ORACLE NETSUITE

Project Management

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Solution Specialists
NetSuite Demo Organization

About the Presenters

Gerry Dewil

- Solution Specialist at NetSuite, focusing on Manufacturing and Food & Bev
- Experience with JD Edwards, Demantra, various Oracle Cloud products
- Located in Evergreen, CO

Ali Omac

- Solution Specialist at NetSuite, focusing on Software & Services
- Field based Professional Services Consultant prior to NetSuite
- Located in London, UK

Agenda

- Terminology
- Project Account Configuration
  - Project Offerings
  - Account Configuration
- Project Administration
  - Work Calendars, Resource Setup, and Billing Classes
- Project Activities
  - Project Overview
  - Task Assignment
  - Resource Allocation
  - Project Monitoring
  - Project Billing
  - Project Budgeting
- SuiteApps
  - Project 360
  - Project Classification
  - Invoice Presentation Templates
  - Purchase to Project
  - Project Cost-to-Cost Percent Complete
- Project Reporting

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4. SuiteApps

SuiteApps

Common Project Terminology

~~Services Resource Planning (SRP)~~ is an outdated term. SRP has been superseded by *SuiteProjects.*

Project Baseline captures a snapshot of your original estimates before any work begins.

Project Milestones are used to mark a point, usually completion of a set of tasks or as a project health check to determine if you are on schedule.

Project Billing: a method to bill project costs to customer. Choose from Charge-Based, Fixed Bid (interval), Fixed Bid (milestone), or Time and Materials.

Dependencies are tasks that rely on the completion of other tasks before they can be performed.

Project Tasks represent individual actions within a set of actions that must be completed to achieve a goal.

Project Templates enable you to create project records for projects that you perform repeatedly.

Gantt Chart is a type of visual Project Management that displays a project in the form of a timeline.

Common Project Terminology

Activity Code is an alphanumeric value by which activities can be grouped and filtered.

Critical Path consists of those tasks that must stay on schedule for the project to be completed on time.

Resource Management is the process of planning and scheduling the resources you need to use for any giving project.

Resource Allocation is the process of identifying exactly how many resources you can use for any given project (time, budget, team members, equipment, software).

Work Breakdown Structure (WBS) is a condensed project plan organized in a visual hierarchy. WBS separates the work on a project into parts, called work items.

Job Costing reflects the cost of project labor in the general ledger by using time tracked against projects.

Common Project Terminology

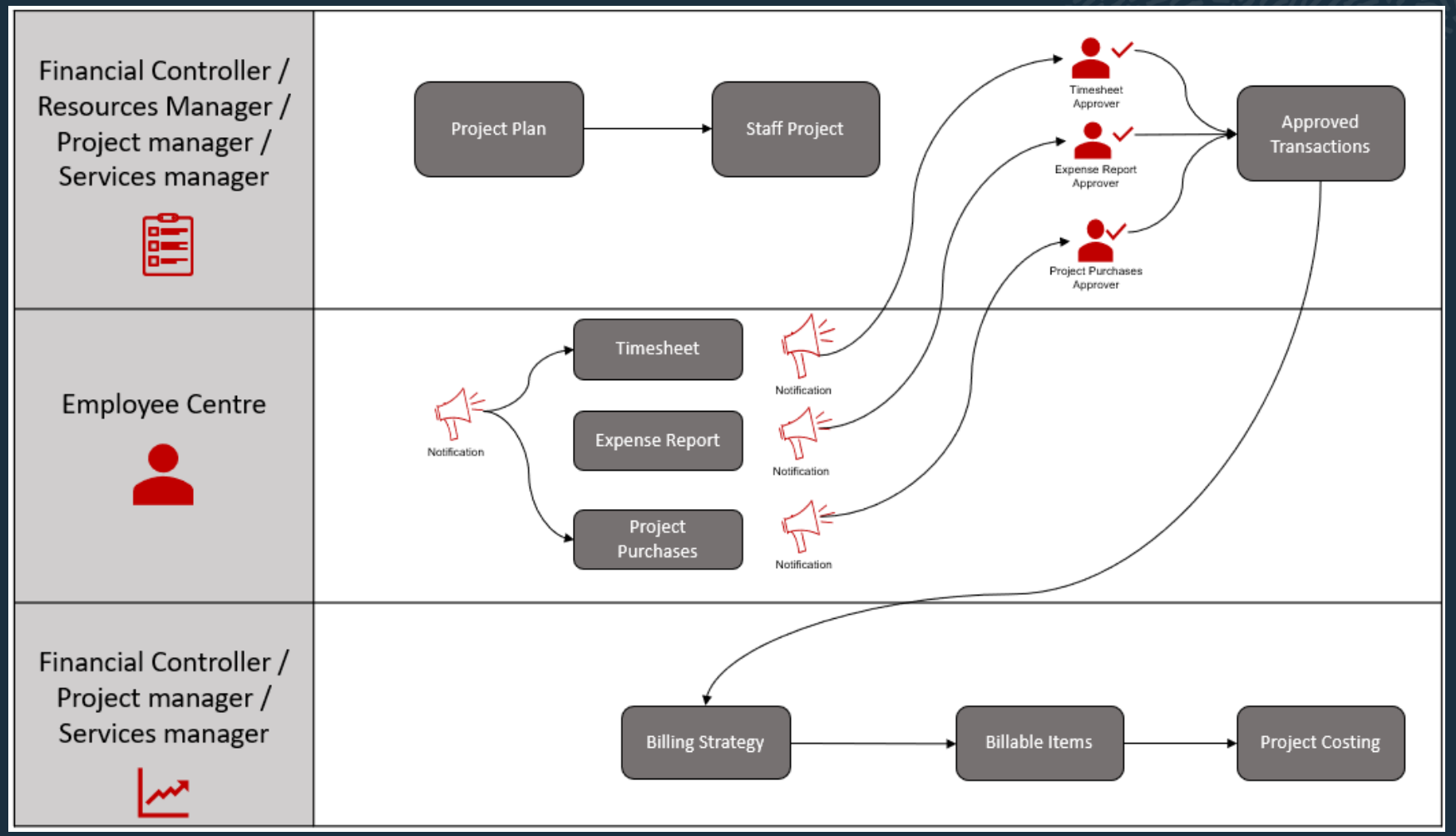
Charges: costs that are incurred in the project and that we are invoicing to the customer for.

EAC – Estimate at Completion shows the forecasted overall cost of the project at completion.

ETC – Estimate to Complete: The value expressed in either dollars or hours developed to represent the cost of the work required to complete a task.

Generic Resources can be used as placeholders when project managers and resource manager are planning a project and when a specific resource has not been identified yet.

Project Management Process Flow



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SuiteApps

Project Offerings

Functionality	Basic Projects	Project Mgmt	SuiteProjects
Log time against projects	Yes	Yes	Yes
Enter a percent-complete override	Yes	Yes	Yes
Track CRM information such as activities and communication for each project	Yes	Yes	Yes
Projects and customers are managed in separate lists of records	No	Yes	Yes
Create project tasks/milestones to define WBS	No	Yes	Yes
Assign project tasks to employees for completion	No	Yes	Yes
Project templates & Project dashboard	No	Yes	Yes
Utilization and Profitability Reporting	No	Yes	Yes
Charge-based Billing	No	Yes	Yes
Resource Allocations (Allocation record, skills sets, Resource allocation chart)	No	No	Yes
Job Costing	No	No	Yes

SuiteProjects

Project Management

- Project templates
- Team collaboration tools
- Track job status & task completion
- Project revenue tracking
- KPI reporting

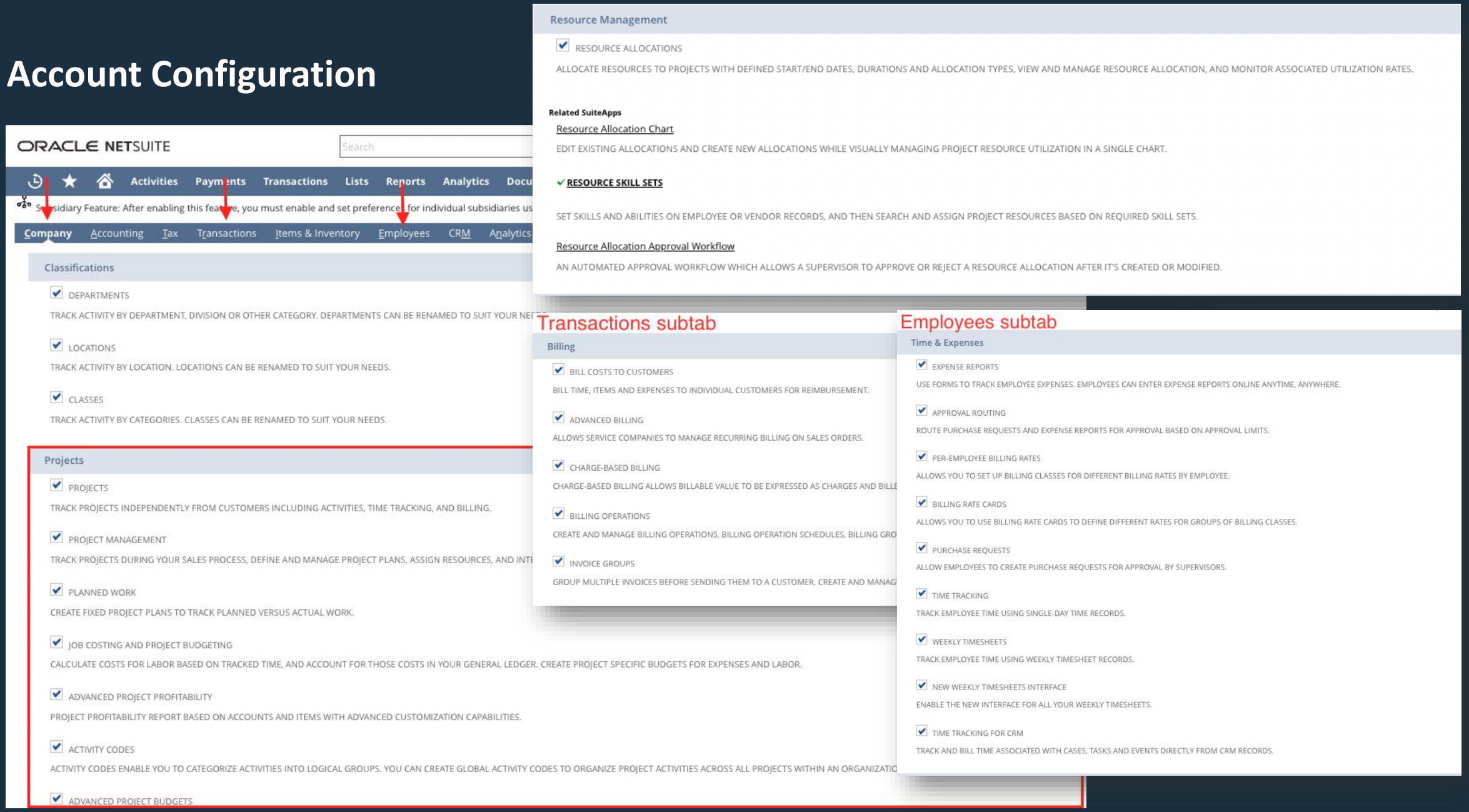
Resource Management

- Assign resources based on availability & expertise
- Automated resource utilization
- Interactive resource reporting
- Booking type visibility

Project Costing

- Automated billing & invoice management
- Time & expense management
- Profitability reports for recognized revenue
- Multi-currency & tax management

Account Configuration



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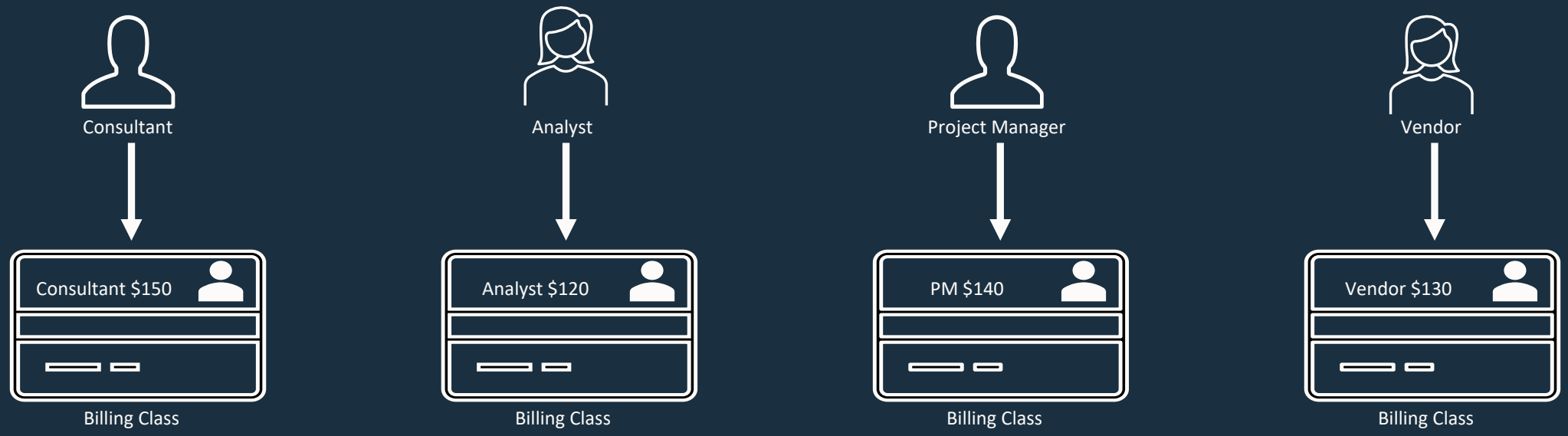
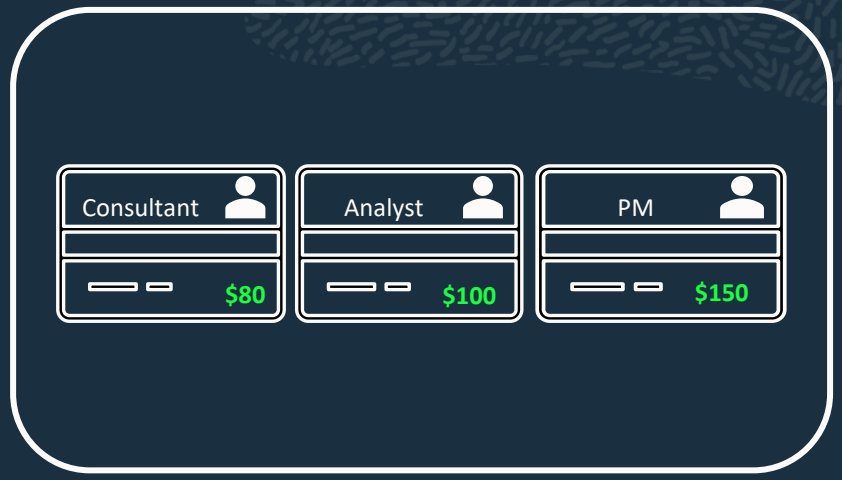
SuiteApps

Billing Classes Overview



Billing Rate Cards

Customer A

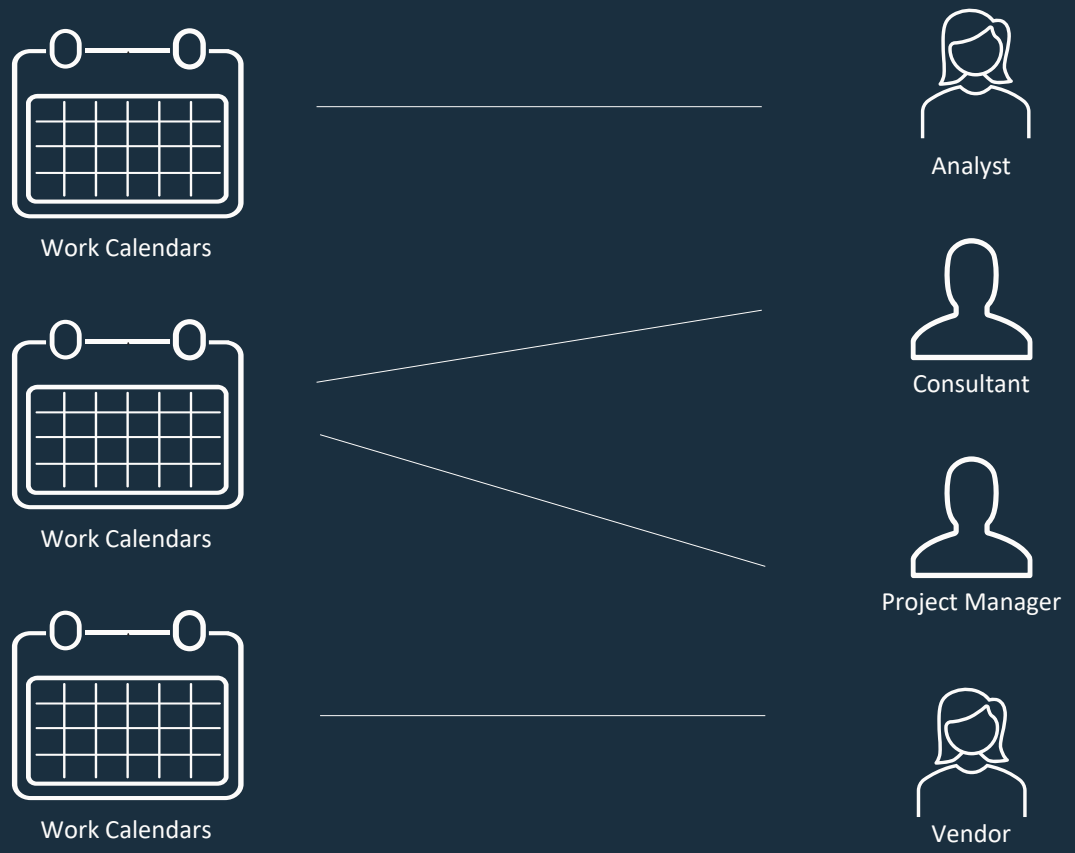


Rate Card

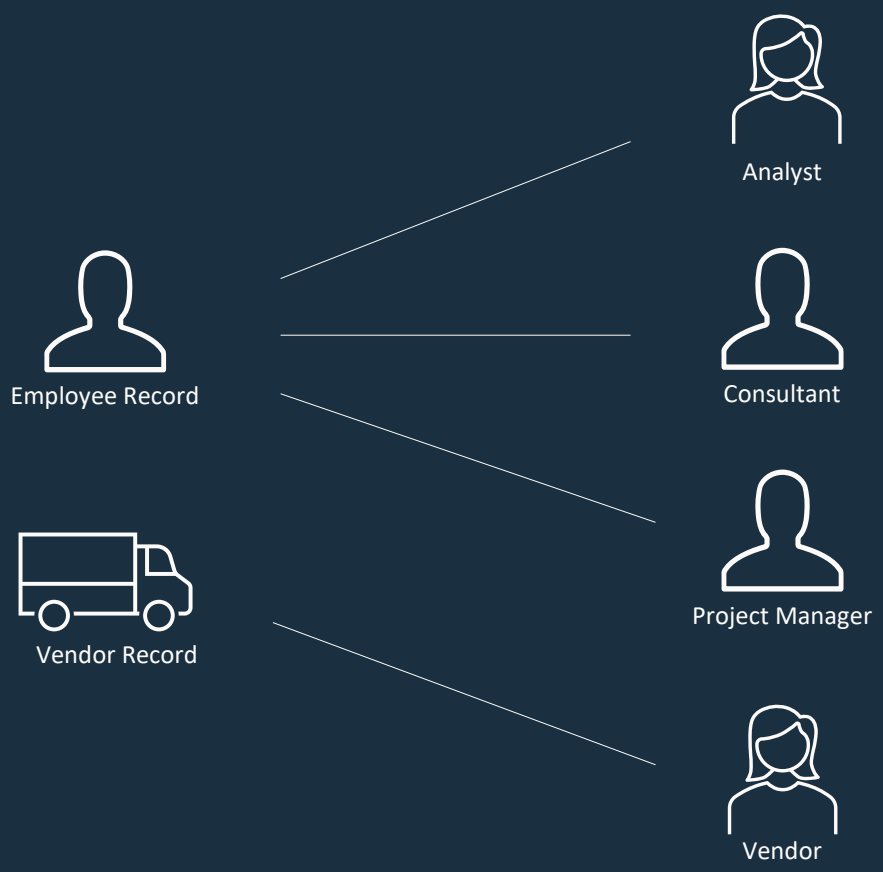
Customer B

Rate Card

Work Calendar



Project Resource Setup



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SuiteApps

Project Overview and Setup

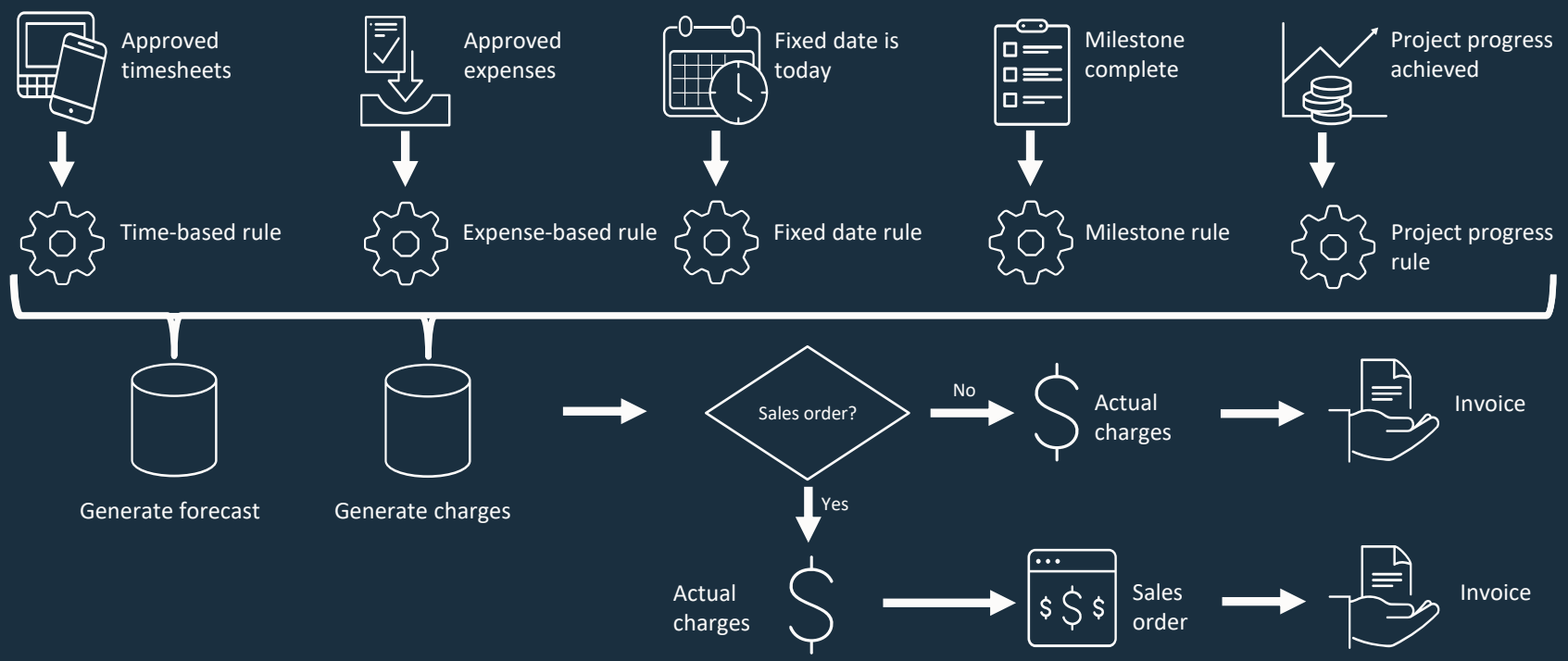
Project Overview & Preferences

Project Billing Setup

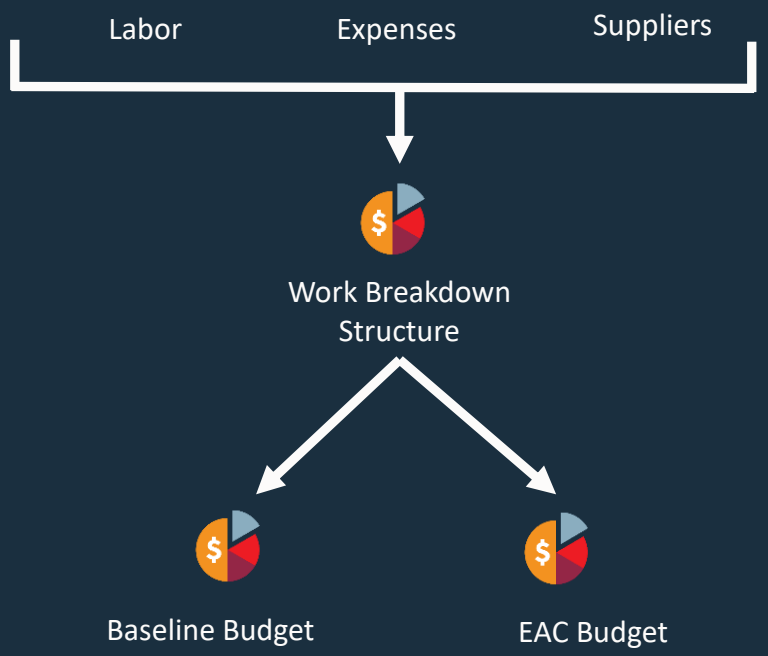
Project Revenue Recognition Setup

Project Budgets

Charge-Based Billing



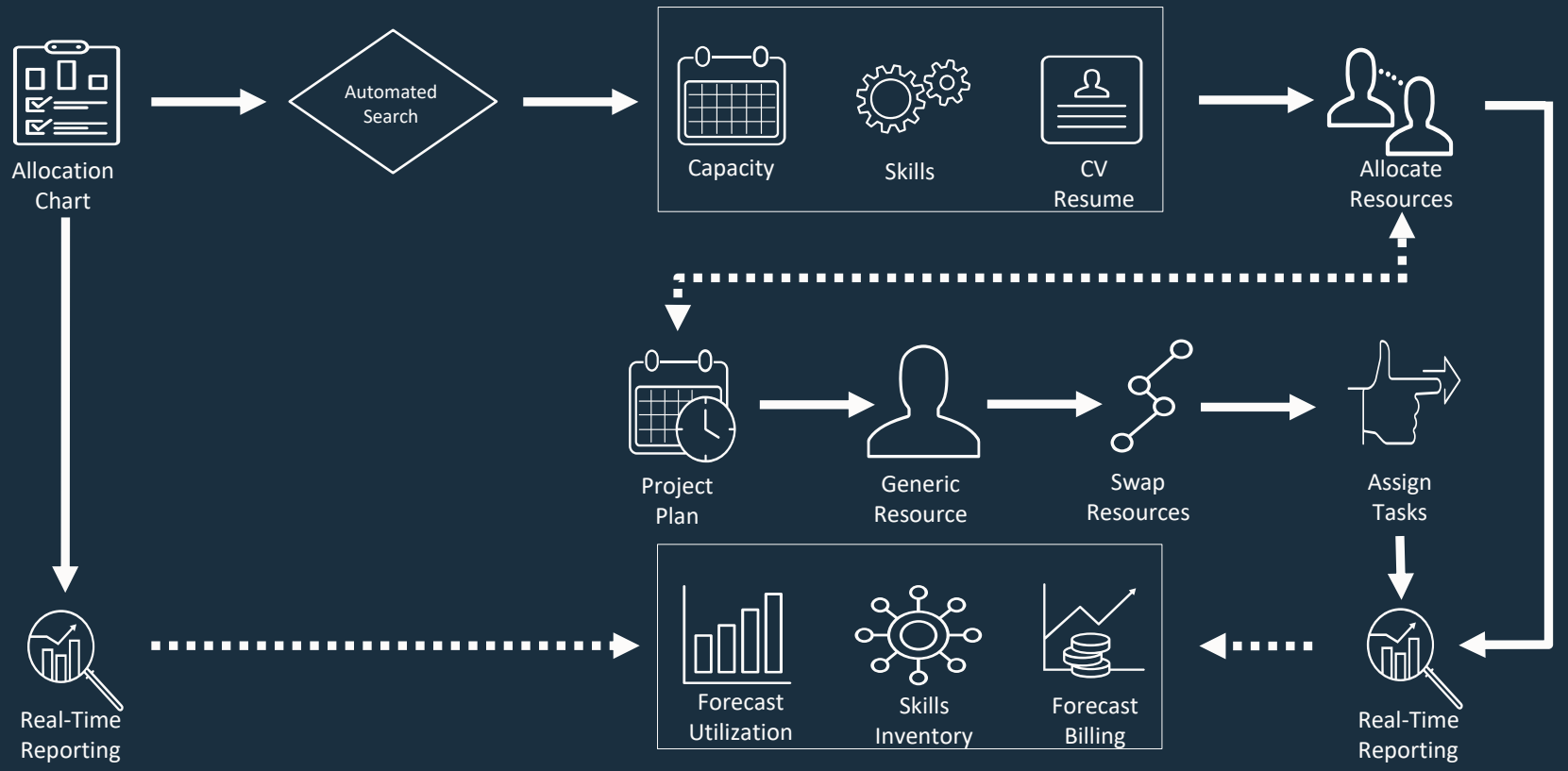
Project Budgeting



With Advanced Project Budgeting, you can:

- Assign estimated amounts to cost or revenue
- Create a detailed work breakdown structure by using activity codes
- Structure the budgets with a hierarchy
- Have multiple budget versions

Resource Allocation Overview



Task Assignments

Project Task Manager Bundle:

- Name – Project Task Manager
- Bundle ID – 241945

Project Monitoring

Project
Schedule

Gannt Chart

Project
Dashboard

Project 360
SuiteApp

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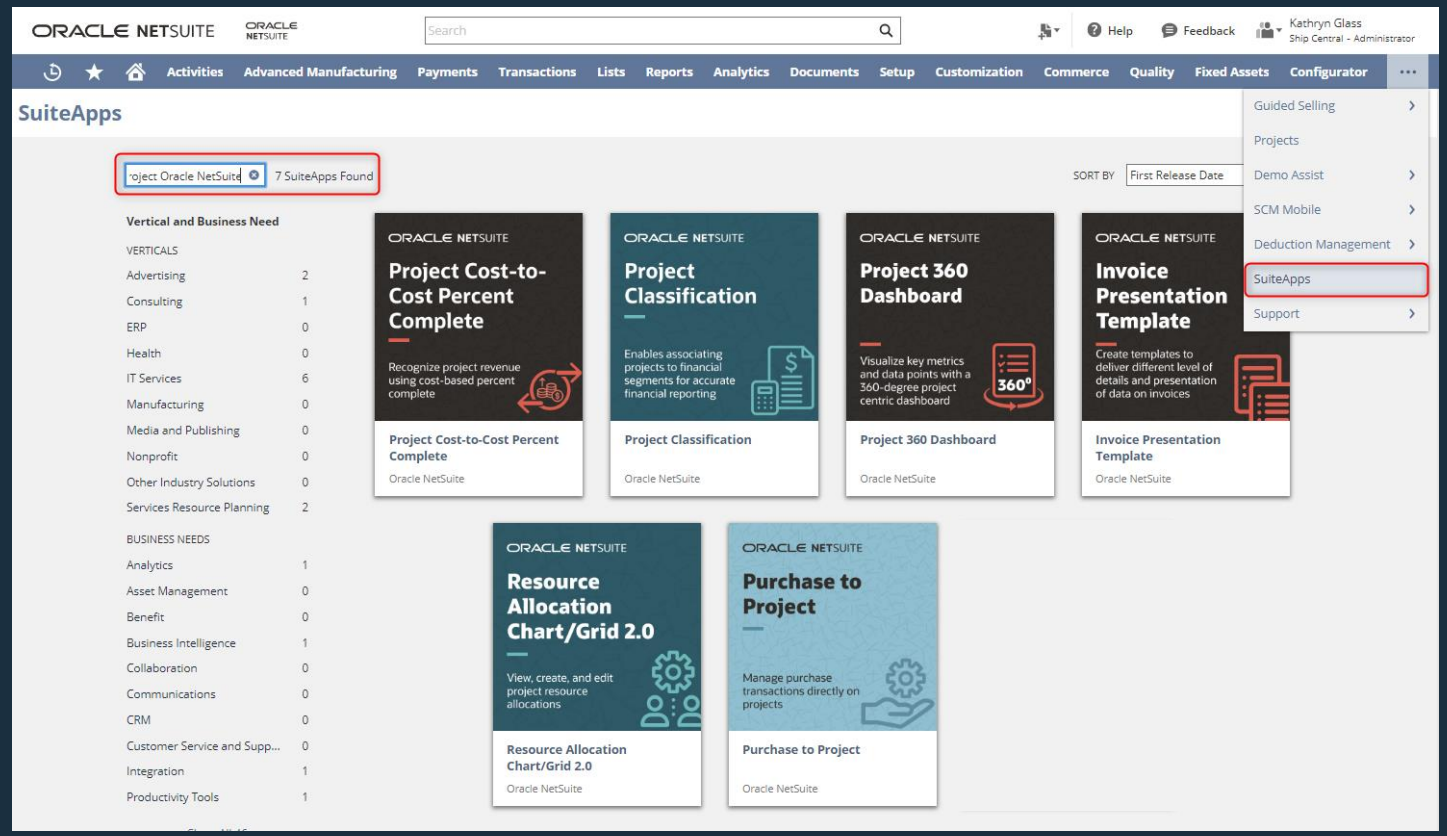
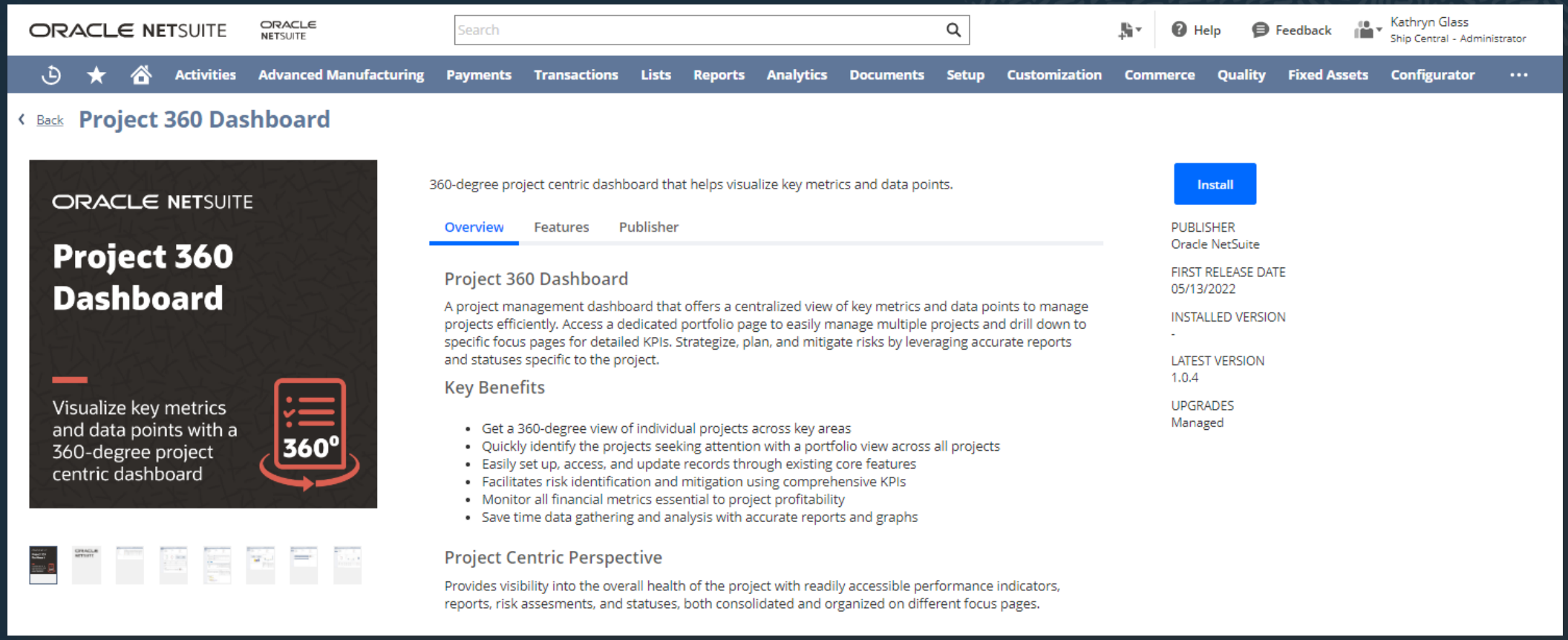
SuiteApps

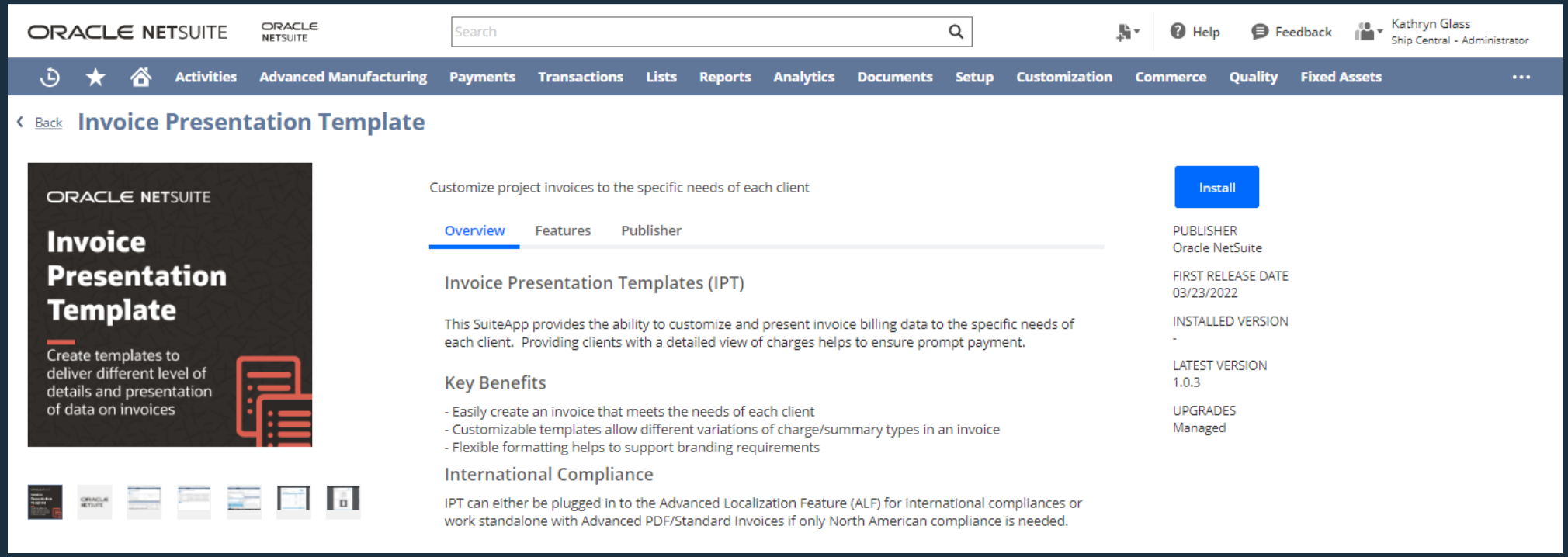
- Project 360
- Invoice Presentation Template
- Project Classification
- Purchase to Project
- Project Cost-to-Cost Percent Complete
- MFG Projects (customization)



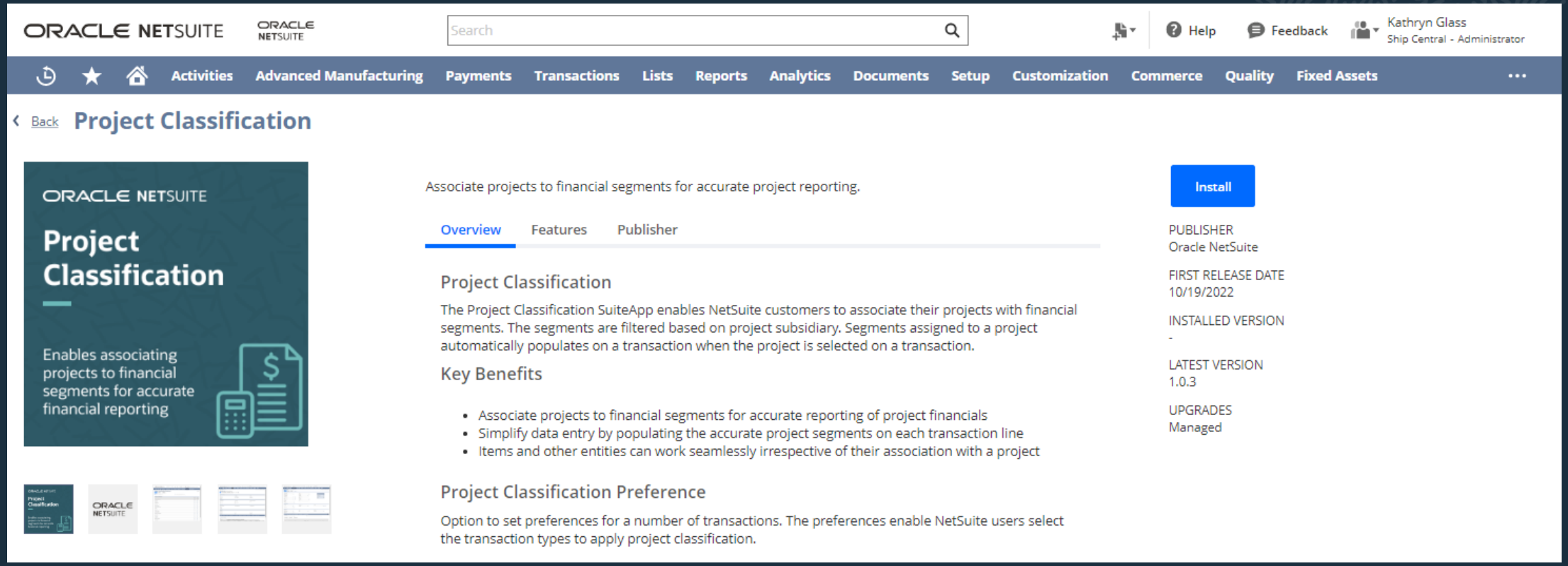
Project 360 SuiteApp



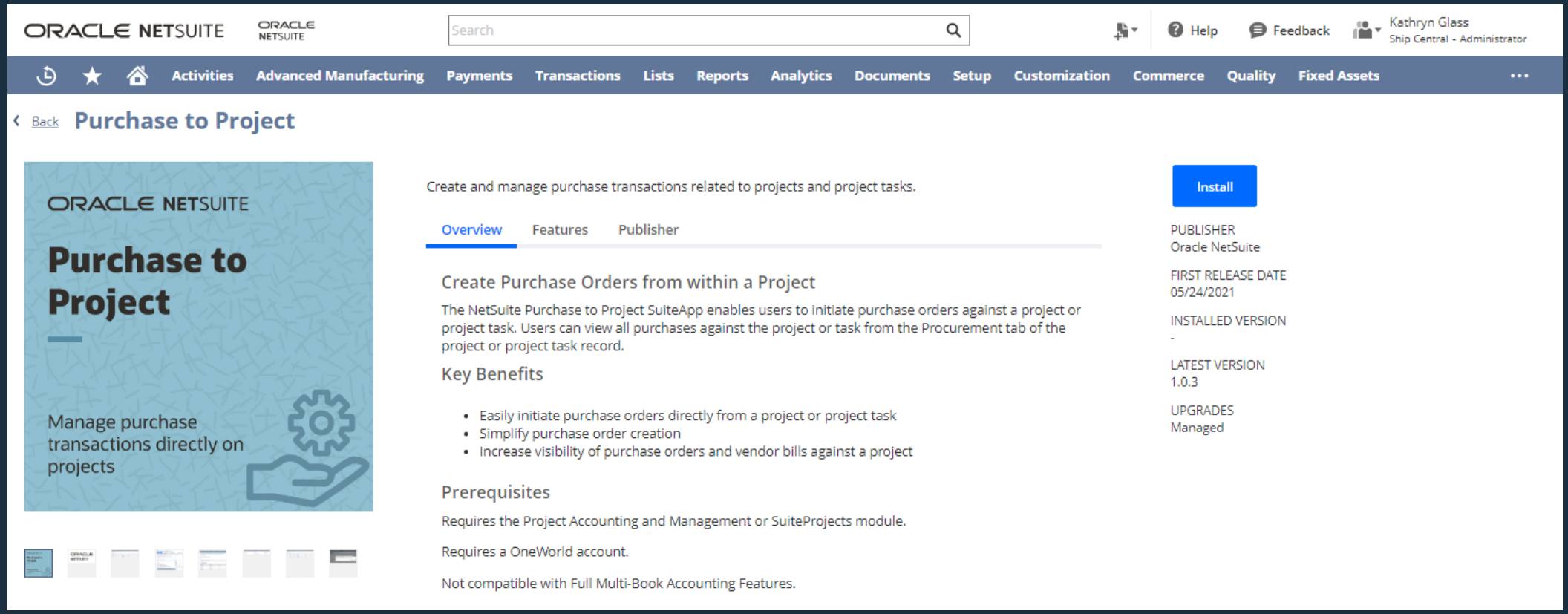
Invoice Presentation Template SuiteApp



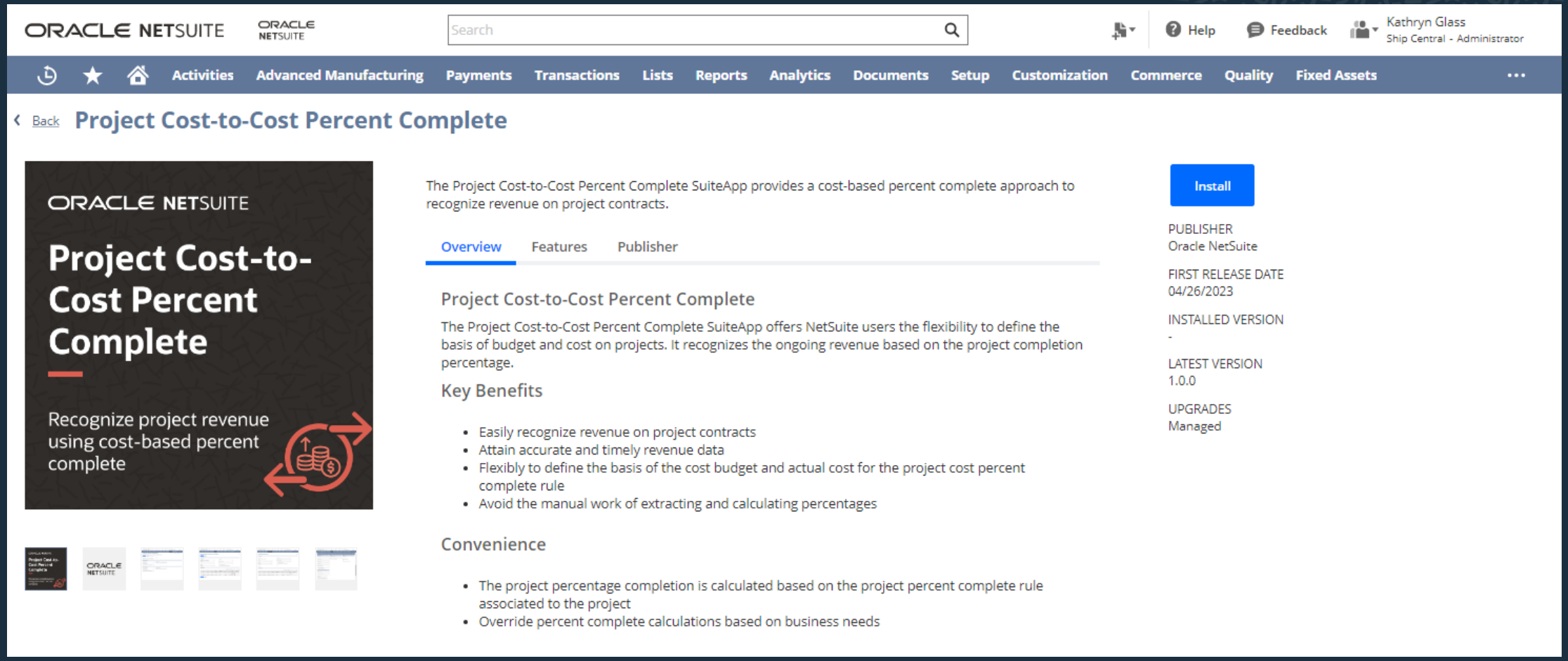
Project Classification SuiteApp



Purchase-to-Project SuiteApp

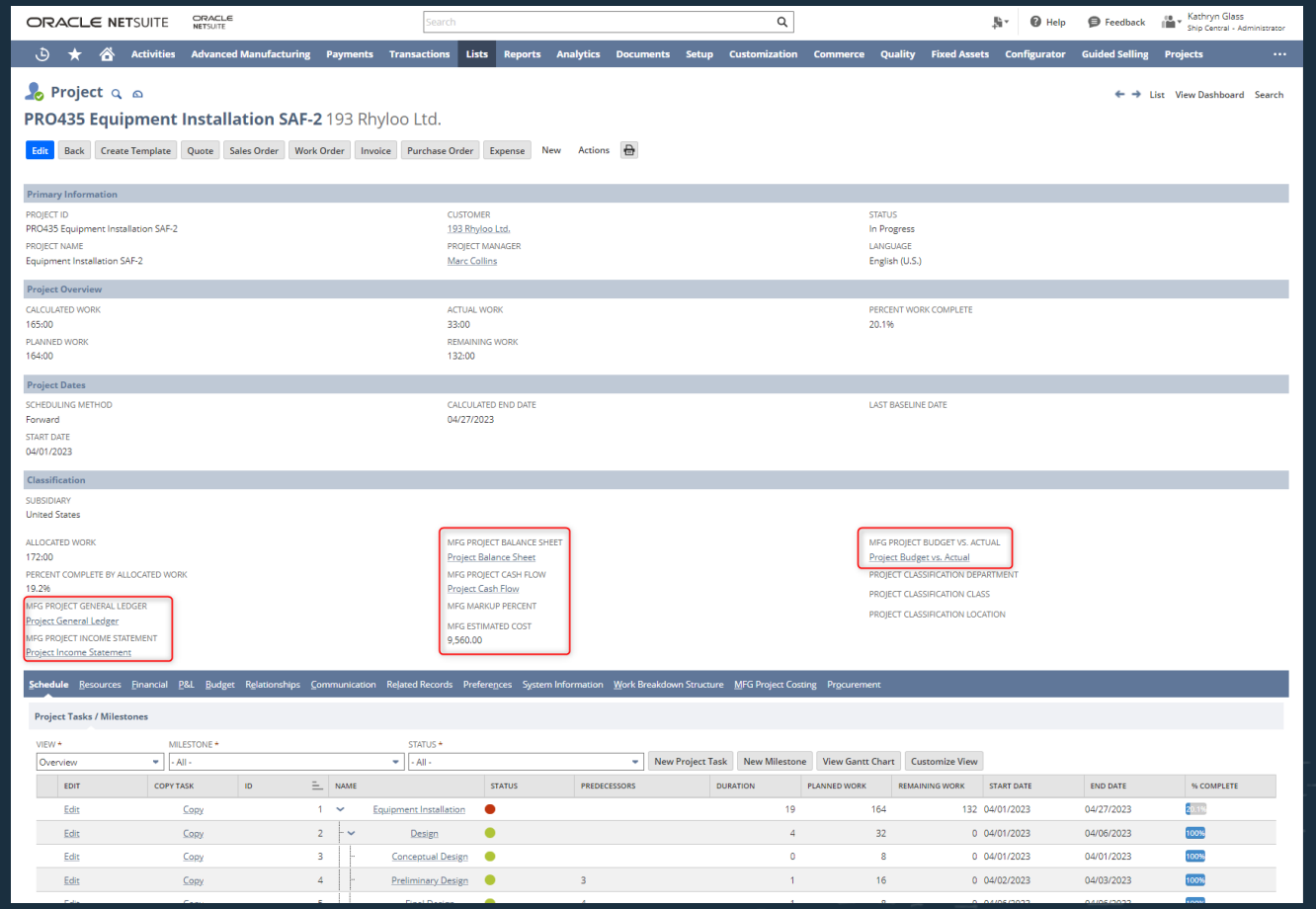


Project Cost-to-Cost Percent Complete SuiteApp

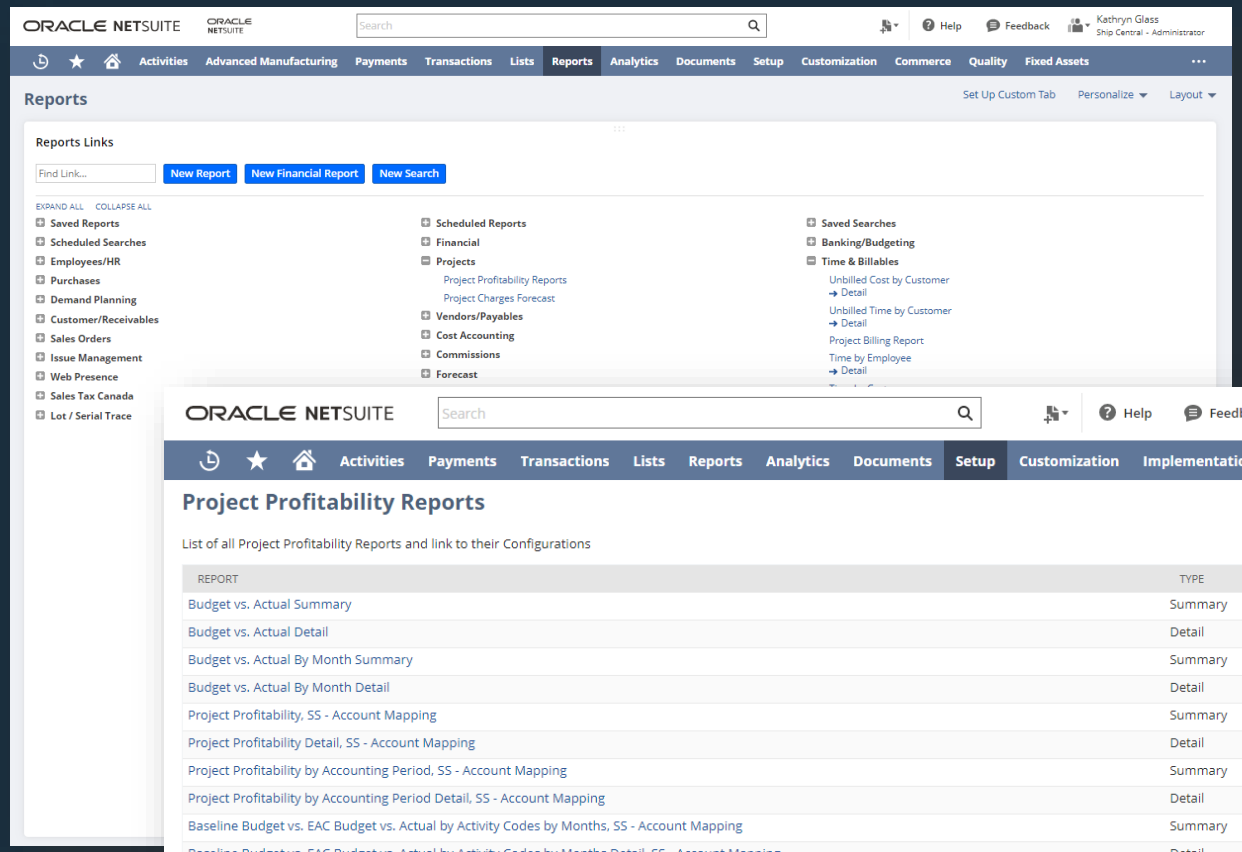


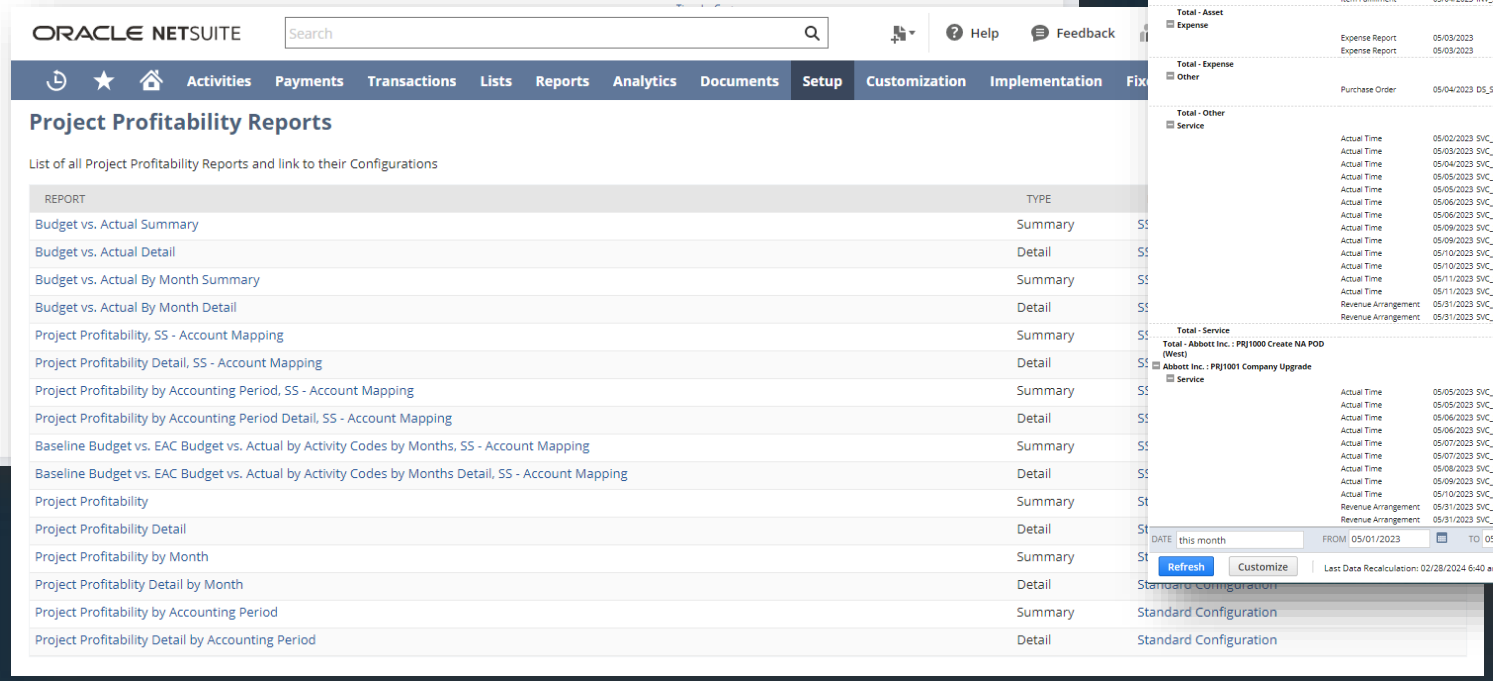
MFG Projects (customization delivered by NetSuite Professional Services)

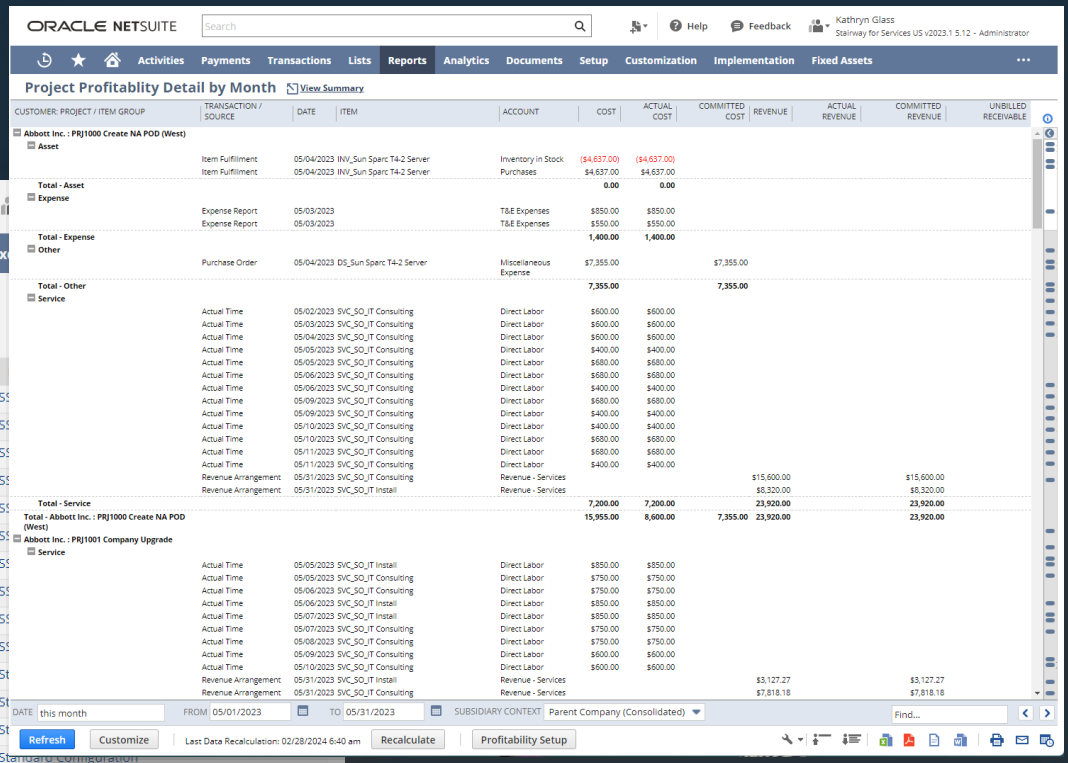
- Ability to tie Work Orders to projects
- Additional Reporting:
  - Project Income Statement
  - Project General Ledger
  - Project Balance Sheet
  - Project Cash Flow



Project Reporting







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