



Release Content Document

See what's coming in Oracle Project Portfolio Management Cloud Release 8

PROJECT BILLING

Oracle Fusion Project Billing accelerates invoice processing while reducing billing errors through a functionally rich work area offering visibility into formatted invoices with estimated taxes. Embedded analytics for contract revenue, invoice, profitability and margin give insight into potential contract and payment problems.

BILLING DIAGNOSTICS

Use additional messages, documentation, and reports provided by supportability and troubleshooting diagnostics to identify and explain reasons for potential problems for the billing specialists and project accountants to investigate. Usage of supportability and troubleshooting diagnostics improves the understanding of billing specialists and project accountants on the cause of potential problems and how to resolve them. Billing diagnostics enable billing specialists and project accountants to quickly diagnose and address issues on their own

CONTRACT TEMPLATE

Contract administrators set up contract templates and use them to create contracts. . For example, the contract administrator can create templates for common types of contracts. The templates can contain a range of details, from a basic contract skeleton to highly detailed information for complex contracts.

ENABLE PERSONALIZATION AND CUSTOMIZATION OF THE INVOICE AND REVENUE WORK AREA OVERVIEW PAGES

Project application administrators can personalize or customize the Overview pages for the Invoice and Revenue work areas. The implementation team adds, changes, moves, and deletes components such as edit boxes, images, text, and links. The implementation team can also add to dashboard panel boxes predefined content such as reports from the business intelligence catalog and common components such as the calendar. Enabling personalization and customization increases efficiency of billing specialists and project accountants by:

- Reducing the required number of navigation and processing keystrokes
- Removing unnecessary attributes or regions
- Adding access to business intelligence reports within the Invoice and Revenue work areas

ENHANCED EVENT WEB SERVICE

The billing specialist and project accountant can include values for descriptive flexfields when creating or updating events using the newly re-architected event Web service.

IMPROVE CUSTOM BUSINESS INTELLIGENCE PUBLISHER REPORT CAPABILITY

The business intelligence author role, available in the cloud, can create custom business intelligence publisher invoice templates and reports, from a wider selection of contract and invoice related attributes. The improved report capability enables any person with the business intelligence author role to create custom invoice templates and reports that meet their unique invoicing and reporting needs.

INVOICE APPROVAL WORKFLOW ENHANCEMENTS

The application implementation team can use additional contract and invoice related attributes when creating custom invoice approval workflow routing rules.

INVOICE IN ANY CURRENCY

Billing specialists can specify any currency for invoices issued to customers. Billing specialists can convert amounts in bill transaction currency to the invoice currency using separate bill transaction to invoice currency conversion attributes on the contract.

TASK MANAGEMENT

Oracle Fusion Project Collaboration and Task Management enables you to manage work and related interactions in a consolidated environment. Identify, track, and collaboratively work on project or administrative tasks using a single tool that provides a complete view of work assigned. Collaborate with others in the context of their tasks, so team members do not lose time searching for instant messages, e-mail threads, or documents associated with the work.

COLLABORATE ON PROJECT WORK USING PROJECT SPACES

Project team members can create or use spaces in Oracle WebCenter to manage and share documents, announcements, blogs, and discussions to collaborate on project work. Project team members can navigate to a project space while working on a project task.

SEND EMAIL NOTIFICATIONS TO NEW FOLLOWERS

Team members can receive e-mail notifications when they are added as task follower.

USABILITY ENHANCEMENTS

Team members can tag tasks and filter based on the tagging. Project application administrators can extend task attributes in Oracle Fusion Task Management.

PROJECT CONTROL

Oracle Fusion Project Control provides full-function project planning, progress management, budgeting and forecasting, as well as delivered integration to Microsoft Project.

ADD PERIOD SPREAD CALCULATION METHOD TO COVER ENTIRE PERIOD WITHOUT PRORATION

Project managers can create a simple even spread curve that does not consider period lengths. The Even spread curve does not have prorated beginning or ending periods if the start date and end date of a resource assignment does not match the beginning or ending periods of the respective period. The existing even spread curve is now called a prorated even spread curve, because it uses the start date and end date of a resource assignment to determine how to spread the assignment to the first and last periods.

BUDGET OPEN INTERFACE

The Budget Open Interface is a new interface to allow project budgets to be imported into Oracle Fusion Project Portfolio Management for customers using our cloud offerings. This interface is designed to allow you to create an upload file based upon an Excel template. Using the template to create and upload a .csv file to the cloud server. Once the .csv file is on the server, you run a background process to import the file into the interface and then

process the data into the native tables. Error reports are generated if the data fails validation. This process is intended for new budget creation only and not for maintenance of existing budget versions on a project.

ENABLE PERSONALIZATION OF MANAGE PROJECT BUDGET AND MANAGE PROJECT FORECAST PAGES

Project application administrators can use the ADF Personalization and Administrator Customization functionality to personalize and customize user interface components on the budget and forecast pages. They can also add predefined content such as reports from the business intelligence catalog and common components such as calendars to dashboard panel boxes.

EXECUTE PROJECT STRUCTURE DENORMALIZATION FOR ALL PROJECTS

Denormalize project structure for all projects in your organization to prepare the projects for reporting on project performance dashboards and Oracle Transactional Business Intelligence reports.

USE AN ACTION TO MOVE TASKS IN PROJECT PLAN

Use an action to move tasks in the project plan based on changing priorities, scope changes, or delays in project schedule.

SECURITY ENHANCEMENTS TO ALLOW AUTHORIZED USERS TO LOCK AND UNLOCK BUDGET AND FORECAST VERSIONS

A new security privilege enables project administrators and project managers to lock and unlock budget and forecast versions from the Manage Budget Versions page or Manage Forecast Versions page.

SET BASELINE FOR NEW AND CHANGED TASKS IN PROJECT PLAN

Set a baseline for new and changed tasks on a project plan that already has baseline values. You can select one or more tasks and add them to the current baseline. The added tasks and their subtasks are added to the existing baseline and the amounts are summarized again to calculate the new amounts.

TASKS OPEN INTERFACE

The Tasks Open Interface is new interface designed to allow a task structure to be imported to Oracle Fusion Project Portfolio Management for customers using our cloud offerings. This interface is designed to allow you to create an upload file based upon an Excel template. Using the template create and upload a .csv file to the cloud server. Once the .csv file is on the server, you run a background process to import the file into the interface and then process the data into the task tables. Error reports are generated if the data fails validation. This process is intended for new task creation only and not for maintenance of existing task structures in a project.

USABILITY ENHANCEMENTS FOR ASSIGNING PLANNING RESOURCES

The Assign Planning Resources user interface is enhanced to promote ease of use and to provide better functionality. Project managers can assign resources to a single task or multiple tasks. Additionally, you can select multiple resources to add to selected tasks, and then assign quantities for each resource you are adding. Upon completing the changes, the costs are calculated and spread automatically for each newly assigned resource.

PROJECT COSTING

Oracle Fusion Project Costing captures commitments and costs from across the Fusion applications as well as supporting third-party integrations. The unique cost collection and processing needs of different sources are streamlined to provide timely insight into validated project costs.

CONSISTENT DRILL DOWN TO EXPENDITURE ITEM DETAILS

Drill down from various areas to the Expenditure Item Details page. The drill down is always to the General tab view of the Expenditure Item Details page instead of to the last visited tab view of the page.

CROSS-CHARGE TRANSACTIONS PROCESS OUTPUT REPORT

Project accountants can review a new Oracle Business Intelligence Publisher output report for the Identify Cross-Charge Transactions process. The output report displays a summary of the transactions identified and any exceptions encountered. It also includes a detailed section that displays reasons for exceptions.

EXPENDITURE ITEM PERFORMANCE OTBI SUBJECT AREA

Use the Expenditure Item Performance subject area to understand performance of the expenditure item with respect to the cost distribution at the granular level. Use the Expenditure Item Performance subject area to report

on the life cycle of expenditure items down to the cost distribution details. Review inception-to-date cost for core dimensions such as project, task, and expenditure type. Display revenue and invoice amounts associated with each expenditure item. Create WIP reports to display activity on the recent transactions for a project that includes the cost, revenue, and invoice amounts. The Expenditure Item Performance subject area enables you to report on transactions that are awaiting revenue, billing, or both.

REFINED LIST OF PROJECT VALUES WHEN ENTERING TRANSACTIONS

This enhancement updates the project list of values available for transaction entry to only show those projects which accept charges. It also displays the proper project information on historical transactions even after the project status has changed.

RETAIN THE HEADER INFORMATION ON EXCEL SHEETS

Project accountants enter cost transactions into Excel sheets and save their work as required before exporting. Header information including business unit, transaction source or document, and batch name are saved. Project accountants can save required attributes on sheets and use them as templates.

TRANSACTION CONTROLS OPEN INTERFACE

The Transaction Controls Open Interface is a new interface to allow transaction controls to be imported into Oracle Fusion Project Portfolio Management for customers using our cloud offerings. This interface is designed to allow you to create an upload file based upon an Excel template. Use the template to create and upload a .csv file to the cloud server. Once the .csv file is on the server, you run a background process to import the file into the interface and then process the data into the native tables. Error reports are generated if the data fails validation.

ENHANCEMENTS TO COST SUBJECT AREA IN ORACLE BUSINESS INTELLIGENCE APPLICATION

Transaction source, document, and document entry attributes are available for use in the project cost and commitments subject areas of the Oracle Business Intelligence application.

ENTER TIME FOR PROJECTS AND TASKS

Team members use Oracle Fusion Workforce Management to record time spent on projects and tasks. The configurable timecard layout enables workers to classify entries as billable or nonbillable.

VALIDATE TIME ENTRIES FOR PROJECT TRANSACTION CONTROLS

Time card entries created in Oracle Fusion Workforce Management are validated against projects, tasks, and expenditure types using transaction controls defined in Oracle Fusion Project Costing.

APPROVE PROJECT TIME ENTRIES

Project managers receive each time card entry submitted for their project for approval. Time cards can be imported into Oracle Fusion Project Costing after project managers approve the time cards.

IMPORT TIME ENTRIES FROM ORACLE FUSION WORKFORCE MANAGEMENT

Approved time cards are imported into Oracle Fusion Project Costing as part of the project lifecycle. After import, time card entries are processed and made available for costing, billing, and capitalization.

TIE BACK TIME ENTRIES TO ORACLE FUSION WORKFORCE MANAGEMENT

After time cards are imported and processed, status is communicated back to Oracle Fusion Workforce Management.

ADJUST PREVIOUSLY APPROVED TIME CARDS

Project accountants can adjust approved time card entries based on business processes and requirements. For example, a project accountant can change a billable time entry to nonbillable either in Oracle Fusion Workforce Management or Oracle Fusion Project Costing.

PROJECT FOUNDATION

Oracle Fusion Project Foundation includes common components that are shared across products within Oracle Fusion Project Portfolio Management. It includes the basic project plan structure and components such as resource breakdown structures, rate schedules, pricing, burdening, and cross-charge processing.

ASSIGN CUSTOM ENTERPRISE ROLES TO PROJECT ROLES

Associate custom enterprise roles with project roles to provision the function and data security for team members. You can customize enterprise roles by adding or removing duties and then associate them with seeded project roles.

CASCADE BURDEN SCHEDULE ASSIGNMENTS TO TASKS

When changing the burden schedule assignment at the project level, you can choose to apply the change to existing tasks. You have options to cascade the change on all existing tasks, on new tasks only, or on tasks with the same burden schedule that was assigned to the project before the change.

PROJECT OPEN INTERFACE

The Project Open Interface is a new interface to allow projects to be imported into Oracle Fusion Project Portfolio Management for customers using our cloud offerings. This interface is designed to allow you to create an upload file based upon an Excel template. Using the template, create and upload a .csv file to the cloud server. Once the .csv file is on the server, you run a background process to import the file into the interface and then process the data into the native tables. Error reports are generated if the data fails validation.

PERSON DIAGNOSTIC

The project application administrator can use a diagnostic script to identify why a person is not available in the list of values when searching for and adding team members. The diagnostic provides person details such as job, department, and assignment effective dates. This information helps the project application administration to identify any missing or invalid data for the person.

USABILITY ENHANCEMENTS FOR MANAGE PROJECTS

The new default search on the Manage Projects page displays all approved projects on which you are a team member. In the new Pending Activities tab, you can review pending activities for your projects, financial plans, and progress and view the status of submitted processes.

USABILITY ENHANCEMENTS FOR PROJECT OVERVIEW

The usability of the Project Overview page in the project work area is improved with the new Collaboration tab, which contains information linked to the primary WebCenter space. You can access this information quickly and easily with limited scrolling. You can access project attachments directly from the Collaboration tab without navigating to the project definition page.

PROJECT INTEGRATION GATEWAY

Oracle Fusion Project Integration Gateway brings together world-class financial project management from Oracle Fusion Project Portfolio Management and best in-class project execution in an optimized end-to-end enterprise project and portfolio management process. The result is a fully integrated and automated solution, which not only provides a single source of project truth, but also enables users to work in their tool of choice.

EXPORT RESOURCE RATES FROM PROJECT FINANCIAL MANAGEMENT TO PROJECT EXECUTION MANAGEMENT

Project application administrators use the Project Integration Gateway to export planning resources to create project enterprise labor and expense type resources in Oracle Fusion Project Management. When defining Oracle Fusion Project Management integration options, they can determine the source of labor cost rates to associate with the project enterprise labor resources.

IMPORT PROJECT PLAN AND PROGRESS FROM PROJECT EXECUTION MANAGEMENT TO PROJECT FINANCIAL MANAGEMENT

Project managers create a high-level financial task structure for projects in Project Financial Management applications in Oracle Fusion Project Portfolio Management. They export the project to Oracle Fusion Project Management to complete detailed planning and collaborate with team members to report progress. When ready, they import project plan and progress information back into Project Financial Management.

PROJECT INTEGRATION GATEWAY USABILITY ENHANCEMENTS

When project managers export projects from Oracle Fusion Project Portfolio Management to Primavera P6 Enterprise Project Portfolio Management, new projects are created in the destination application based on a project template. Application administrators can create a project template in Primavera P6 Enterprise Project Portfolio Management called Oracle Fusion Applications Integrated Project Template based on organization-specific preferences. If no template of that name is available, then default settings for used for all exported projects.

PROJECT MANAGEMENT

Oracle Fusion Project Management has been designed from the ground up to address the needs of all project managers, regardless of their level of experience, and can be adopted by all organizations for any type of project work. For either simple or complex projects, the intuitive and interactive Gantt user interface allows users to plan and natively schedule work; drag and drop tasks to create dependencies; assign work to team members, track progress and manage issues.

CREATE CUSTOM OTBI REPORTS USING THE PROJECT PLAN SUBJECT AREA

The Project Plan Real Time subject area enables you to effectively report on information related to the project plan including cost, schedule, effort, and bill metrics at the project and task assignment levels. You can perform variance analysis using these metrics. The Project Plan Real Time subject area includes dimensions such as start date, finish date, project, task, task hierarchy, sprint, resource, employee, and resource class.

DELIVERABLES DIAGNOSTICS

Diagnose issues in the Project Deliverables feature of Oracle Fusion Project Management Control. Perform basic debugging by verifying setup data and flows that support deliverable management.

ENHANCEMENTS TO EMAIL NOTIFICATION SETTINGS IN MY PROFILE REGION

Project managers receive immediate notifications for projects they manage. The email notification shows all open issues.

IMPORT PROJECT PLAN INTO MICROSOFT PROJECT

Project managers create a project plan in Oracle Fusion Project Management and update plan details including task assignments, dependencies, constraints, and progress. They can then import the project plan and associated details into Microsoft Project. A transfer report provides the status of the transfer request and lists errors, warnings, and success messages encountered during processing.

ISSUE CLOSE ENHANCEMENTS

View issue resolution details when team members reopen a previously closed issue. Team member can capture the reason for reopening a previously closed issue for future reference.

ISSUE MANAGEMENT DIAGNOSTICS

Diagnose issues in the Project Issues feature of Oracle Fusion Project Management Control. Perform basic debugging by verifying setup data and flows that support issue management.

PLAN AMOUNTS FOR LABOR RESOURCES

Project managers can select a set of labor resources to work on a project. Each resource has a default cost and bill rate from the resource's project enterprise resource definition and project managers can update these default rates on the project. As part of project planning, project managers assign labor resources to lowest-level tasks to track the planned, remaining, and actual amounts for each labor resource. The application calculates the cost and bill amounts for each task based on the planned hours and selected resource. They can view the labor cost and bill amounts in detail for each lowest-level, rolled up the task hierarchy, and in summary on the Project Manager Dashboard.

PLAN FOR EXPENSE RESOURCES

Project managers can select a set of expense resources such as hotel, airfare, and office supplies to plan for the overall expense amounts on a project. As part of project planning, project managers assign expense resources to lowest-level tasks to track the planned, remaining, and actual amounts for each type of expense. They can view the expense cost and bill amounts in detail for each lowest-level tasks, rolled up the task hierarchy, and in summary on the Project Manager Dashboard.

PROJECT ENTERPRISE RESOURCES OPEN INTERFACE REPORT

Upon completion of the Import Project Enterprise Resources process, Oracle Fusion Project Management generates a detailed report listing the resources that the process created or updated from the open interface, and errors that occurred during the import process.

PROVISION CUSTOM JOB ROLES FOR PROJECT USERS

Project application administrators create custom enterprise roles using predefined duties or customer-defined duties to support the business requirements, instead of directly changing predefined project enterprise roles. Project application administrators assign predefined or customer-defined roles to project enterprise resources. Administrators can optionally specify roles to assign by default to new project enterprise resources.

PROVISION RESOURCES FROM PROJECT ENTERPRISE RESOURCES

Project application administrators initiate user account creation and project role provisioning on the Manage Project User Provisioning page. Alternatively, project application administrators initiate user account creation and project role provisioning while creating resources on the Manage Project Enterprise Resources page.

PROVISION USERS FOR LABOR RESOURCES EXPORTED FROM MICROSOFT PROJECT

Project managers create a project plan in Microsoft Project. They can then export the project to Oracle Fusion Project Management. For any resources that do not already exist in Oracle Fusion Project Management, first and last name information is used to create new project enterprise resources.

RECEIVE EMAIL NOTIFICATIONS FOR PROJECT ISSUES

Receive notifications when an issue owner changes or when an issue is reopened. Issue owners receive email communication notifying transfer of ownership or reopening of a closed issue. Email notifications are also sent to the project manager and creator of the issue if the issue is reopened for further resolution.

RECORD AGILE USER STORIES

Project managers can capture a user story and up to 10 acceptance criteria for the lowest level of requirement (backlog item). A user story is a very high-level definition of a requirement, containing just enough information so that the developers can produce a reasonable estimate of the effort to implement it. Testers and developers can benefit from and write test cases based on the acceptance criteria.

REPLACE RESOURCES ON PROJECT RESOURCE ALLOCATION

Project managers can replace planning resources with assigned resources on a project. When this occurs, the planning resource is automatically replaced with the assigned resource on project tasks in Oracle Fusion Project Management.

REVIEW AND COLLABORATE ON PROJECT WORK USING PROJECT SPACES

Project managers can create project spaces or associate existing spaces to a project. The project manager and project team members use the tools such as wikis, documents, announcements, blogs, and discussions that are provided by Oracle WebCenter to collaborate on project work. If required, the project manager removes the link between the project and the project space.

REVIEW RESOURCE ALLOCATION TO PROJECTS

Review the allocation of resources on your projects including those managed by other project managers. Project managers can view the weekly resource capacity, project allocation, and allocation percentage. Colors assigned indicate which resources are overallocated or underallocated. Project managers can change the default colors as needed.

REVIEW TARGET AND ACTUAL PERCENT COMPLETE OF PROJECTS

Review the target and actual percentage of work completed on your projects. If the actual percentage of work complete on the current date is less than the target, then the percent complete bar is red in color. If the percentage of work complete on the current date is on track, then the bar is in green color.

REVIEW TASK EXCEPTIONS IN PROJECTS

Project managers can review the number of exceptions when tasks are overdue, or if the application raises exceptions when team members update tasks. Project managers can view this information in a graph or table and drill down to find out the reason for the exceptions.

USABILITY ENHANCEMENTS FOR AGILE PROJECT METRICS

Project managers can select multiple filter criteria and filter information with a single Go button in the regions displaying Agile project metrics. The Sprint Burndown graph is enhanced to use the earliest sprint start date to select the current sprint when multiple overlapping sprints exist.

USABILITY ENHANCEMENTS FOR PROGRESS LAST REPORTED BY TEAM

Project managers can select multiple filter criteria and filter information with a single Go button. In addition, project managers can drill down to review project progress information from the Progress Last Reported region.

USABILITY ENHANCEMENTS FOR PROJECT ENTERPRISE RESOURCES

The following usability enhancements are included for project enterprise resources:

- Maintain information on project-specific resources and change a project-specific resource to a cross-project resource to assign to multiple projects.
- Provide increased visibility to resource managers when a resource is no longer available to fulfill project resource requests.
- View or search by additional resource attributes such as rates, resource pool, and availability to fulfill requests.

USABILITY ENHANCEMENTS FOR PROJECT PLAN

The following usability enhancements are included for the project plan:

- Fill down data to a range of selected tasks below it.
- Directly assign project enterprise resources to your project tasks.
- Hide the task plan to provide more space to work on your project plan.
- Use the navigation links provided in the page-level Actions menu to switch between different pages within the project such as Manage Project Plan, Review Project Progress, Manage Project Resources, and Manage Project Resource Requests.
- Leverage the default allocation percentage you specified in the Manage Project Resources page when you assign a resource to a task.

USABILITY ENHANCEMENTS FOR PROJECT REQUIREMENTS

The following usability enhancements are included for project requirements:

- Select multiple requirements and update them simultaneously.
- Search for requirements with additional search fields: Release and Sprint.
- Define and use additional requirement statuses.

USABILITY ENHANCEMENTS FOR PROVISIONING PROJECT RESOURCES

The following usability enhancements are included for provisioning project resources:

- Assign a resource as a project manager to any project from the Manage Project User Provisioning page.
- Receive automatically generated error messages during resource provisioning to help take action to resolve problems encountered during provisioning.

USABILITY ENHANCEMENTS FOR RESOURCE ASSIGNMENT INTEGRATION

Project managers and resource managers can adjust assignments, such as canceling assignments or changing dates, for resources that are managed in Oracle Fusion Project Resource Management. Project managers can view the adjustment details in Oracle Fusion Project Management.

WORK PLAN OPEN INTERFACE

The Work Plan Open Interface is a part of a new interface designed to enable customers of our cloud offerings to import work plans to Oracle Fusion Project Portfolio Management. Create an upload file based upon an Excel template. Using the template, create and upload a .csv file to the cloud server. Once the .csv file is on the server, you run a background process to import the file into the interface and then process the data into the native tables. Error reports are generated if the data fails validation.

PROJECT PERFORMANCE REPORTING

Oracle Fusion Project Performance Reporting delivers a revolutionary approach to help project-driven organizations keep pace and keep score through extraordinary project performance insight. It allows project stakeholders to receive answers to critical business questions and take action in real time, utilizing a multidimensional model at the heart of the solution to deliver the right information at the right time.

UPDATE PROJECT PERFORMANCE DATA ACROSS PROJECTS

The project administrator can submit the Update Project Performance Data process for a range of projects. Previously, only the project manager could submit the process to summarize project data for multiple projects.

PROJECT RESOURCE MANAGEMENT

Resource managers use the Manage Project Resources business process to manage the availability and staffing of project enterprise labor resources in a global environment, fulfill project resource requests, and monitor resource utilization. The Manage Project Resources business process in Oracle Fusion Project Resource Management is used in conjunction with the Plan Project and Execute Project business processes in Oracle Fusion Project Management.

ACTUAL HOURS OPEN INTERFACE

Import resource actual hours from any time entry application into Oracle Fusion Project Resource Management through an open interface table using a comma delimited file. Resource managers use these hours to track actual utilization for resources and resource pools. Resource managers can monitor actual resource utilization in Oracle Fusion Project Resource Management. The ability to gather information from any time entry application provides maximum flexibility.

ADD BUSINESS-SPECIFIC FIELDS ON PROJECT RESOURCE REQUEST

Project applications administrators can configure the project resource request with additional fields pertaining to the specific needs of their organization. The fields appear on the project resource request and are available for entry.

ANALYZE ACTUAL UTILIZATION

Oracle Fusion Project Resource Management tracks resource actual utilization for the current quarter or previous four quarters. Actual utilization for the current quarter includes both actual hours that are recorded to-date and project assignment hours from the current date to the end of the quarter. Rolled-up actual utilization is available for the resource pools. The actual utilization is compared to the target utilization for the selected date range. Comparing target utilization to actual utilization in previous quarters allows resource managers to monitor trends in resource utilization and determine how well a resource achieved target utilization. Analyzing actual utilization in the current quarter allows resource managers to proactively improve utilization when actual utilization is lower than the target utilization, or find relief for an overworked resource when actual utilization is higher than the target utilization.

CAPTURE TARGET AND RESOURCE COST AND BILL RATES

Project managers and resource managers can specify the desired bill and cost rates when creating a project resource request. Resource managers compare these target rates to the rates of potential candidates when searching for a resource to fulfill the request.

MAINTAIN ASSIGNMENT DATES

Resource managers and project managers can adjust assignment start and finish dates for a resource assigned to a project. As a result of the adjustment, the application generates a request for adjustment approval. Upon approval, the assignment reflects the adjusted dates. Project resource assignments often require changes over the course of the assignment date range due to changes in scope and other circumstances. The ability to change the assignment dates allows project managers and resource managers to manage the assignments in real-world situations.

MONITOR ASSIGNMENTS ENDING SOON

Resource managers can actively keep track of resource assignments that are ending soon and act on them when necessary, such as by extending assignment dates. Resource managers can also monitor any processes that they start and ensure that the processes complete successfully, or follow up on the unsuccessful processes. Having easy access to resource assignments that are ending soon allows resource managers to actively find new assignments for a resource or proactively collaborate with the project manager to determine if the resource will finish work on the project as of the assignment finish date. Resource managers have a single location to manage dates for assignments ending in the near future.

PROJECT RESOURCE REQUEST OTBI SUBJECT AREA

Report on project resource requests as a fact using the Project Resource Request subject area in Oracle Transactional Business Intelligence. The fact contains information such as the total number of requested hours, target cost rate, and target bill rate. Report on the fact using dimensions such as resource, project, time, request status, request type, project role, qualifications, and proficiencies. The Project Resource Request subject area in OTBI enables resource managers and project managers to create reports to track resource demand. For example, the reports can answer business questions about requests that are open and awaiting fulfillment, the most commonly requested qualifications, and the potential revenue for open project resource requests.

RECEIVE NOTIFICATIONS FOR NEWLY SUBMITTED REQUESTS

When a project manager submits a project resource request for fulfillment, the person who is listed as responsible for staffing the request receives a notification via workflow. Proactively informing the resource manager of submitted project resource requests can shorten the time from submission of the request to the assignment of a resource. A resource manager does not have to actively search for open requests and can instead rely on automatic notifications.

REQUEST AND ASSIGN RESOURCES BASED ON SPECIFIED HOURS

Project managers can specify the number of hours per day that the resource is needed to work on a project. Resource managers can locate a resource that is available for the requested hours. The resource is assigned to the project for the specified hours per day. The ability to request and assign a resource to a project for a specified number of hours provides greater flexibility for project managers to manage work on a project. A project manager can assign a resource to work partial days on a project, which enables the project manager to utilize the resource only as much as needed. The remaining capacity for the resource can be assigned to other projects.

RESOURCE ASSIGNMENT OTBI SUBJECT AREA

Report on resource assignments as a fact using the Resource Assignment subject area in Oracle Transactional Business Intelligence. The fact contains information such as the total number of assigned hours. In addition, report on the fact using dimensions such as resource, project, time, assignment status, request type, and project role. The Resource Assignment subject area in Oracle Transactional Business Intelligence enables resource managers and project managers to create reports to track resource assignments. For example, the reports can answer business questions about resource assignments for a resource pool that are ending soon, active resource assignments for the quarter or other period, and the margin for resource assignments on a project.

RESOURCE REQUEST OPEN INTERFACE

Import project resource requests from any application into Oracle Fusion Project Resource Management using an open interface table. These requests are available for fulfillment by resource managers. Create project resource requests in your current application and import the requests into Oracle Fusion Project Resource Management to search for resources to fulfill the requests. You can maintain the current infrastructure while benefitting from Oracle Fusion Project Resource Management features.

RESOURCE SUPPLY OTBI SUBJECT AREA

Report on resource supply as a fact using the Resource Supply subject area in Oracle Transactional Business Intelligence. The fact contains information such as the cost rate, bill rate, resource calendar, and whether resource managers manage resource availability and staffing. Report on the fact using dimensions such as the resource pool, primary project role, and resource qualifications and proficiencies. The Resource Supply subject area in Oracle Transactional Business Intelligence enables resource managers and project managers to create reports to track resource supply. For example, the reports can answer business questions about the competencies and proficiencies for all resources in a resource pool, the number of resources that are highly skilled in a particular competency, and which resources are currently unassigned.

USABILITY ENHANCEMENTS FOR PROJECT RESOURCE MANAGEMENT

When populating a value in a choice list field, the application displays a list of suggested values that contain the characters entered. A subset of attributes appears for the choice list. Resize the dialog box as needed.

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Hardware and Software, Engineered to Work Together