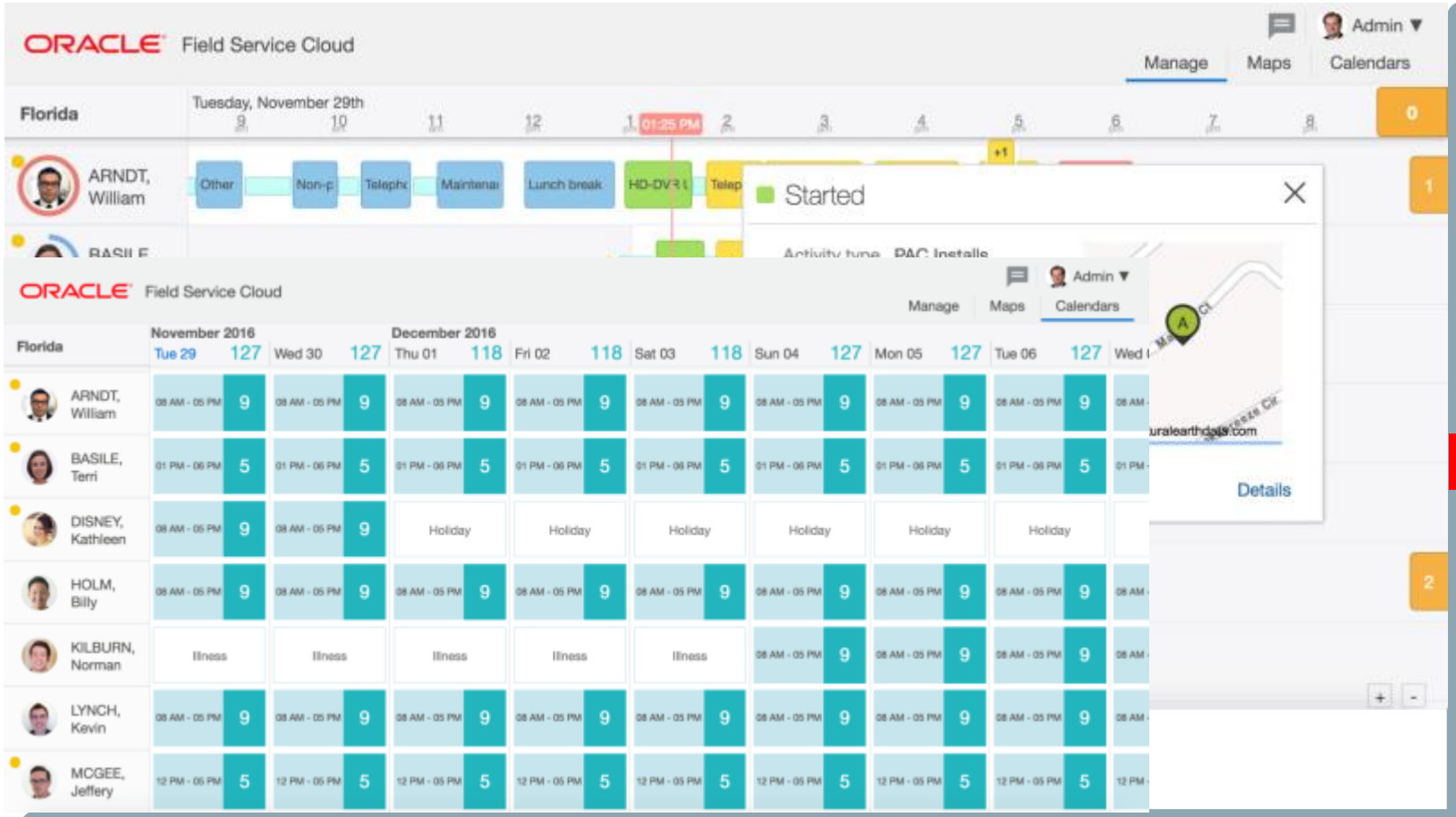
Field Manager Mobility: For field based team control



- Real time visibility of field managers team, or sub-sets of the team to improve monitoring/mentoring ability without the needs for constant mobile updates
- Maintain field resources key attributes such as working calendar, skills, locations
- Monitor select groups in focus views
- Take over field resource and complete tasks on their behalf

Benefits

- Improve manager:field-resource ratio
- Faster reaction to in-day field events
- Enables field based dispatching where required
- Improved updates for skills, availability, non-availability times

Online/offline ability for field managers to oversee and control their teams

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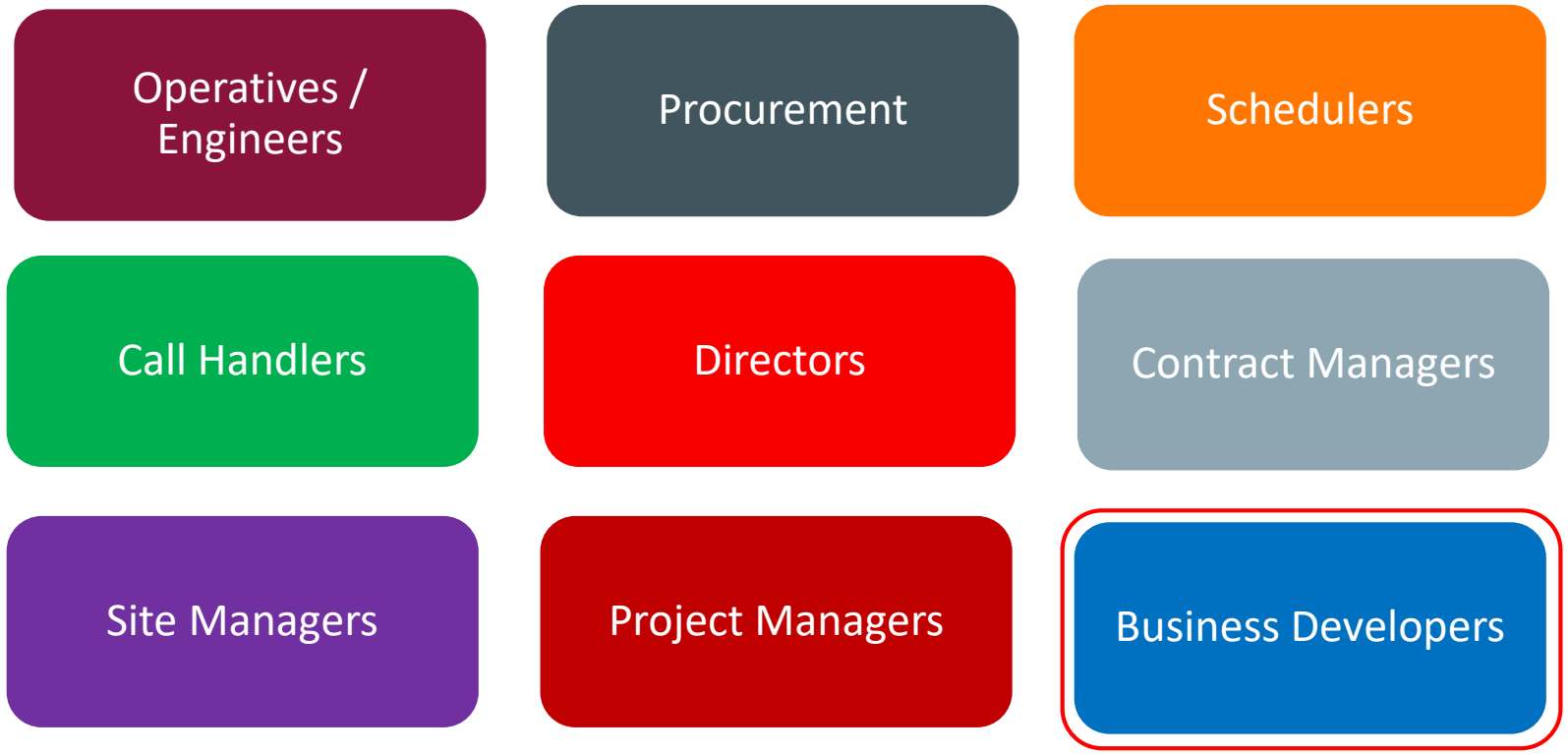
Roles



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ORACLE PRIMAVERA Unifier

Company Administrator | Sign Out

All Projects | Company Work... | Warehouse 01 | All Properties | Building 500 | Hangar Lane | VX10 ABC

Navigate To...

All Properties ▸ North America ▸ Corporate Ca... ▸ Building 500

User | Admin

- Building 500 - Home
- Mailbox
- Task Manager
- Information
- Document Manager
- Facilities Contract Management
- Facility Requests for Bid
- Cost Management-FMRE
- Asset Management
- Maintenance Management
- Material Management
- Facility Condition Assessment
- Space Management
- Lease Management
- Reservation Management
- Move Add Change (MAC)
- Real Estate Data Management
- Utilities Management
- Sustainability Management
- Reports

File Edit View Help

New | Copy | Open | Find | Filtered By | Import

Facility Requests for Bid - Current View: All

1 Item(s) Page 1 of 1 Display 100 Items Per Page

Record No.	RFB Title	RFB Due Date	Bid Invitations	Bids Received	Winning Bid	Awarded Vendor	Vendor ID	Status
RFB-0001	HVAC & Mechanical Sys. Preventive I	04/27/2016	0	0				Pending

Facility Requests for Bid - HVAC & Mechanical Sys. Preventive Maintenance Bid - Project No. NA-BLDG-0001 - Google Chrome

https://ucf4-pri0016-uni.oracledemos.com/bp/studio/bp/log/open?srcid=1&model=ufrfb&fromcostlog=1&project_id=1147&

File Edit View Actions Help

Accept Task | Decline Task | Review | Close Window

Facility Requests for Bid

RFB Details

General

Record No.: RFB-0001 Due Date:

Title: HVAC & Mechanical Sys. Preventive M Status: Pending

Bid Package Details

RFB Due Date: 04/27/2016 08:00 PM (UTC-5) Order Delivery Date: 04/22/2016 08:00 PM (UTC-5

Bid Priority: High Question Cut Off Date: 04/22/2016

Task Details

From: Company Administrator; Task Due Date: Task Notes (0)

To: Building Managers;Contract Managers;Real Estate Managers; More.. Task Status: Not Started Workflow Progress

Cc:

Bid Items

Current View: All

1 Item(s) Page 1 of 1 Display 100 Item

No.	Cost Code	Short Description	Item Unit Cost	Item Quantity	UOM	Amount
001	Expenses-5700-Repairs and Mai	Mechanical Systen	0.00	1	each	0.00

Grid Total Amount:

Attachments (0) Linked Records (0) General Comments Linked Mail (0)

Workflow Progress - Google Chrome

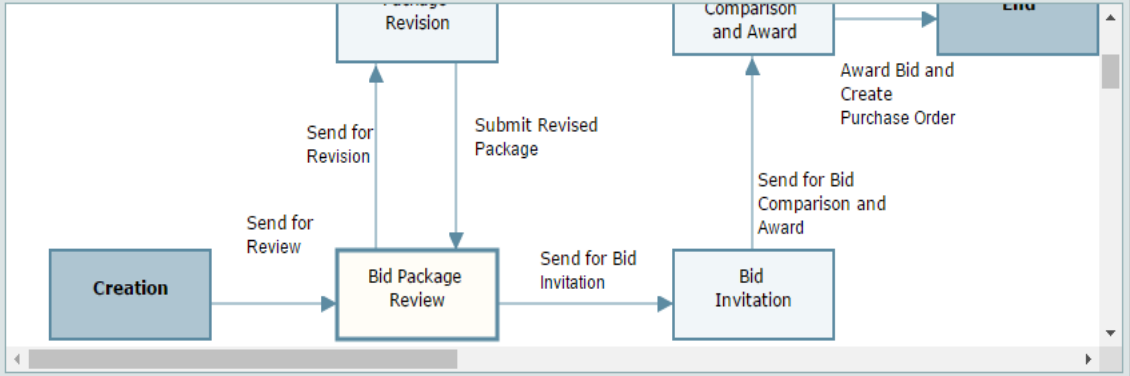
https://ucf4-pri0016-uni.oracledemos.com/bp/studio/workflow/show/progress?processId=175&selected_node_id=1274&__uref=uu

Workflow Progress

Title: **HVAC & Mechanical Sys. Pre...** Record No.: **RFB-0001** BP Setup used: **Facility Requests f...**

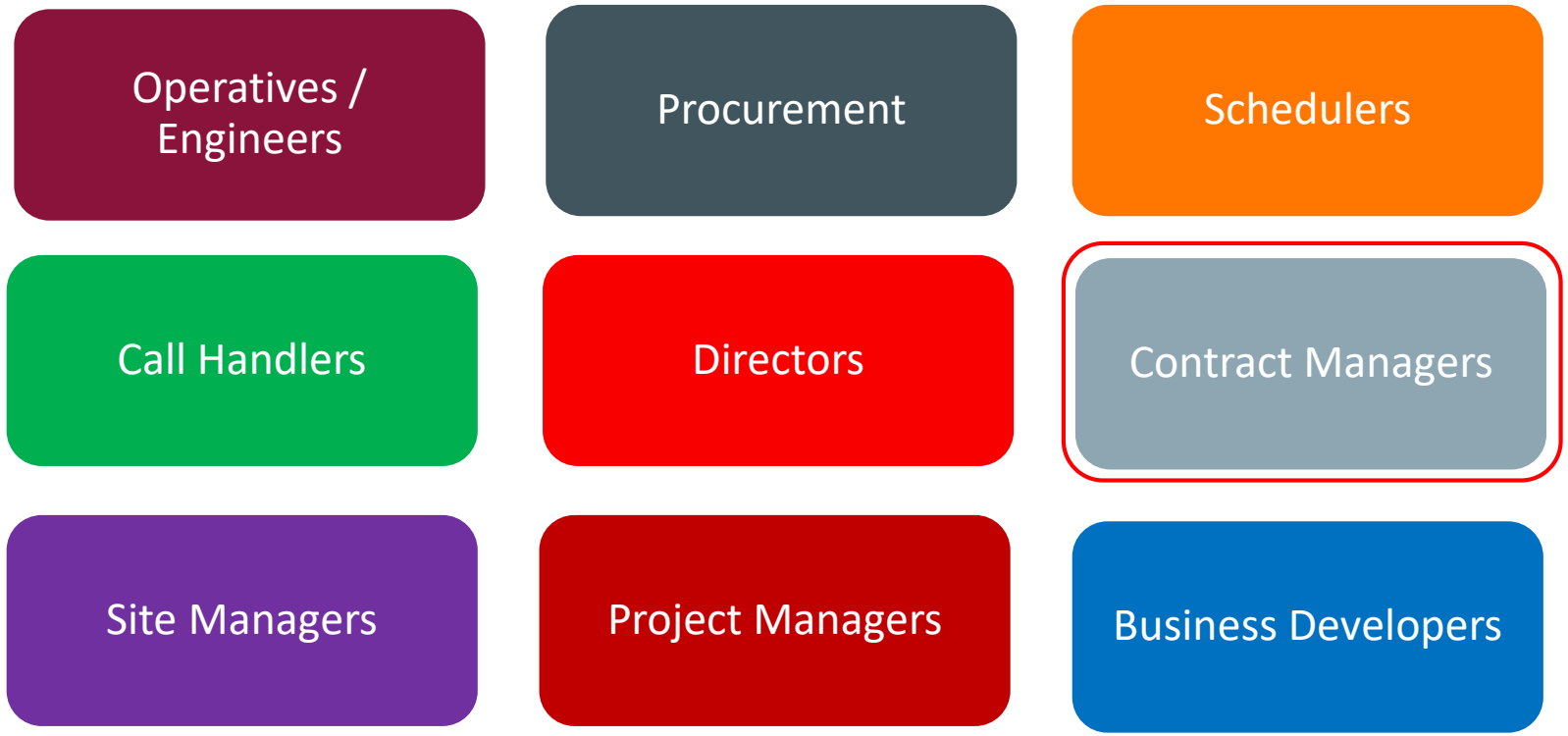
Filter By: Visited Steps

Step Name	Assignee	Company	Status	Action	Completion Date
Creation	Company Administrator	GILMARTINS	Completed	Send for Review	04/19/2016 03:21 PM (UTC-5)
Bid Package Review	Joseph Real	GILMARTINS	Not Started		
Bid Package Review	Company Administrator	GILMARTINS	Not Started		



Print Graphic | Close

Roles



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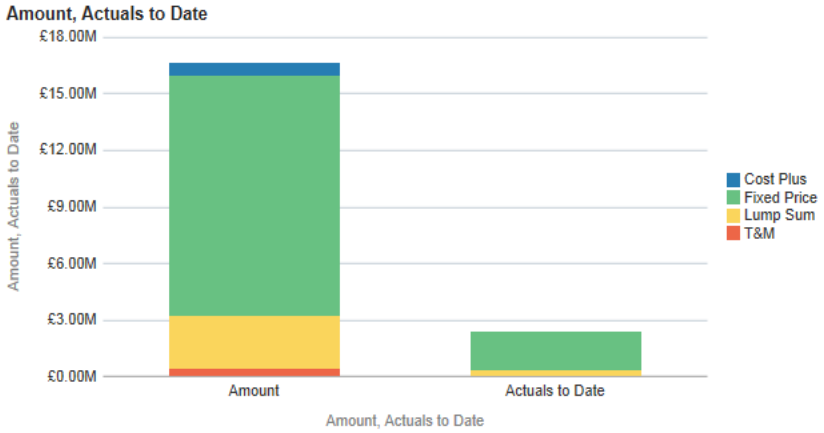
Milestone
Project Management Solutions

Contract Performance



Project Status --Select Value-- | Administrator --Select Value-- | Country --Select Value--
Project Phase --Select Value-- | Business Process Name --Select Value-- | State/Province --Select Value--
Project Type --Select Value-- | Business Process Status --Select Value-- | Contract Type --Select Value--
Currency Base
Reset

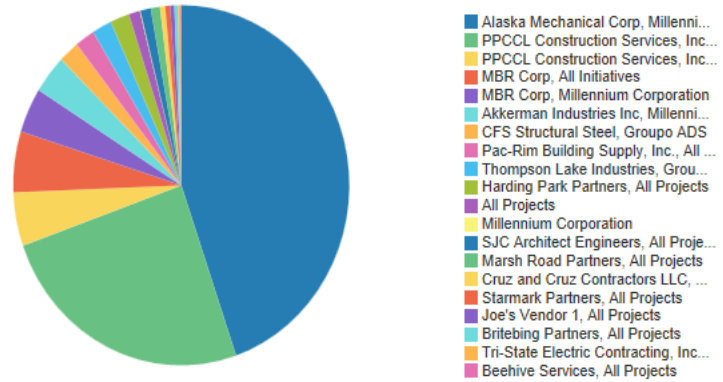
Contract Alert

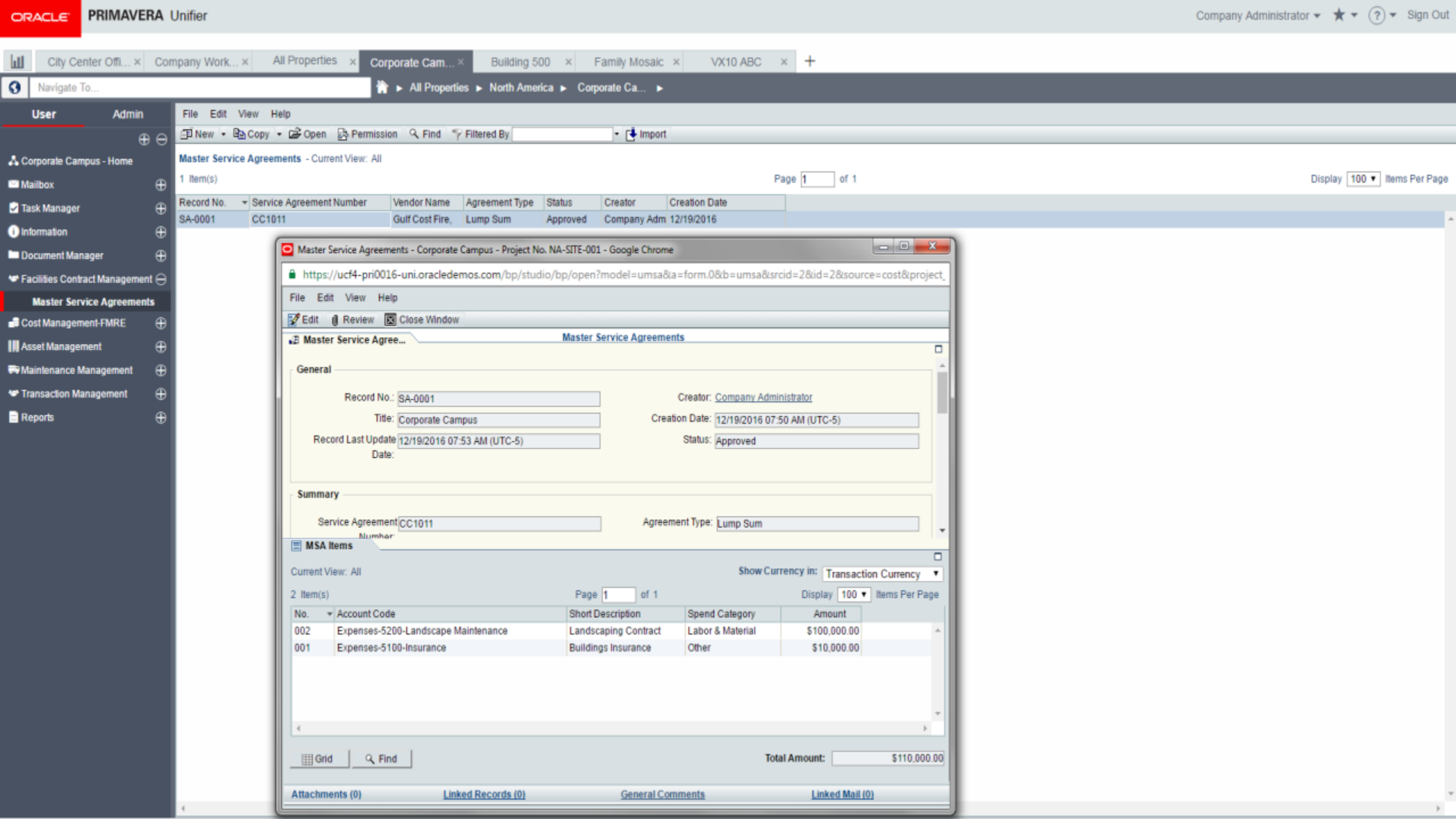
Contract Type	Record Number	Title	Status	Amount	Actuals to Date	Remaining	Navigate to Unifier
Lump Sum	CON-022	Ray's Second Test for New Pay App	Approved	£45,281.00	£69,300.00	-£24,019	Link to BP Record
Lump Sum	CON-002	Contract 2	Approved	£4,529.70	£10,000.00	-£5,470	Link to BP Record

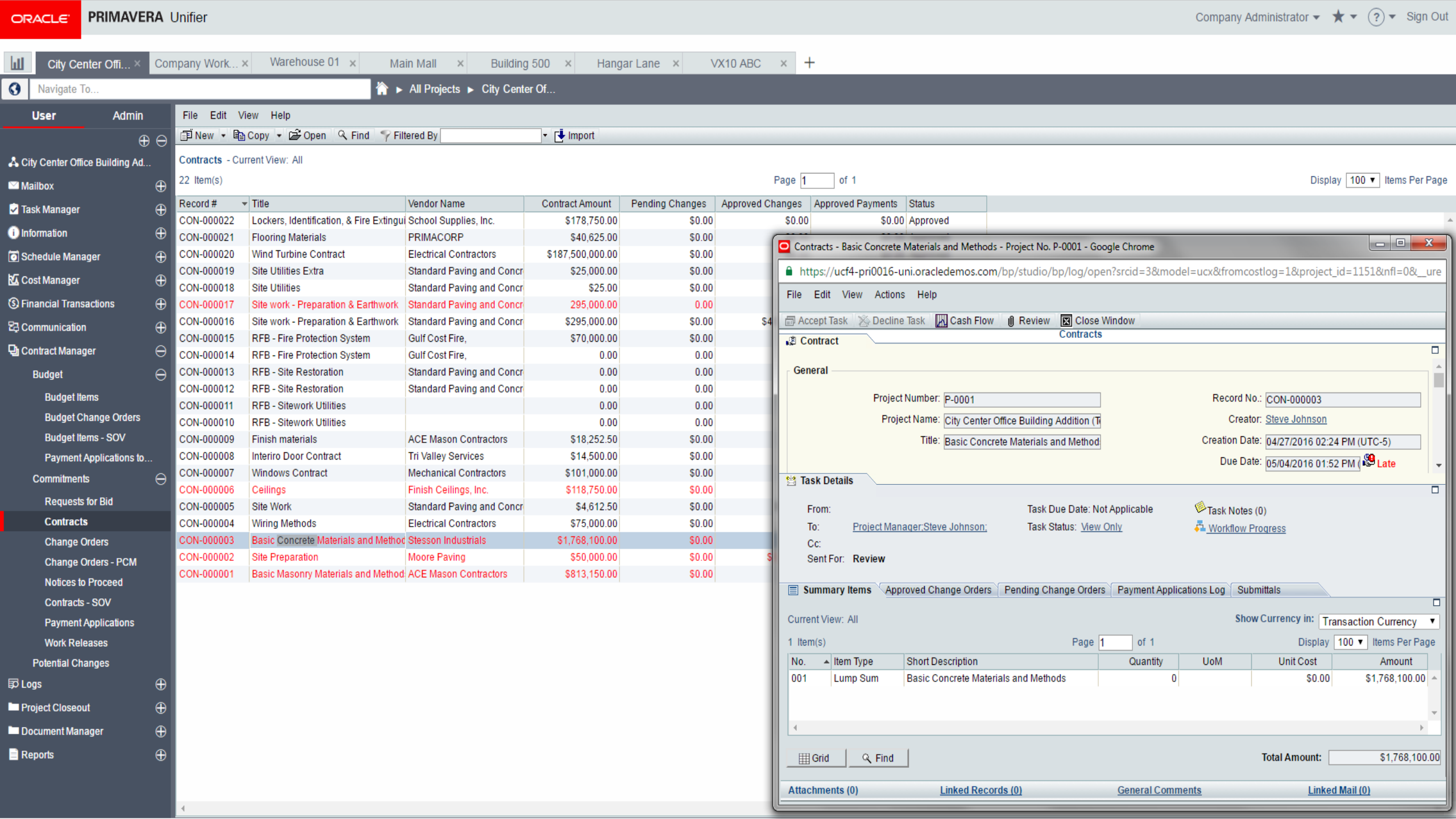
Contract Type	Record Number	Title	Status	Amount	Actuals to Date
Cost Plus	CLCON-00003	Hospital Annex - Structure	Approved	£714,750.00	£0.0
Fixed Price	CLCON-00002	Steel Structure Contract	Approved	£440,000.00	£0.0
	CON-001	Contraint Number One	Approved	£502,263.02	£0.0
		Core Structure Rebuild	Approved	£229,863.01	£0.0
		Core Structure Rebuild 1	Approved	£1,712,581.09	£0.0
		Metal Decking Sub Contract	Approved	£61,650.00	£0.0
		Site Construction	Approved	£3,879,700.00	£1,880,640.0
		Specialty Labor	Approved	£28,125.00	£0.0
		Steel Structures	Approved	£246,040.20	£0.0
	CON-002	Contract Number 2	Approved	£7,904.01	£0.0
		Metal Structure and Framing Setup	Approved	£234,100.00	£0.0
	CON-004	Main Structure Buildout	Approved	£3,084,400.00	£208,125.0
	UPA-001	Clearing and Demolition - Concrete Orders 21	Approved	£13,978.36	£0.0

Approved Contracts by Vendor

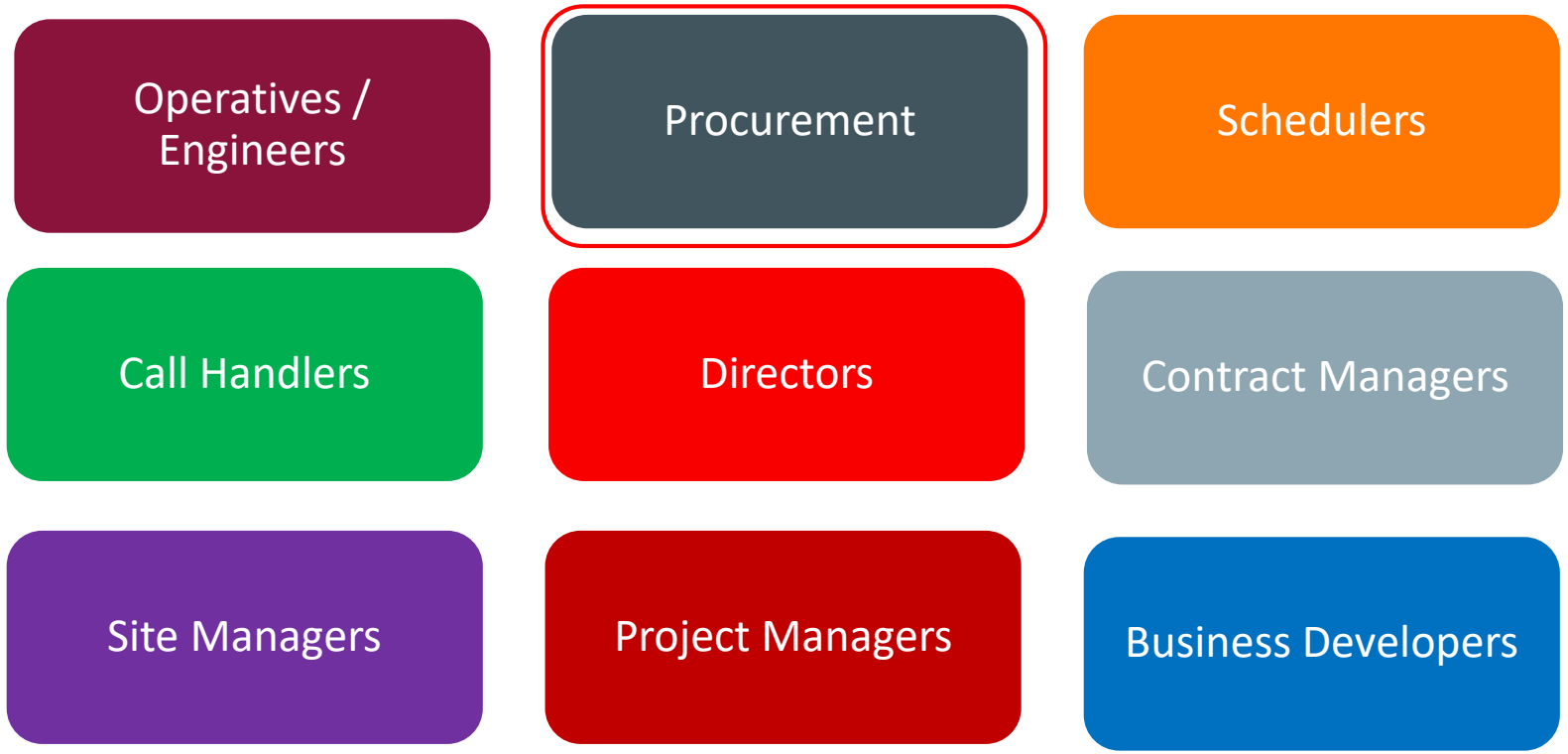
Vendor Name	Project Name (Root Level)	
Alaska Mechanical Corp	Millennium Corporation	$5,551,700
PPCCL Construction Services, Inc	Millennium Corporation	$3,084,400
	All Initiatives	$598,740
MBR Corp	All Initiatives	$677,300
	Millennium Corporation	$502,263
Akkerman Industries Inc	Millennium Corporation	$428,904
CFS Structural Steel	Groupo ADS	$246,040
Pac-Rim Building Supply, Inc.	All Initiatives	$237,500
Thompson Lake Industries	Groupo ADS	$234,100
Harding Park Partners	All Projects	$228,514
	All Projects	$133,327
	Millennium Corporation	$7,904
SJC Architect Engineers	All Projects	$124,377
Marsh Road Partners	All Projects	$108,922




ORACLE PRIMAVERA Unifier
Company Administrator
Sign Out
City Center Offi...
Company Work...
All Properties
Corporate Cam...
Building 500
Family Mosaic
VX10 ABC
Navigate To...
All Properties ▸ North America ▸ Corporate Ca...
User
Admin
File Edit View Help
New Copy Open Permission Find Filtered By Import
Corporate Campus - Home
Mailbox
Task Manager
Information
Document Manager
Facilities Contract Management
Master Service Agreements
Cost Management-FMRE
Asset Management
Maintenance Management
Transaction Management
Reports
Master Service Agreements - Current View: All
1 Item(s)
Page 1 of 1
Display 100 Items Per Page
Record No. | Service Agreement Number | Vendor Name | Agreement Type | Status | Creator | Creation Date
SA-0001 | CC1011 | Gulf Cost Fire, | Lump Sum | Approved | Company Adm | 12/19/2016
Master Service Agreements - Corporate Campus - Project No. NA-SITE-001 - Google Chrome
https://ucf4-pri0016-uni.oracledemos.com/bp/studio/bp/open?model=umsa&a=form.0&b=umsa&srcid=2&id=2&source=cost&project
File Edit View Help
Edit Review Close Window
Master Service Agree...
Master Service Agreements
General
Record No.: SA-0001
Title: Corporate Campus
Record Last Update Date: 12/19/2016 07:53 AM (UTC-5)
Creator: Company Administrator
Creation Date: 12/19/2016 07:50 AM (UTC-5)
Status: Approved
Summary
Service Agreement Number: CC1011
Agreement Type: Lump Sum
MSA Items
Current View: All
Show Currency in: Transaction Currency
2 Item(s)
Page 1 of 1
Display 100 Items Per Page
No. | Account Code | Short Description | Spend Category | Amount
002 | Expenses-5200-Landscape Maintenance | Landscaping Contract | Labor & Material | $100,000.00
001 | Expenses-5100-Insurance | Buildings Insurance | Other | $10,000.00
Grid Find
Total Amount: $110,000.00
Attachments (0) Linked Records (0) General Comments Linked Mail (0)


ORACLE PRIMAVERA Unifier
Company Administrator
Sign Out
City Center Offi...
Company Work...
Warehouse 01
Main Mall
Building 500
Hangar Lane
VX10 ABC
Navigate To...
All Projects ▸ City Center Of...
User
Admin
City Center Office Building Ad...
Mailbox
Task Manager
Information
Schedule Manager
Cost Manager
Financial Transactions
Communication
Contract Manager
Budget
Budget Items
Budget Change Orders
Budget Items - SOV
Payment Applications to...
Commitments
Requests for Bid
Contracts
Change Orders
Change Orders - PCM
Notices to Proceed
Contracts - SOV
Payment Applications
Work Releases
Potential Changes
Logs
Project Closeout
Document Manager
Reports
File Edit View Help
New Copy Open Find Filtered By Import
Contracts - Current View: All
22 Item(s)
Page 1 of 1
Display 100 Items Per Page
Record # Title Vendor Name Contract Amount Pending Changes Approved Changes Approved Payments Status
CON-000022 Lockers, Identification, & Fire Extingui School Supplies, Inc. $178,750.00 $0.00 $0.00 $0.00 Approved
CON-000021 Flooring Materials PRIMACORP $40,625.00 $0.00
CON-000020 Wind Turbine Contract Electrical Contractors $187,500,000.00 $0.00
CON-000019 Site Utilities Extra Standard Paving and Concr $25,000.00 $0.00
CON-000018 Site Utilities Standard Paving and Concr $25.00 $0.00
CON-000017 Site work - Preparation & Earthwork Standard Paving and Concr 295,000.00 0.00
CON-000016 Site work - Preparation & Earthwork Standard Paving and Concr $295,000.00 $0.00
CON-000015 RFB - Fire Protection System Gulf Cost Fire, $70,000.00 $0.00
CON-000014 RFB - Fire Protection System Gulf Cost Fire, 0.00 0.00
CON-000013 RFB - Site Restoration Standard Paving and Concr 0.00 0.00
CON-000012 RFB - Site Restoration Standard Paving and Concr 0.00 0.00
CON-000011 RFB - Sitework Utilities 0.00 0.00
CON-000010 RFB - Sitework Utilities 0.00 0.00
CON-000009 Finish materials ACE Mason Contractors $18,252.50 $0.00
CON-000008 Interiro Door Contract Tri Valley Services $14,500.00 $0.00
CON-000007 Windows Contract Mechanical Contractors $101,000.00 $0.00
CON-000006 Ceilings Finish Ceilings, Inc. $118,750.00 $0.00
CON-000005 Site Work Standard Paving and Concr $4,612.50 $0.00
CON-000004 Wiring Methods Electrical Contractors $75,000.00 $0.00
CON-000003 Basic Concrete Materials and Method Stesson Industrials $1,768,100.00 $0.00
CON-000002 Site Preparation Moore Paving $50,000.00 $0.00
CON-000001 Basic Masonry Materials and Method ACE Mason Contractors $813,150.00 $0.00
Contracts - Basic Concrete Materials and Methods - Project No. P-0001 - Google Chrome
https://ucf4-pri0016-uni.oracledemos.com/bp/studio/bp/log/open?srcid=3&model=ucx&fromcostlog=1&project_id=1151&nfl=0&__ure
File Edit View Actions Help
Accept Task Decline Task Cash Flow Review Close Window
Contracts
Contract
General
Project Number: P-0001
Project Name: City Center Office Building Addition (T
Title: Basic Concrete Materials and Method
Record No.: CON-000003
Creator: Steve Johnson
Creation Date: 04/27/2016 02:24 PM (UTC-5)
Due Date: 05/04/2016 01:52 PM (Late
Task Details
From:
To: Project Manager;Steve Johnson;
Cc:
Sent For: Review
Task Due Date: Not Applicable
Task Status: View Only
Task Notes (0)
Workflow Progress
Summary Items
Approved Change Orders
Pending Change Orders
Payment Applications Log
Submittals
Current View: All
Show Currency in: Transaction Currency
1 Item(s)
Page 1 of 1
Display 100 Items Per Page
No. Item Type Short Description Quantity UoM Unit Cost Amount
001 Lump Sum Basic Concrete Materials and Methods 0 $0.00 $1,768,100.00
Grid
Find
Total Amount: $1,768,100.00
Attachments (0)
Linked Records (0)
General Comments
Linked Mail (0)

Roles



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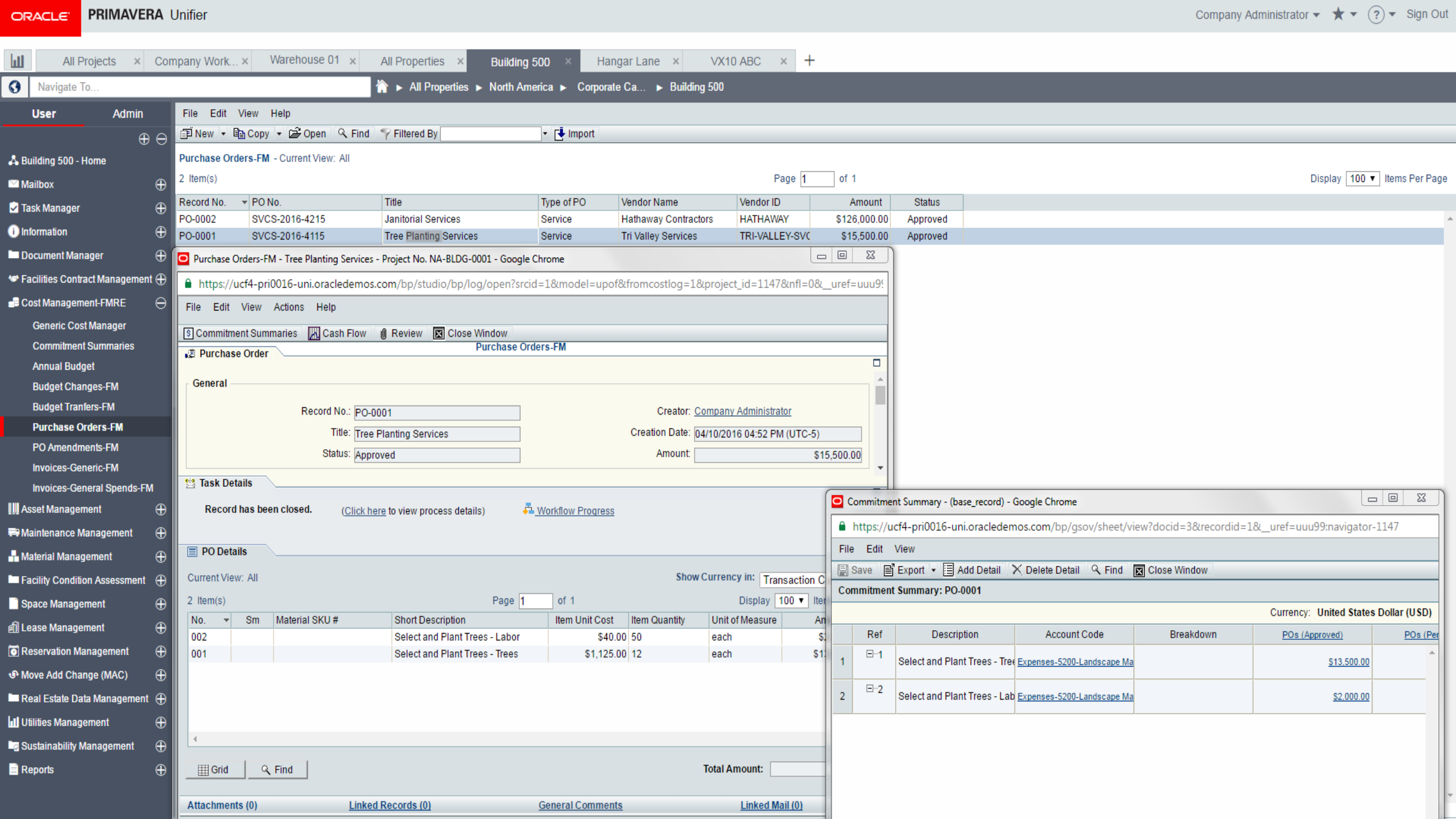
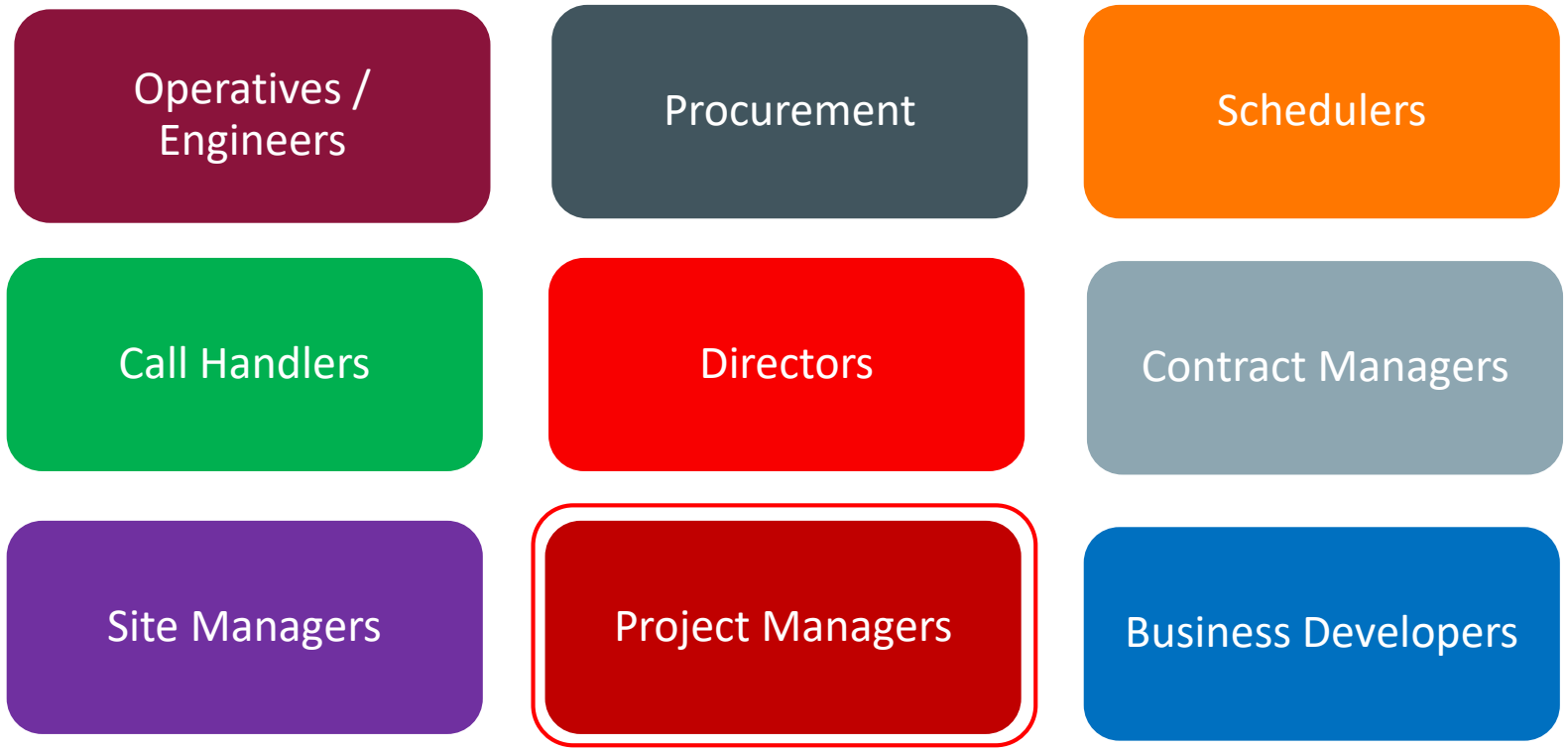

ORACLE PRIMAVERA Unifier
Company Administrator
Sign Out
All Projects
Company Work...
Warehouse 01
All Properties
Building 500
Hangar Lane
VX10 ABC
Navigate To...
All Properties ▸ North America ▸ Corporate Ca... ▸ Building 500
User
Admin
Building 500 - Home
Mailbox
Task Manager
Information
Document Manager
Facilities Contract Management
Cost Management-FMRE
Generic Cost Manager
Commitment Summaries
Annual Budget
Budget Changes-FM
Budget Tranfers-FM
Purchase Orders-FM
PO Amendments-FM
Invoices-Generic-FM
Invoices-General Spends-FM
Asset Management
Maintenance Management
Material Management
Facility Condition Assessment
Space Management
Lease Management
Reservation Management
Move Add Change (MAC)
Real Estate Data Management
Utilities Management
Sustainability Management
Reports
File Edit View Help
New Copy Open Find Filtered By Import
Purchase Orders-FM - Current View: All
2 Item(s)
Page 1 of 1
Display 100 Items Per Page
Record No. PO No. Title Type of PO Vendor Name Vendor ID Amount Status
PO-0002 SVCS-2016-4215 Janitorial Services Service Hathaway Contractors HATHAWAY $126,000.00 Approved
PO-0001 SVCS-2016-4115 Tree Planting Services Service Tri Valley Services TRI-VALLEY-SVC $15,500.00 Approved
Purchase Orders-FM - Tree Planting Services - Project No. NA-BLDG-0001 - Google Chrome
https://ucf4-pri0016-uni.oracledemos.com/bp/studio/bp/log/open?srcid=1&model=upof&fromcostlog=1&project_id=1147&nfl=0&__uref=uuu9
File Edit View Actions Help
Commitment Summaries Cash Flow Review Close Window
Purchase Orders-FM
Purchase Order
General
Record No.: PO-0001
Title: Tree Planting Services
Status: Approved
Creator: Company Administrator
Creation Date: 04/10/2016 04:52 PM (UTC-5)
Amount: $15,500.00
Task Details
Record has been closed.
(Click here to view process details)
Workflow Progress
PO Details
Current View: All
Show Currency in: Transaction C
2 Item(s)
Page 1 of 1
Display 100
No. Sm Material SKU # Short Description Item Unit Cost Item Quantity Unit of Measure
002 Select and Plant Trees - Labor $40.00 50 each
001 Select and Plant Trees - Trees $1,125.00 12 each
Grid Find
Total Amount:
Attachments (0) Linked Records (0) General Comments Linked Mail (0)
Commitment Summary - (base_record) - Google Chrome
https://ucf4-pri0016-uni.oracledemos.com/bp/gsov/sheet/view?docid=3&recordid=1&__uref=uuu99:navigator-1147
File Edit View
Save Export Add Detail Delete Detail Find Close Window
Commitment Summary: PO-0001
Currency: United States Dollar (USD)
Ref Description Account Code Breakdown POs (Approved) POs (Per
1 1 Select and Plant Trees - Tree Expenses-5200-Landscape Ma $13,500.00
2 2 Select and Plant Trees - Lab Expenses-5200-Landscape Ma $2,000.00

Roles



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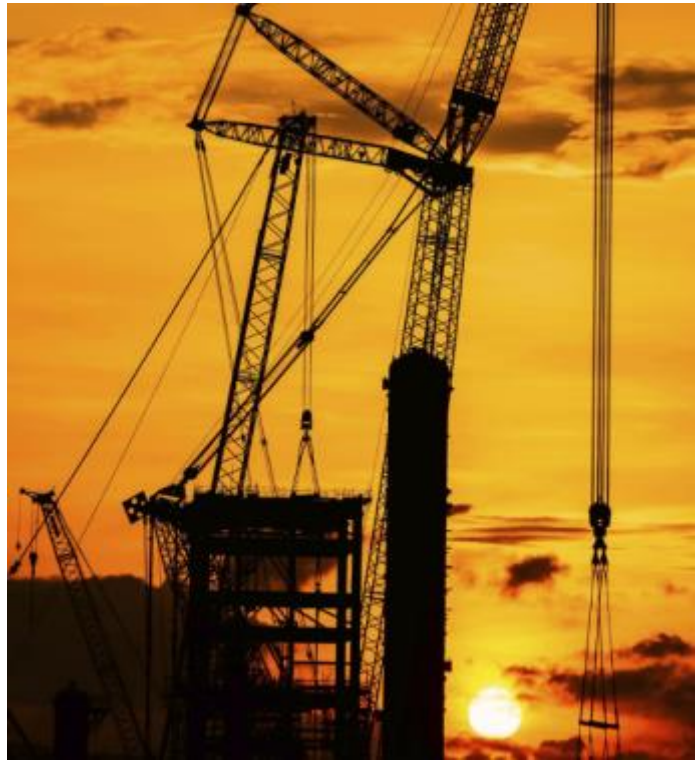
Seamless link to Capital Projects



- One Unifier Instance for Construction & Engineering as well as Maintenance & Operations
- Embed necessary handover processes into Project Closeout
- Allows Buildings to manage their own “small” construction projects & renovations

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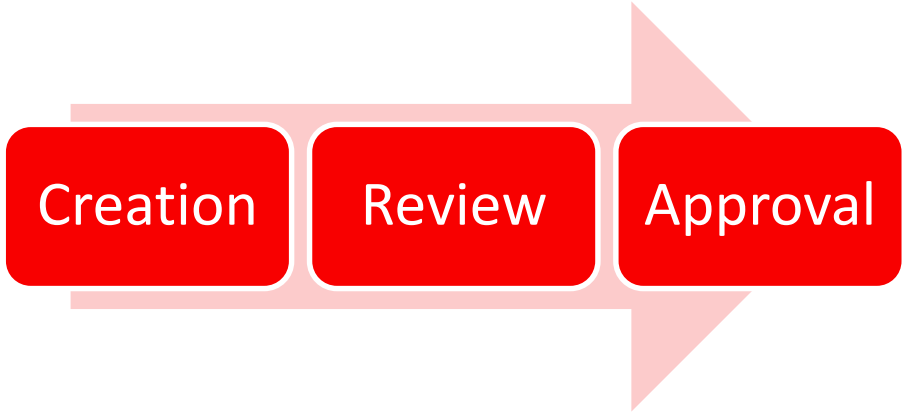
Project Delivery

Submittals, Transmittals

RFIs, Issues

Meeting Minutes,
Action Items

Safety Checklists,
Project Closeout



…with workflow

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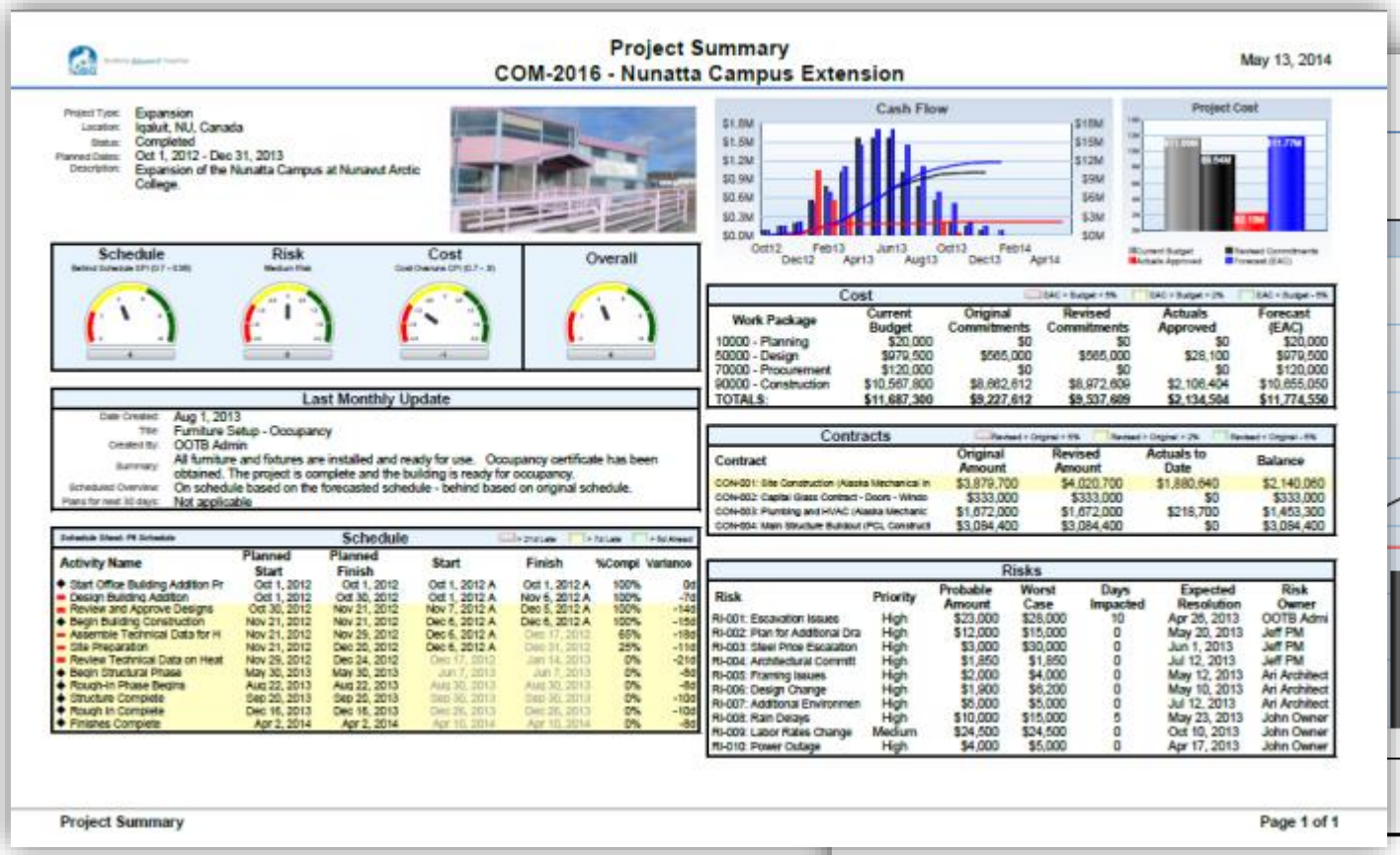
Accountability with Reporting



Project Summary
COM-2016 - Nunatta Campus Extension
May 13, 2014

Project Type: Expansion
Location: Iqaluit, NU, Canada
Status: Completed
Planned Dates: Oct 1, 2012 - Dec 31, 2013
Description: Expansion of the Nunatta Campus at Nunavut Arctic College.

Schedule | Risk | Cost | Overall

Last Monthly Update
Date Created: Aug 1, 2013
Title: Furniture Setup - Occupancy
Created By: OOTB Admin
Summary: All furniture and fixtures are installed and ready for use. Occupancy certificate has been obtained. The project is complete and the building is ready for occupancy.
Scheduled Overview: On schedule based on the forecasted schedule - behind based on original schedule.
Plans for next 30 days: Not applicable

Schedule

Activity Name	Planned Start	Planned Finish	Start	Finish	%Compl	Variance
Start Office Building Addition Pr	Oct 1, 2012	Oct 1, 2012	Oct 1, 2012 A	Oct 1, 2012 A	100%	0d
Design Building Addition	Oct 1, 2012	Oct 30, 2012	Oct 1, 2012 A	Nov 6, 2012 A	100%	-7d
Review and Approve Designs	Oct 30, 2012	Nov 21, 2012	Nov 7, 2012 A	Dec 5, 2012 A	100%	-14d
Begin Building Construction	Nov 21, 2012	Nov 21, 2012	Dec 6, 2012 A	Dec 6, 2012 A	100%	-15d
Assemble Technical Data for H	Nov 21, 2012	Nov 29, 2012	Dec 6, 2012 A	Dec 17, 2012	65%	-18d
Site Preparation	Nov 21, 2012	Dec 20, 2012	Dec 6, 2012 A	Dec 31, 2012	25%	-11d
Review Technical Data on Heat	Nov 29, 2012	Dec 24, 2012	Dec 17, 2012	Jan 14, 2013	0%	-21d
Begin Structural Phase	May 30, 2013	May 30, 2013	Jun 7, 2013	Jun 7, 2013	0%	-8d
Rough-in Phase Begins	Aug 22, 2013	Aug 22, 2013	Aug 30, 2013	Aug 30, 2013	0%	-8d
Structure Complete	Sep 20, 2013	Sep 20, 2013	Sep 30, 2013	Sep 30, 2013	0%	-10d
Rough In Complete	Dec 16, 2013	Dec 16, 2013	Dec 26, 2013	Dec 26, 2013	0%	-10d
Finishes Complete	Apr 2, 2014	Apr 2, 2014	Apr 10, 2014	Apr 10, 2014	0%	-8d

Cash Flow

Project Cost

Cost

Work Package	Current Budget	Original Commitments	Revised Commitments	Actuals Approved	Forecast (EAC)
10000 - Planning	$20,000	$0	$0	$0	$20,000
50000 - Design	$979,500	$565,000	$565,000	$28,100	$979,500
70000 - Procurement	$120,000	$0	$0	$0	$120,000
90000 - Construction	$10,567,800	$8,662,612	$8,972,609	$2,106,404	$10,655,050
TOTALS:	$11,687,300	$9,227,612	$9,537,609	$2,134,504	$11,774,550

Contracts

Contract	Original Amount	Revised Amount	Actuals to Date	Balance
CON-001: Site Construction (Alaska Mechanical In	$3,879,700	$4,020,700	$1,880,640	$2,140,060
CON-002: Capital Glass Contract - Doors - Windo	$333,000	$333,000	$0	$333,000
CON-003: Plumbing and HVAC (Alaska Mechanic	$1,672,000	$1,672,000	$218,700	$1,453,300
CON-004: Main Structure Buildout (PCL Construct	$3,084,400	$3,084,400	$0	$3,084,400

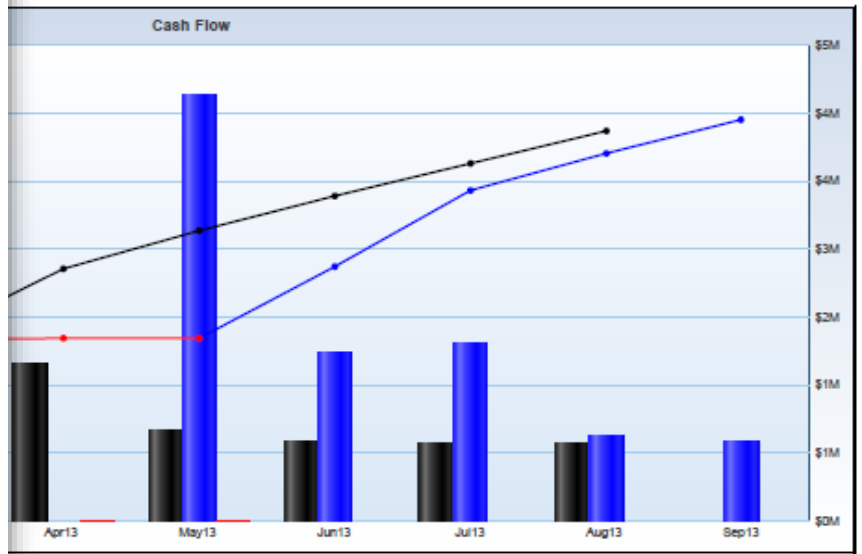
Risks

Risk	Priority	Probable Amount	Worst Case	Days Impacted	Expected Resolution	Risk Owner
RI-001: Excavation Issues	High	$23,000	$28,000	10	Apr 26, 2013	OOTB Admi
RI-002: Plan for Additional Dra	High	$12,000	$15,000	0	May 20, 2013	Jeff PM
RI-003: Steel Price Escalation	High	$3,000	$30,000	0	Jun 1, 2013	Jeff PM
RI-004: Architectural Committ	High	$1,850	$1,850	0	Jul 12, 2013	Jeff PM
RI-005: Framing Issues	High	$2,000	$4,000	0	May 12, 2013	Ari Architect
RI-006: Design Change	High	$1,900	$6,200	0	May 10, 2013	Ari Architect
RI-007: Additional Environmen	High	$5,000	$5,000	0	Jul 12, 2013	Ari Architect
RI-008: Rain Delays	High	$10,000	$15,000	5	May 23, 2013	John Owner
RI-009: Labor Rates Change	Medium	$24,500	$24,500	0	Oct 10, 2013	John Owner
RI-010: Power Outage	High	$4,000	$5,000	0	Apr 17, 2013	John Owner

Project Summary | Page 1 of 1

Project Cash Flow
May 13, 2014

Site Construction - Cash Flow _



From Date	To Date	Total	Unassigned
Jan 4, 2013	Aug 30, 2013	$4,020,700	$0
May 3, 2013	Sep 20, 2013	$4,130,700	$0
Jan 11, 2013	May 3, 2013	$1,880,640	$0

Project Cash Flow | Page 4 of 5

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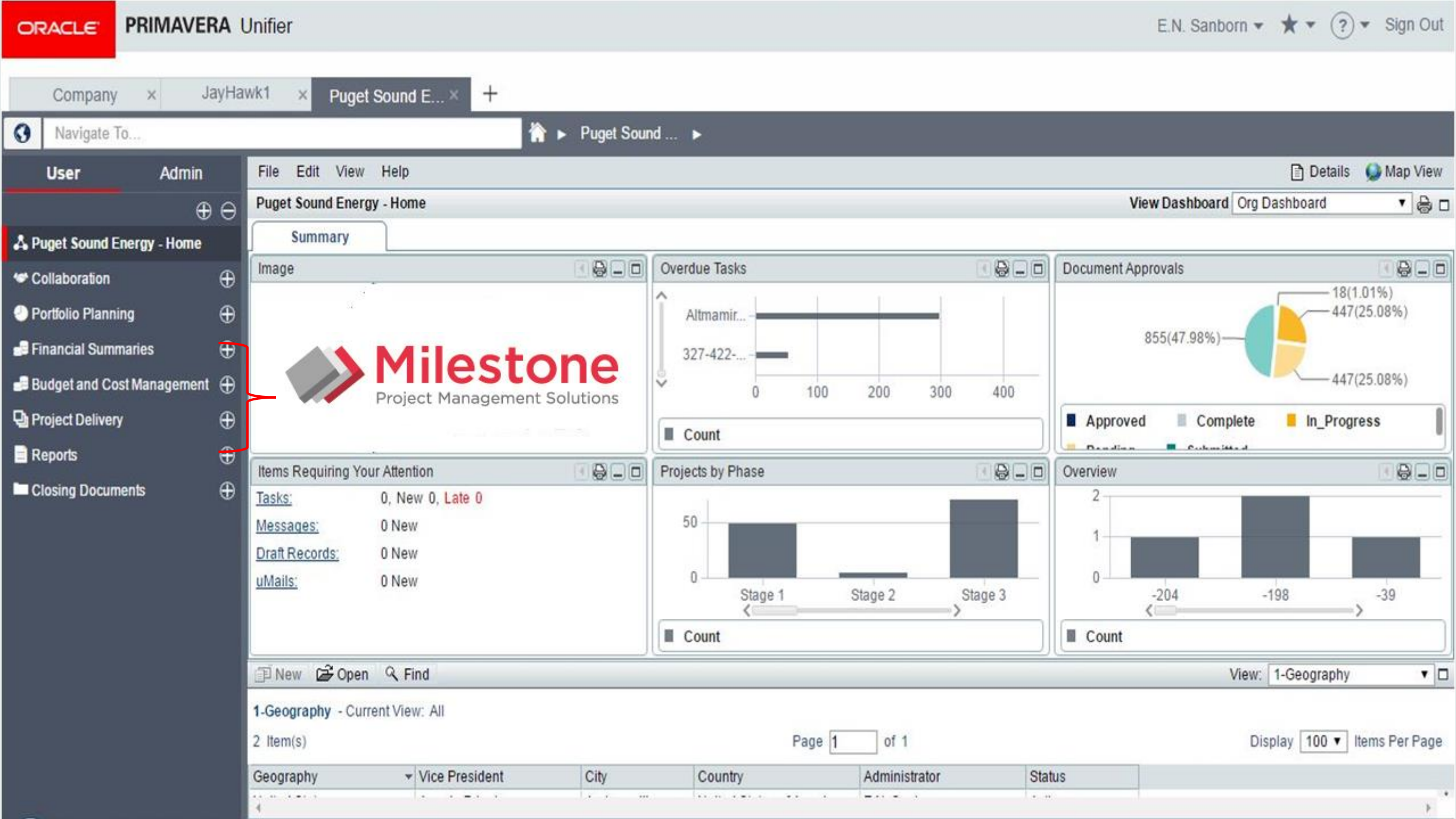
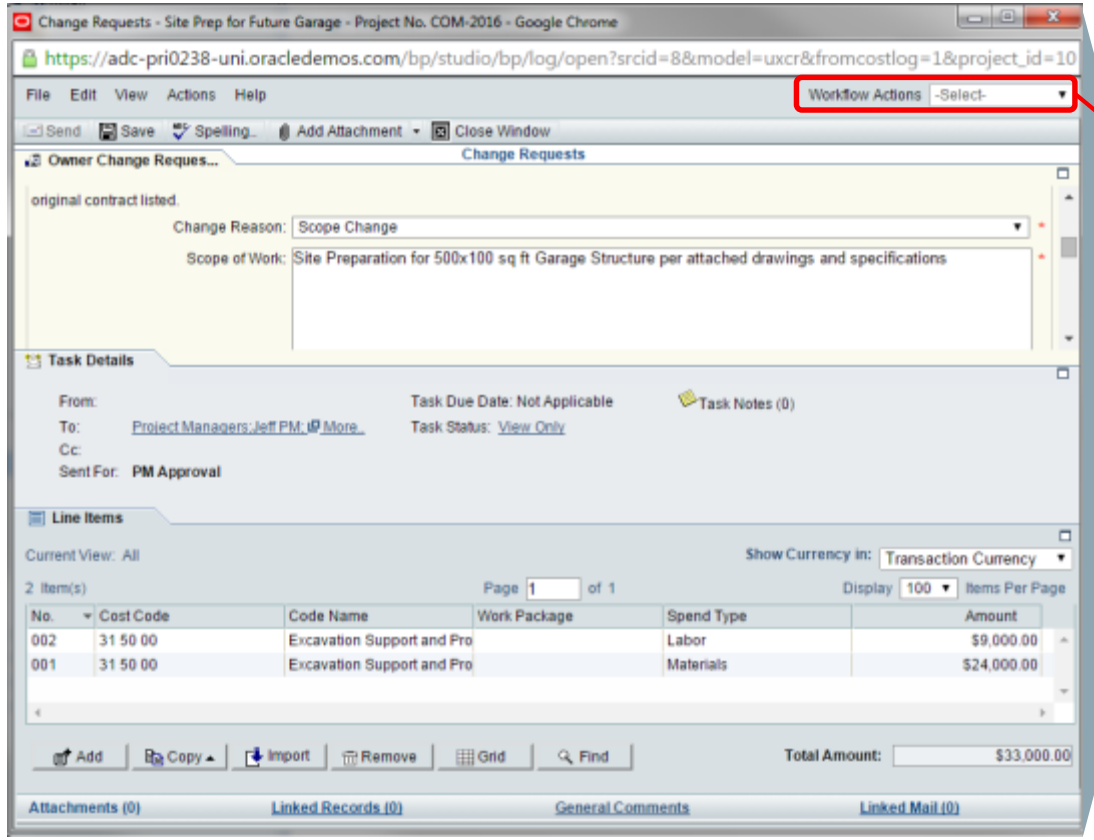
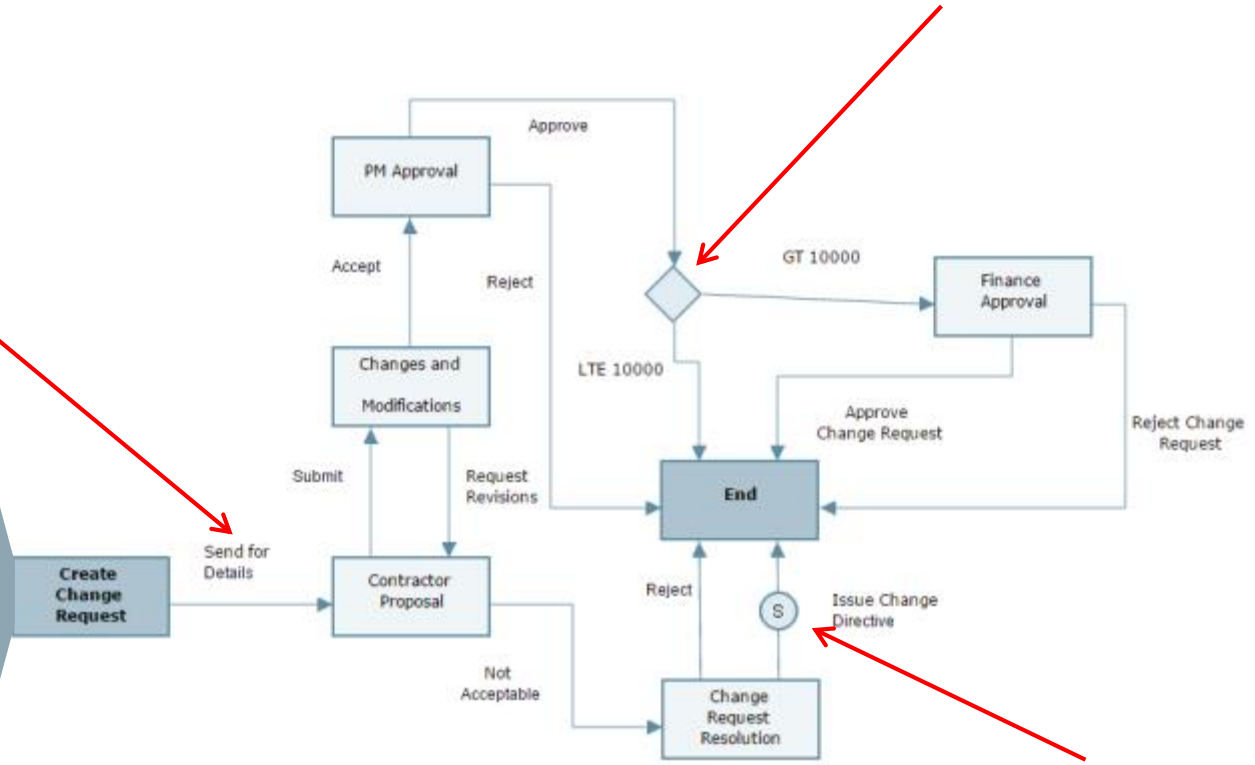

ORACLE
PRIMAVERA Unifier
E.N. Sanborn
Sign Out
Company
JayHawk1
Puget Sound E...
Navigate To...
Puget Sound ...
User
Admin
File
Edit
View
Help
Details
Map View
Puget Sound Energy - Home
View Dashboard
Org Dashboard
Summary
Puget Sound Energy - Home
Collaboration
Portfolio Planning
Financial Summaries
Budget and Cost Management
Project Delivery
Reports
Closing Documents
Milestone
Project Management Solutions
Image
Overdue Tasks
Altmamir...
327-422-...
0
100
200
300
400
Count
Document Approvals
18(1.01%)
447(25.08%)
855(47.98%)
447(25.08%)
Approved
Complete
In_Progress
Items Requiring Your Attention
Tasks: 0, New 0, Late 0
Messages: 0 New
Draft Records: 0 New
uMails: 0 New
Projects by Phase
50
0
Stage 1
Stage 2
Stage 3
Count
Overview
2
1
0
-204
-198
-39
Count
New
Open
Find
View: 1-Geography
1-Geography - Current View: All
2 Item(s)
Page 1 of 1
Display 100 Items Per Page
Geography
Vice President
City
Country
Administrator
Status

Managing Process





Forms + WorkFlow

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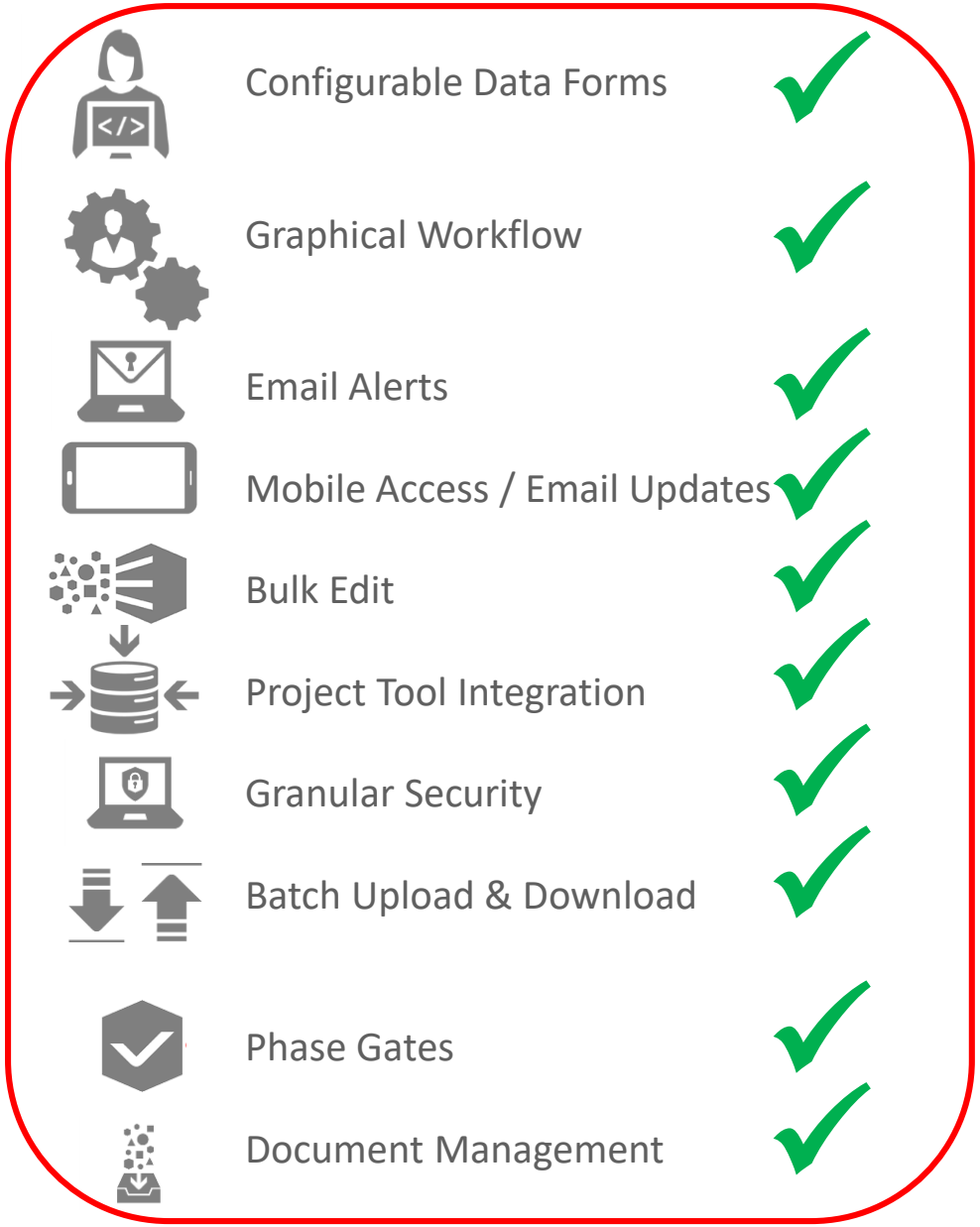
Business Process

Cost Controls

- Blanket Purchase Orders
- Budget Approval
- Budget Changes
- Budget Transfers
- Change Orders
- Contracts
- Estimates
- Forecasts
- Fund Appropriations
- Invoices
- Journal Entries
- Payment Applications
- Payments
- PO Amendments
- Potential Change Orders
- Purchase Orders
- Requests for Bid
- Requests for Substitution
- Risks & Issues
- Timesheets
- Vendor Prequal Requests
- Vendors
- Vendors Evaluations
- Work Releases

Project Delivery

- Action Items
- Architect's Instructions
- Arch/Eng Daily Observations
- Correspondence
- Daily Reports
- Design Change Requests
- Design Reviews
- Incident Reports
- Lessons Learned
- Meeting Minutes
- Monthly Updates
- Notices to Proceed
- Project Closeout
- Project Information
- Project Requests
- Punchlist
- Risk & Issues
- Requests for Information (RFI)
- Document Package
- Document Submittals
- Transmittals
- Warranties



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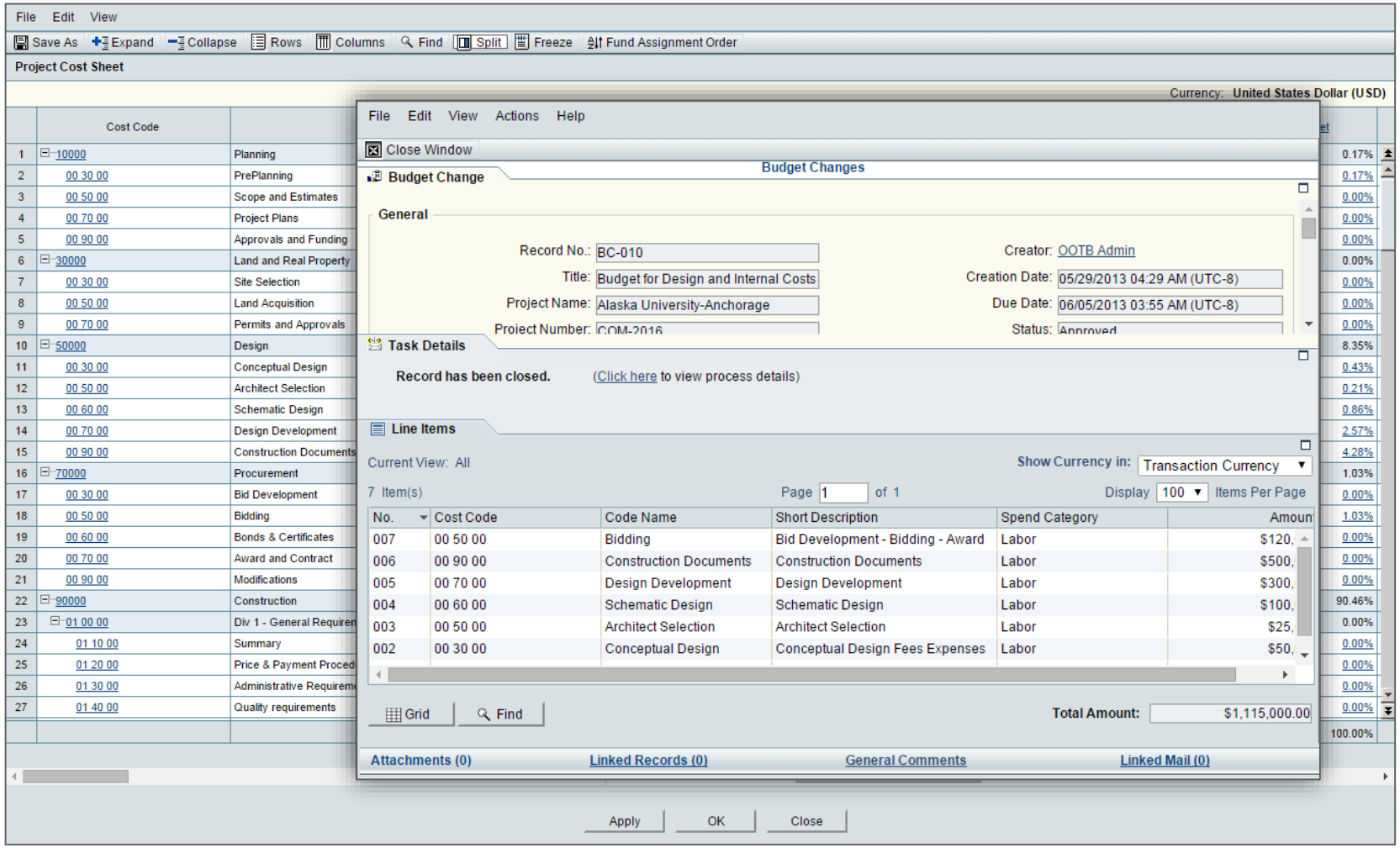
Cost Sheet



- Single view with all budget, forecast, commit, and actuals
- Dynamic, driven by business process

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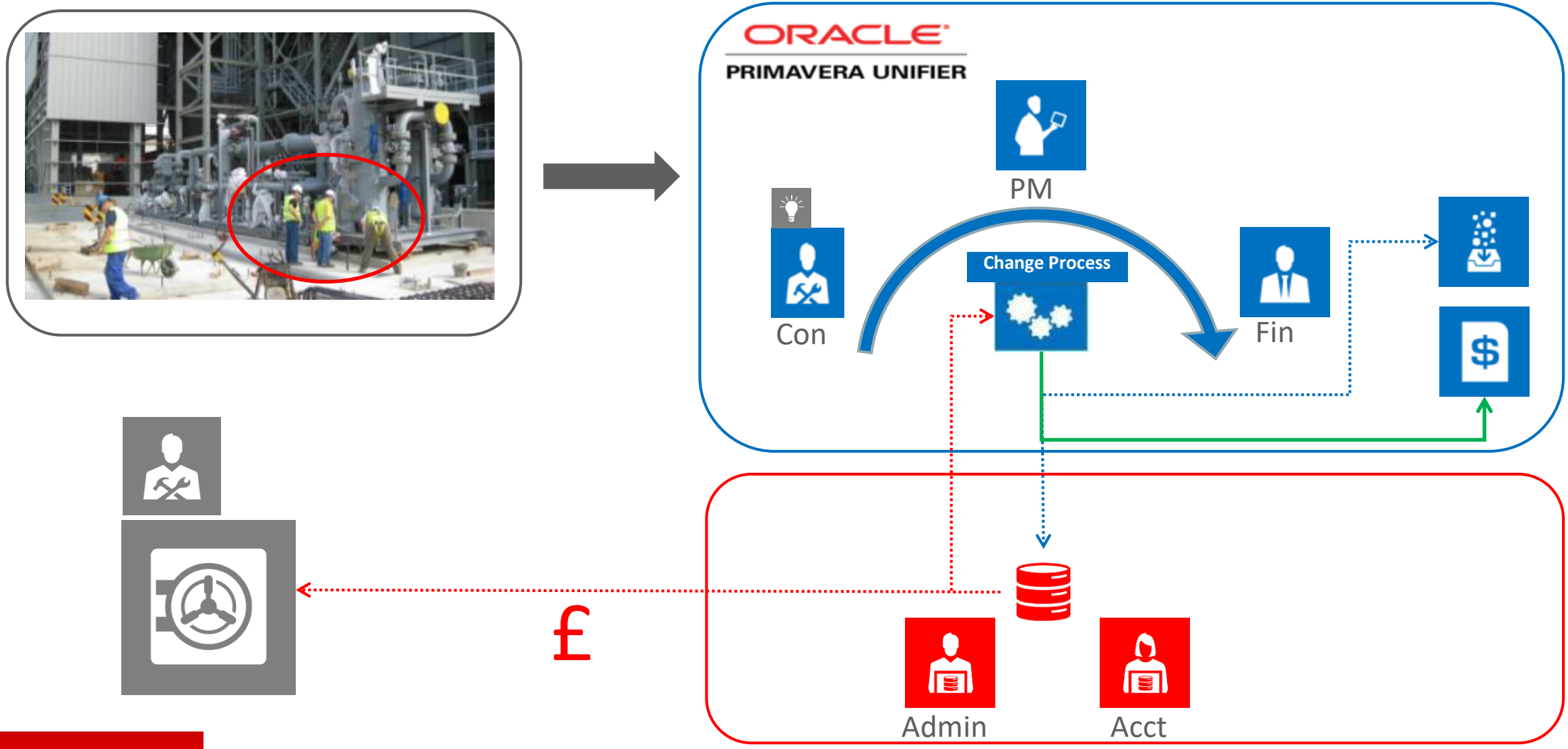
Unifier and Finance



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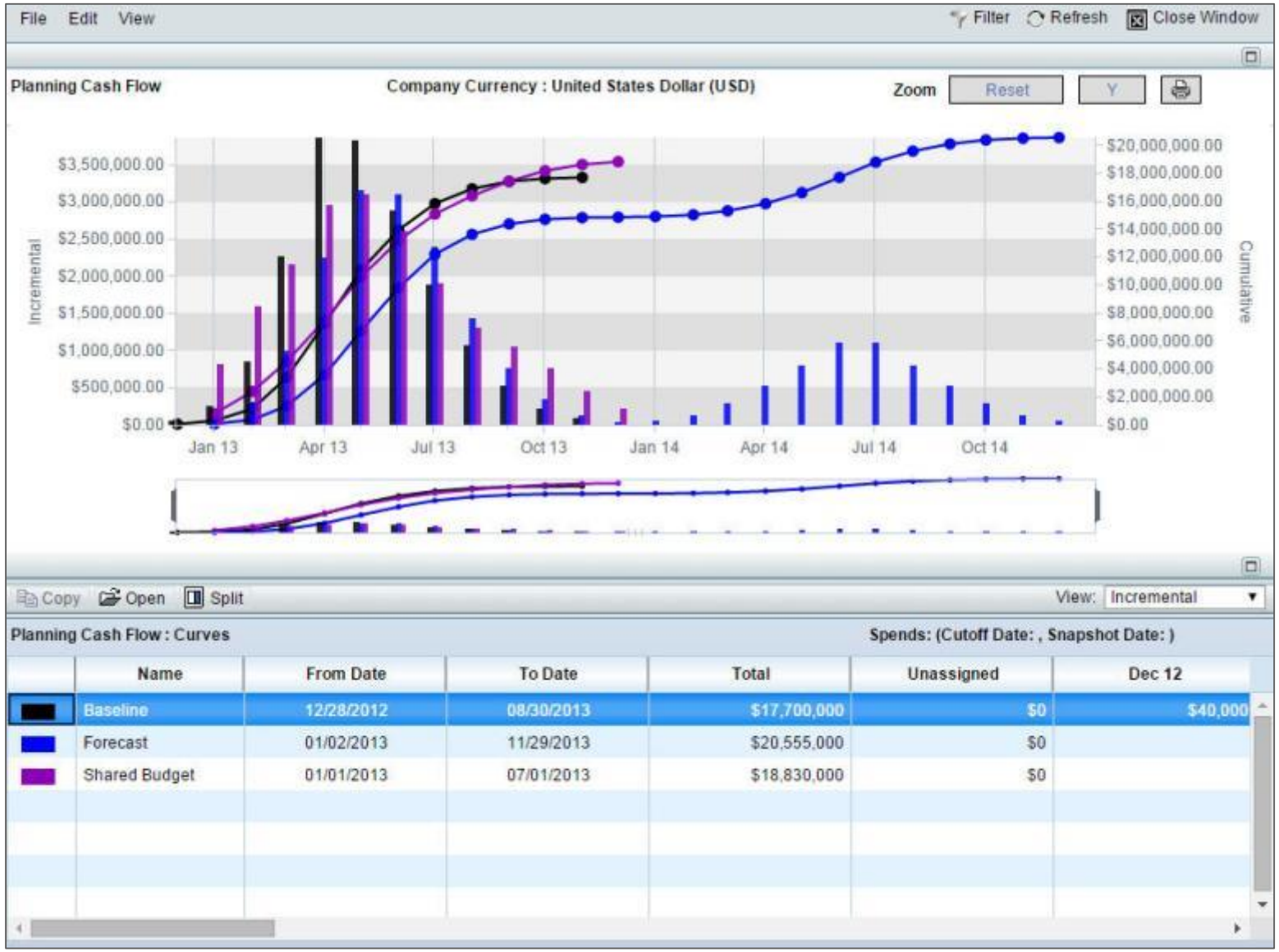

Visualize cash flow over time for all company/program level projects

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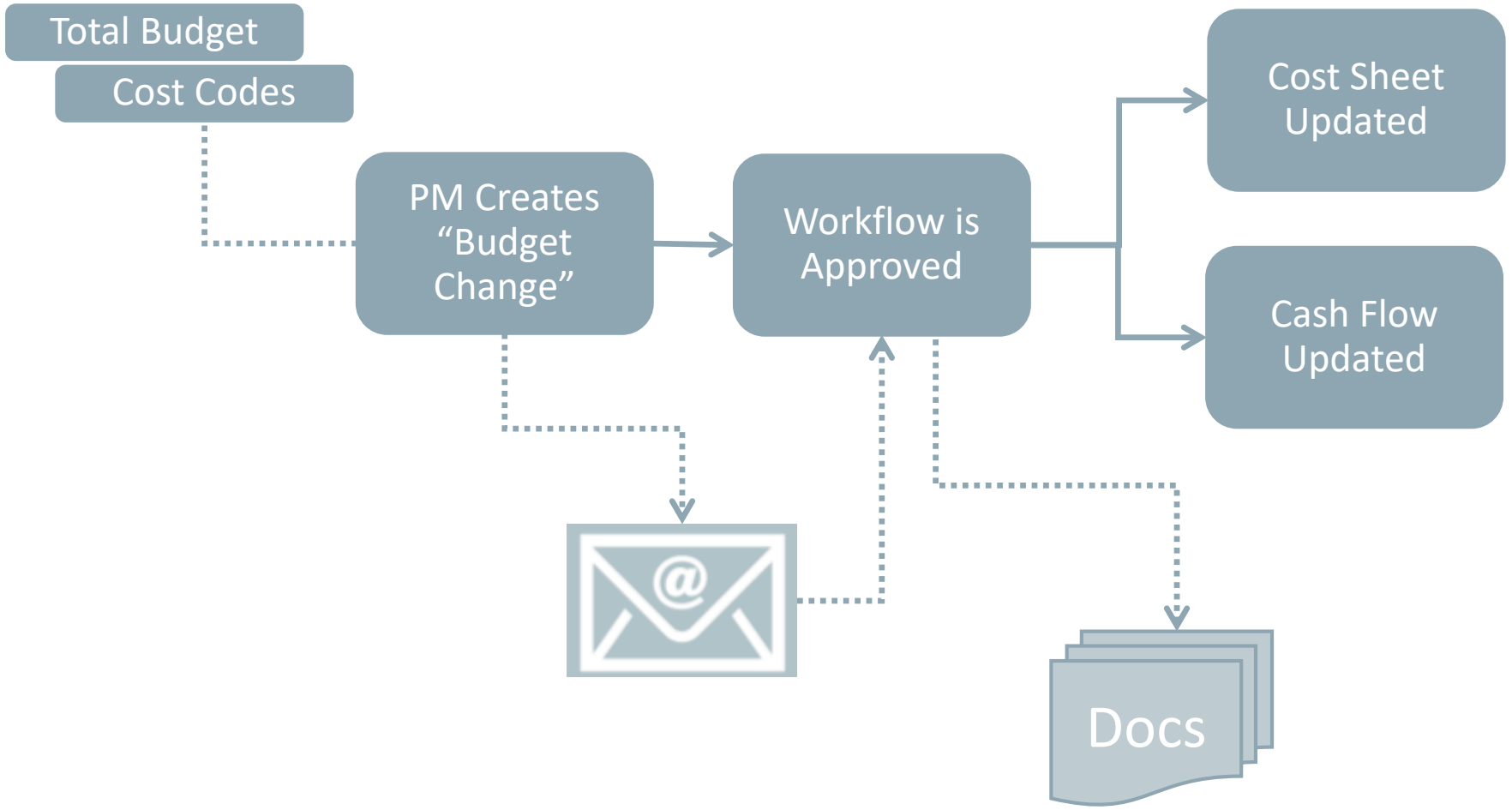
Budget Changes



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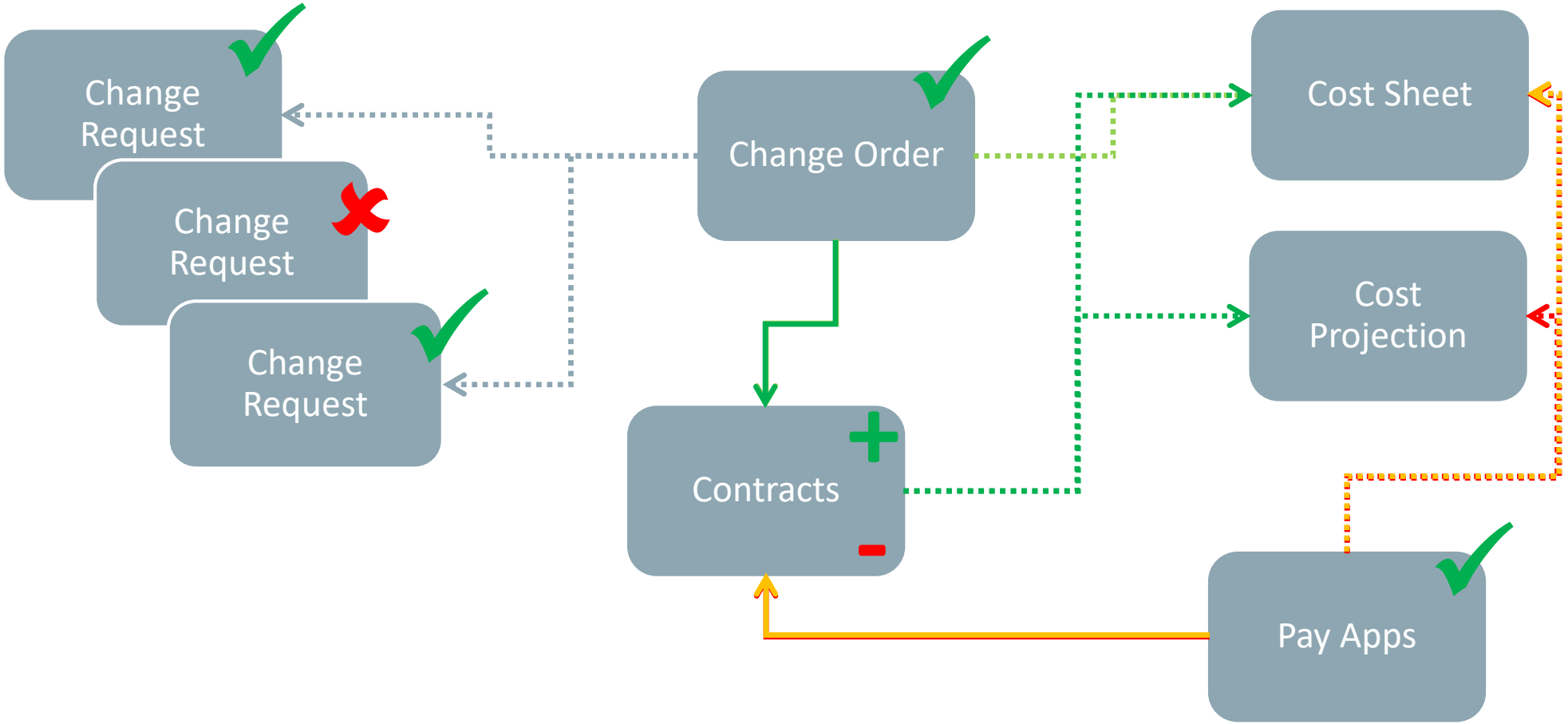
Change Management



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REAL ESTATE PORTFOLIO MANAGEMENT

FMRE COST MANAGEMENT

DOCUMENT MANAGEMENT and VISUALIZATION

FACILITIES MANAGEMENT

ASSET MANAGEMENT	MAINTENANCE MANAGEMENT	SPACE MANAGEMENT	CONDITION ASSESSMENT
Asset Creation	Portal Service Requests	Space Planning Classifications	Facility Inspections
Asset Templates	WO Requests	Stacking Plans	Uniformat II System Codes
Assets by Type	Corrective WO Preventive WO	Space Requests & Assignments	FCI Index
Asset Warranty	Job Plans PM Books	Move Management	Facility Condition Manager
Asset Meters	Material SKUs Material Inventory Material Requests Materials Received	Room Reservations	
Asset Total Cost			

REAL ESTATE MANAGEMENT

LEASE MANAGEMENT	TRANSACTION MANAGEMENT	DATA MANAGEMENT	ENERGY MANAGEMENT
Lease Requests	Prospective Properties	Property Titles	Carbon Footprint
Leases	Property Acquisitions	Insurance Certif	Emissions
Lease Contacts	Property Dispositions	Deeds	Utilities Mgmt
CAM Reconciliation	Property Creation	Easements	LEED Certifications
Lease Actions		Parcels	Recycling
Amendment Reqs.		Permits	Waste Generation
Lease Invoices		Property Taxes	
Lease Payments		RE Payments	
Lease Termination			

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To Be…

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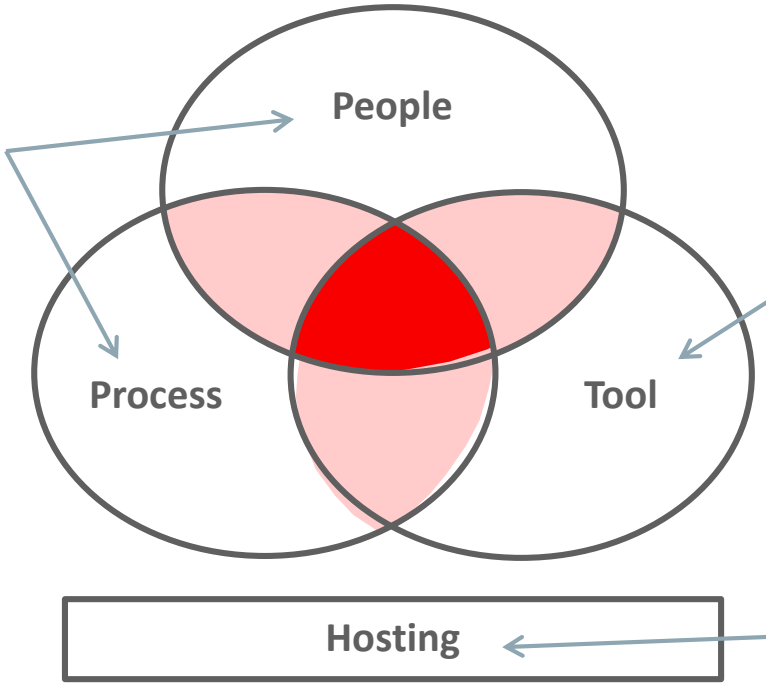
Drive Efficiency…

Implementation Approach

Milestone– Project Delivery



Oracle Unifier &
Oracle Fields Services Cloud

Oracle Cloud

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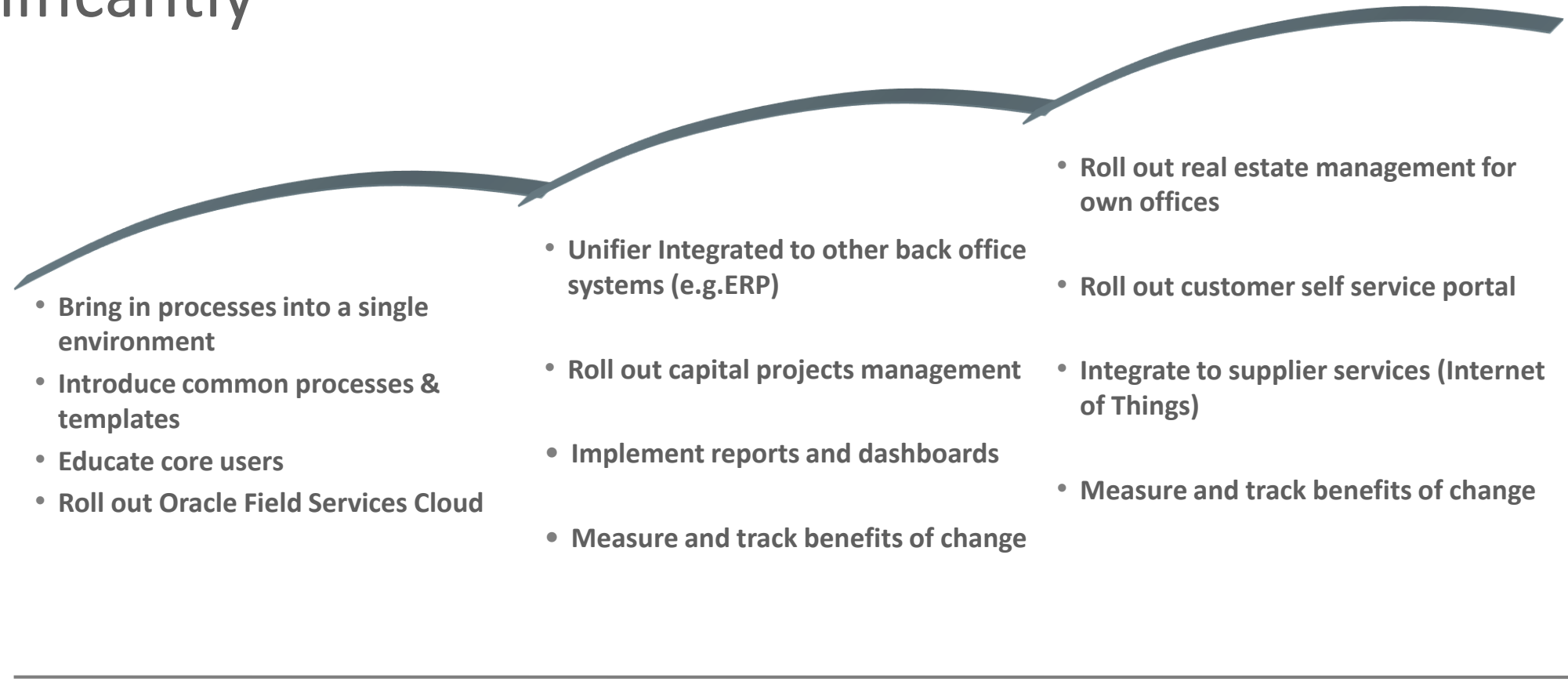
Phased Roll Outs Can Reduce The Implementation Risk Significantly



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Any Questions?

Integrated Cloud

Applications & Platform Services

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