A Federal Agency finds a nifty way of managing huge Projects, Tasks and Budgets under tight resource limitations.

A More4Apps Case Study

The Presidio of San Francisco is managed by two federal agencies in partnership: 300 acres along the coast are managed by the National Park Service, while the rest of the Presidio, 1,191 acres, is managed by the Presidio Trust. Both agencies work in close collaboration with the Golden Gate National Parks Conservancy, a non-profit organization that provides indispensable philanthropic and programmatic support.

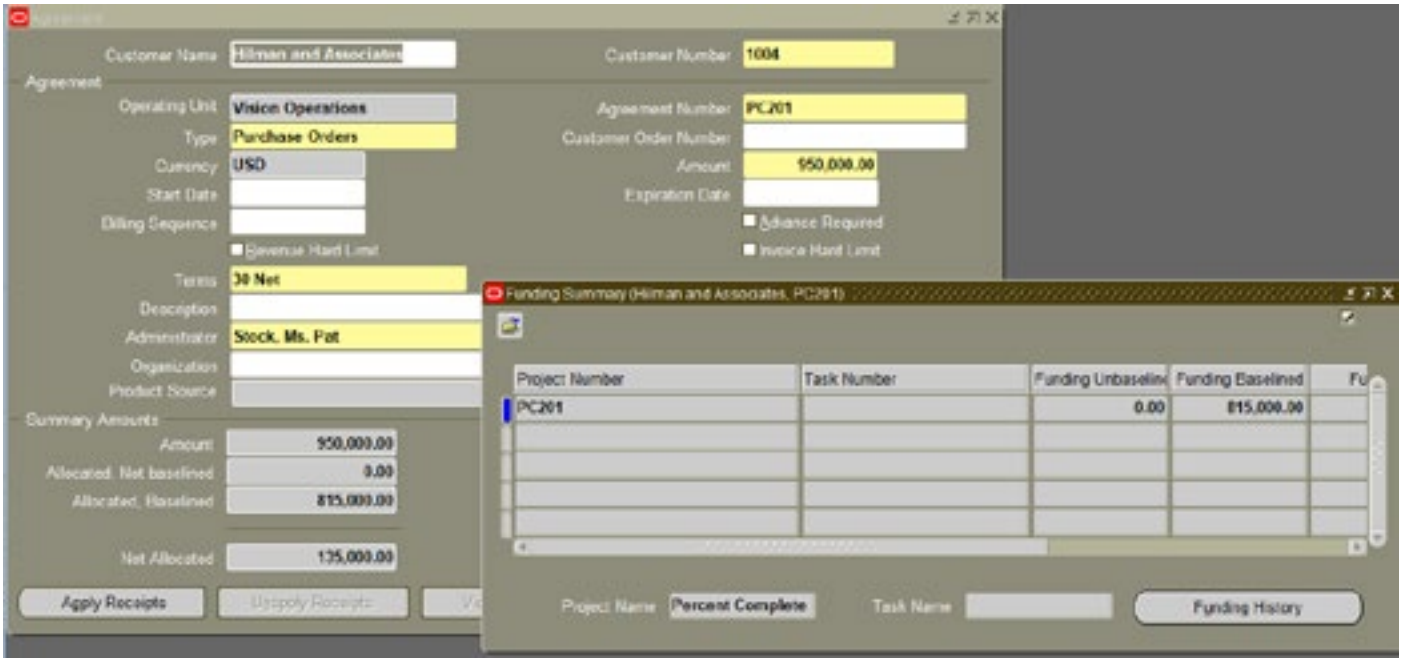
In partnership with the National Park Service and the Golden Gate National Parks Conservancy, and at no cost to taxpayers, the Presidio Trust brings alive the unique historic, natural, and recreational assets of the Presidio for the inspiration, education, health, and enjoyment of all people.

Presidio Trust undertakes roughly about 400 building, construction or maintenance projects of varying sizes each year and meticulously tracks project costs and returns.

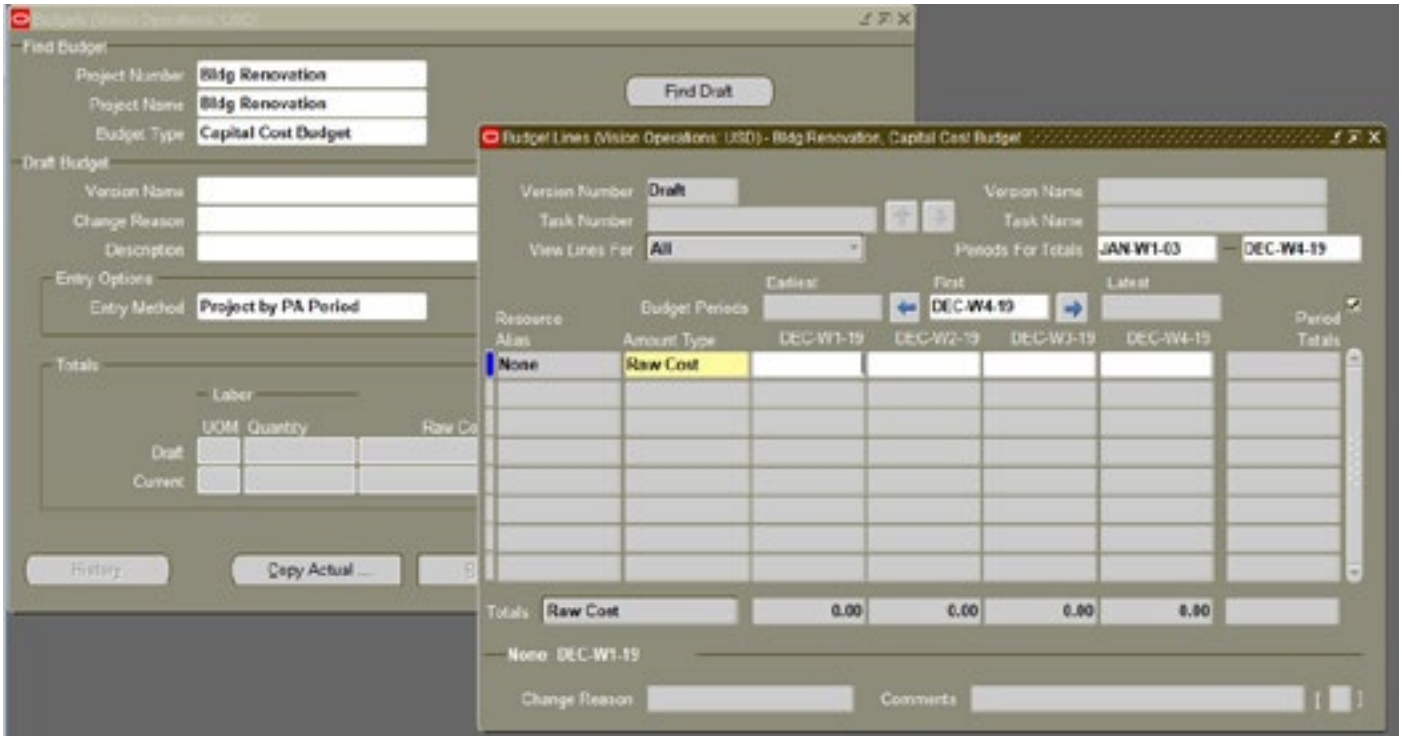
Using the prowess of Oracle E-Business Suite Projects modules, they are able to aggregate costs, enter and follow budgets, as well as report project returns accurately across the hundreds of tasks being tracked under each project. Operating with a trim Project Accounting team, this herculean task of entering tasks and budgets at the start of each fiscal year for each of the hundreds of projects is made possible only with the help of deft accelerator tools like the More4Apps Wizards.

More4Apps Projects and Budgets Wizard was adopted by Presidio users about 16 years ago when they were cutting over entire projects data to a new set of books. Historically they used excel templates as a starting point for their first-cut project plan with different templates covering capital, sponsored and operating projects. After capital approval, users entered these again into the standard Oracle forms.

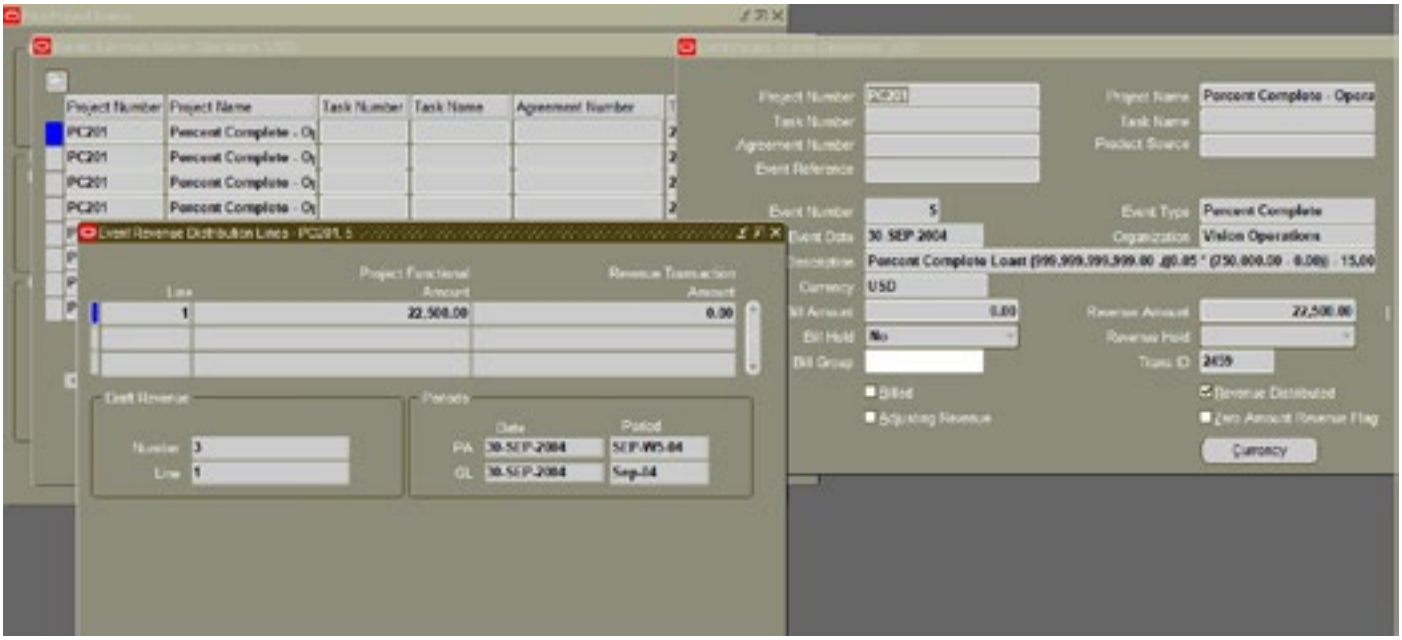
Funding Summary and Details



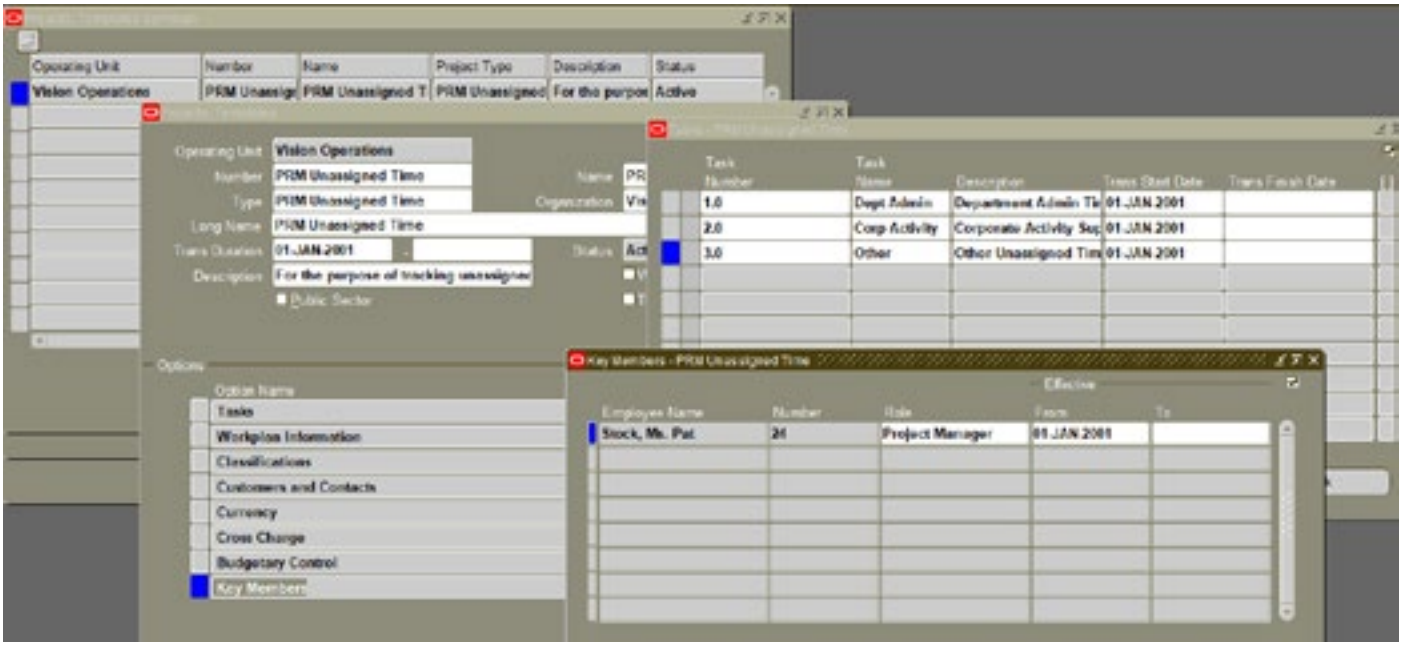
Budgets



Events

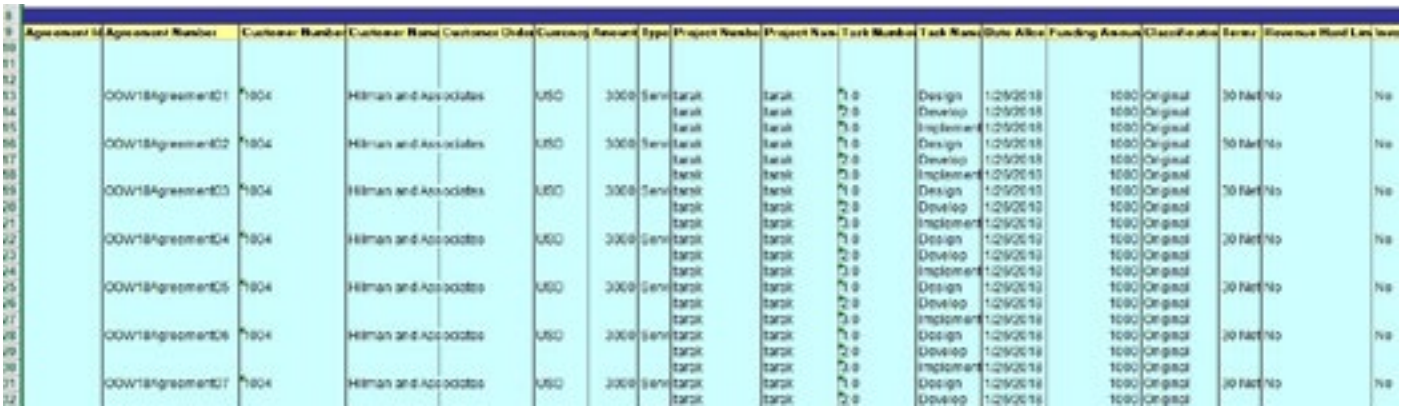


Projects (Tasks, Key Members etc)

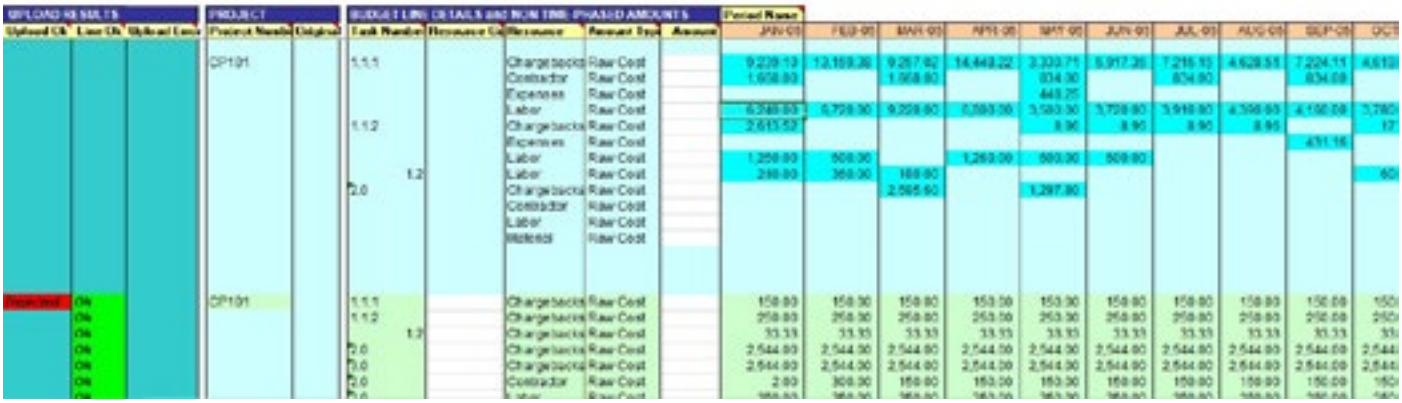


More4Apps Wizards liberated them from the cumbersome forms interface and gave instead to the users the power of connecting their excel templates directly into EBS through well-supported, standard Oracle interfaces. The Presidio excel templates could now be straightaway adapted into the More4Aapps wizards layout and uploaded into Oracle EBS with easy validated-upload functionality.

Agreements and Funding Wizard

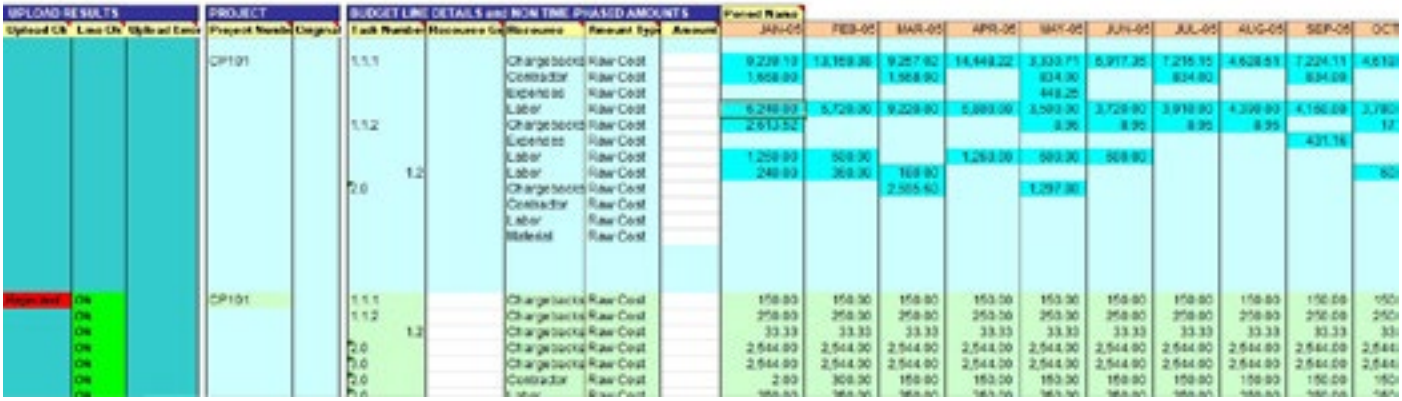


Budgets Wizard



Event Wizard

Project Wizard



Transaction Wizard

The tools not only saw them through this short-term task but has ever since been their aide in speeding up their Projects and Budgets annual entry plus maintenance from the familiar comfort of excel spreadsheets.

Every October, the fiscal year's projects are entered with 3 budgets - one for each of prior-year, current year and inception-to-date. Some of the budgets are at project tasks level resulting in about 800 budgets to be loaded for the fiscal year. Where this could well have been a labor-intensive 2 weeks' task for about 4 people it is reduced to a 2-days job for 2 people to set the Projects and Budgets rolling for the fiscal year on time every year.