

**Oracle® Fusion Applications Project Management, Define and
Manage Projects Guide**

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Oracle® Fusion Applications Project Management, Define and Manage Projects Guide

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Preface

This Preface introduces the guides, online help, and other information sources available to help you more effectively use Oracle Fusion Applications.

Oracle Fusion Applications Help

You can access Oracle Fusion Applications Help for the current page, section, activity, or task by clicking the help icon. The following figure depicts the help icon.



With a local installation of help, you can add custom help files to replace or supplement the provided content. Help content patches are regularly made available to ensure you have access to the latest information. Patching does not affect your custom content.

Oracle Fusion Applications Guides

Oracle Fusion Applications guides are a structured collection of the help topics, examples, and FAQs from the help system packaged for easy download and offline reference, and sequenced to facilitate learning. You can access the guides from the **Guides** menu in the global area at the top of Oracle Fusion Applications Help pages.

Note

The **Guides** menu also provides access to the business process models on which Oracle Fusion Applications is based.

Guides are designed for specific audiences:

- **User Guides** address the tasks in one or more business processes. They are intended for users who perform these tasks, and managers looking for an overview of the business processes. They are organized by the business process activities and tasks.
- **Implementation Guides** address the tasks required to set up an offering, or selected features of an offering. They are intended for implementors. They are organized to follow the task list sequence of the offerings, as displayed within the Setup and Maintenance work area provided by Oracle Fusion Functional Setup Manager.
- **Concept Guides** explain the key concepts and decisions for a specific area of functionality. They are intended for decision makers, such as chief financial officers, financial analysts, and implementation consultants. They are organized by the logical flow of features and functions.

- **Security Reference Manuals** describe the predefined data that is included in the security reference implementation for one offering. They are intended for implementors, security administrators, and auditors. They are organized by role.

To supplement these guides, which cover specific business processes and offerings, the following guides address common areas:

Other Information Sources

My Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

Use the My Oracle Support Knowledge Browser to find documents for a product area. You can search for release-specific information, such as patches, alerts, white papers, and troubleshooting tips. Other services include health checks, guided lifecycle advice, and direct contact with industry experts through the My Oracle Support Community.

Oracle Enterprise Repository for Oracle Fusion Applications

Oracle Enterprise Repository for Oracle Fusion Applications provides visibility into service-oriented architecture assets to help you manage the lifecycle of your software from planning through implementation, testing, production, and changes. In Oracle Fusion Applications, you can use the Oracle Enterprise Repository for Oracle Fusion Applications for:

- Technical information about integrating with other applications, including services, operations, composites, events, and integration tables. The classification scheme shows the scenarios in which you use the assets, and includes diagrams, schematics, and links to other technical documentation.
- Publishing other technical information such as reusable components, policies, architecture diagrams, and topology diagrams.

The Oracle Fusion Applications information is provided as a solution pack that you can upload to your own deployment of Oracle Enterprise Repository for Oracle Fusion Applications. You can document and govern integration interface assets provided by Oracle with other assets in your environment in a common repository.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/us/corporate/accessibility/index.html>.

Comments and Suggestions

Your comments are important to us. We encourage you to send us feedback about Oracle Fusion Applications Help and guides. Please send your suggestions to oracle_fusion_applications_help_ww@oracle.com. You can use the **Send Feedback to Oracle** link in the footer of Oracle Fusion Applications Help.

Define Project

Project List: Explained

The project list is a collection of projects that are filtered and displayed based on project search criteria such as project manager, customer, business unit, or project set. For example, the default saved search **My Projects** displays all projects on which you have a role and which are not closed.

From the project list, you can select a number of actions based on your role on the project. For example, project managers can update the project plan and progress, manage financial plans, review project performance, and manage integrations with external scheduling applications. You can also drill down to a project's home page to view project, financial, and performance details.

Projects and Project Information on the Project List

The project list can display all projects that you are involved with, either directly as a project team member, or by having project authority for the user is an active member of, directly through a role on the project or indirectly by having authority over a business unit or project unit.

As described in the following table, your project role also determines the information you can view for each project displayed in the project list.

Information	Project Manager	Project Administrator	Team Member
General project information including name and number, type, status, dates, customer, description, attachments, and notes	Yes	Yes	Yes
Project health status and trends	Yes	Yes	Yes
Current working, baseline, and approved budget and forecast information	Yes	Yes	No
Budget and forecast variance	Yes	Yes	No
Inception-to-date and period-to-date measures	Yes	Yes	No
Pending activities related to the project, financial plans, and progress	Yes	Yes	No

Copying of Attributes During Project Creation: Explained

You create projects based on a project template or another project. During creation, Oracle Fusion Projects deals with project attributes from the source project template or project as follows:

- Always copied: Project attributes such as resource breakdown structures, currency conversion attributes, and key performance indicators are automatically copied to the new project.
- Optionally copied: You can optionally select certain attributes, including tasks and task assignments, to copy to the new project.
- Copied if not overridden in project details: Project attributes such as team members, and class categories and codes are not copied if you can specify them in the project details for the new project.
- Not copied: No transactions, whether expenditure items, requisitions, purchase orders, supplier invoices, or billing events are copied to the new project. Project progress is also never copied.

Using Copy Options

The following table lists the project attributes available as copy options when you create a new project. The table also indicates whether the copy options are available when you create a project in Microsoft Project.

Project Attribute	Copy Option Available in Microsoft Project	Comments
Assets and asset assignments	Assets: Yes Asset Assignments: No	<p>When copying asset and asset assignment information for capital projects, the following data is not copied: asset number, the employee to whom an asset is assigned, and the date on which the asset was placed in service.</p> <p>Asset location is copied when the source is a project template. In addition, the estimated in-service date is shifted based on the difference in the start date of the source template and the project start date.</p> <hr/> <p>Note</p> <p>You cannot copy asset assignments when creating a project in Microsoft Project</p>
Attachments	Yes	<p>All attachments are copied, including those associated with capital projects assets.</p> <p>When creating a project from another project, you can select to copy attachments from the source project or from the original project template.</p>

Budget and forecast versions	No	<p>You can optionally copy existing budget or forecast versions when creating a project in Oracle Fusion Projects.</p> <hr/> <p>Important</p> <p>You cannot copy budget and forecast versions if you do not copy tasks to the new project.</p> <hr/>
Descriptive flexfields	Yes	
Project Customers	Yes	
Project plan (tasks)	No	<p>Entire project plan is copied if you select to copy tasks when creating a project in Oracle Fusion Projects.</p> <p>When exporting a project from Microsoft Project, tasks from the source project or project template are not copied. The task structure in Microsoft Project is used to create the project plan.</p> <p>To copy a task structure from an existing project or project template, import it from Oracle Fusion Projects into Microsoft Project.</p>
Task assignments	No	<p>If you create a project in Microsoft Project, then all scheduling information is entered in that application. Therefore, no task assignment information is copied from the source project template or project you select when exporting the project to Oracle Fusion Projects.</p>
Team members	Yes	<p>All team members can be copied unless their project role matches a role you can specify in the project details of the new project.</p> <p>For example, assume Marilyn Saunders is listed as a team member on the source template and her project role is Project Administrator. If you can specify a project administrator in the project details, then Marilyn Saunders will not be copied to the new project, whether or not you specify another project administrator.</p>

Transaction controls and costing overrides	Yes	If you create a project in Microsoft Project, then only transaction controls at the project level are copied because tasks are not copied.
Project space details	Yes	All project space details are copied if a group space template is associated with the source project template.

Budgets and Forecasts: How They Are Copied from Project Templates or Projects

When creating a new project, either based on a project template or an existing project, you can optionally copy existing financial plan versions.

Settings That Affect Copying of Financial Plan Versions

The following points determine what and how financial plan versions are copied to a new project:

- **Calendar type:** Whether financial plan types use the accounting calendar, project accounting calendar, or none
- **Creation source and version status:** Whether the project is created from a project template or another project, and the status of the financial plan version in the source

When creating a new project, versions of all financial plan types used on the source template or project can be copied if they do not contain errors and are in one of the following statuses:

- **Current Working**
- **Current Baseline**
- **Current Approved**
- **Submitted**

You can select one version of a financial plan type (of any status) to copy to the new project.

Important

For financial plan types that support cost and revenue in separate plan versions, both cost and revenue versions are displayed and are available for selection separately, based on their status.

How Financial Plan Versions Are Copied

When you create a project from another project, financial plan versions are copied in Current Working status, irrespective of the version status in the source project. When your source is a template, then you can select one of the following options to copy a current baseline budget version:

- Copy the selected version as the current working version.
- Copy the selected version as current baseline version and as current working version. That is, create two versions in the new project.

The following table provides further details about copied version information:

Aspect of Version	Details
Generation and copy sources	If the copied financial plan version was originally generated or copied from another source, those details are copied over to the new project. However, if the version was generated or copied from another financial plan version that you did not select to copy, then source information is deleted even though the budget or forecast creation method remains unchanged.
Actual amounts	Actual amounts for forecast versions are not copied to the new project. Estimate-at-completion (EAC) amounts are copied over as estimate-to-complete (ETC) and actual amounts are set to zero.
Period information	<p>When you copy financial plan versions that use an accounting or a project accounting calendar, then periods for the versions created in the new project are based on the periods of the target project and task start dates.</p> <p>If the source project or template does not have a date or you have not entered a start date for the target project, then periods are copied to the new financial plan version without adjustment.</p> <p>However, if both the source project or template, and target project have start dates, then Oracle Fusion Projects performs the following actions:</p> <ol style="list-style-type: none"> 1. Calculates the number of periods between the following: <ol style="list-style-type: none"> 1. The period that contains the start date of the source project template or project 2. The period that contains the start date of the new project 2. Derives the start period for each budget or forecast line in the new project by adding the number of periods determined above to the period of the new start date. <p>For example, assume your projects have the following start dates:</p> <ul style="list-style-type: none"> • Source project or template: September 1, 2010 • New project: December 15, 2010 <p>If the financial plan version in the source project contains plan amounts for periods SEP-2010, OCT-2010, and DEC-2010 (assuming monthly periods), then the financial plan version in the new project will contain amounts in DEC-2010, JAN-2011, and MAR-2011.</p> <hr/> <p>Note</p> <p>Oracle Fusion Projects assumes that all periods are equal. If your periods are different lengths, then you must review plan amounts in the new financial plan version and update them as required.</p>

Task Dates: How They Are Calculated for New Projects

When creating a project, you can select to copy tasks from the source project or template. If you are creating the project in Oracle Fusion Projects, then the application calculates planned dates for tasks on your project plan based on dates you specify for the new project and the dates in the source project.

Note

If you create the project in Microsoft Project, then all scheduling information is entered in that application. Therefore, dates from the source project template or project that you select when exporting the project to Oracle Fusion Projects are not used.

Settings That Affect Calculation of Task Dates

The default information in the source project template or project and the information you provide for the new project when specifying project details determine how task dates are calculated.

Note

The option to roll up task planned dates that is specified on the associated project plan type does not affect project and task dates during project creation.

How Task Dates Are Calculated

If you do not enter start and finish dates for your new project, then Oracle Fusion Projects determines dates as follows:

- If tasks are defined for the source project or template, then the start date for the new project is derived from the planned start date of the earliest task.
- If no tasks are defined for the source project or template, then the start date for the new project is the current date.

If you do enter a project start date, then Oracle Fusion Projects shifts the task dates based on the difference between the dates of the source and the dates you specify for the new project. Consider the following example, where the task start and finish dates are pushed out 31 days based on the specified start dates:

Date Type	Source Template Date	Date Entered in Project Details	Resulting Project Date
Project Start	May 01, 2010	June 01, 2010	June 01, 2010
Project Finish	May 31, 2010	NA	July 01, 2010
Task Start	May 02, 2010	NA	June 02, 2010
Task Finish	May 31, 2010	NA	July 01, 2010

If you enter both a project start and finish date and the duration of the project is reduced, then task dates that are past the project finish date are truncated, as highlighted in the example in the following table.

Date Type	Source Template Date	Date Entered in Project Details	Resulting Project Date
Project Start	May 01, 2010	June 01, 2010	June 01, 2010
Project Finish	May 31, 2010	June 15, 2010	June 15, 2010
Task 1 Start	May 01, 2010	NA	June 01, 2010
Task 1 Finish	May 15, 2010	NA	June 15, 2010
Task 2 Start	May 02, 2010	NA	June 02, 2010
Task 2 Finish	May 31, 2010	NA	June 15, 2010

FAQs for Define Project

What's a project set?

A personalized set of projects grouped for searching or reporting purposes. Project sets can be shared with others.

How can I add projects to a project set?

From the project list, you can add projects to any existing project set that you own or that is shared by others.

Why can't I view all projects in a shared project set?

On a shared project set, you can only view projects to which you have access. For example, if you share a project set that contains ten projects, and a coworker is a team member on seven of them, then the coworker sees only those seven projects when viewing the project set.

What's the difference between the project list and a project set?

The project list is a collection of projects that are filtered and displayed based on project search criteria such as project manager, customer, business unit, or project set. For example, the default saved search **My Projects** displays all projects on which you have a role and which are not closed.

A project set is a collection of projects that you group based on your business requirements. For example, you can add projects (to which you have access) to a project set even if the projects have different project managers or customers, or are created for a particular organization or business unit.

You cannot share saved project list searches that you create with other users.

You can share a project set with other users.

What projects appear when I view my projects on the project list?

The **My Projects** saved search displays all projects that are not in closed status and on which you have a role, for example, as a project manager or other team member.

Can I change the organization that owns a project or task?

Yes. You can change the project or task owning organization at any time, unless unprocessed transactions exist for the project. You can also simultaneously reprocess transactions for the affected tasks. Note that the project or task owning organization has no effective as-of date. Therefore, the new organization applies for the duration of the project.

How are project space roles mapped to project team members?

Each project team member is automatically assigned a project space role on the associated project space. The project manager is assigned the role of project space moderator. All other team members are project space participants.

Project space moderators can manually add additional participants or modify participant access, if required.

Define Project: Manage Project Options

Project Date Cascade Options: Explained

Use cascade options to determine whether your changes to project dates cascade to tasks.

You can select one of the following options:

- Do not cascade date changes: Both start and finish dates are editable. However, you must ensure the following:
 - The project start date is not later than the earliest task date.
 - The project finish date is not earlier than the latest task date.
- Cascade change to the start date: You can edit only the project start date.
- Cascade change to the finish date: You can edit only the project finish date.

Restriction

If you have selected to roll up planned dates for tasks or are using an external application for scheduling, then you cannot modify the project start or finish dates.

Cascading Changes to Transaction Dates

If you have selected to synchronize transaction dates with planned dates, then transaction dates are updated automatically when date changes cascade to tasks.

Note

If transactions are already charged to a task, then you must ensure that your new summary dates are before or after the transaction date (depending on whether you are cascading start or finish dates.)

Cascading Changes to Assignment Dates

If you have selected to synchronize task assignment dates with task dates, then your changes to project dates will cascade to assignments automatically. Otherwise, you must ensure that all task assignment dates are within the range of the new task dates.

Project Customers: Explained

Project customers are internal or external parties who are billed for work performed on a project.

You associate customers with projects in two ways:

- Select project customers when editing the project definition.
- Associate the project or task with a contract.

Project Customers

Specifying one or more project customers during the initial or proposal stages can help you track customers until a contract is signed and associated with the project.

Until a contract is available, project customers are displayed on the project list and the project overview.

Note

If you specify multiple project customers, then only the first customer appears on the project list.

Contract Customers

After a project is associated with a contract, the bill-to customer specified on the contract bill plan appears on the project list. If the project is associated with multiple contract lines that have different customers, then the first customer appears.

The project overview displays all customers linked to the project through associated contracts.

Using Class Categories: Examples

Class categories and class codes enable you to classify projects. The following example illustrates how you can use project classifications.

Scenario

InFusion Corporation designs and implements heavy engineering projects for government and private customers. Because InFusion Corporation maintains

a diverse portfolio of contracts, the ability to track sector and funding is very important to corporate management.

Therefore, the organization classifies projects by market sector and funding source. The following table describes the two class categories used.

Class Category	Assign to All Projects	One Class Code per Project	Enter Percentage for Class Codes	Description
Market Sector	Yes	Yes	No	Market sector in which project work takes place. A single class code must be provided on the project for the class category.
Funding Source	Yes	No	Yes	Source of funding for project. At least one class code must be provided on the project for the class category. Percentages must be provided to indicate contribution for each source.

The following table describes the class codes available for the categories specified above.

Class Category	Class Code	Description
Funding Source	Private	Project funded by private organizations
Funding Source	Federal	Project funded by the federal government
Funding Source	State or Local	Project funded by a state or local government
Funding Source	Foreign	Project funded by a foreign government
Market Sector	Utilities	Project involves utility or power plant construction
Market Sector	Waste	Project involves waste disposal or recycling facility constructions
Market Sector	Mechanical	Project involves mechanical design and engineering work
Market Sector	Structural	Project involves structural design and engineering work

InFusion management can easily assess projects based on the above class categories and codes.

For example, assume you specify a class category Funding Source on your project. With this category, you select two class codes: Private and Federal. If you assign 30 percent to Private and 70 percent to Federal, then you indicate the proportion of funding received for your project from the two sources.

On the other hand, because you must select a single market sector, you indicate whether project work involves utilities, waste, mechanical, or structural activities.

FAQs for Define Project: Manage Project Options

Can project dates be outside of the earliest task start date and latest task end date?

Yes. If you select not to automatically roll up task dates (at the project plan type level), then project start and finish dates are editable and need not coincide with the earliest start date and latest finish dates of constituent tasks.

If task dates roll up the task hierarchy, then project dates are not editable and always coincide with the earliest task start date and latest task finish date.

What's a partner organization?

An external party, defined in the partner management application, that collaborates on your project.

For example, InFusion Corporation is working on a project for Business World. InFusion Corporation hires ABC Consulting as functional consultants. In the project created to track costs and work, the project manager for InFusion Corporation can enter ABC Consulting as a partner organization.

What's the difference between a job title and a project role?

Job titles represent the function persons fulfill within an organization and their position within a reporting hierarchy. For example, your organization may have designations or job titles such as software developer, sales representative, or accounts manager.

Project roles represent either a requirement or an assignment on a particular project, for example, project manager. Project roles may differ from project to project.

What's a default planning resource breakdown structure?

A planning resource breakdown structure consisting of one resource format (resource class) with four associated planning resources: Labor, Equipment, Material Items, and Financial Resources.

A default planning resource breakdown structure is created automatically for each project unit. When you create a project template, it is selected as the primary planning resource breakdown structure. You can designate other planning resource breakdown structures as primary if required. However, you cannot remove the default planning resource breakdown structure from the project template or project.

What's a primary resource breakdown structure?

A planning resource breakdown structure that is selected as the primary at the project template or project level. The primary planning resource breakdown structure is used for project planning.

When you create a project template, the default planning resource breakdown structure for the project unit is automatically added and set as primary. You can add additional planning resource breakdown structures to the template and set any one of them as primary. Projects inherit planning resource breakdown structures from the associated template. As with templates, you can add or remove planning resource breakdown structures and change the primary designation as required.

Can I edit resource breakdown structures on a project?

Yes. If a planning resource breakdown structure allows resource changes at the project level, then you can add resources, though not resource formats, while working on the project plan or a financial plan.

You can also determine whether a planning resource breakdown structure is used both for planning and reporting. However, you cannot make any other changes at the project level.

What's the difference between a planning resource breakdown structure, billing resource breakdown structure, and a reporting resource breakdown structure?

Planning resource breakdown structures provide a list of resource formats and associated planning resources that you can use for project and financial planning, and optionally, project reporting.

Billing resource breakdown structures are similar in organization to planning resource breakdown structures. However, only two predefined billing resource breakdown structures exist and they provide a restricted set of implementation-defined resource formats and billing resources that are used for invoicing and recognizing revenue for contracts.

Reporting resource breakdown structures provide a resource hierarchy consisting of resources, resource types, and other resource groupings, which is used for reporting on planning and actual amounts on a project. Also, unlike planning and billing resource breakdown structures, you can use reporting resource breakdown structures in allocation rules to determine the allocation source and basis amounts.

Why do I specify a percentage for a class category and class code combination?

If you can associate multiple class codes with a class category, then specifying a percentage enables you to create reports based on relative values for each code.

For example, assume you specify a class category Funding Source on your project. With this category, you select two class codes: Private and Federal. If you assign 30 percent to Private and 70 percent to Federal, then you indicate the proportion of funding received for your project from the two sources.

Define Project: Manage Transaction Controls

Transaction Controls: Explained

Define transaction controls to specify the types of transactions that are chargeable or nonchargeable for projects and tasks. Use transaction controls to configure your projects and tasks to allow only charges that you expect or plan. You can also define which items are billable and nonbillable on your projects that are enabled for billing. For capital projects, you can define which items are capitalizable and noncapitalizable.

You create transaction controls by configuring the following components:

- Expenditure category
- Expenditure type
- Nonlabor resource
- Person
- Job and organization for the person
- Person type
- Chargeable status
- Billable or Capitalizable status
- From and To dates

You can create any combination of transaction controls that you want; for example, you can create a transaction control for a specific person and expenditure type, or you can create a combination for a person, expenditure type, and nonlabor resource. You also specify the date range to which each transaction control applies. If you do not enter transaction controls, you can charge expenditure items from any person, expenditure category, expenditure type, and nonlabor resource to all lowest tasks on the project.

Chargeable Status

You can further control charges for each transaction control record by specifying whether to allow charges. The default value is to allow charges.

You usually select Chargeable when you are using inclusive transaction controls. For example, if you wanted to allow people to charge only labor to your project, you would define a transaction control with the Labor expenditure category, and allow charges to the project or task.

You usually do not select Chargeable when you are using exclusive transaction controls because exclusive transaction controls list the exceptions to chargeable transactions.

System Person Type

You can use this control to specify whether transactions incurred by employees, contingent workers (contractors), or both are chargeable.

The validation rules for system person type controls are described in the following table.

Transaction Control Type	System Person Type	Validation Rule
Inclusive	No value	Transactions incurred by employees and contingent workers are not chargeable.
Inclusive	Employee	Only transactions incurred by employees are chargeable.
Inclusive	Contingent worker	Only transactions incurred by contingent workers are chargeable.
Exclusive	No value	Transactions incurred by employees and contingent workers are not chargeable.
Exclusive	Employee	Transactions incurred by employees are not chargeable.
Exclusive	Contingent worker	Transactions incurred by contingent workers are not chargeable.

Billable and Capitalizable Status

You can define billable transactions for billable projects and capitalizable transactions for capital projects by selecting the billable or capitalizable option. You can choose between the options of **No** or **Task Level**. Select **No** if you want the charges to be nonbillable or noncapitalizable. Select **Task Level** if you want the billable or capitalizable status to default from the task to which the item is charged.

You define the billable or capitalizable status for a task in the Task Details.

Note

The billable or capitalizable status of an individual transaction takes precedence over the billable or capitalizable status of a task.

From and To Dates

You can define transactions as chargeable for a given date range by entering a From Date and To Date for each transaction control record.

Expenditure Item Chargeability: How It Is Determined

Oracle Fusion Projects checks all levels of chargeable controls when you try to charge a transaction to a project. The check is performed when you save the record.

Oracle Fusion Projects checks the chargeable status when you enter a new cost transaction or transfer expenditure items to another project or task.

Settings That Affect Chargeable Status

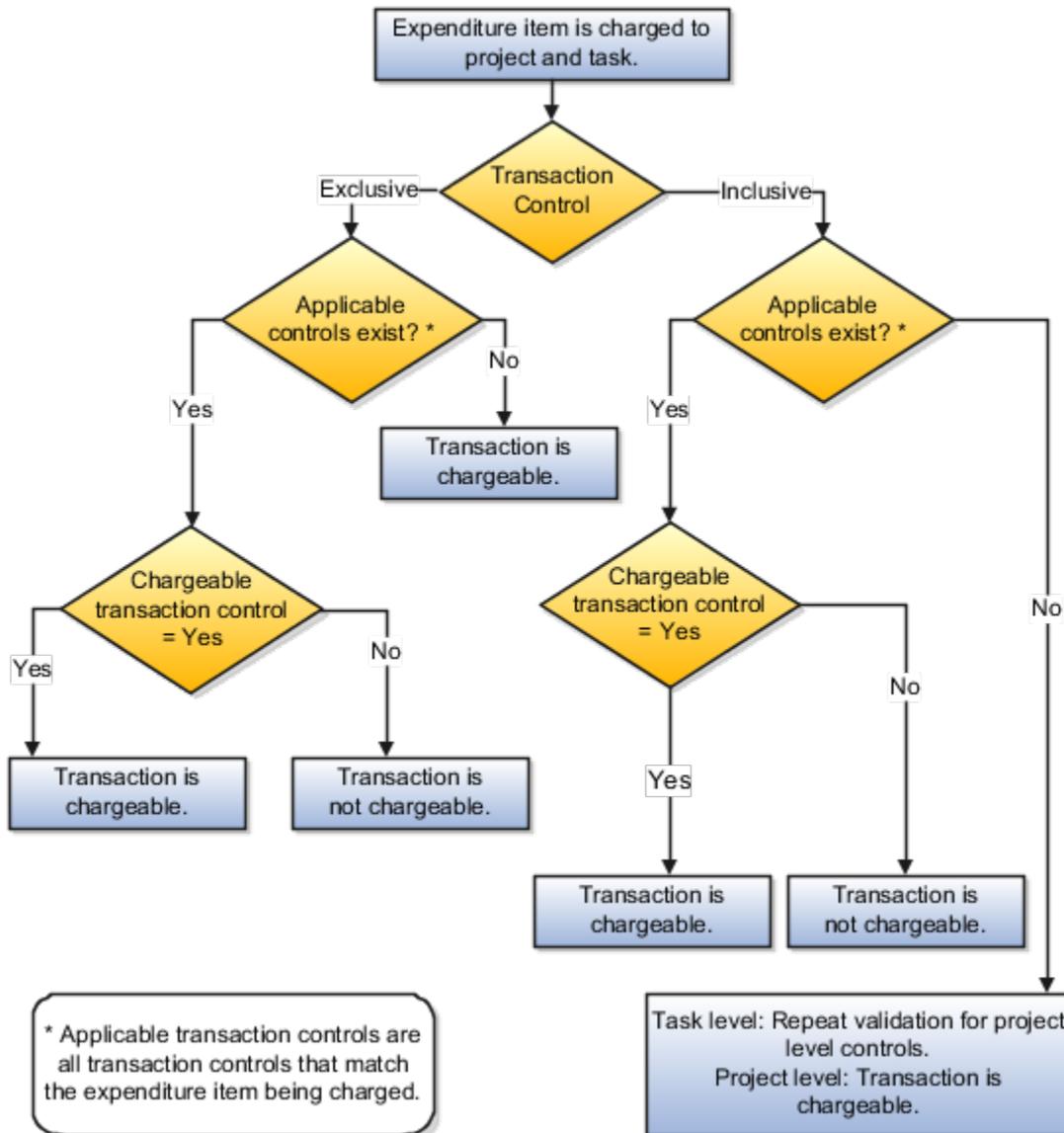
Use the exclusive and inclusive transaction control option to set the chargeable status for all expenditures charged to the project.

Inclusive transaction controls prevent all charges to a project or task except the charges you specifically allow. Specify the types of expenditures that you want to be chargeable and enable the **Chargeable** option.

Exclusive transaction controls allow all charges to a project or task by default. Specify the types of expenditures that do not want charged to the project or task.

How Chargeable Status Is Determined

The following illustration shows the steps Oracle Fusion Projects uses to determine the chargeable status of an expenditure item.



If the inclusive option is selected and applicable transaction controls do not exist, then the transaction is not chargeable. If applicable controls do exist, then

the application checks whether the transaction controls allow charges. If the **Chargeable** check box is selected for an applicable control, then the transaction is chargeable. If the **Chargeable** check box is not selected, then the transaction is not chargeable.

If the exclusive option is selected and there are no applicable controls, then the transaction is chargeable. If applicable controls do exist, then the application checks whether the transaction controls allow charges. If the **Chargeable** check box is selected for an applicable control, then the transaction is chargeable. If the **Chargeable** check box is not selected, then the transaction is not chargeable.

FAQs for Define Project: Manage Transaction Controls

What's the difference between exclusive and inclusive transaction controls?

Exclusive transaction controls allow all charges to a project or task by default. You specify the criteria, for example, expenditure category, expenditure types, and organization, to define which expenditures are not chargeable to projects or tasks.

Inclusive transaction controls prevent all charges to a project or task except the charges you specifically allow. You specify the types of expenditures that are chargeable.

Can I override the billable status of an expenditure item?

Yes. Change the billable status of an expenditure item on an invoice, or in the Manage Expenditure Items page.

Define Project: Manage Asset Assignment and Capitalization Options

Asset Cost Allocation Methods: Explained

The asset cost allocation method determines how indirect or common costs incurred on a project are allocated to multiple assets.

You can specify an asset cost allocation method to enable Oracle Fusion Projects to automatically allocate unassigned asset lines and common costs across multiple assets. Unassigned asset lines typically occur when more than one asset is assigned to an asset grouping level.

Project templates and projects inherit a default asset cost allocation method from the associated project type. You can override the default at the project level. If you use capital events to allocate costs, then you can also override the asset cost allocation method at the event level.

Asset Cost Allocation Methods

The following table describes the available asset cost allocation methods.

Method	Basis of Cost Allocation
Actual Units	Number of units defined for each asset
Client Extension	Rules defined specifically for your organization
Current Cost	Construction-in-process (CIP) cost of each asset
Estimated Cost	Estimated cost of each asset
Standard Unit Cost	Combination of the standard unit cost and the number of units defined for each asset
Spread Evenly	Equal allocation of cost to each asset

Managing Capitalized Interest: Points to Consider

Capitalized interest is an estimate of the interest cost incurred when you invest in long-term capital projects.

Subject to accounting rules and regulatory guidelines, you can capitalize interest as part of the total cost of acquiring and constructing assets that require an extended period to be ready for use. To support this requirement, Oracle Fusion Projects enables you to calculate and record capitalized interest for capital projects. You can recognize multiple types of capital interest on your projects. For example, you can calculate capitalized interest separately for interest types such as debt and equity.

Oracle Fusion Projects calculates capitalized interest on open construction-in-process (CIP) amounts. You can spread the cost for one expenditure item across multiple assets. If you have previously capitalized any of the assets to which the cost is allocated, then the total item cost is excluded from the interest calculation.

The process for generating and recording capitalized interest transactions includes the following tasks:

- Defining rates names and rate schedules
- Setting up capital projects for calculating capitalized interest
- Generating, reviewing, and releasing capitalized interest expenditure batches

Defining Rate Names and Rate Schedules

Define capitalized interest rate names to represent each interest type that you want to capitalize. Create capitalized interest rate schedules to define rates of interest calculation for each organization.

Setting Up Capital Projects for Calculating Capitalized Interest

To correctly calculate capitalized interest, ensure that correct capitalization options are defined at the project type, project template, and project levels. At the project level, verify the following:

- The project allows capitalized interest calculation

- The appropriate capital interest rate schedule and capitalized interest stop date are specified

Generating, Reviewing, and Releasing Capitalized Interest Expenditure Batches

You can generate capitalized interest transactions periodically to calculate capitalized interest and generate transactions for eligible projects and tasks. You can review the capitalized interest batches, and delete or reverse them if required.

Important

Before generating capitalized interest batches for a project, you must ensure that the project status allows capitalized interest calculation.

Setting Up Capital Projects for Calculating Capitalized Interest: Points to Consider

To correctly calculate capitalized interest, ensure that correct capitalization options are defined at the project type, project template, and project levels. At the project level, verify the following:

- The project allows capitalized interest calculation
- The appropriate capital interest rate schedule and capitalized interest stop date are specified

Allowing Capitalized Interest for a Project

Indicate whether the project is eligible for capitalized interest. By default, this option is enabled for all capital projects. However, you can update the option as required.

Selecting a Capital Interest Schedule and Capital Interest Stop Date

Capitalized interest rate schedules to define rates of interest calculation for each organization. The default interest schedule is inherited from the project type. You can override it if the project type allows schedule changes at the project level.

FAQs for Define Project: Manage Asset Assignment and Capitalization Options

What's a capital interest stop date?

Date that determines the accounting period up to which capital interest is calculated for a project or task.

For example, assume the stop date for your project is December 27, 2010 and your accounting periods are weekly. That is, the stop date falls in the fourth

period of December. In such a case, capital interest is calculated only up to the third period in December 2010.

Define Project: Manage Reporting Options

Summarized Financial Plan Types: Explained

Summarized financial plan types are financial plan types whose previous and current approved versions (for forecasts) or original and current baseline versions (for budgets) are used in summarization of project performance data.

Particular financial plan types are included in summarization by default, while you must manually select others.

Default Financial Plan Types

Approved forecast and baseline budget versions of the following financial plan types are automatically included in summarization of project performance data:

- Approved Revenue Budget
- Approved Cost Budget
- Primary Revenue Forecast
- Primary Cost Forecast

Important

A budget or forecast financial plan type may support both cost and revenue in one version.

User-Selected Financial Plan Types

Apart from the default financial plan types, you can include up to four others in summarization of project performance data.

Tip

You can include a financial plan type before it is used on a project for creating a version.

You can replace a user-selected financial plan type until project performance data is summarized for reporting. After that, you can only disable the financial plan type to exclude it from further summarization.

Performance Trend Indicators: Explained

Project performance trend indicators show whether project performance is favorable or unfavorable.

When you sort rows in a table by the trend indicator, the order is based on the sort order specified on the trend indicator definition. You can change the default sort order. For example, you can specify that KPIs or projects with an unfavorable trend appear at the top of the list.

The following are the attributes in the trend indicator setup.

Name

Displays the predefined trend indicator name that can be viewed when you move the cursor over the trend indicator image. The following are the predefined trend indicator names:

- Up, favorable
- Up, unfavorable
- Down, favorable
- Down, unfavorable
- Unchanged

Description

Describes what the trend indicator signifies when it appears against a project or a KPI.

Modifying Sort Order

The sort order of a trend indicator is a number between 1 and 5. If the sort order of a trend indicator is set to 1, the KPI or project appears at the top of the list. Similarly, if the sort order of a trend indicator is set to 5, the KPI or project appears at the bottom of the list. For example, if you want the KPIs or projects that have an unfavorable trend to appear at the top of the table, you can change the sort order of the **Up, unfavorable** and **Down, unfavorable** trend indicators to 1 and 2.

Image Preview

Displays a preview of the image that appears for each trend indicator.

KPI Components: How They Work Together

A key performance indicator (KPI) enables you to define thresholds of possible values for a performance measure for any project in a project unit. During KPI definition, you associate a performance status indicator with each threshold level. When you generate KPI values, the application compares the value against the thresholds defined for the KPI. If the value falls within any of the defined threshold levels, then the application associates the status indicator of that

threshold with the performance measure. The following are the KPI components we will discuss:

- Performance Measure
- Performance Status Indicator
- Threshold Level
- Trend Indicator
- Tolerance Percentage
- Project Performance Data
- Project Unit

Performance Measure

Oracle Fusion Project Performance Reporting provides both fundamental and derived measures that present an objective insight into the performance of the project. In addition, you can create custom measures to meet the unique needs of your organization. Use any delivered or custom performance measure to create a KPI.

Performance measures are available in the areas of budgets and forecasts, billing and revenue, costs, effort, margin, capitalization, and more. Following are examples of predefined performance measures:

- EAC Budget Cost (the estimate at completion burdened cost from the current baseline budget)
- ITD Forecast Revenue Variance (the inception-to-date current baseline budget revenue - current approved forecast revenue)
- Prior Period Margin Percentage Variance (the prior period current baseline budget margin percentage - actual margin percentage)

A performance measure is associated with a time dimension. The following time dimensions are available:

- Estimate-at-completion (EAC)
- Inception-to-date (ITD)
- Prior Period
- Period-to-date (PTD)
- Quarter-to-date (QTD)
- Year-to-date (YTD)

A particular performance measure set, such as Budget Cost, can have as many as six performance measures: one for each time dimension.

A performance measure can be expressed as a currency amount, as a percentage, or in time units such as hours when effort is measured. If the KPI is used on projects that use different currencies, you can enter different thresholds levels for each currency you need.

Performance Status Indicator

Performance status indicators give an immediate picture of the status of a project, such as critical, at risk, and on track. Icons with unique colors and shapes indicate the status and severity of performance. During KPI definition, you first associate status indicators with performance statuses:

- Critical
- Severe
- At risk
- On track
- Ahead

You then associate these statuses with threshold levels. When KPI values are generated for a project, each value is compared to the defined thresholds and the corresponding status indicator for the KPI appears on project performance reports.

A status can identify negative performance so that you can take the appropriate actions to prevent or quickly resolve problems. Conversely, a status can identify positive performance to help you track expected or excellent performance.

Threshold Level

During KPI definition, you define threshold levels to cover all possible values for a KPI. If a KPI value exceeds the range of values defined for the KPI threshold levels, the closest threshold is used to determine the KPI status. For example, if a KPI value falls below the lowest threshold level, the application assigns the status of the lowest threshold level to the KPI.

A status indicator can be associated with more than one threshold level. For example, both underutilization and overutilization of resources can indicate a critical performance status.

Trend Indicator

Performance trend indicators give an immediate picture of improving or worsening KPI value trends on the project. Icons with unique colors and shapes indicate whether an increasing performance trend has a positive or negative impact. For example, an increase in nonbillable costs is considered unfavorable to organizations that are able to bill costs to their clients. In this example, the performance trend indicator will show a negative impact.

Tolerance Percentage

A tolerance percentage is used to compare the previous KPI value to the current value to show if the performance trend is increasing, decreasing, or staying the same. For example, if the tolerance percentage is 10 percent for a KPI, and the difference between the previous KPI value and current value is greater than 10 percent, then the trend is increasing. If the difference is greater than -10 percent, then the trend is decreasing. If the difference is between -10 percent and 10 percent, then the trend shows no change. A single tolerance percentage

value, such as 10 percent in this example, represents both negative and positive tolerances.

Project Performance Data

The application provides programs that extract and update transaction data and maintain project performance data. The process of generating KPI values uses this project performance data. Before you generate new KPI values, check the date that the project performance data was last generated to make sure that the data includes all transactions that may impact project performance results. Then decide if you must update project performance data before you generate KPI values. After you run these programs you will have a true picture of project performance.

When you generate KPI values, the period for which KPI values are being generated is determined by the KPI Period Determination Date. The data during that period is used to generate project performance data that will be populated on the project performance dashboard.

Note

KPIs that are enabled for use in the KPI definition are included when KPI values are generated.

Project Unit

KPIs are created for specific project units. During project unit implementation you specify whether KPIs are tracked for the project unit.

KPI Values: How They Are Generated

Key performance indicator (KPI) values are calculated when you generate KPI values. KPI values must be generated after project data is updated.

Settings That Affect KPI Values

You must specify the following parameters:

Settings	Description
KPI Period Determination Date	Set the date used to derive the project calendar and accounting calendar periods for performance measure calculations when KPI values are generated.
Replace Current KPI Values	Replace the current KPI values with the values that are generated now.
Delete Previous KPI Values	Delete the KPI values that were generated the previous time the generate KPI values process was run.
Number of Days to Retain KPI Values	Retain KPI values for the specified number of days starting from the current date before deleting previous KPI values.

For example, assume KPI values were generated on the following dates:

KPI Period Determination Date	Generation Date
October 29, 2010	November 12, 2010
September 30, 2010	October 15, 2010

If you generate KPI values on November 18, 2010 and select to replace the current KPI values, the KPI values generated on November 12, 2010 are deleted and replaced with KPI values generated on November 18, 2010. You must select to replace the current KPI values for a given period if you want to retain one set of KPI values and review KPI values during the period.

You can also delete KPI values that are not required for reporting. The options, **Delete Previous KPI Values** and **Number of Days to Retain KPI Values**, enable you to delete KPI values that were generated prior to a specific number of days. For example, if today is November 18, and you want to remove all KPI values generated in the previous year, you must select to delete previous KPI values, and set **Number of Days to Retain KPI Values** to 322. All KPI values created since January 1, 2010 are retained and KPI values generated before that period are deleted.

Important

Do not delete previous KPI values in the following cases:

- When you are generating KPI values for the first time in a period.
- If you want to see trending information for the KPIs over the life of the project.

When you generate KPI values, you can select to receive a notification by e-mail by enabling workflow notifications, once KPI values are generated.

How KPI Values Are Generated

KPI values are calculated based on the value of the performance measure associated with the project. When you generate KPI values, the KPI period determination date is compared to the current date to determine the period. KPI values are generated for the period based on the options in the key performance indicator definition. Only one set of key performance indicators is kept for a single KPI period determination date.

For example, KPI values are generated for a KPI period determination date of August 24 at 8:15 a.m. for Projects A and B. Then KPI values are generated for a KPI period determination date of August 24 at 10:45 a.m. just for Project B. The KPI values for Project B generated at 8:15 a.m. are deleted, but KPIs belonging to Project A are retained.

Note

To keep historical information, use a unique KPI period determination date.

Performance Status for Tasks and Resources: How It Is Calculated

The application calculates performance status for individual tasks and resources for percentage-based key performance indicator (KPI) values.

Settings That Affect Performance Status for Tasks and Resources

When you enable the **Track by Task** and **Track by Resource** options on the project definition, a status indicator appears for the task and resource on project performance reports when the individual KPI value is not on track. Enabling this option helps you easily identify the troubled tasks and resources in a hierarchical task and resource structure in a project.

Note

You can track performance by task and resource only for KPI values that are expressed as a percentage.

How Performance Status for Tasks and Resources Are Calculated

Performance status is individually calculated for all levels of the task and resource hierarchy based on the KPI threshold definition. KPI threshold values are defined when KPIs are created. Based on the threshold values defined, the status for tasks and resources are calculated for the KPI values that are based on a percentage. This example shows how the status of tasks and resources are calculated. For example, assume that the KPI named ITD Nonbillable Cost as a Percentage of Total Cost has the following threshold definition.

Threshold Level	Threshold Range From	Threshold Range To	Status Indicator
1	-99.00%	-12.00%	Critical
2	-11.99%	-5.00%	At Risk
3	-4.99%	4.99%	On Track
4	5.00%	11.9%	At Risk
5	12.00%	99%	Critical

Example of System Implementation Task

In the example, we have a System Implementation task containing six subtasks.

Task	Task	ITD Nonbillable Cost	ITD Billable Cost	ITD Total Cost	ITD Nonbillable Cost as a Percentage of Total Cost
System Implementation		20,000	105,000	125,000	16.00%

	Planning	0	21,000	21,000	0%
	Definition	6,000	51,000	57,000	10.53%
	Build	15,000	33,000	48,000	31.25%
	Test	0	0	0	0%
	Release	0	0	0	0%
	Support	0	0	0	0%

The ITD Nonbillable Cost as a Percentage of Total Cost KPI value for the Definition task is 10.53% (6,000/57,000). Based on the threshold levels defined for this KPI, the Definition task shows the At Risk status indicator.

Example of a Consulting Resource Breakdown Structure

In another example, the Consulting resource breakdown structure contains a Labor resource. Labor is a parent to the Project Manager resource, which is a parent to resources Max Martin, Robert Altima, and Fred Jones. The ITD Nonbillable Cost as a Percentage of Total Cost KPI value for Labor is 12.97% (15,700.00/121,015.00). The ITD Nonbillable Cost as a Percentage of Total Cost KPI value for Fred Jones is 0%. Because the KPI value for each row in the hierarchical structure is calculated separately, Labor has a status indicator of Critical and Fred Jones does not have a status indicator.

Resource	Resource	Resource	Resource	ITD Nonbillable Cost	ITD Billable Cost	ITD Total Cost	ITD Nonbillable Cost as a Percentage of Total Cost
Consulting				19,776	105,315	125,091	15.81%
	Labor			15,700	105,315	121,015	12.97%
		Project Manager		15,700	50,000	65,700	23.90%
			Max Martin	2,800	14,000	16,800	16.67%
			Robert Altima	8,400	0	8,400	100.00%
			Fred Jones	0	36,000	36,000	0%

If you track tasks and resources for a project, each task and resource with a KPI value that is not on track is designated as an exception. The KPI value for the project does not impact the exception designation for individual tasks and resources. For example, if a task has a Critical status indicator based on the KPI value and threshold definition, it is designated as an exception even if the project has an On Track status indicator.

Important

Task and resource performance status is based on the latest summarized data, which may not be the same as the summarized data used to generate the latest KPI values.

FAQs for Define Project: Manage Reporting Options

Can I select a financial plan type for summarization before creating a version of it on a project?

Yes.

Can I replace a financial plan type that is enabled for summarization on a project?

Yes. You can replace or disable any user-selected financial plan type before project performance data is summarized for reporting.

What happens if I use period-to-date amount-based measures for large projects?

Period-to-date amount-based measures use the same threshold values for all phases of the project. This may result in a spike in the key performance indicator (KPI) values if the amounts used to calculate the KPI values vary widely throughout the project. To avoid this problem, consider using different sets of threshold values for amount-based KPIs defined in small and large projects.

What happens if I attach different KPIs to a project for the same measure?

Overall project health is based on the most severe KPI status even if you have more than one KPI that uses the same performance measure.

For example, assume the Financial category contains three KPIs, and two of those KPIs use the same performance measure with two different threshold definitions. If the KPI status falls in the critical and on track ranges for the two KPIs that use the same performance measure, and the KPI status is on track for the third KPI, then the overall project health is critical. If the KPI status is on track for the two KPIs that use the same performance measure, and is critical for the third KPI, the overall project health is still critical.

What's the difference between key performance indicator and KPI category?

Key performance indicators (KPIs) measure how well an organization or individual performs an operational, tactical, or strategic activity that is critical for the current and future success of the organization. Examples are: Period-to-Date (PTD) Actual Spent Labor Effort Percentage, PTD Actual Spent Equipment Effort Percentage, and PTD Actual Margin Percentage.

A KPI category is a group of KPIs that belong to a specific performance area. Examples are: cost, profitability, financial, and schedule.

From the examples above, PTD Actual Margin Percentage must be in the KPI category of profitability.

Manage Project Plan Tasks and Task Assignments

Task and Assignment Date Settings: How They Work Together

Task and task assignment date options are selected when specifying project planning options. Task and assignment date settings interact to determine how planned and transaction dates are set for tasks and how dates are set for task assignments.

Rolling Up Planned Dates for Tasks

You can select to roll planned dates for lowest-level subtasks up the task hierarchy. In this case, planned dates for summary tasks, top tasks, and the project are not editable. Edit planned dates for lowest-level tasks as required. Updated dates roll up the hierarchy to ensure that planned dates at the summary and project level are equal to the earliest start date and the latest end date of lower-level tasks.

Conversely, if you select not to roll up planned dates, lowest-level subtask dates are editable but must be within the planned date range for summary tasks and the project. You can also edit project or summary task dates as required.

Synchronizing Task Transaction Dates with Planned Dates

If you select to synchronize transaction dates with planned dates, then task transaction dates are not editable. Transaction dates always match task planned dates, plus or minus the number of days specified as a date adjustment buffer.

Tip

Specify a positive buffer value to indicate the number of days before the planned start date and the number of days after the planned finish date that a transaction can be charged to a task. Conversely, specify a negative buffer value to indicate the number of days after the planned start date and the number of days before the planned finish date that a transaction can be charged to a task. In other words, when specifying a negative buffer, transaction dates are within the range of the planned dates.

If you select not to synchronize transaction dates with planned dates, then transaction dates are blank by default and can be edited as required. Transaction dates entered at the summary-task level are used as the default transaction dates for tasks at lower levels. Transaction dates specified for subtasks must be within the transaction dates for the summary task. If none of the summary tasks in the

hierarchy have transaction dates, then the new transaction date must be within the project date range.

You can modify the date synchronization option until you charge transactions to a task. Implications of changing between options are as follows:

- Deselected to selected: Existing transaction dates are replaced with dates calculated based on task planned dates plus or minus the date adjustment buffer.
- Selected to deselected: Existing transaction dates can be edited. New tasks have blank transaction dates that are editable. Existing transaction dates outside the project dates are cleared.

Setting Task Assignment Dates Using Planned Dates for Tasks

If you select to base task assignment dates on task planned dates, task assignments span the entire task duration. Task assignment dates are not editable.

Note

You can override this option for individual task assignments.

Task Assignment Period Amounts: Explained

Depending on the calendar type selected on the associated project plan type, you can enter planned amounts for the entire project duration or for specific periods from the accounting or the project accounting calendar. If you select a calendar, the assignment spread curve is used to spread the planned amounts you entered for a task assignment across all periods within the assignment duration.

Editing and Calculating Planned Amounts

You can edit planned quantity for all resources and rates for rate-based resources. After you edit amounts for one period, you can optionally distribute values across all open periods based on the assignment spread curve.

You can also clear planned quantities and amounts for a selected period. When you calculate and save your changes, total quantity and cost values for the task assignment are updated accordingly.

If the project plan supports planning in multiple transaction currencies, then you can edit project and project ledger currency conversion attributes for a selected period. Cost amounts in project currency and project ledger currency are updated when you calculate and save your changes.

Project Plan Baseline: How It Is Set

You can set a baseline for your project plan as often as required. Each time you set a baseline, baseline information is overwritten by the current planned values.

Restriction

You cannot set a baseline if the project plan has errors.

Settings That Affect Baseline Creation

When you set a baseline for your project plan, planned amounts are copied over as baseline amounts without changes.

If you select to automatically roll up planned dates for tasks, then subtask and summary task planned dates are copied, without change, as baseline dates. However, if planned dates are not automatically rolled up the task hierarchy, then summary task dates may not match the dates of their earliest and latest subtasks. To avoid a mismatch, the application revises the planned dates for summary tasks based on subtask dates.

For example, consider the planned dates in the following task structure:

Task 1: January 1, 2010 to December 31, 2010

- Task 1.1: January 1, 2010 to February 28, 2010
- Task 1.2: March 1, 2010 to March 31, 2010

When you set a baseline for the project plan, the planned finish date for Task 1 is changed from December 31, 2010 to March 31, 2010 before being copied as the baseline finish date.

Important

When setting a baseline for your project plan, project start and end dates do not change because project dates can be beyond the dates for the earliest and latest top task dates.

How a Project Plan Baseline Is Set

When you set a baseline for your project plan, the application saves the following current planned values as baseline information at the task and task assignment level:

- Planned dates
- Quantity or effort
- Raw and burdened cost in transaction currency, project currency, and project ledger currency
- Average (standard) raw and burdened cost rates for the task assignment
- Standard raw and burdened cost rates for each period

Burden Costs: How They Are Calculated

Burdening provides a buildup of raw and burden costs to represent the total cost of doing business accurately. You can calculate burdened costs as a buildup of costs using a precedence of multipliers. Taking the raw cost, Oracle Fusion Project Costing performs a buildup of burden costs on raw costs to provide a true representation of costs. Using burdening, you can perform internal costing, revenue accrual, and billing for any type of burdened costs that your company applies to raw costs.

Settings That Affect Burden Cost Calculation Processing

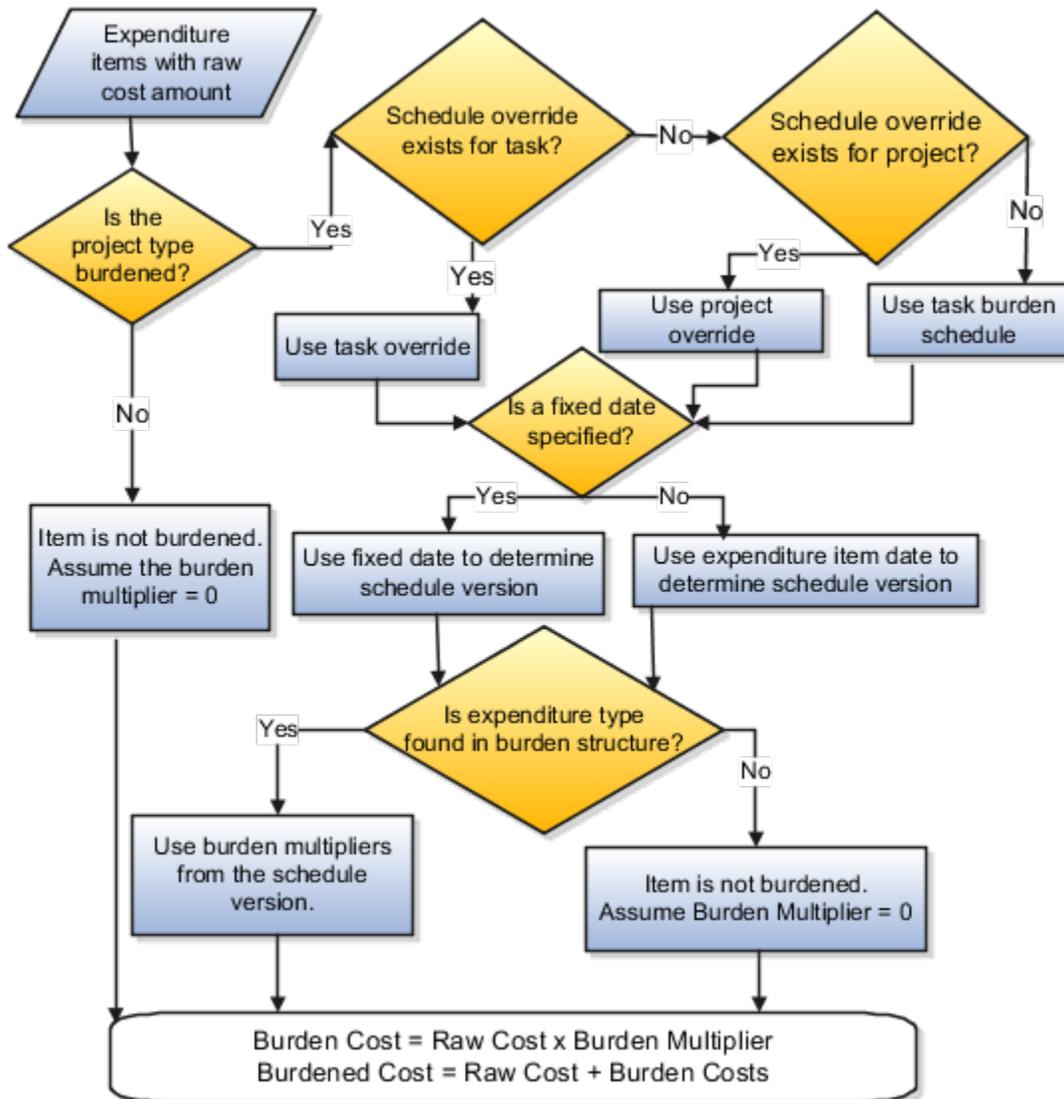
You define the projects that need to be burdened by enabling project types for burdening. When you specify that a project type is burdened, you must then specify the burden schedule to be used. The burden schedule stores the burden multipliers and indicates the transactions to be burdened, based on cost bases defined in the burden structure. You specify the expenditure types that are

included in each cost base. With burdening, you can use an unlimited number of burden cost codes, easily revise burden schedules, and retroactively adjust multipliers. You can define different burden schedules for costing, revenue, and billing purposes.

How Burden Costs Are Calculated

The calculation of burden cost includes the following processing decision logic and calculations:

The following is a diagram of the burden cost calculation process and its explanation:



1. Expenditure items with a raw cost amount are selected for processing.
2. The process determines if the related project type of the expenditure item is defined for burdening.
3. If the project type is enabled for burdening, then the process determines the burden schedule to be used.

4. If the project type is not enabled for burdening, then the expenditure item is not burdened. The process assumes the burden multiplier is zero; therefore, burden cost is zero and thus burdened cost equals raw cost.
5. To determine which burden multiplier to use, the process determines if there is a burden schedule override for the expenditure.
6. If a burden schedule override exists, then the process uses the task burden schedule override on the associated task.
7. If no task burden schedule override exists on the associated task, then the process uses the project burden schedule override on the associated project.
8. If there are no burden schedule overrides, the process determines the burden schedule to use for burden cost calculations in the following order:
 - a. Burden schedule assigned at the task level
 - b. Burden schedule assigned at the project level
9. The process checks if a fixed date is specified for burdening. If yes, it uses the fixed date to determine the schedule version.
10. If fixed date is not specified, then the process uses the expenditure item to determine the burden schedule version.
11. After a schedule version is determined, the process verifies that the expenditure type of the expenditure item is found in any of the cost bases of the selected burden schedule version.
12. If an expenditure type is excluded from all cost bases in the burden structure, then the expenditure items that use that expenditure type are not burdened (burden cost equals zero, thus burdened cost equals raw cost).
13. The application calculates burden cost and burdened cost amounts according to the following calculation formulas:
 - Burden cost equals raw cost multiplied by a burden multiplier.
 - Burdened cost equals the sum of raw cost and burden costs.

Cost Buildup

The burden structure assigned to the burden schedule version determines whether calculations are additive or based on the precedence assigned to each cost code. A burden structure can be additive or precedence based.

If you have multiple burden cost codes, an additive burden structure applies each burden cost code to the raw costs in the appropriate cost base. The examples in the following tables illustrate how Oracle Fusion Projects calculates burdened cost as a buildup of raw and burden costs and how different burden structures using the same cost codes can result in different total burdened costs:

The following table shows the cost codes and multipliers for calculating burdened cost using the additive burden structure.

Cost Code	Precedence	Multiplier
Overhead	1	.10

Material Handling	1	.10
General Administrative Costs	1	.10

Cost Type	Calculation	Amount
Raw Cost	Not Applicable	1000.00
Overhead	1000.00×0.10	100.00
Material Handling	1000.00×0.10	100.00
General Administrative Costs	1000.00×0.10	100.00
Burdened Cost	$1000.00+100.00+1000.00+100.00$	1300.00

A precedence burden structure is cumulative and applies each cost code to the running total of the raw costs, burdened with all previous cost codes. The calculation applies the multiplier for the cost code with the lowest precedence number to the raw cost amount.

The calculation applies the cost code with the next lowest precedence to the subtotal of the raw cost plus the burden cost for the first multiplier. The calculation logic continues in the same way through the remaining cost codes. If two cost codes have the same precedence number, then both are applied to the same subtotal amount.

The following table shows the cost codes and multipliers for calculating burdened cost using the precedence burden structure for a nonrate-based expenditure item:

Cost Code	Precedence	Multiplier
Overhead	10	.10
Material Handling	20	.10
General Administrative Costs	30	.10

Cost Type	Calculation	Amount
Raw Cost	Not Applicable	1000.00
Overhead	1000.00×0.10	100.00
Material Handling	$(1000.00+100.00) \times 0.10$	110.00
General Administrative Costs	$(1000.00+100.00+110.00) \times 0.10$	121.00
Burdened Cost	$1000.00 +100.00 +110.00+121.00$	1331.00

Note

The order of the burden cost codes has no effect on the total burdened cost with either additive or precedence burden structures.

Resource Mapping: How It Is Calculated

The Update Mapping process matches actual costs and revenue to the latest, saved planning resources for project planning and forecasting. Summarized actual costs and revenue are recalculated for project performance reporting.

Resource Mapping Considerations

Consider these points when using the Update Mapping process:

- You can update resource mappings after you change resource formats or add resources, and save the resource breakdown structure.
- Baseline project plan values are not affected by the Update Mapping process.
- The Update Mapping process applies only if you do not allow resource changes at the project level.

Tip

If you allow resource changes at the project level, use the Update Actual Amounts action on the project plan to update the actual amounts for all tasks on the project plan. Use the process monitor to start the process to summarize project performance data for reporting.

-
- After running the Update Mapping process, regenerate forecast versions to reflect the new actual costs.

How Resource Mapping Is Calculated

You can track the cost impact of every resource that has been assigned to a project task and use the resource breakdown structure to view the breakdown of these costs. Oracle Fusion Projects associates the costs of the resources used for tasks with branches and levels in the resource breakdown structure. The process for determining the correct association is managed by rules of precedence.

Oracle Fusion Projects uses the following rules to associate cost amounts with resources:

- Select the lowest level in the resource breakdown structure to which a transaction can map.
 - If there is only one level to which the transaction maps, the cost amounts are mapped to that level.
 - If the transaction maps to more than one level, Oracle Fusion Projects sums the precedence numbers for all resource types in the branch, and gives precedence to the resource element in the branch with the lowest sum.
 - If more than one branch has the lowest precedence number at the lower level, the application uses the precedence number of the next level up.
- If the sum of precedence numbers is the same for more than one branch, precedence is given to the branch with the lowest number at the lowest level.
 - If one branch contains a user-defined resource type, precedence is given to the branch that does not contain a user-defined resource type.

Note

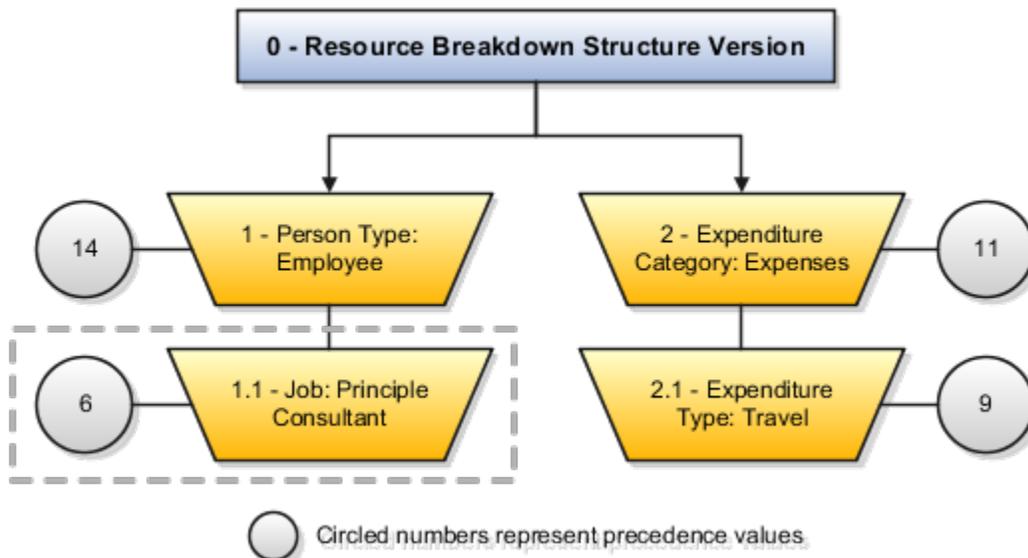
Oracle Fusion Projects gives more precedence to a lower precedence number. For example, a resource element with a precedence number of 1 is given precedence over a resource element with a precedence number of 10.

Rules of precedence are listed in the following table:

Resource Type	Precedence in Labor Resource Class	Precedence in Equipment Resource Class	Precedence in Material Items Resource Class	Precedence in Financial Resources Resource Class
Named Person	1	1	1	1
Project Nonlabor Resource	3	3	3	3
Inventory Item	5	5	5	5
Job	6	6	6	6
Item Category	8	8	8	8
Expenditure Type	9	9	9	9
Event Type	10	10	10	10
Expenditure Category	11	11	11	11
Revenue Category	12	12	12	12
Organization	13	13	15	15
System Person Type	14	14	14	14
Supplier	15	15	13	13
Resource Class	16	16	16	16

Example of Resource Mapping Using Rules of Precedence

This example illustrates that precedence is given to the branch with the lowest number at the lowest level if the sum of precedence numbers is the same for more than one branch.



In this example, a time card transaction for a principle consultant who incurs travel expenses maps to two branches.

- The first branch consists of two levels (1-Person Type: Employee and 1.1-Job: Principle Consultant). The highest level has a precedence number of 14, and the lowest level has a precedence number of 6, for a sum of 20 for the branch
- The second branch also consists of two levels (2-Expenditure Category: Expenses and 2.1-Expenditure Type: Travel). The highest level has a precedence number of 11, and the lowest level has a precedence number of 9, for a sum of 20 for the branch.

The transaction cost amount is mapped to the Job: Principle Consultant resource element because it has the lowest number (6) at the lowest level.

FAQs for Define Project Plan Tasks and Schedule

What's a planning project?

Designating a project as a planning project enables you to create task assignments and enter planning amounts, bring in summarized actual amounts into the project plan, and capture progress.

In other words, you can only perform the following activities if your project is a planning project:

- Create task assignments.
- Enter effort against tasks.
- Track project progress.
- Enable display of summarized actual amounts on the project plan.
- Use Microsoft Project integration.

Restriction

If actual costs are excluded from summarization at the project unit level, then you cannot designate projects as planning projects.

What's a work type?

A classification of actual work. For example, a professional services enterprise may define work types such as Analysis, Design, and External Training. Use work types to determine the billability of expenditure items and to classify cross-charge amounts into cost and revenue.

When you create or import expenditure items, the default work type is inherited from the associated task. Tasks, in turn, inherit work type values from parent tasks and ultimately from the project. Project types determine the default work type value for projects and project templates.

What's a baseline project plan?

Key planned information for tasks and task assignments, including dates, costs, quantity, effort, and rates, that you can save from current project plan values. Setting a baseline for a project plan does not create a new plan version. Rather, current plan information is saved in baseline columns of the current project plan.

You must set a baseline for your project plan before capturing progress. Baseline amounts determine earned value for lowest-level tasks, which in turn is used to roll up physical percent complete to summary tasks.

Baseline data cannot be deleted, and does not change until it is overwritten when you next set a baseline for the project plan.

Tip

By generating a budget version when you set a baseline for your project plan, you can maintain an historical record of past baseline data.

What happens if I generate a budget from a project plan?

Budget versions created while setting a baseline project plan are generated based on the planning options (calendar type, planning level, rates, and so on) specified in the selected financial plan type.

For example, amounts are calculated and summarized up to the planning level specified in the plan settings. If you select a financial plan type that supports revenue, corresponding amounts are calculated based on the revenue generation method specified in the generation options.

Why can't I select some financial plan types when generating a budget version while setting a baseline for the project plan?

For generating a budget when setting a baseline project plan, you can select any active budget financial plan type otherwise available for budget creation. However, some financial plan types (including the default financial plan type selected in the budget generation options of the project plan type) are unavailable for selection in the following circumstances:

- If your project plan contains costs in multiple planning currencies, then only financial plan types that support planning in multiple transaction currencies are available.
- If you have already selected an approved cost or revenue budget financial plan type for creating a budget version, then no other approved budget financial plan types are available.

When must I update actual amounts in the project plan?

Use the **Update Actual Amounts** menu option in the following circumstances:

- Actual amounts do not appear on the project plan after project performance data is updated, that is after the summarization process is run.
- You delete a task assignment with actual amounts and want to bring the amounts back into the project plan.
- You replace the primary planning resource breakdown structure, thereby deleting all task assignments, after actual amounts are brought into the project plan.

FAQs for Define Project Staffing Plan

Can I assign a resource to a task multiple times on the project plan?

No. However, if a resource is intermittently assigned to a task and amounts across periods are in the same planning currency, then you can create a single task assignment covering the work or task duration. Adjust period amounts to assign zero planned quantity or cost to periods in which the resource is unused.

Can I transfer task assignments or other changes from the budget to the project plan?

No. You can generate a budget version from a project plan. However, none of your subsequent changes to the budget, including new task assignments or updates to planned amounts, can be transferred back to the project plan.

What happens if I adjust task assignment amounts?

When you adjust cost rates or quantity for a task assignment by a positive or negative percentage, the application automatically recalculates raw and burdened cost amounts for that assignment and saves your changes.

If you had previously overridden burden costs, revised burdened costs are calculated based on the override burden multiplier.

What's an unplanned resource?

A resource with which actual costs are associated but a task assignment was not previously created.

When you update project performance data, actual costs are mapped to resources on the primary planning resource breakdown structure. If no task assignment exists for a planning resource with actual costs, then the application creates a new assignment and marks it as unplanned. Unplanned resources and associated actual costs are displayed when you capture progress. However, you cannot enter progress information, including estimate-to-complete quantity or estimated and actual dates for unplanned resources.

Unplanned resources may appear on the project plan for various reasons, including the following:

- Transactions incorrectly charged to a project or task
- Mismatch between the planned resource and the resource actually used on the task

You can designate an unplanned resource as a planned resource. However, you cannot undo this change.

What happens if I set an unplanned resource as a planned resource?

When you set an unplanned resource as a planned resource, the application derives planned amounts for the task assignment based on the associated actual cost, effort, and quantity.

Actual costs are copied over to planned raw and burdened cost amounts in transaction currency, project currency, and project ledger currency. Actual quantity is copied over as planned quantity. For effort-based resources (labor or equipment), actual effort is copied over to the planned effort. However, the planned start and finish dates are derived from the planned start and finish date for the task. You can subsequently update these planned dates and amounts as required.

You can also enter progress information for the resource.

What happens if I update planned amounts based on progress?

Updating planned amounts based on progress involves using estimate-at-completion (EAC) quantity to update planned values for task assignments. After planned quantity and effort are revised, planned costs are recalculated. Revised assignment amounts roll up the task hierarchy and are spread across planning periods as appropriate.

You can update plan amounts for the entire project plan when publishing progress or select specific task assignments for update in the project plan.

Important

You cannot edit progress information for unplanned resources. Consequently, you cannot update the corresponding task assignment in the project plan based on progress until you set the resource as a planned resource.

What's the difference between distributing and calculating task assignment period amounts?

By distributing amounts, you ensure that updates to amounts for any period are distributed across all open periods based on the spread curve for the task assignment. Your changes are not saved or rolled up to the task assignment.

By calculating and saving amounts, you ensure that amounts for each period line are recalculated based on your updates, amounts roll up to the task assignment,

and all your changes are saved. If you have updated amounts for particular period lines, amounts will not be redistributed to other periods based on the associated spread curve.

Why are burden cost amounts in the Burden Details window different from those on the resource assignment?

The burden cost amounts are calculated based on the latest built burden schedule version. If the burden rates on a resource assignment are not refreshed on the project plan, budget, and forecast, then the burden cost amounts may not match.

The burden cost amounts in the **Burden Cost Details** window is calculated using a single transaction date, therefore a single burden schedule version. When a resource assignment spans multiple periods, there is a chance that the individual period start dates reside within multiple burden schedule versions. When viewing burden cost details for a resource assignment, the resource assignment start date is used to determine the burden schedule version, therefore the burden cost amounts may mismatch with the resource assignment burden cost amounts. This is due to the actual burden cost of the resource assignment being an aggregate of the individual periods, which may have used different multipliers.

Manage Project Budgets and Forecasts

Budget and Forecast Creation Methods: Critical Choices

A budget or forecast version represents a specific planning scenario created using a financial plan type: for example, a cost budget that is based on a set of proposed contract terms or a cost forecast that is based on an engineering estimate.

Select one of the following methods to create budget or forecast versions.

- Generate amounts based on quantity from another financial plan or the project plan.
- Copy amounts from another budget or forecast version.
- Manually enter amounts for budget or forecast lines.

Generating Budget or Forecast Versions

You can generate budget or forecast versions based on other financial plans or from the project plan. During generation, quantity from the source plan and rates derived from the target financial plan type planning options are used to calculate amounts for the new version.

Important

The planning resource breakdown structure is the only planning option that is inherited from the source and cannot be edited.

Copying Budget or Forecast Amounts

You can create a version by copying another financial plan. Copy plan values without change or specify a positive or negative percentage by which to adjust amounts before the new version is created.

The copied version inherits planning options from the source financial plan. You cannot edit planning options for the new version during initial creation.

Manually Creating Budget or Forecast Lines

When you manually create a budget or forecast version, the basic task structure is recreated without any quantities, rates, or amounts. Budget or forecast dates are based on the planned dates for tasks entered in the project plan.

To create the version efficiently, add the following at the selected planning level:

- Planning resources: Add all resources in the associated planning resource breakdown structure.
- Financial resources: Add a placeholder resource so that you can enter amounts against tasks without having to assign a planning resource.

Depending on your access, you can edit planning options inherited from the selected financial plan type. Of course, generation options do not apply when manually creating versions.

Budget and Forecast Modifications: Explained

Edit budget and forecast versions, including generated quantities and amounts, either by directly changing quantities and amounts, or by changing attributes that determine amounts.

Directly edit summary quantities and amounts at the budget- or forecast-line level, and edit quantities and amounts associated with period lines. You can also adjust amounts by a specific percentage at the version, line, or period level. When you adjust amounts at the version level, you can create another version based on adjusted values.

Note

When you edit a forecast version, you cannot change actual values. However, you can change estimate-to-complete (ETC) quantities and amounts. You can also change estimate-at-completion (EAC) quantities and amounts at the line level and for periods without actual amounts (that is, periods whose start date is on or after the ETC start date).

The following is an overview of changes that you can make to budget and forecast versions.

Modifying Period Information

Apart from directly editing values for period lines, you can modify the periodic spread of amounts by changing the spread curve associated with planning resources at the plan line level. You can also increase or decrease the number of associated periods by editing from and to dates for budget or forecast lines.

Overriding Rates

You can override effective rates that are used to calculate cost and revenue amounts (for example, raw cost, burdened cost, and bill rates), and revise currency conversion attributes for individual budget or forecast lines.

When you override effective rates on budget or forecast line, the associated period lines inherit these overridden rates.

Modifying Values for Rate-Based and Nonrate-Based Resources

For planning resources that are not rate-based, for example financial resources, you can only enter cost or revenue amounts. You cannot change quantity and rate.

For rate-based planning resources, you can edit quantity, rates, or amounts. If you edit a value, associated values are automatically recalculated using predefined precedence rules, as described in the following table.

Changed Values	Precedence Rule
Quantity, rate, or both	Calculate amounts based on the quantity and the corresponding rate.
Amounts or a combination of amounts and quantity	Calculate rate from quantity when available, and then amounts.
Rate and amounts	<p>Calculate the rate based on updated amounts and existing quantity. Your updates to the rate are overridden.</p> <p>In addition, if you specify rate and amounts, and not quantity, when creating a new plan line, rate is cleared and only amounts are saved.</p> <hr/> <p>Restriction</p> <p>Quantity is never modified based on changes to rate or cost and revenue amounts.</p> <hr/>
Quantity, rate, and amounts	Calculate the rate based on updated amounts and existing quantity.

FAQs for Manage Project Budgets and Forecasts

Why don't margin amounts appear for some budget or forecast versions?

When viewing the list of budget or forecast versions for a project, or when editing a version, margin is calculated and appears only if the focal version contains both cost and revenue amounts.

However, when reviewing a budget or forecast version that is based on a financial plan type where cost and revenue are planned separately, you can select another version with the corresponding amounts to derive margin.

What's the difference between standard cost rate and effective cost rate?

Standard cost rate is derived from the cost rate schedules specified on the planning options if you are using planning rates or derived using actual cost rate derivation logic if you are using actual rates.

Effective cost rate is applied to quantity for calculating budget or forecast raw cost. It equals the standard cost rate unless you enter a revised effective rate or raw cost amount.

What's the difference between standard burden multiplier and effective burden multiplier?

Standard burden multiplier is a numeric multiplier derived from a burden schedule. The burden schedule is either assigned on the planning options or derived using actual cost rate derivation logic.

Effective burden multiplier is a numeric multiplier applied to raw cost to calculate burden cost amounts for financial planning. It equals the standard burden multiplier until recalculated when you enter a revised burdened cost or effective burdened cost rate.

What's the difference between standard revenue rate and effective revenue rate?

Standard revenue rate is derived from the revenue rate schedules specified on the planning options or from the associated contract, depending on the revenue generation method for the budget or forecast version.

Effective revenue rate is applied to quantity for calculating budget or forecast revenue. It equals the standard revenue rate unless you enter a revised effective rate or revenue amount.

Can I select any financial plan version for comparison when reviewing a budget or forecast?

Yes. You can select any of the project's financial plan versions to compare with the focal version.

However, if the calendar type associated with a comparison version differs from that of the focal version, then personalized period information does not appear for the comparison version. (If the focal version does not use a calendar, then no period information appears.)

Similarly, if a comparison version uses a different planning resource breakdown structure, then personalized information for that comparison version does not appear in the resource structure view.

Do reporting options for the focal financial plan version determine comparison plan values?

Yes. Reporting options for the focal version also apply to comparison plan versions.

For example, if you select raw cost as the reporting cost, then margin analysis is performed using raw cost for both the focal version and the comparison versions.

Another example: The focal version is created using a financial plan type where cost and revenue are planned using the same version. Here the focal version contains a single quantity and that is used for comparison. If a comparison plan is based on a financial plan type where cost and revenue are planned using separate versions, then the reporting options (report quantity) for the focal version determines whether quantity from the cost or the revenue version is used to calculate variance.

Important

At the financial plan type level, report quantity is always cost quantity when planning for cost and revenue on the same version. However, when reviewing budget or forecast versions, you can edit reporting options to use quantity from the revenue version of the comparison plan.

Track Project Progress

Project Progress: Explained

Capture progress to track the current status of tasks and measure the amount of work remaining. Capture progress centrally in Oracle Fusion Projects, or use either Microsoft Project or Primavera P6 Enterprise Project Portfolio Management to capture and then import progress into Oracle Fusion Projects.

Following is a brief description of capturing progress and calculating values, reviewing earned value metrics, publishing progress, and using external scheduling applications for progress entry.

Calculating ETC and EAC Values

Estimate-to-complete (ETC) and estimate-at-completion (EAC) values are derived based on the ETC method assigned to the task or task assignment. Available options are **Manual Entry** and **Remaining Plan**. If you select the Remaining Plan option, then ETC quantity for the task assignment is calculated as EAC quantity minus actual quantity. EAC quantity is set equal to the current planned quantity for the project plan when you capture progress. ETC quantity is used to determine ETC Effort and to calculate ETC cost.

EAC amounts are calculated by adding ETC amounts to actual amounts. After calculation, both ETC and EAC values are rolled up the task hierarchy.

Calculating Physical Percent Complete

Physical percent complete is calculated at the lowest-task level based on the physical percent complete calculation method. Available calculation methods are **Cost**, **Effort**, and **Manual Entry**. If you select either Cost or Effort, then the application derives physical percent complete from the ratio of actual cost or effort consumed to date against the latest EAC amounts. You can update the calculated value.

Use the **Manual Entry** calculation method to manually enter physical percent complete for lowest-level tasks or when importing progress information from external scheduling applications.

Calculating Earned Value Metrics

After capturing progress, review earned value metrics at the project and task level to determine whether the project is on track.

Earned value cost and effort are calculated at the lowest-task level by multiplying physical percent complete and baseline planned cost or effort. Earned value rolls up the task hierarchy and is then used to determine rolled-up physical percent complete at the level of summary tasks and the project.

The following table describes some of the other metrics calculated at the task and project levels.

Metrics	Calculation
Cost Variance	Earned Value Cost - Actual Cost
Cost Performance Index	Earned Value Cost / Actual Cost
Schedule Variance	Earned Value Cost - Baseline Planned Cost to Progress As-of Date Note Baseline Planned Cost to Progress As-of Date = (Baseline Planned Cost / Duration in Days based on Baseline Dates) * Number of Days to Progress As-of Date based on Baseline Start Date
Schedule Performance Index	Earned Value Cost / Baseline Planned Cost to Progress As-of Date
To Complete Performance Index	(Baseline Planned Cost - Earned Value) / (Baseline Planned Cost - Actual Cost)

Publishing Progress

Publish progress to finalize progress collection and make it available for use in project planning, forecasting, revenue generation, and invoicing.

While publishing progress, you can simultaneously generate and approve a forecast version. You can also update planned quantity with EAC quantity. In this case, the application copies the EAC quantity to planned quantity and calculates related values. Revised values roll up the task hierarchy and are spread to periods as appropriate.

Depending on how contract revenue and invoices are generated and processed, you can use the latest published progress when calculating revenue and invoice amounts based on percent complete.

Every time you publish progress, historical information is recorded for the project. You can view historical progress at the project, task, or task assignment level.

Using External Scheduling Applications

Use Microsoft Project Integration or the Project Integration Gateway to capture progress in an external scheduling application before sending it to Oracle Fusion Projects.

Oracle Fusion Projects Integration for Microsoft Project enables you to import actual amounts into Microsoft Project, enter progress manually, and then export the resulting progress to Oracle Fusion Projects.

When you use the Project Integration Gateway to integrate with Primavera P6 Enterprise Project Portfolio Management, you can export summarized actual amounts for lowest-level tasks from Oracle Fusion Projects, track progress and reschedule the project plan in Primavera P6 Enterprise Project Portfolio Management, and then import the revised project plan and progress back into Oracle Fusion Projects.

FAQs for Track Project Progress

How does physical percent complete roll up the task hierarchy?

The physical percent complete value for lowest-level tasks is used, along with baseline planned cost or effort, to calculate earned value cost and effort.

Earned value cost and earned value effort roll up the task hierarchy. At each level, earned value is divided by the baseline planned amount to derive physical percent complete. The **Primary Physical Percent Complete Basis** option for the project plan determines whether baseline planned cost or effort is used.

Tip

You can view physical percent complete calculated using both cost and effort for each task. However, the Primary Physical Percent Complete Basis option determines which value is used for other financial activities and calculations.

What's the difference between planned dates and estimated dates?

Planned dates indicate the scheduled start or finish date of a project or task and form the basis for task planning.

Estimated dates indicate the projected start or finish date for the project, task, or task assignment. When you capture progress for a project, estimated dates equal the planned dates for tasks and the assignment dates for task assignments. You can revise estimated dates for task assignments and lowest-level tasks without assigned resources. You can compare estimated dates from the latest published progress with planned dates and baseline dates from the project plan.

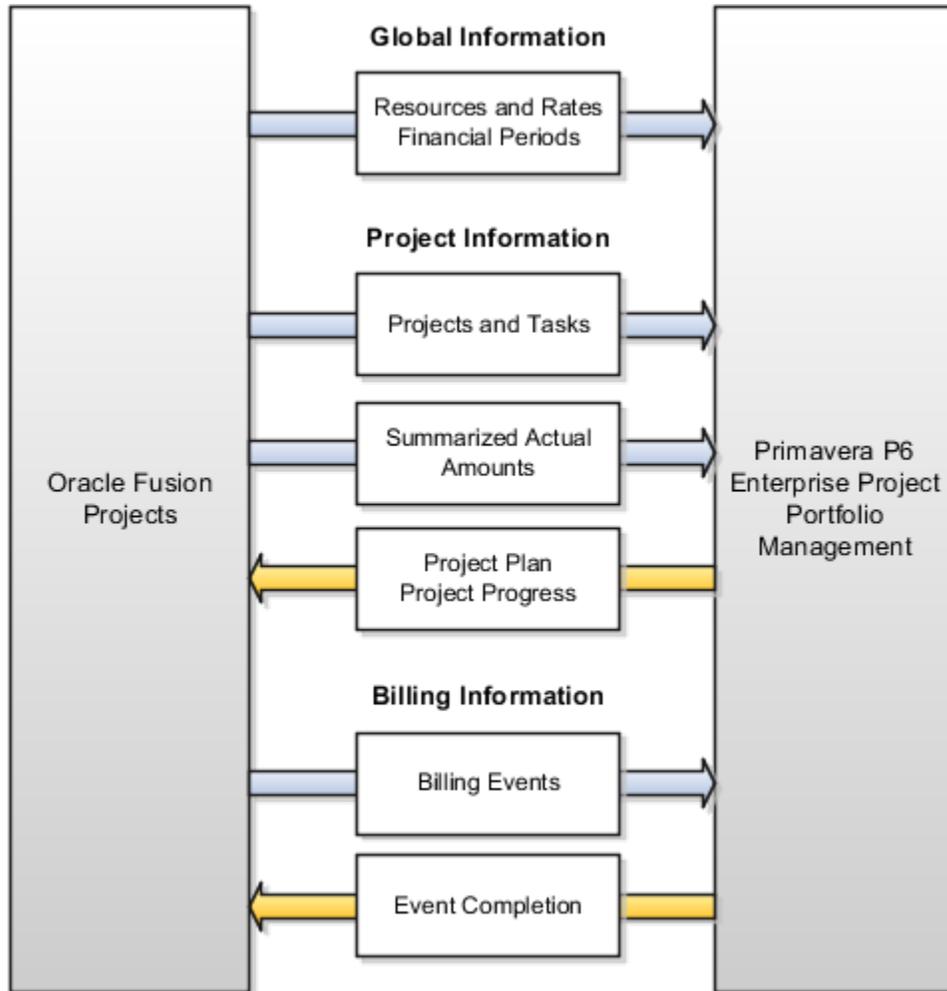
Use Project Integration Gateway

Primavera P6 Enterprise Project Portfolio Management and Oracle Fusion Projects: How They Work Together

Use Oracle Fusion Project Integration Gateway to integrate Oracle Fusion Projects with Primavera P6 Enterprise Project Portfolio Management. The integration enables project accountants, project billing specialists, and executives to centrally perform project costing, billing, accounting, and executive reporting tasks in Oracle Fusion Projects while enabling each project manager to perform detailed project planning and scheduling in Primavera P6 Enterprise Project Portfolio Management.

To ensure data integrity and efficiency, Oracle Fusion Project Integration Gateway defines a set framework in which data is exported from and imported into Oracle Fusion Projects. The following table and diagram provide an overview of the flow of information.

Information Type	From Application	To Application
Global integration information	Oracle Fusion Projects	Primavera P6 Enterprise Project Portfolio Management
Projects and task definition	Oracle Fusion Projects	Primavera P6 Enterprise Project Portfolio Management
Summarized project actual quantity and cost	Oracle Fusion Projects	Primavera P6 Enterprise Project Portfolio Management
Project plans and progress	Primavera P6 Enterprise Project Portfolio Management	Oracle Fusion Projects
Billing events	Oracle Fusion Projects	Primavera P6 Enterprise Project Portfolio Management
Event completion	Primavera P6 Enterprise Project Portfolio Management	Oracle Fusion Projects



Global Integration Information

Export resources from the integration planning resource breakdown structure and associated rates to the global dictionary for resource and roles in Primavera P6 Enterprise Project Portfolio Management. Before export, raw or burdened cost rates are derived using logic for actual cost rates, increasing the accuracy of planned costs calculated for planned units.

Export either accounting or project accounting periods to use in Primavera P6 Enterprise Project Portfolio Management and to enable import of periodic project plans into Oracle Fusion Projects.

Project and Task Information

You must create projects and complete initial planning in Oracle Fusion Projects. After you build out the task structure to the required reporting level, you can activate integration and export your project and tasks to Primavera P6 Enterprise Project Portfolio Management. Export creates links between the project and tasks in Oracle Fusion Projects and between the project and WBS created in Primavera P6 Enterprise Project Portfolio Management. All export and import processing is dependent on these links.

Actual Amount Information

Export summarized actual amounts, as required, for comparing with planned amounts. For each integrated WBS that is linked to a lowest-level task, a

summary activity is created to store actual quantity and costs in Primavera P6 Enterprise Project Portfolio Management.

Project Plan and Progress Information

After exporting a project and its tasks to Primavera P6 Enterprise Project Portfolio Management, you can build out the project structure, add WBS nodes and activities, assign resources, and complete planning to the desired detail. Use resources, roles, and expense categories created in the global dictionary based on the integration planning resource breakdown structure.

Tip

Integration supports manual creation of resources or planning for labor or nonlabor amounts directly against activities in Primavera P6 Enterprise Project Portfolio Management.

Import project plan information into Oracle Fusion Projects as required. Before import, planned amounts for each resource are totaled up across all activities and child WBSs within the hierarchy of an integrated WBS. The summarized planning amounts are imported into a single task assignment that Oracle Fusion Projects creates for the resource against the lowest-level task associated with the integrated WBS.

After import, a baseline project plan is automatically created in Oracle Fusion Projects and progress is captured and published. Based on the project plan planning options in Oracle Fusion Projects, a baseline budget version can optionally be created.

Billing Information

For contract-based projects, you can export billing events that are assigned to milestone tasks to create finish milestone activities under the integrated WBS in Primavera P6 Enterprise Project Portfolio Management.

Import event completion information into Oracle Fusion Projects, as required, so that you can initiate contract billing activities.

Project Integration Options: How They Work Together

Project integration options determine how Oracle Fusion Projects interacts with Primavera P6 Enterprise Project Portfolio Management. When defining integration options you do the following.

- Specify integration definition information including the business unit, project unit, and the integration language.
- Select the integration planning resource breakdown structure.
- Specify resource rate options.
- Select the actual amount information for export.
- Specify calendar and period options.

Specifying the Integration Definition

Oracle Fusion Project Integration Gateway supports a single integration with an installation of Primavera P6 Enterprise Project Portfolio Management. For this integration, you must select a business unit and project unit.

Warning

You cannot change the business unit and project unit after exporting data from or importing data into Oracle Fusion Projects.

Your business unit selection determines the integration (ledger) currency. The ledger currency is the primary ledger currency for the business unit, that is, the project ledger currency. Primavera P6 Enterprise Project Portfolio Management stores amounts in a single base currency across all projects. Therefore, the

ledger currency is used for exporting all actual costs and resource rates from Oracle Fusion Projects. In addition, cost amounts for expense categories and nonintegrated material resources are imported from Primavera P6 Enterprise Project Portfolio Management using the ledger currency.

You also select an integration language. When you export data, all translatable text is sent to Primavera P6 Enterprise Project Portfolio Management in this language. Similarly, after you import data, translatable information is stored in association with the selected language.

Selecting a Planning Resource Breakdown Structure

The integration planning resource breakdown structure is the source of resources exported to Primavera P6 Enterprise Project Portfolio Management. Exported resources create labor, nonlabor, and material resources, roles, or expense categories that you can use on projects in that application.

In Oracle Fusion Projects, you must use this planning resource breakdown structure as the primary planning resource breakdown structure on all integrated projects. That is, you must use it for task assignments on the project plan.

Using a single set of planning resources facilitates the creation of task assignments when you import project plan information into Oracle Fusion Projects.

Options are limited to planning resource breakdown structures that belong to the selected project unit and do not allow resource changes at the project level.

Restriction

You cannot change the integration planning resource breakdown structure after you export resources.

Selecting Resource Rate Options

When defining project integration options, you can select options for exporting cost rates associated with the resources from the integration planning resource breakdown structure. Rates are maintained as part of the global dictionary for resources and roles in Primavera P6 Enterprise Project Portfolio Management.

The following table describes rate options.

Integration Option	Description
Resource class rate schedule	Used to specify a default source of cost rates when rates cannot be derived for the resource using logic for actual cost rates. Options are limited to rate schedules that are available to the integration business unit.
Burden schedule	Used as the source of burdened cost rates when calculating the resource rate to export from Oracle Fusion Projects. If you do not specify a burden schedule, then the burdened rate equals the raw cost rate for the effective rate date.
Effective rate date	Date as of which rates are retrieved and exported. Note For Roles, Primavera P6 Enterprise Project Portfolio Management does not maintain date effective rates. That is, only a single rate is available for each role.

Selecting Actual Amounts to Export

To store these amounts, Primavera P6 Enterprise Project Portfolio Management creates a summary activity for each affected WBS.

Use exported actual amounts to compare with planned amounts for the WBS.

Specifying Calendar and Period Options

Selecting a common set of periods for planning in Oracle Fusion Projects and Primavera P6 Enterprise Project Portfolio Management enables you to exchange periodic planned amounts. The following table describes which integration options enable sharing of financial periods.

Integration Option	Description
Calendar type and financial period from date	<p>Together determine the type of calendar (accounting or project accounting) and the date from which periods must be exported.</p> <hr/> <p>Restriction</p> <p>You cannot modify the calendar type after you export financial periods.</p>
Default period profile	<p>Default period profile to use if Oracle Fusion Projects must change the calendar type for a project when importing the project plan. (The calendar type selected on the planning options of the associated project plan type must match the calendar type specified in the integration options.)</p> <p>Options are limited to period profiles associated with the selected calendar type.</p>

Projects and Tasks: How They Are Exported to Primavera P6 Enterprise Project Portfolio Management

You export projects to Primavera P6 Enterprise Project Portfolio Management after you have completed high-level planning (created tasks up to the desired financial planning and reporting level) in Oracle Fusion Projects.

Settings That Affect the Export of Projects and Tasks

You must activate integration for a project before exporting it. In addition, for subsequent export, you can select to export all information for the selected linked projects or only incremental changes since the previous export.

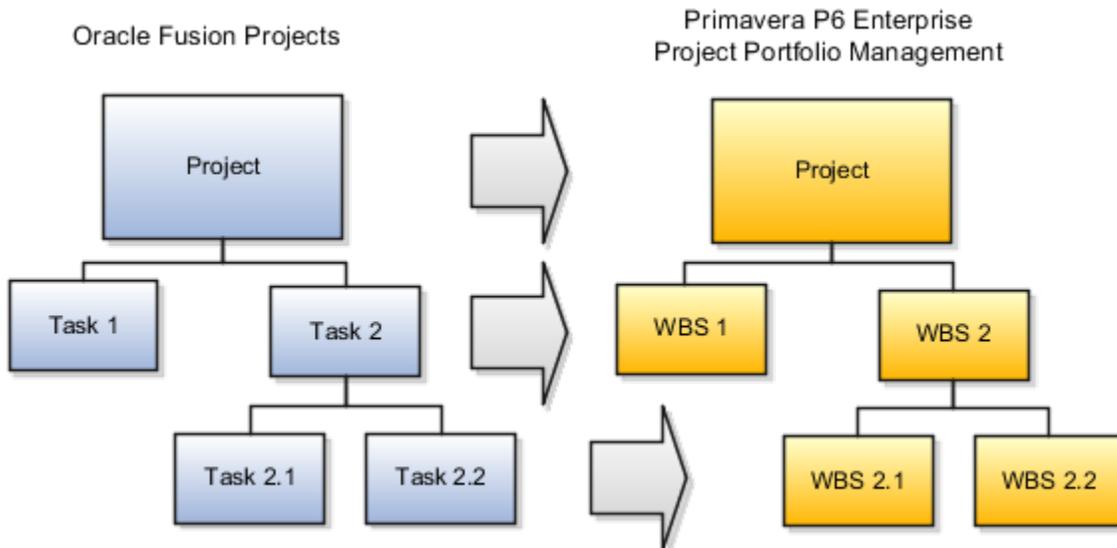
Use the full export option to recreate an integrated WBS that was inadvertently deleted in Primavera P6 Enterprise Project Portfolio Management or to restore the WBS hierarchy to match the task structure in Oracle Fusion Projects.

How Projects and Tasks Are Exported

In Primavera P6 Enterprise Project Portfolio Management, exported projects are added to an enterprise project structure (EPS) node called **Imported Projects**. Move the exported projects to a different EPS node as required.

As illustrated in the following diagram, during initial export, project information from Oracle Fusion Projects is used to create a new project in Primavera P6 Enterprise Project Portfolio Management. Alternatively, if the project number of a project matches the project ID of an existing project in Primavera P6 Enterprise Project Portfolio Management, then the two projects are linked.

Similarly, WBSs are created for each task in the hierarchy, up to the lowest-level task. The tasks and WBS are linked. If you build out your WBS in Primavera P6 Enterprise Project Management by adding further WBS and activities, all information is summarized up to the integrated WBS before project plan information is imported into Oracle Fusion Projects.



The following table describes how changes in the task structure in Oracle Fusion Projects affect the WBS of a linked project during a subsequent export.

Change	Impact to Project in Primavera P6 Enterprise Project Portfolio Management
Create task	New WBS created and integrated with task. Note If the task number of the new task matches the WBS ID of an existing WBS, then it is linked to the new task.
Delete task	Integrated WBS is not deleted. You must manually delete the WBS and revise planning, if required.
Move task	Indent for integrated WBS is increased or decreased accordingly.
Update task attributes	Modified task attributes, including name, description, and task manager, are used to update WBS information.
Create subtask for integrated task	New WBS created for subtask. You must move planning information from the parent WBS to the new WBS to continue importing it into Oracle Fusion Projects.

Project and Task Attributes Exported to Primavera P6 Enterprise Project Portfolio Management: Explained

When you export projects, project and task attribute values are used to update project and WBS information in Primavera P6 Enterprise Project Portfolio Management.

Following is a description of the project and task attributes exported from Oracle Fusion Projects.

Exported Project Attributes

The following table describes some of the important project attributes exported from Oracle Fusion Projects.

Attribute in Oracle Fusion Projects	Attribute in Primavera P6 Enterprise Project Portfolio Management
Project name	Project name
Project number	Project ID
Project start date	Project planned start date
Project finish date	Project must finish by date
Project manager	User-defined field
Project status	Project status

Warning

Primavera P6 Enterprise Project Portfolio Management restricts the length of project names and project IDs to 100 and 20 characters respectively. Therefore, project names and numbers from Oracle Fusion Projects are truncated if their length is over the limit.

Project status in Oracle Fusion Projects is exported as follows:

System Status in Oracle Fusion Projects	Status in Primavera P6 Enterprise Project Portfolio Management
Unapproved	Planned
Submitted	Planned
Approved	Active
Pending Close	Active
Closed	Inactive

Exported Task Attributes

When a WBS is created based on a task exported from Oracle Fusion Projects, the attribute **Integrated Type** is used to indicate that the WBS is integrated. Other WBS attributes updated using information exported from Oracle Fusion Projects are described below.

Attribute in Oracle Fusion Projects	Attribute in Primavera P6 Enterprise Project Portfolio Management
Task name	WBS name
Task number	WBS ID

Task description	Notebook topic at WBS level
Task manager	User-defined field
Chargeable option	<p>WBS status</p> <hr/> <p>Important</p> <p>The Chargeable option only impacts WBS that are mapped to lowest-level tasks. If the corresponding task is not chargeable, then the integrated WBS is marked as inactive and is not visible on the timesheet.</p>

Warning

Primavera P6 Enterprise Project Portfolio Management restricts the length of WBS names and WBS IDs to 100 and 20 characters respectively. Therefore, task names and numbers from Oracle Fusion Projects are truncated if their length is over the limit.

Use Project Integration Gateway: Manage Project Plan and Progress

Project Plans: How They Are Imported from Primavera P6 Enterprise Project Portfolio Management

Project planning and resource assignment are performed in Primavera P6 Enterprise Project Portfolio Management before being imported into Oracle Fusion Projects.

Settings That Affect Import of Project Plans

To import project plan information into Oracle Fusion Projects, the project must be designated as a planning project.

Other project options that affect how project plan information is imported, and are therefore set to an appropriate value automatically, are described in the following table.

Option	Description
Primary planning resource breakdown structure	Set to the integration planning resource breakdown structure.
Calendar type	<p>Set to the integration calendar type. Related options are set as follows:</p> <ul style="list-style-type: none"> • Period profile: If the calendar type changes during import, then set to the default period profile selected in the integration options. • Current planning period: Set to the earliest period for the project, that is the period in which the project start date falls.
Automatically roll up planned dates for tasks	Option selected.
Use task planned dates as task assignment dates	Option deselected because task assignment dates imported from Primavera P6 Enterprise Project Portfolio Management may be different from task dates.

Enable project plan cost	Option selected so that Oracle Fusion Projects can calculate costs based on quantities sent from Primavera P6 Enterprise Project Portfolio Management.
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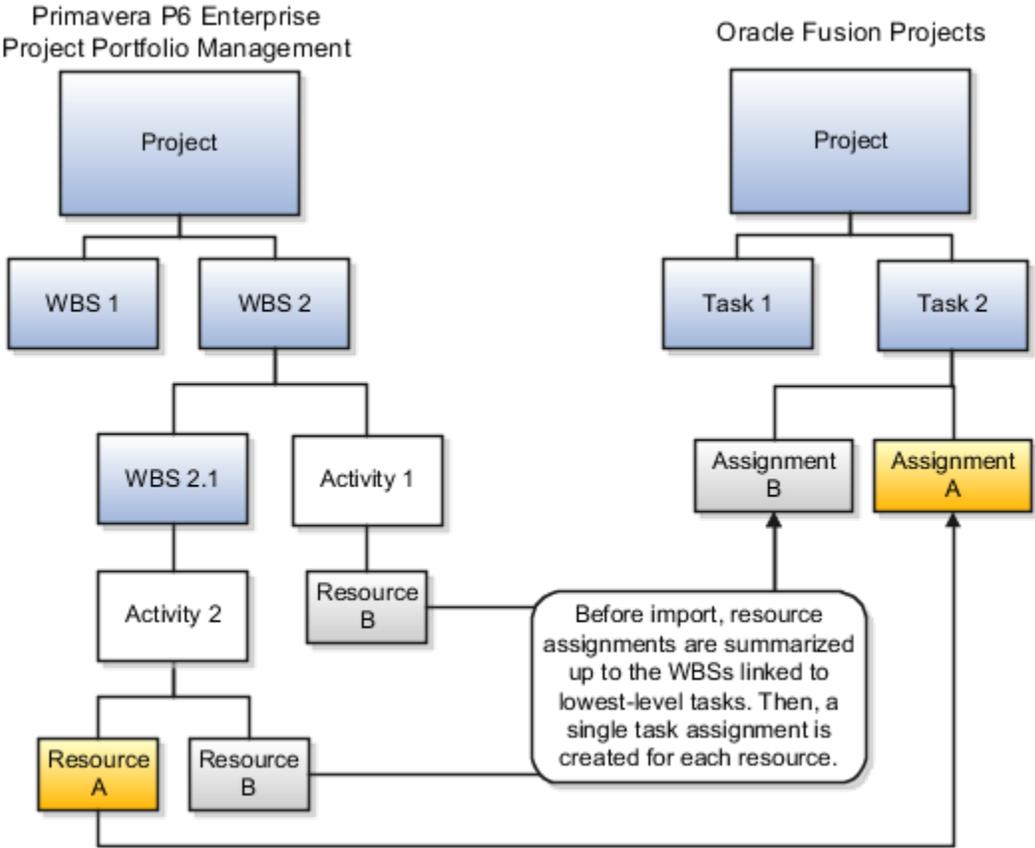
How Project Plans Are Imported

Importing project plan information from Primavera P6 Enterprise Project Portfolio Management overrides all planning information already in Oracle Fusion Projects. For example, any task assignments you create directly in Oracle Fusion Projects are updated if a corresponding resource assignment exists in Primavera P6 Enterprise Project Portfolio Management or are deleted if it does not. Similarly, unplanned resources are deleted on import.

Tip

If you have planned for the unplanned resource in Primavera P6 Enterprise Project Portfolio Management, then a new planned task assignment is created in Oracle Fusion Projects when you import project plan data.

As illustrated in the following figure, before import, assignment information is summarized up to the level of the integrated WBS that is linked to a lowest-level task. Then, for each integrated lowest-level task, a single task assignment is created in Oracle Fusion Projects for every resource assigned within the hierarchy of the integrated WBS, irrespective of the number of assignments.



Task assignment information is populated using data imported from Primavera P6 Enterprise Project Portfolio Management based on the resource type, as described in the table below.

Resource Type	Planned Dates	Planned Amounts
Integrated labor, nonlabor, and material resources	Earliest start date and latest finish date of all occurrences of the resource within the hierarchy of the integrated WBS	At completion units summarized and imported by financial period. Costs calculated based on planning options in Oracle Fusion Projects.
Integrated roles	Earliest start date and latest finish date of all occurrences of the role within the hierarchy of the integrated WBS	At completion units summarized and imported by financial period. Costs calculated based on planning options in Oracle Fusion Projects.
Integrated expense categories	WBS start and finish dates	At completion cost summarized and imported as planned quantity (where UOM is Currency). In case the project currency and project ledger currency are different in Oracle Fusion Projects, then the raw and burdened costs in project currency are calculated based on settings in the project planning options.
Direct labor or nonlabor planning against activities (without resource or role assignments)	WBS start and finish dates	At completion units summarized and imported by financial period. Costs are calculated based on planning options in Oracle Fusion Projects.
Nonintegrated resources	WBS start and finish dates	Costs or units imported based on resource type. <ul style="list-style-type: none"> • Material resources and expense categories: At completion cost summarized and imported as planned quantity (where UOM is Currency). • Labor and nonlabor resources, roles: At completion units summarized and imported by financial period. Costs calculated based on planning options in Oracle Fusion Projects.

Important

If you delete a resource assignment in Primavera P6 Enterprise Project Portfolio Management, then Oracle Fusion Projects checks if the task assignment can be deleted as well. If it cannot, then planned quantity is set to zero.

Apart from imported data, Oracle Fusion Projects uses the following logic to provide information for other assignment-related attributes.

Task Assignment Attribute	Description
Spread curve	Set to default value specified for the planning resource in the planning resource breakdown structure.
Progress estimate-to-complete (ETC) method	Set to Remaining Plan . If you change this value, it is reset during the next import.
Rate overrides	No value set automatically. If you enter an override, then this information is not changed during subsequent import.
Planning currency	Set to the project ledger currency.
Unplanned resource	Option deselected.

Project Plan Attributes Imported from Primavera P6 Enterprise Project Portfolio Management: Explained

When you import project plans, task and task assignment values are updated based on integrated WBS information in Primavera P6 Enterprise Project Portfolio Management.

The following table describes the assignment amount and period-related attributes imported into Oracle Fusion Projects.

Attribute in Oracle Fusion Projects	Attribute in Primavera P6 Enterprise Project Portfolio Management	Notes
Resource class	Resource type (for nonintegrated resources)	When you import information for nonintegrated resources or for direct planning against activities, the resource type determines the resource class-level resource used for the corresponding task assignment in Oracle Fusion Projects. For nonintegrated expense categories or roles, Oracle Fusion Projects always uses the resource class-level resources Financial Resources and Labor respectively.
Assignment planned quantity (by period)	At completion units	Imported for labor and nonlabor resources, and integrated material resources
Assignment planned quantity (by period)	At completion costs	Imported for expense categories and nonintegrated material resources
Period name	Period ID	None
Period start and finish date	Period start and end date	Imported for each periodic line

Importing Task and Assignment Planned Dates

The following table describes how date-related information is imported from Primavera P6 Enterprise Project Portfolio Management.

Task or Resource Type	Attribute in Oracle Fusion Projects	Source Details
Task	Task planned start date and planned finish date	Actual start and finish dates for the WBS are imported when available. Else, start and finish dates are imported. These dates are imported because task planned dates do not roll up from assignment dates for integrated projects in Oracle Fusion Projects.
Expense categories and nonintegrated resources	Assignment planned start date and planned finish date	WBS dates are imported when creating task assignments in Oracle Fusion Projects using resource class level resources. For example, if expense categories or nonintegrated resources are assigned or you plan for labor or nonlabor directly against an activity in Primavera P6 Enterprise Project Portfolio Management.
Integrated roles, and labor, nonlabor, and material resources	Assignment planned start date	Actual start date for the assignment is imported from Primavera P6 Enterprise Project Portfolio Management when work is in progress or completed. Start date is imported when work has not started.
Integrated roles, and labor, nonlabor, and material resources	Assignment planned finish date	Actual finish date for the assignment is imported from Primavera P6 Enterprise Project Portfolio Management when work is completed. Finish date is imported when work has not started or is in progress.

Importing Nonintegrated Resources from Primavera P6 Enterprise Project Portfolio Management: Explained

When you import project plans from Primavera P6 Enterprise Project Portfolio Management, Oracle Fusion Projects maps resources, roles, and expense categories to planning resources on the integration planning resource breakdown structure. If a matching planning resource is not found, then Oracle Fusion Projects creates a new task assignment using the appropriate resource class, as follows:

Resource Class Level Resource	Cases in Which Used
Labor	<ul style="list-style-type: none"> • Nonintegrated labor resource type resources • Nonintegrated labor roles • Direct labor planning for an activity (without an assignment)

Equipment	<ul style="list-style-type: none"> • Nonintegrated nonlabor resource type resources • Nonintegrated nonlabor roles • Direct nonlabor planning for an activity
Material Items	Nonintegrated material resource type resources
Financial Resources	Nonintegrated expense categories

Task assignment dates are based on the start and finish dates of the WBS.

Following are details related to using the Financial Resources and Material Items resource class resources when using nonintegrated resources and the calculation of progress information.

Using Material Items and Financial Resources

When using the **Material Items** resource class resource to import information for nonintegrated resources, Oracle Fusion Projects uses the at-completion cost from Primavera P6 Enterprise Project Portfolio Management as the planned quantity. Importing planning quantity is not meaningful because each material resource can have a different UOM. In addition, the resource class Material Items in Oracle Fusion Projects uses a UOM of currency.

Similarly, when creating task assignments using the Financial Resources resource class resource, the at-completion cost specified in Primavera P6 Enterprise Project Portfolio Management is used as the planned quantity in Oracle Fusion Projects. As with material items, the UOM for the financial resources in Oracle Fusion Projects is Currency.

Importing Progress

Estimate-to-complete values are calculated for nonintegrated resources using the imported planned amounts, as they are for other resources. However, actual dates are not imported. Derivation of actual dates takes place in Oracle Fusion Projects. For example, if the task assignment in Oracle Fusion Projects has actual amounts, then the actual start date is set to the start date of the period with the actual amounts.

Actual date information is not imported because the generic resource class task assignment in Oracle Fusion Projects can incorporate planning from a variety of different resources from multiple activities and child WBSs in Primavera P6 Enterprise Project Portfolio Management.

FAQs for Use Project Integration Gateway: Manage Project Plan Tasks and Task Assignments

What happens if a resource is assigned to multiple activities on an integrated WBS in Primavera P6 Enterprise Project Portfolio Management?

Planning for all activities roll up to WBSs. Totals for each resource are then imported into Oracle Fusion Projects for each lowest-level task that maps to an

integrated WBS. A single task assignment is created or updated in Oracle Fusion Projects for each resource with rolled up planned amounts for the integrated WBS.

Use Microsoft Project Integration

Microsoft Project and Oracle Fusion Projects: How They Work Together

Microsoft Project integration enables project managers to create projects, complete in-depth scheduling using dependencies and constraints, and perform what-if analysis offline, before synchronizing project plan and progress information with Oracle Fusion Projects.

Project executives, project accountants, and billing specialists can use the information exported to Oracle Fusion Projects for financial planning, project costing, billing and revenue accrual, and performance reporting.

Microsoft Project integration enables you to do the following:

- Import templates or existing projects from Oracle Fusion Projects to create projects in Microsoft Project.
- Export projects from Microsoft Project to create projects in Oracle Fusion Projects.
- Synchronize existing projects with Oracle Fusions Projects.
- Import resources from the primary planning resource breakdown structure to use for creating task assignments in Microsoft Project.
- Plan and schedule projects, assign resources, and track progress.
- Import actual quantities and costs into Microsoft Project for progress collection.
- Export project plan and progress information to Oracle Fusion Projects.

Importing Projects

You can import a template or an existing project from Oracle Fusion Projects to create a new project file in Microsoft Project. During import, select to import all project information or only planning resources. If you want to subsequently export new task assignments for the project to Oracle Fusion Projects, you must import resources from the primary planning resource breakdown structure.

Restriction

While importing from Oracle Fusion Projects, you cannot select templates whose primary planning resource breakdown structure allows changes at the project level. This restriction does not apply when importing projects.

When importing an existing project, retain the link if you intend to synchronize the project. If you only want to view project details, or intend to export the project to Oracle Fusion Projects as a different project later, then do not retain the project link.

Restriction

You cannot retain the project link if third-party scheduling is disabled for the project.

Exporting Projects

You can export a project from Microsoft Project to create a new project in Oracle Fusion Projects. Exporting links the projects in the two applications. Optionally, set a baseline for the project plan, and simultaneously generate a budget version and create a baseline.

When exporting a project, you must select a source project or template unless you had originally imported a project or template from Oracle Fusion Projects. The source project or template must allow for third-party scheduling and the associated primary planning resource breakdown structure must not allow changes at the project level.

Synchronizing Project Information

Use synchronization rules to transfer information from and to Microsoft Project. Select the required synchronization rule to synchronize all information, or import or export selected information only. For example, you can select to only synchronize schedule updates for the project. Depending on the synchronization rule, select synchronization options to determine how information is transferred.

The following table describes the default direction in which attributes are transferred.

Attributes	Imported into Microsoft Project	Exported from Microsoft Project
Task structure	Yes	Yes
Resources and resource rates	Yes	No
Task attributes	Yes	Yes
Actual quantities and costs	Yes	No
Scheduling and progress	No	Yes

Importing Resources and Rates

You can import all planning resources from the primary planning resource breakdown structure associated with the project in Oracle Fusion Projects or import selected resources only.

Import rates from Oracle Fusion Projects to calculate planned costs in Microsoft Project. The **Cost Type** synchronization option determines whether raw cost rates or burdened cost rates are imported.

Before import, rates are derived for each resource based on the actual or planning rate schedules specified on the associated project plan type. Any override rates you specify on the project plan in Oracle Fusion Projects are not imported.

Importing Actual Costs and Exporting Progress

You can import actual quantity and costs either from the latest summarized data or from draft progress. The source of actual amounts determines how progress is exported, as described in the following table.

Source of Actual Amounts	Impact on Importing Progress
Latest summarized data	Actual amounts on the draft progress are refreshed from the latest summarized data when you export progress. Also, you specify the progress as-of date in the synchronization options.
Draft progress	Actual amounts on the draft progress are not refreshed and hence, they match the actual amounts previously imported into Microsoft Project.

When you export progress from Microsoft Project, the estimate-to-complete (ETC) method and physical percent complete calculation method are set to **Manual**. Values for planned, actual, and estimated finish dates and physical percent complete are exported at each level in the task hierarchy and do not roll up in Oracle Fusion Projects. Values for all other attributes are transferred at the task assignment level and roll up in Oracle Fusion Projects.

After export, draft progress is published. A forecast version is generated depending on progress settings defined for the associated project plan type.

Restriction

If burdening is not enabled on the project type, then you can export progress with raw cost. If burdening is enabled, then you must use burdened cost to export progress. That is, set the **Cost Type** synchronization option to **Burdened cost**.

Action Controls: Explained

Action controls control data that is imported to Oracle Fusion Projects from Microsoft Project. An action control prevents you from performing an action in Oracle Fusion Projects on a record that originated in Microsoft Project.

Available Action Controls

You can set controls on the following actions:

- Add Task
- Delete Task

- Update Project Dates
- Update Project Description
- Update Project Name
- Update Project Number
- Update Project Organization
- Update Project Status
- Update Task Dates
- Update Task Description
- Update Task Name
- Update Task Number
- Update Task Organization

For example, consider the following scenario:

- You imported a project from Microsoft Project.
- Your business rule states that project and task dates are always maintained in Microsoft Project.
- To ensure data integrity, you want to prevent projects and tasks that originate in Microsoft Project from being deleted in Oracle Fusion Projects.

To enforce this rule, you enter the following action controls for the source Microsoft Project:

- Update Project Dates
- Update Task Dates
- Delete Task

FAQs for Use Microsoft Project Integration

What happens if I use Microsoft Project as a third-party scheduling application?

Using Microsoft Project for scheduling limits your ability to modify project and task dates in Oracle Fusion Projects. Start and finish dates for the project and existing tasks cannot be modified. You can enter start and finish dates for new tasks. However, these dates must be within the planned dates for the summary task. You can modify transaction dates. However, these must be within both the task planned dates and transaction dates for the summary task or project.

What happens if I clear project identifiers in Microsoft Project?

Clearing project identifiers deletes the link between your projects in Microsoft Project and Oracle Fusion Projects. You can then export the project as a new project to Oracle Fusion Projects, if required.

Tip

Clear project identifiers after you change the Oracle Fusion Projects environment.

Why do I select attribute values in Microsoft Project?

Use the **Select Attribute Values** menu option to select values for service type, work type, task manager, and progress status. Using the menu option stores the internal ID in Microsoft Project, which enables export of the value to Oracle Fusion Projects.

If the internal ID is not populated using the Select Attribute Values option, then the associated value is not exported to Oracle Fusion Projects. If you select an attribute value and subsequently change it manually without also changing the internal ID, then the original attribute value is exported to Oracle Fusion Projects.

When do I clear the attribute cache in Microsoft Project?

Clear the attribute cache after you change the Oracle Fusion Projects environment or if synchronization rules are modified to change the mapping between Oracle Fusion Projects attributes and Microsoft Project fields.

Tip

If the attribute cache is accidentally cleared, it is repopulated when you next synchronize the project.

Can I import actual amounts into an unlinked project in Microsoft Project?

Yes. You can import actual amounts along with other information from Oracle Fusion Projects when creating a new project in Microsoft Project even if you do not retain the project link. However, you cannot subsequently export progress for the project.

Glossary

activity

A business action or task that uses a resource or incurs a cost. In Primavera P6 Enterprise Project Portfolio Management, the fundamental executable work element in the work breakdown structure of a project. Activities contain all the information necessary to perform the required work.

attribute cache

Stores values for Oracle Fusion Projects attributes and information related to their mapping with Microsoft Project fields for use during synchronization.

baseline project plan

Key planned information for tasks and task assignments, including dates, costs, quantity, effort, and rates, that you can save from current project plan values. Setting a baseline for a project plan does not create a new plan version. Rather, current plan information is saved in baseline columns of the current project plan.

burden cost

Burden costs are legitimate costs of doing business that support raw costs and cannot be directly attributed to work performed.

burden cost base

The grouping of raw costs to which burden costs are applied.

burden cost code

A classification of overhead costs. A burden cost code represents the type of burden cost that you want to apply to raw cost. For each burden cost code in the burden structure, you specify what cost base it is applied to, the expenditure types it is associated with, and the order in which it is applied to raw costs within the cost base.

burdened cost

Cost of an expenditure item, including the raw cost and burden costs.

business unit

A unit of an enterprise that performs one or many business functions that can be rolled up in a management hierarchy.

calendar type

Type of calendar, accounting calendar or project accounting calendar, used for entering and displaying periodic information for financial or project plans.

class category

Method of classifying projects. For example, use class categories to define project funding sources, investment strategies, or industry sectors. Class categories are associated with a set of values called class codes.

class code

Implementation-defined value within a class category that is used to classify projects. For example, a class category called Industry Sector can have class codes such as Construction, Banking, and Health Care.

current planning period

The current project accounting period or accounting period (depending on the selected calendar type) for the purposes of financial planning.

financial plan

A budget or forecast representing an estimate of the financial performance of a project.

financial plan type

Categories or collections of either project budgets or project forecasts.

financial resource

A resource that uses currency as its unit of measure.

KPI period determination date

Date used to determine the accounting calendar and project accounting calendar periods for performance measure calculations during key performance indicator (KPI) value generation.

period line

Represents budget or forecast amounts for combinations of tasks, currency, and planning resources, for a particular accounting period, project accounting period, or group of periods.

period profile

Determines how periods are grouped and displayed when you edit financial or project plans that allow entry of amounts based on a calendar.

project set

A personalized set of projects grouped for searching or reporting purposes. Project sets can be shared with others.

project unit

An operational subset of an enterprise, such as a line of business, that conducts business operations using projects, and needs to enforce consistent project planning, management, analysis, and reporting.

raw cost

Costs that are directly attributable to work performed. Examples of raw costs are salaries and travel expenses.

resource breakdown structure

One or more hierarchies of resources, resource types, resource formats, or other resource groupings that are used for financial and project planning and for viewing planned and actual amounts for a project.

summarization

The summarization or update project performance data process extracts data related to actual cost, commitment, budget, forecast, revenue, and invoice transactions and prepares the data for reporting purposes.

transaction controls

Set of criteria that control whether transactions can be charged to a project or task. Can also define which items are billable and nonbillable on projects enabled for billing. For capital projects, can define which items are capitalizable or noncapitalizable.

unit of measure

A division of quantity that is adopted as a standard of measurement.

WBS

Abbreviation of work breakdown structure. Represents the hierarchy of work that must be accomplished to complete the project. In Primavera P6 Enterprise Project Portfolio Management, WBSs are structured in levels of work detail, starting with the completed product and then broken down into identifiable work elements. WBSs correspond to tasks in Oracle Fusion Projects.