

Planning and Scheduling

Planning and Scheduling is part of the Oracle Fusion Cloud Project Management solution and helps project-centric businesses to optimize their project planning and financial control processes, with embedded AI capabilities to unleash project team productivity. Simplified project planning, budgeting, and forecasting streamlines project financial planning processes, and planning and scheduling is extended to the “occasional” project manager, as more people are given projects to manage as a secondary role. Planning and Scheduling is designed from the ground up to intuitively address the needs of project managers, regardless of their level of experience, and can be adopted by all organizations for any type of project work.

Project Planning Made Easy

The heart of the project lifecycle is the project plan, determining the “what”, “when”, and “how”. The solution offers powerful planning and scheduling capabilities in a high-performance, interactive Gantt user experience which hides complexity and expedites the project planning process.

Project managers can use extensive drag and drop capabilities to efficiently manage task dependencies, reorganize tasks, and quickly fill down values to multiple tasks. Scheduling and visualization capabilities include critical path identification, summary task and milestone scheduling – with instant updates to the project schedule.

Tasks are quickly created with minimal data - adding effort, dates, and dependencies later. A simple start or finish date holds the task where it is placed unless it becomes dependent on other work, when it can easily be scheduled just by linking it to another task. More experienced project managers still benefit from capabilities such as constraint dates and types, dependency types, leads and lags, and plan comparisons with current and historical baselines. For a more managed planning approach, gate management orchestrates critical decision points, polling stakeholders for input, and automatically opening the gate once approvals are complete.

Project managers and administrators can assign multiple resources to multiple tasks in a single action or use mass editing capabilities such as date cascade functions, to quickly apply the same changes to a group of tasks. Rapid project plan development ensures the team “hits the ground running”, leveraging standards and templates for accuracy and repeatability. The solution delivers easy-to-use integration with Microsoft Project®, allowing users to create projects, maintain project plans, schedule resources, and collect progress.

Planning as a Collaborative Activity

Team members are closest to the actual work so should be included in the development of the plan; the Planning and Scheduling solution works with the Task Management solution to let project managers create the plan by working together with the project team.

Team members can identify additional work for themselves or for others on the project, which is highlighted to the project manager for review and potential incorporation into the plan. They can indicate a task has started or finished with a single click or tap and can propose changes in dates or effort; project managers get constant visibility into progress, and can immediately accept or reject any proposed changes, having previewed the impact on the project schedule.

Superior Project Financial Planning and Control

Planning and Scheduling underpins the project lifecycle, from driving efficient project initiation to streamlining project financial planning, budgeting, forecasting, and progress management. Highly automated processes focus on user-oriented and guided activities for the critical activity of managing the financial aspects of the project and encourage early corrective action to quickly remedy any issues.

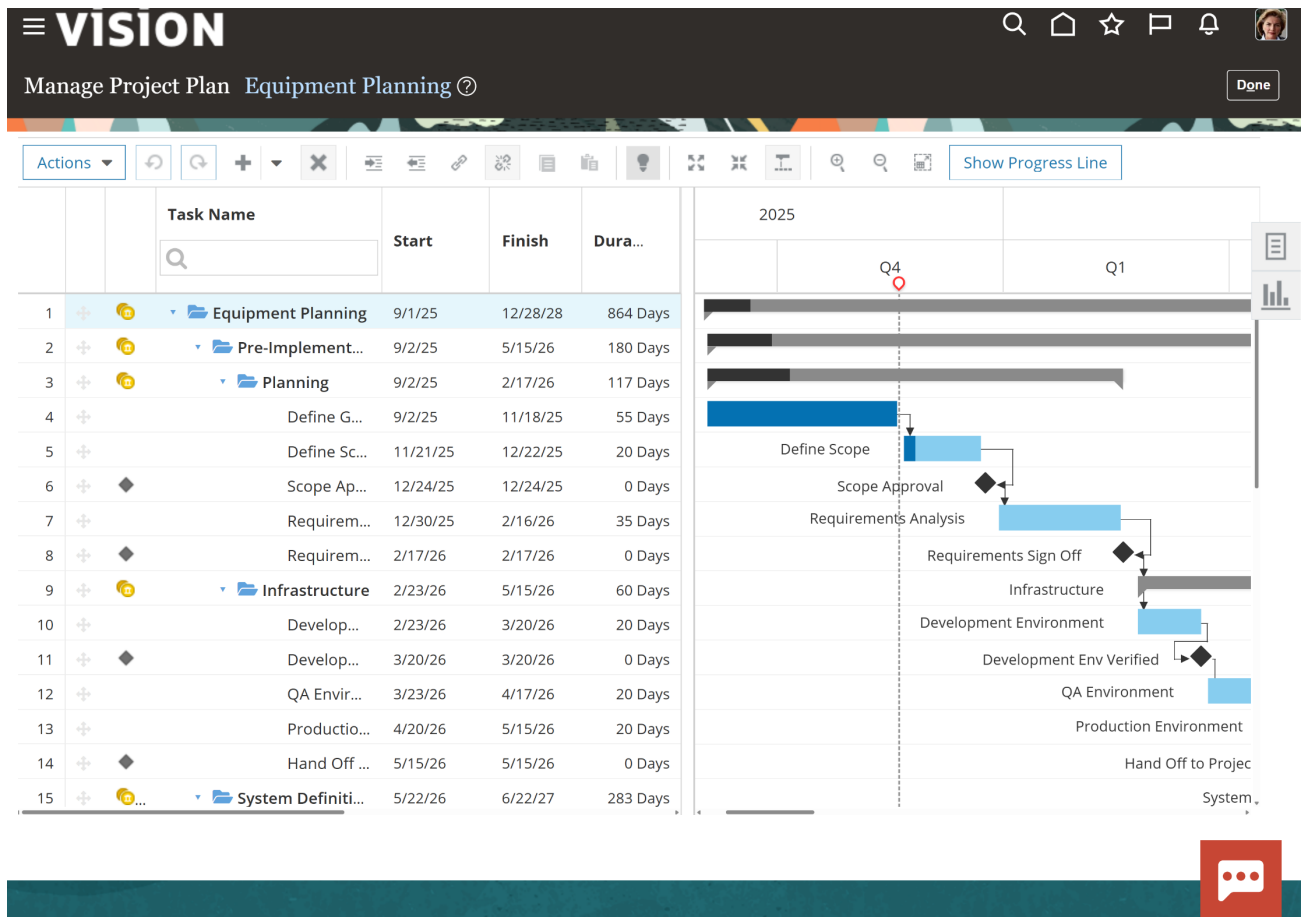


Figure 1. Simplified, collaborative project planning and scheduling.

The solution places an emphasis on expediting the flow of information between each step in the business process. Better connections between project phases effectively bridge the gap between project management and financial control, to ensure continuous and effective monitoring. For example, as project plans are frozen, a working or baseline cost budget can be generated automatically, at the level of detail the project accountant requires. As the project progresses remaining work estimates are recorded, and this information can be fed back into the current project plan to incorporate the new estimates.

Budgets and forecasts are quickly generated from the project plan, resource plan or existing financial plans. Mass changes can be made across a selection of tasks and resources, adjusting quantities, costs, or rates. Budgets can be edited with a focus on tasks or resources, or by using a curve to spread resource load assignments. Budget entry is streamlined through personalized layouts, with the option to budget periodically, and users who prefer to manage their budget or forecast in spreadsheets can take advantage of a seamless Microsoft Excel® integration.

As progress is collected it automatically rolls up the project for immediate visibility into the impact. Published progress can be compared across time periods at the project, task, or resource levels, and earned value is presented automatically for a more objective view of performance. Finally, project managers can immediately see the impact of current and remaining work estimates as input to the forecast for the final outcome of the project, thus completing the project financial planning and control process.

Automated AI-Powered Project Management

AI-driven project management elevates productivity and helps automate project activities such as proposal generation and change management. With Oracle AI project managers can plan projects for sales opportunities by generating a project proposal that covers project objectives, scope, timeline, budget estimates, and staffing plans. The proposal is designed to be easily editable, so project managers retain full control. The generated project proposal structure includes sections on the company background, executive summary, implementation plan, resource plan and budget allocation. Each section is fully editable and can be individually regenerated, to

finalize the proposal content, communicating to stakeholders the project's goals, scope, and expected outcomes, and so securing the necessary funding and resources.

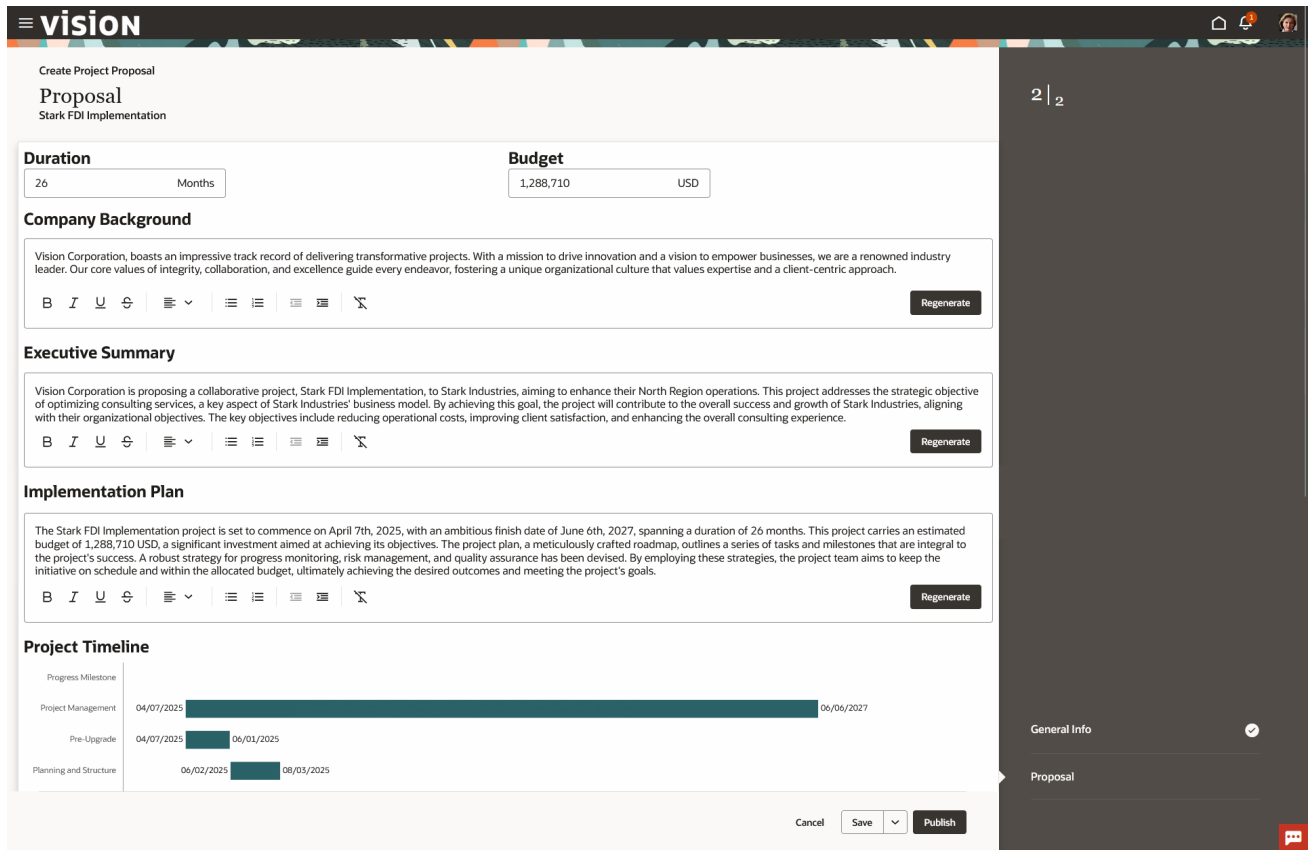


Figure 2. Generate a comprehensive project proposal using Oracle AI during project planning.

An automated and AI-driven project change management process helps the team orchestrate and control project changes through proposal, impact assessment, review, approval, and implementation. Change requests assess the impact on project schedules and margin, and track client approvals to keep stakeholders aligned. Multiple change requests can be consolidated into a change order, updating project plans and budgets in a single action.

Change order impact assessments that track changes to project budgets, project financial plans, project contracts, or scope are all automatically implemented when the change is approved. For example, a change that records additional effort and amounts for specific task assignments can be viewed for the overall impact on the financial project plan, and upon stakeholder approval, the changes are automatically implemented without any further involvement from the change order owner.

Change owners can quickly create an AI-generated summary of a project change order with a single click or tap, to highlight the impact of the change order on the project financials, help align stakeholders, and ease approvals. The AI-generated summary can be easily edited and finalized saving valuable time.

Issues encountered during execution are captured, categorized, and prioritized. Any resulting actions can be assigned to the team for resolution, monitored with issue aging analytics. Generative AI also underpins the effortless creation of a change order from a project issue.

The combined benefits of automated change impact assessments and AI-generated change orders and summaries dramatically improves accuracy and significantly accelerates the issue to change order implementation process, increasing project team productivity.

Support for a Broad Array of Project Usages

Project enterprises can adopt Planning and Scheduling for a broad variety of project-based usages, to optimize services projects, innovate with product development projects, conduct strategic sourcing, or unify organizational planning and budgeting with the execution of projects.

Companies introducing new products need to efficiently manage items, products, documents, requirements, and engineering change orders, all underpinned by project management processes. Close integration with the innovation management and product development solutions in Oracle Fusion Cloud Product Lifecycle Management (PLM) lets product managers, product design managers, and product design engineers track deliverable progress, including ideas, concepts, requirements, proposals, items, and changes, while project managers monitor deliverable progress in the context of a project task based on activity in the PLM solution.

A project can be created from the context of a sourcing negotiation in Oracle Fusion Cloud Procurement to track and manage the negotiation-related work, driving task completion based on key events in the negotiation lifecycle and facilitating collaboration across the negotiation team.

Organizational planning and budgeting are unified with the execution of projects to improve the ability of organizations to plan, budget and execute projects to meet strategic objectives. The planning capabilities of Oracle Fusion Cloud Enterprise Performance Management (EPM) can be used to develop the strategic plan and budget and drive it down to the project team to initiate projects to meet the objectives, executing and collecting costs. When the projects are completed, actual costs are collected and summarized in EPM planning to provide variance analysis and a starting point for re-planning.

Complete, Modern Enterprise Project Management

Planning and Scheduling is part of the Oracle Project Management solution which works seamlessly with the Oracle Fusion Cloud Applications Suite to deliver an end-to-end global project management business process. Organizations can innovate with AI-powered project management that reshapes project team interactions, transform their project management processes to take projects to the next level, and deliver improved profitability, productivity, and growth for a broad spectrum of projects. Oracle Project Management helps you eliminate integration costs, close the books faster, boost customer satisfaction, drive up project margins, and deliver more project value.

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