

Oracle® Project Resource Management

Implementation and Administration Guide

Release 11*i*

December, 2001

Part No. A90320-02

ORACLE®

Part No. A90320-02

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**Oracle Project Resource Management Implementation and Administration Guide, Release 11i
Part No. A90320-02**

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Preface

This guide provides you with information on how to implement Oracle Resource Management, Release 11i.PRM.C. This preface describes the organization of this guide.

Intended Audience

The intended audience for the material presented in this guide is system administrators and persons responsible for performing the duties of implementing, configuring, and administrating the Oracle Project Resource Management application.

Structure

The organization of this guide is as follows:

[Chapter 1, "Introduction"](#) describes the purpose and key features of the product. It also covers the required technology stack and implementation considerations.

[Chapter 2, "User Process Flows and Concepts"](#) discusses the various user and process flows within Oracle Project Resource Management.

[Chapter 3, "Establishing Your Enterprise Structure"](#) covers how to set up your organization and its various components such as business groups and organizational hierarchies.

[Chapter 4, "Defining Your People"](#) discusses how to define the various resource attributes and how to establish your resource pool.

[Chapter 5, "Configuring Your Organization Security"](#) describes responsibility-based security and how to establish a security structure for your organization.

[Chapter 6, "Defining Your Project Roles"](#) discusses how to define roles and role attributes.

[Chapter 7, "Defining Calendars and Schedules"](#) describes calendars and schedules, and covers how to define the associated attributes. It also describes how to maintain the calendars and schedules so they stay current.

[Chapter 8, "Defining the Project Environment"](#) describes the attributes associated with projects, setting up probability, establishing the status and workflow structures, and setting up the self-service environment.

[Chapter 9, "Implementing Resource Utilization"](#) describes how to set up utilization functions for tracking your resource utilization.

[Chapter 10, "Implementing Financial Forecasting"](#) describes how to set up forecasting functions so you can perform forecasting on your project resources.

[Chapter 11, "Setting Up for Reporting Capabilities"](#) covers how to set up reporting functions in order for you to perform reporting on your projects and resources. This chapter also describes the seeded reports.

[Chapter 12, "Maintaining Your Data"](#) discusses the various processes you must run in order to maintain accuracy in your data.

[Appendix A, "Implementation Steps Checklist"](#) provides a step-by-step checklist for implementing the Oracle Project Resource Management application.

This guide also includes a [Glossary](#) and an [Index](#).

Related Documents

The chapters of this guide provide basic and product-related information for setting up, configuring, and maintaining information such as your enterprise structure, resources, calendars, and schedules. For additional information, you are referred to other sources of information as appropriate for the topic. Depending upon which application you are using to perform the set up, your reference source may differ.

These sources include:

- *Oracle Projects User Guide*
- *Implementing Oracle HRMS*
- *Oracle Projects 11i Release 11.5.3/Mini Pack B User Guide Supplement*
- *Documentation Update for Patch Numbers 1383905 and 1377992 - Global Competencies*

- *Oracle Applications System Administrator's Guide*
- *Oracle Applications Developer's Guide*

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Conventions

The following conventions are used in this guide:

Convention	Meaning
.	Vertical ellipsis points in an example mean that information not directly related to the example has been omitted.
. . .	Horizontal ellipsis points in statements or commands mean that parts of the statement or command not directly related to the example have been omitted
boldface text	Boldface type in text indicates a term defined in the text, the glossary, or in both locations.
< >	Angle brackets enclose user-supplied names.
[]	Brackets enclose optional clauses from which you can choose one or none.

Since Oracle Project Resource Management is a self-service application, references to a page within the application are specific to a self-service Web page. Any references to forms refers to forms within the Oracle Projects, Oracle Human Resources Management System (HRMS), or Oracle CRM applications.

Introduction

Oracle Project Resource Management is a self-service application to manage the deployment and capacity of your resources in a global environment. You use this application to manage your project resource needs, project profitability, and organization utilization, by locating and deploying qualified and available resources to your projects across your global, extended enterprise.

Using this application, project managers, resource managers, and staffing managers throughout your enterprise can manage their resources and more effectively communicate their needs to one another.

This chapter discusses the key features of the Oracle Project Resource Management application and considerations to review in your implementation process through the following topics:

- [Key Features](#)
- [Required Technology Stack](#)
- [Implementation Planning](#)
- [Determining the Deployment Method](#)

Key Features

The Oracle Project Resource Management application includes features such as:

- Role-based security
- Detailed requirement definition
- Search functions for:
 - matching qualified resources to open requirements
 - locating requirements for which resources may nominate themselves
- Tracking candidates for filling requirements
- Automated approval processing
- Detailed schedule management of your project team, including timeline views
- Utilization reporting on your resource assignments from the individual resource level to the organization level
- Capabilities for performing analysis and financial forecasts on your projects
- Simple Web interface for easy access by all project stakeholders
- Complete project and customer sales history access through the integration with Oracle Sales Online

Required Technology Stack

Prior to installing the Oracle Project Resource Management application, you must install other software components that build a base. This base provides the structure for the Oracle Project Resource Management application.

The required base installation for Oracle Project Resource Management is Oracle Applications, Release 11i.

You must upgrade your Oracle Applications Web Tier environment to include the Self-Service Framework technology stack. The instructions for upgrading your Oracle Applications Environment to use the Oracle Applications Self-Service Framework are included with the framework patch in README-Config-FAQ-Apps-HTTPServer.html located under the top level patch directory. Please complete all steps in those instructions before proceeding with the installation of Oracle Project Resource Management.

For additional information on installing these products and patches, you can refer to the following sources:

- *Installing Oracle Applications, Release 11i*
- Associated readme files for each patch

Implementation Planning

Since Oracle Project Resource Management is integrated with applications such as Oracle Projects, Oracle Human Resources Management System (HRMS), and Oracle CRM, many interdependencies exist. Careful planning is required because of these interdependencies. A large portion of the information you must enter for your implementation is actually loaded through these applications. Therefore, you should create an implementation plan. Use the checklist provided in [Appendix A](#) as a starting point for this plan because it identifies all the required and optional steps for your implementation.

Shared Data

All organization and employee data is stored in Oracle HRMS tables. As most of these tables are shared, you can enter this information using Oracle HRMS and access the information through other Oracle applications such as Oracle Projects. However, if your business does not currently use Oracle HRMS, you can define the resource data through Oracle Projects. For more information, refer to Chapter 17, "Oracle Projects Setup and Implementation," in the *Oracle Projects User Guide, Volume 3*.

Determining the Deployment Method

Prior to implementing Oracle Project Resource Management, you must determine how you want to handle project staffing. You have three possible approaches in addressing who manages the task of project staffing:

- **Centralized**

The centralized approach uses staffing analysts (resource analysts.) These analysts are responsible for managing requirements and assignments for all the projects of an organization.

- **Decentralized**

The decentralized approach uses project managers, or project assistants, who work with resource managers to fill project requirements.

- **Combination**

The combination approach is used by companies who have all these roles interacting in the effort to fill project requirements and to obtain the highest utilization of the available resources.

The method you choose effects how you roll out the implementation of the application, how you establish training plans, and determines your security strategy.

User Process Flows and Concepts

The Oracle Project Resource Management application provides functionality to meet the needs of several key user scenarios, each with its own set of responsibilities and related task flows. You can adapt these scenarios into your environment, or modify them accordingly.

Understanding the process flows and user concepts of the application provides you with the appropriate knowledge for making key decisions for your implementation.

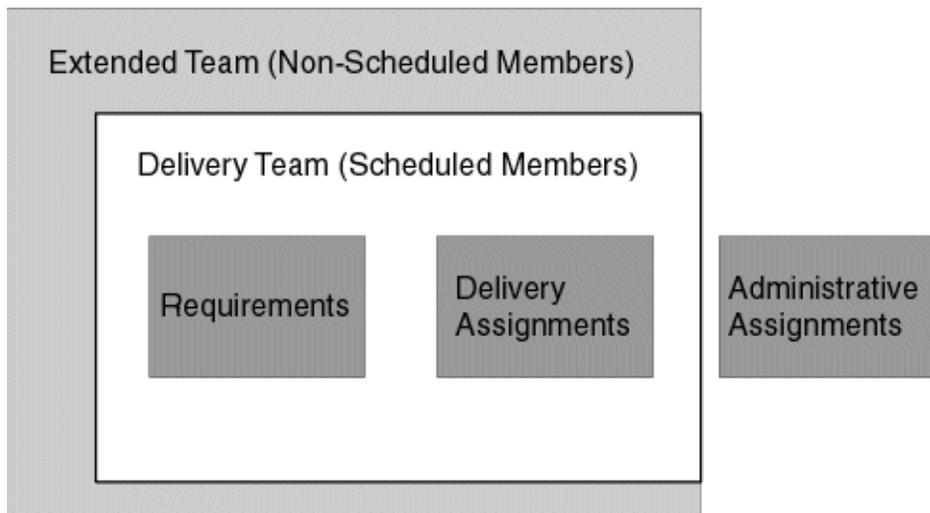
This chapter covers the following topics:

- [Defining a Project Team](#)
- [Standard Task Flows](#)
- [Application Process Flows](#)

Defining a Project Team

A project team has two layers: the delivery team and the extended team. The delivery team consists of all the key members who perform the project tasks. These members are scheduled and tracked within the organization that owns the project. The extended team consists of team players outside of the project team such as individuals within the organization performing administrative duties and client participants. These players interact with the team members, but are not managed within the organization owning the project.

The following diagram demonstrates how the delivery team and extended team own requirements and assignments.



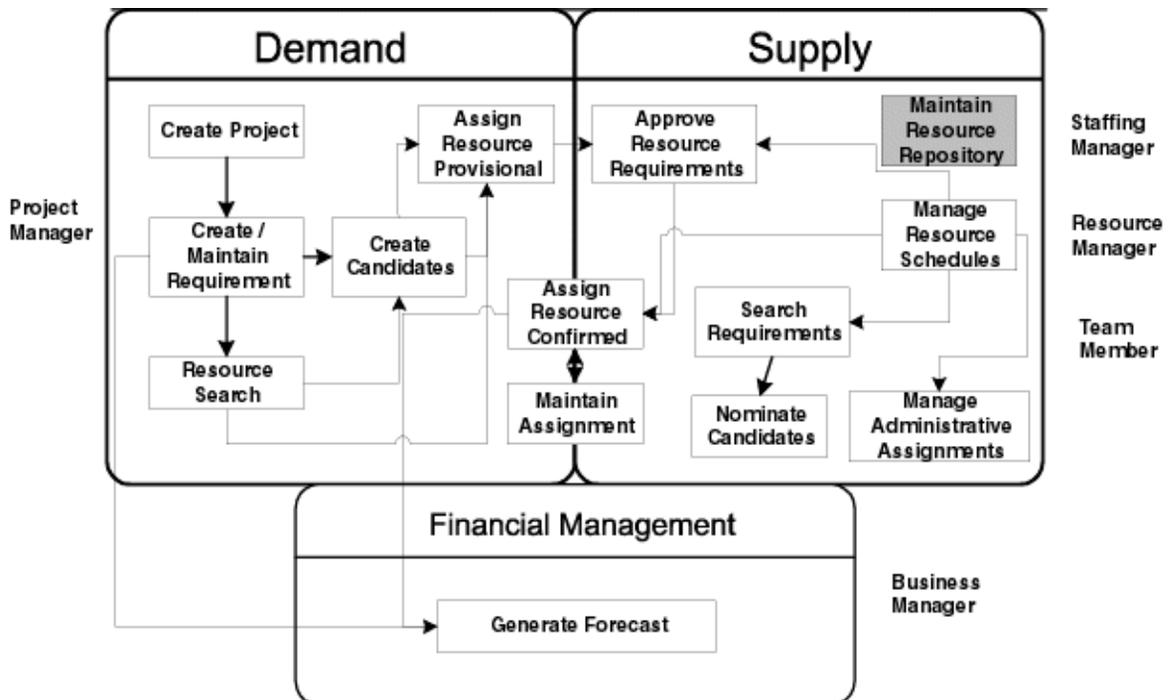
Administrative assignments are not included in the domain of the delivery team as these assignments are typically tracked on an indirect/administrative project. Therefore, to distinguish these assignments from delivery assignments, they are shown outside the framework of the project team. Administrative projects can have project managers who manage these assignments, but having a project manager is not a requirement.

Standard Task Flows

You can divide the overall process flow of Oracle Project Resource Management into three segments: Demand, Supply, and Financial Management. The borders dividing these segments are not definite. In fact, many of the tasks are shared between segments.

The segments demonstrate how Oracle Project Resource Management addresses the different, but related, tasks and viewpoints needing access to project staffing data. Different needs coming together to use the same data.

The following diagram illustrates how the different needs of the users can use the same data through process flows. It also provides the segment division of task flows and the various user roles that might use these segments.



The objectives of the role a user is playing on a project drives the tasks the user must perform. The implementation of Oracle Project Resource Management provides seeded roles to which you can add your own to suit your business needs.

In the above diagram, typical user roles are associated with the applicable process segments. For example, a Financial Analyst performs tasks related to financial management, and a Project Manager concentrates on tasks relating to project staffing from the demand side.

In general, you have the following typical user roles to address the issues of project staffing:

- **Project Manager**

A project manager initiates the creation of the project and requirements. In order to fill the requirements, the project manager must perform searches from which candidates can be identified. Once a candidate is selected, a provisional assignment is created for the resource. The provisional assignment is forwarded to the resource manager or primary contact for approval. If the project manager wants specific persons to fill requirements, the search step can be bypassed and direct provisional assignments can be made.

- **Staffing Manager**

Staffing managers generally fill the supply side of the task flows as they have the access to all the resource data and manage the schedules and utilization of the resources. Therefore, these persons know the availability of their own resources. Staffing managers can approve assignments given the proper authority, as well as, search for resources, nominate candidates, and fill open requirements.

- **Resource Manager**

Resource managers confirm or deny resource assignments, and manage the schedules and utilization of their direct reports (resources.)

- **Team Member**

Team members are the resources. They can manage their own competence profiles and work information through the shared professional model of Self-Service Human Resources. Team members can also view their schedule of project assignments and search for requirements to nominate themselves as candidates.

Application Process Flows

The process flows of the Oracle Project Resource Management application entail activities such as creating a requirement, electing a person as a candidate, and creating assignments. Based on the responsibility of the user, these process flows may vary. This section describes some of the basic process flows of the application.

Creating Requirements

Through Oracle Project Resource Management, you have the ability to define the requirements for a given project. The purpose of these requirements is to provide a representation of the resources that are needed to complete the project.

For example, you have a project to install a product at a customer site. This project may require two DBAs and two Implementation Consultants skilled in the product to be installed. Without knowing the specific individuals that will fill these required roles, you can identify information such as what level of experience is necessary, where the work will be carried out, and approximately how long each position is required. You define this information for each requirement which simplifies the process of identifying potential resources to fill these roles.

Performing a Resource Search

When performing a resource search for a requirement, the dates of the requirement are compared with the availability of the resource. If these time periods match, the resource is considered a candidate for the requirement given the other search criteria for the requirement also matches.

Filling Requirements

Filling a requirement involves either directly identifying a known resource, or searching the resource repository to find suitable resources.

When a requirement is filled, an assignment is created. The assignment identifies the period of time a specific resource will fill a specific role. If the person assigning the resource to the requirement has authority over the resource, the assignment is considered a confirmed assignment. Otherwise, the assignment must go through an approval process, either manual or workflow-enabled depending upon how you have implemented your installation. These assignments are provisional until confirmed.

Confirmed assignments appear on the schedules of the assigned resource and the project. This assignment to the resource reduces the availability of the resource.

Adding Assignments to Projects

An assignment is a filled work position on a project associated with a specific resource for a designated period of time. An assignment can have various statuses as required such as proposed, provisional, and confirmed.

Upon selecting the team role for the assignment, default values are provided for the assignment name and job levels. Values for the assignment location and calendar are retrieved from the associated project. You can change any of these defaults as necessary.

After you have entered all the desired assignments, click **Save and Submit** to submit the assignments for approval. This process prompts you for the approvers of the assignment and then, forwards the assignment through the approval process.

Creating Administrative Assignments

An administrative assignment represents a non-work activity and is tracked against an administrative project. You can use such assignments to block off time on your resource schedules. The following examples demonstrate the functionality of administrative assignments:

- vacation time
- internal training
- project management duties
- personal holiday
- sick time
- jury duty

You may want to track such assignments because they consume the work hours of your resources, and therefore, affect availability, financial forecasting, and resource utilization.

Establishing Your Enterprise Structure

The structure of your enterprise determines how to define your business groups, organizations, hierarchies, jobs, and job groups. You must establish these key pieces of information prior to implementing Oracle Project Resource Management.

If you have already set up some of these features in a previous implementation of Oracle Projects or Oracle Human Resources, you can skip the respective sections of this chapter. However, you may want to review the information to ensure it corresponds to the data you want to use with Oracle Project Resource Management.

This chapter covers the following topics:

- [Setting Up Your Business Group Model](#)
- [Defining Organizations](#)
- [Defining Organizational Hierarchies](#)
- [Defining Jobs and Job Mapping](#)

Setting Up Your Business Group Model

A Business Group is a special class of organization. Every business group can have its own set of default values, with its own internal organizations, grades, jobs, positions, payrolls, employees, applicants, compensations, competence structures, and benefits.

In setting up your enterprise structure, you can establish one business group or divide it into multiple business groups. If you set up more than one business group, the associated data, such as organizations and employees, is partitioned accordingly. Establishing an organization as a business group is not reversible, therefore, you should plan your business group setup carefully.

Note: If you plan to set up project roles to use default jobs, you must enable CBGA.

For more information on business groups and structuring your enterprise, see "Adapting or Creating a New Business Group," in *Using Oracle HRMS – The Fundamentals*.

Prerequisites

Your enterprise structure strategy plan outlines your business groups. Prior to actually setting up your business groups, you must complete the following tasks:

- Set the HR: Cross Business Group Profile as described in the *Oracle Projects 11i Release 11.5.3/Mini Pack B User Guide Supplement*.
- Define the six key flexfield structures outlined in "Implementation Steps" in *Documentation Update for Patch Numbers 1383905 and 1377992 - Global Competencies*.

Defining Organizations

Organizations are the basic work structure of any enterprise. They represent the functional, management, or reporting groups for individual business groups or globally for your entire enterprise.

You can choose any organization, but typically, you use expenditure organizations to track project resource-related expenses. Expenditure/Event organizations can own project events, incur expenditures, and hold budgets for projects. To enable these capabilities in the organization, you must perform the following tasks when defining an organization:

- Enable the Project Expenditure/Event organization classification.
- Define a default operating unit for the organization in the Additional Information section. This step causes all resources belonging to this organization to inherit the specified operating unit and calendar as their default operating unit and calendar.
- Enable the HR Organization classification. This task is necessary in order to have the ability to assign resources (people) to the organization.
- Attach the organization to the Expenditure hierarchy assigned to the operating unit using the Setup Implementation Options form.

For instructions on performing these tasks, refer to the following sources:

- "Creating an Organization" in *Using Oracle HRMS – The Fundamentals*.
- "Entering Organization Classifications" in *Using Oracle HRMS – The Fundamentals*
- "Entering Additional Information" in *Using Oracle HRMS – The Fundamentals*

Understanding the Resource Operating Unit

Every resource, employees and contractors alike, is associated with an operating unit for security and forecasting reasons. This operating unit is derived from the organization operating unit. The operating unit of the resource is active for the duration of an assignment. It drives forecasting based on the transfer price defined for the operating unit if the resource is assigned on a project under a different operating unit, in other words, a borrowed resource.

Each time the employee assignment changes or if the default operating unit originally set up for the employee changes, the Project Resource Management application updates the resource operating unit. A history is maintained for

record-keeping purposes and allows date-specific operating unit defaults for the resource.

Defining Organizational Hierarchies

An organization hierarchy provides the structure of the relationships between your organizations. Depending on your business needs, you can define one hierarchy or multiple hierarchies for the following purposes:

- project-owning organizations
- expenditures
- reporting
- project burdening hierarchies for each business group

You can also set up global organization hierarchies spanning across multiple business groups if you are operating in a cross-business group environment (the HR: Cross Business Group profile option is set to yes.)

For more information on organization hierarchies, refer to the following sources:

- "Organization Hierarchy" in the *Oracle Projects User Guide*
- "Define Global Organization Hierarchies" in the *Oracle Projects 11i Release 11.5.3/Mini Pack B User Guide Supplement*
- "Creating Organization Hierarchies" in *Using Oracle HRMS - The Fundamentals*

Defining Jobs and Job Mapping

Each person in Oracle HRMS can have only one primary job assignment. However, HR jobs are often too granular for the purposes of project jobs. For example, you may have an HR job defined as Consultant - Level 2, but for the purposes of making project assignments, you only want to see Consultant. Oracle Projects provides you with the ability to map the HR-defined jobs to the project-related jobs.

The following table provides the tasks you should complete categorized by the associated Oracle application.

Application	Task
In Oracle HRMS ...	<ul style="list-style-type: none"> ■ Define Job Groups in Oracle HRMS. Job groups enable you to classify certain types of work. ■ Define Jobs in Oracle HRMS. Jobs are the precise assignment the employee fills. <p>Note: If you have shared HR, you can access these forms in Oracle Projects.</p>
In Oracle Projects ...	<ul style="list-style-type: none"> ■ Define Job Relationships (Job Mapping) in Oracle Projects. Job Mapping enables you to link similar jobs in different job groups. (For details on mapping, see the <i>Oracle Projects 11i Release 11.5.3/Mini Pack B User Guide Supplement</i>.) ■ Select Job Groups for Resource Lists in Oracle Projects. ■ Select Job Groups for Project Templates in Oracle Projects. You can assign a Billing Job Group to contract projects and project templates.

You can enter this information directly through Project Resource Management using the Project Super User responsibility, if you do not have Oracle HRMS or Oracle Projects.

For more information and instructions for setting up these job-related attributes, refer to the following sources:

- *Implementing Oracle HRMS*
- *Oracle Projects User Guide*
- the *Oracle Projects 11i Release 11.5.3/Mini Pack B User Guide Supplement*

Note: Jobs and job groups are business group-specific.

Determining the Master Job Level

Valid job levels are defined through the sequence number of grades associated to the master jobs in the master job group. Each master job has a job level which is derived from the sequence definition of the job grade. Each HR job of the resource maps back to a master job and retrieves the job level of the master job as well. This job level defaults to the employee (resource) through the HR primary assignment.

You can have multiple job levels of a master job by assigning multiple grades. However, since Project Resource Management uses the job level for resource searches, you should only define one job level for each master job. If multiple levels for a master job are defined, the resources assigned HR jobs which map to the master job will inherit the highest job level. This job level is defined using the Job Grades form and is the sequence number associated with the grade. The required fields for defining the job grades are sequence, name, from date, and to date.

Using the Job Level in Resource Searches

Each project requirement has defined minimum and maximum job levels for the purpose of resource searching. During a search, the job levels of the resources are compared to the minimum and maximum job levels of the requirement. If the job level of a resource falls between the minimum and maximum job levels of the requirement, the resource is considered a possible match for the requirement given other search criteria are met.

The Minimum and Maximum Job Level fields default from the levels defined on the requirement, but you can modify them on the Modify Search Criteria page. Modifying these values on this page does not change the original definition on the requirement. The original definition of the requirement is available on the Requirement Details page.

The minimum and maximum job levels are based on the master job levels associated with the master jobs for the master job group if the implementation is in CBGA mode. If the implementation is in SGBA mode, then the job levels are based on the job levels for the single job group.

Defining Your People

Managing your resource pool not only includes understanding the organization, the people, and their assignments, it begins to enter the realm of performing project forecasts and managing resource utilization. The skill sets and availability of your resources compose the basic foundation you need in order to perform these valuable management functions. All this information developed properly can offer you the ability to manage your resources effectively and efficiently.

The structure of your enterprise determines how your resources are distributed, how competencies are shared and tracked, and how calendars and schedules are created and maintained. Therefore, you should establish this structure in your system before you delve into setting up your resources. For more information on the organization structure, see [Chapter 3, "Establishing Your Enterprise Structure"](#).

This chapter provides information and instructions on establishing the resource building blocks through the following topics:

- [Understanding Resource Pool Benefits](#)
- [Defining Employees and Employee Assignments](#)
- [Setting Up Competencies](#)

Understanding Resource Pool Benefits

The resource pool is the collection of all your valid resources into a single group. Each individual within your resource pool has various attributes defined such as personal information, work patterns, location, and competencies. Through entering this information as accurately as possible, you gain the following benefits:

- resources with consistent information from which to search
- secured single-source access to information such as personal information, resume, and competencies
- precise requirement matching capabilities
- forecasting based on resource needs
- resource utilization manageability

Performing Searches on Your Resource Pool

Only valid resources (including future-date employees) are considered in resource search queries. In order for a person to be considered a qualified resource within Project Resource Management, certain criteria must be met. For a complete list of the criteria, refer to [Chapter 12, "Maintaining Your Data"](#).

Note: Future-dated employees can qualify as a match for a requirement only if their start date is on or after the start date of the requirement.

When searching your resource pool for potential matches to requirements, you specify certain criteria to limit the search. These criteria include the following:

- **Organizational Hierarchy**

This field identifies the project expenditure/event organization hierarchy in which to conduct the search for resources. The default hierarchy value is the hierarchy assigned to the operating unit for the current responsibility as defined in Implementation Options. You can change this value to any project expenditure/event organization hierarchy in the database. This field is required for performing a resource search.
- **Starting Organization**

This field identifies the starting organization from which to start the search within the specified project expenditure/event organization hierarchy. All

project expenditure/event organizations below the specified starting organization in the organizational hierarchy are considered in the search as well. This field is required for performing a resource search.

- **Country**

This field identifies the country for which to conduct the search for resources. This country is compared to the primary address of the resource as of their primary HR assignment start date.

Note: If a resource does not have a country defined for their primary address, but matches all other search criteria, that resource will be included in the search results.

- **Availability**

The Minimum Availability field identifies the minimum availability required for the resource to be considered a match for the requirement. Availability is the available number of hours in schedule of a resource. It is equal to the capacity of the resource minus the number of hours on confirmed assignments. Any assignment with a provisional system status does not reduce the availability of the resource.

The availability of a resource is considered from the current system date and does not reflect any past dates. For example, you have a requirement that spans four weeks with the start date that began last week. If a resource is found to have the next three weeks 100% available, then that resource is considered as a 100% match without any regard to the availability of the resource for the first week of the requirement. A resource search will never return any results when the requirement is completely in the past (when the end date of the requirement is prior to the current date.)

In order for a resource to qualify for the search results, the resource must have availability records for at least a portion of the assignment duration. An availability record represents each day a resource has availability. These records are generated for a specific time period in the future for every resource. The specific time period is determined by the profile option PA: Availability Duration. For example, you have a requirement with a time length of two years but a resource has availability records for only the next year with availability (meaning these records are not used for other confirmed assignments), the resource will still be delivered in the search results as a potential match.

You can view the availability of a resource on the timeline on the Resource Details page. The displayed availability may not be correct if the resource does not have an assigned calendar for the duration of the requirement or the calendar schedules have not been generated or updated for the period.

For more information on the calculation of availability, refer to ["Establishing the Availability Calculation"](#) in Chapter 7, ["Defining Calendars and Schedules"](#).

- **Job Level Match**

For an explanation on how the job levels affect searches on your resource pool, refer to ["Using the Job Level in Resource Searches"](#) in Chapter 3, ["Establishing Your Enterprise Structure"](#).

- **Competencies**

For an explanation on how competencies affect your search results, refer to ["Matching Resource and Requirement Competencies"](#) and ["Assigning Global and Local Competencies"](#) later in this chapter.

Defining Employees and Employee Assignments

After establishing your enterprise structure, you can add your employees and their respective primary assignments.

You can enter employee information through the Enter and Maintain People form using either the Project Resource Management Super User, US HR Manager or the Human Resources responsibilities.

Note: In Oracle HRMS, contractors are set up as employees (system person type) and are created under the user person type of Contractor.

Resources are assigned to organizations by creating assignments. You can use these date-specific assignments to define future assignments.

Defining Employees

Oracle Project Resource Management requires the following employee information:

- Last Name
- First Name
- Employee Number
- Start Date
- Organization (Expenditure/Event organizations only)
- Job (HR job)
- Supervisor (for workflow approval processes)
- Location (Address)
- Primary Address
- Calendar

You can enter your employee information manually, or most of the information in a bulkload through the use of an Application Programming Interface (API).

For more information on jobs, refer to ["Defining Jobs and Job Mapping"](#) in [Chapter 3, "Establishing Your Enterprise Structure"](#).

For technical information about using the HRMS APIs, refer to "Technical Essays" in *Implementing Oracle HRMS*. For instructions on entering employee information, refer to *Managing People Using Oracle HRMS*.

For instructions on assigning a calendar to a resource, refer to "[Assigning Calendars to Resources](#)" in [Chapter 7, "Defining Calendars and Schedules"](#).

Note: Each employee must have a defined primary address. This address is used by the search functions within Oracle Project Resource Management. If the address information is missing, the employee cannot be created as a resource within this application.

Defining Employee Assignments

Employee assignments, also called primary assignments, describe the role of the person within your organization. This organization must be in the project expenditure organization hierarchy. Every employee, including contractors, must have a primary assignment. For instructions on creating and assigning employee assignments, refer to *Managing People Using Oracle HRMS*.

Defining Locations

The Locations table is populated as you add the employee locations, or any locations, in the free text fields through the Project Resource Management application. Users can reuse previous entries or create new locations. For example, if you enter the following as a new location:

```
City: San Francisco  
State: California  
Country: United States
```

Any user can access this location information when prompted for location anywhere in the application. However, you can add only city and states. You cannot add countries.

Setting Up Competencies

Competence management encompasses a full cycle of events, from designing your competence structure to performing project resource matching. Once established, you can use your competencies for various activities such as determining the competence profiles of your resources, staffing projects using skill matching, and searching your staff for specific skills.

Defining Your Competence Structure

In defining your competence structure and competencies, you must first decide if the competencies should be shared across business groups. This decision determines if you will setup global competencies and local competencies for each business group.

Oracle Project Resource Management recognizes all competencies regardless of whether they are flagged as global or local. However, you can only establish global competencies if the HR: Cross Business Group profile option is set to Yes. If you are not in cross-business group mode, you can only view the local competencies for your business group. This exclusion eliminates viewing any competencies that belong exclusively to other business groups.

Note: You must make a decision on your competence structure in the planning stage because once you set up the competencies, you cannot change the structure.

Your competence structure can reflect skills or measurable behaviors broken down into multiple levels. The number of levels you want to set up determines how you should set up your key flexfield structures.

The following table provides an example of how a competence of language expertise can be broken down into multiple levels:

Competence - Level 1	Level 2	Level 3	Level 4
Language	Indo-Iranian	Indic	<ul style="list-style-type: none"> ■ Assamese ■ Bengali ■ Sindhi ■ Hindi ■ Urdu

Competence - Level 1	Level 2	Level 3	Level 4
Language	Indo-Iranian	Iranian	<ul style="list-style-type: none"> ■ Persian ■ Kurdish
Language	Germanic	West Germanic	<ul style="list-style-type: none"> ■ English ■ Dutch ■ German
Language	Germanic	North Germanic	<ul style="list-style-type: none"> ■ Icelandic ■ Norwegian ■ Swedish ■ Danish

Unless your business is very specific about linguistics, you most likely would not categorize the languages into such detail. However, the example does demonstrate how you might use the various levels of competencies to categorize the skills.

Using a different example, you may have a competence such as knowledge of Oracle Projects application. As your business may have many software skills you want to track, you might want to set up a higher competence level labeled "Knowledge of Software Applications". The following table provides an overview of how you might breakdown the competence levels:

Competence - Level 1	Level 2	Level 3	Level 4
Knowledge of Software Applications	Oracle Projects	Projects Costing	<ul style="list-style-type: none"> ■ Implementing Product ■ Using Product
Knowledge of Software Applications	Oracle Projects	Projects Billing	<ul style="list-style-type: none"> ■ Implementing Product ■ Using Product

For more information and instructions on setting up competencies, refer to the following sources:

- *Documentation Update for Patch Numbers 1383905 and 1377992 - Global Competencies*
- "Career and Succession Management" in *Implementing Oracle HRMS*
- "Creating a Competence" in *Managing People Using Oracle HRMS*

- "Planning Your Descriptive Flexfields" in the *Oracle Applications Descriptive Flexfields Guide*
- "Defining Descriptive Flexfields" in the *Oracle Applications Descriptive Flexfields Guide*

Note: When creating your competencies, you must define proficiency levels in order for the competencies to be recognized in Oracle Project Resource Management resource requirement searches. The Oracle HRMS application does not require you to complete this information.

Assigning Competencies

You can assign competencies to the following objects:

- Resources (people)
- Jobs
- Roles
- Requirements

When defined for all of these objects, you have a structure in which you can perform competence matching.

Assigning Job Competencies

You define jobs through the Oracle HRMS application. For each job, you can assign required and desired competencies. For more information on defining jobs, see *Implementing Oracle HRMS*.

Assigning Role Competencies

When you define a requirement, you must associate a role to it. This role determines the default competencies for the requirement which are used for performing searches to fill the requirement.

You define roles using the Define Project Roles form in Oracle Projects. For each role, you define a default job. All job-associated competencies are automatically copied over to the role. You can add, modify, or delete competencies and their associated proficiency levels as suits your needs. For information on creating roles, see [Chapter 6, "Defining Your Project Roles"](#).

Note: You can only assign global competencies to a role.

Assigning Requirement Competencies

You define project requirements using the Requirement Detail page. When you create a requirement, you must specify a role. The system copies the competencies of the role to the requirement to which you can add, modify, or delete as suits your needs. For each competence you determine to be mandatory for the requirement, you must specify the required range of proficiency in that skill. This range is used for comparison during a resource search.

Note: You can assign to a requirement global competencies, as well as local competencies belonging to the business group of the requirement.

Assigning Resource Competencies

You can define the competencies of a resource either in Oracle HRMS using the Career Management form, or through the Competence Profile page in Oracle Project Resource Management. Resources can update their own competence profiles as well through Oracle Project Resource Management. Using SSHR, you can initiate a workflow approval process to the resource manager. These competencies, in addition to other pertinent information, are compared to the competencies of a requirement when performing resource searches.

Matching Resource and Requirement Competencies

When a user performs a resource search to fill a requirement, all the mandatory and optional competencies of the requirement are compared to those of the resource. All resources with the mandatory competencies and desired competence levels are potential matches given the other search criteria is met. Each resource produced from the search must have these mandatory competencies at a level that is within the specified competence levels for the requirement. If a competence associated to a resource or a requirement has no proficiency level then it is considered to be at the lowest proficiency level.

For each matching resource, the matches between the optional competencies of the requirement and the competencies of the resource are displayed in the following format: 0/2. The first number indicates the number of matches, and the second number refers to the actual number of optional competencies of the requirement.

For example, 4/5 means that the resource has four of the five optional competencies at the specified proficiency level for the requirement.

The competencies in the Modify Search Criteria page will default from the competencies defined for the requirement, but you can also modify them, their associated proficiency levels, as well as their mandatory flag on the Modify Search Criteria page as well. Note that by modifying them on this page, you are not changing the original definition on the requirement.

Assigning Global and Local Competencies

Local competencies are competencies defined for a particular business group. Global competencies span across all business groups.

You can assign both global and local competencies to a resource. However, to assign a local competence to the resource, the local competence must belong to the same business group as the resource.

For a requirement, the competence list is based on the selected role. You can modify this list through the Requirement Details page, defining both mandatory and optional competencies.

You can assign both global and local competencies to a requirement. If you flag local competencies as mandatory on a requirement, ensure that these competencies all belong to the same business group. Assigning mandatory local competencies from different business groups will prevent the search functionality from producing any results. A resource can have assigned local competencies only within their own business group. Therefore, you should make such local competencies optional for the requirement, or only select global competencies.

Configuring Your Organization Security

The Oracle HRMS and Oracle Projects applications provide the setup for the core security of your enterprise structure. You define this responsibility-based security structure based on your organization structure and user responsibilities.

With Oracle Project Resource Management, you have an extended project security structure based on project roles. Role-based security enables users to have multiple levels of function access depending upon the assigned roles they have for each given project. For more information on role-based security, see [Chapter 6, "Defining Your Project Roles"](#).

This chapter discusses the project security models through the following topics:

- [Defining Your Security Strategy](#)
- [Understanding Responsibility-Based Security](#)
- [Understanding Role-Based Security](#)
- [Defining Organizational Authority](#)
- [Demonstrating a Security Check](#)

Defining Your Security Strategy

Your security structure depends heavily on how you manage your projects, and what type of access you want to provide your users. You should determine this information prior to setting up any of the security features. The following table describes some of the basic differences between the responsibility-based and role-based security models:

Basic Function	Responsibility-Based Security Model	Role-Based Security Model
Project List	The project list displays all projects for the given operating unit.	The project list displays all projects for the given operating unit where the user is an active member of has project authority over the project organization.
View Project Information	The user can view project information except for labor costs for any of the projects appearing on the project list. A user can view the labor costs for a project if this function has been assigned to the responsibility of the user.	<ul style="list-style-type: none"> ■ If the project member on a project has been assigned to roles with function security enabled, then the member can view the project attributes as allowed by the roles. For users with project authority on a project organization, the user can view all attributes as allowed by the project authority menu. If the member has been assigned to a role with function security disabled, then the member can view the project attributes as allowed by the responsibility level function security. ■ The projects that a user can view are limited the by the project list of the user.
Update Project Attributes	Active key members or users with profile PA: Cross Project responsibility enabled (at the responsibility level) can update the project attributes as allowed by the responsibility level function security.	<ul style="list-style-type: none"> ■ If the project member on a project has been assigned to roles with function security enabled, then the member can update the project attributes as allowed by the roles. For users with project authority on a project organization, the user can update all attributes as allowed by the project authority menu. If the member has been assigned to a role with function security disabled, then the member can update the project attributes as allowed by the responsibility level function security. ■ The projects that a user can view are limited the by the project list of the user.

Each of these models has its own benefits and is described in further detail in the sections to follow.

Understanding Responsibility-Based Security

Within the responsibility-based security structure, users have viewing access to the projects for the operating unit associated to their respective responsibilities. Only project members and cross-project users can update project information or view labor costs (given the appropriate authority.)

You associate functions to menus and the menus to responsibilities. Therefore, the responsibility of a user determines what functions the user can perform.

For further information and instruction, refer to the following sources:

- *Implementing Oracle HRMS*
- the Security chapter in *Customizing, Reporting and System Administration in Oracle HRMS*
- *User Guide Supplement for Oracle Projects Minipack B (Release 11i Mandatory Patch)*
- "Project and Labor Cost Security" in Chapter 15, "Advanced Topics and Essays," in the *Oracle Projects User Guide*.

Defining User Level Access

Oracle Project Resource Management has four levels of users with different access to projects. Regardless of the permissions a user has, the role controls what functions the user can perform.

Project Members

A project member is a user who is explicitly defined as a member of a project team. Since project members have roles to fill on the project, they must have assigned role with role-based security. For more information on role-based security, see "[Understanding Role-Based Security](#)" later in this chapter.

Project members include extended members (key members) who have administrative access and team members who have scheduled assignments on the project.

Cross-Project User with View Access

Cross-project users with view access can view all projects across multiple operating units whether or not they are defined as a project member or have project authority. You can provide view access by setting the profile option called PA: Cross-Project User - View to Yes.

You can set this profile option at the following levels:

- site
- responsibility
- user

The default value for this profile option is Yes. However, for responsibilities of Project Resource Management, you may want to consider setting this profile option to No so that only relevant projects (projects within the operating unit) is available for viewing. For either setting, you want to set this profile option consistently across responsibilities.

Cross-Project User with Update Access

Cross-project users with update access can update any project provided no other restrictions have been applied. However, users can only update information on the Project Definition tab of a project if the project belongs to the same operating unit as the responsibility the user has used to log in.

You can provide update access through the profile option called PA: Cross-Project User - Update. Setting this profile option to Yes provides your users this ability. You can set it at the responsibility and user levels. The default value for this profile option is No.

Note: This profile option is generally reserved for your power users that need cross-project and cross-organization access.

Authority at the Organization Level

You can designate a user to have project, resource, utilization, or forecast authority for a given organization. This specific role defined at the organization level provides access to all projects created under the organization. See "[Defining Organizational Authority](#)" in this chapter.

Understanding Role-Based Security

Role-based security provides a means of controlling user access based upon the role the user is currently playing on a project team. Every project member is assigned a role. The access levels of that role are bestowed upon the user for the duration of the role assignment. A user can play different roles on different project teams. For example, you may assign a user a project lead role for a particular project in the first half of the year and then, a consultant role on another project for the second half of the year. These roles have completely different project security access and controls. Responsibilities allow access to the overall application and determine the menus and functions to which a user has access.

With role-based security, you assign the menus to roles. This level of assignment offers more flexibility than the responsibility-based security structure.

Note: You define project roles for your entire enterprise. They are not specific to any operating group or business group.

Levels of Role-Based Security

Role-based security offers multiple levels of control. You determine how detailed you want your security levels. The available levels are as follows:

- **Roles**
You assign menus to roles to determine the menu and function access for each role.
- **Menus**
You assign functions to menus, roles, and responsibilities.
- **Functions**
You can attach the desired functions (access to pages or actions) to the individual menus.

Confirming Role-Related Profile Option Settings

Two profile options are available for determining the viewing and updating access your users have on projects regardless of what role they are playing on various projects:

- PA: Cross-Project User - View

The default setting for this profile option is Yes.

- **PA: Cross-Project User - Update**

If you want to provide your users with access to update projects within their entire organization, set this profile option to Yes at the responsibility and user level.

You can override the settings of both profile options at the responsibility and user levels.

Note: If you have an existing Oracle Projects base, these profile options replace the profile option called PA: Cross Project Responsibility in order to separate the viewing and updating function abilities.

Seeded Roles

Oracle Project Resource Management provides the following seeded roles. For more information on the individual authorities, refer to "[Defining Organizational Authority](#)".

Project Manager

The Project Manager role provides access to all security access functions for the project.

Project Authority

Project Authority is an internal role at the organization level. A user with project authority on an organization can view all projects in that organization. The Staffing Analyst menu is assigned to this role as seeded data. Therefore, a user with project authority is by default a staffing analyst for all projects within the organization of the user.

Resource Authority

Resource Authority is an internal role at the organization level. A user with Resource Authority can manage all of the resources for that organization. This role provides access to all resource information within the given organization including any project-related information for that resource.

Utilization Authority

Utilization Authority is an internal role at the organization level. A user with Utilization Authority can calculate and view utilization for an organization.

Forecast Authority

Forecast Authority is an internal role at the organization level. A user with Forecast Authority can generate and view forecast information for all projects in an organization.

Seeded Responsibilities

You have the following classes of users who typically need access to project resourcing information:

- Business Manager (Organization Manager)
- Project Manager
- Resource Manager
- Staffing Manager
- Resource (Team Member)
- Project Resource Management Super User

The implementation of Oracle Project Resource Management provides these user classes as predefined responsibilities on the home page of Oracle Project Resource Management. The seeded responsibilities have the following associated default functions:

Business Manager

- Project reviews
- Team reviews
- Forecast generation and review
- Resource utilization generation and review

Project Manager

- Project creation and maintenance
- Project schedule creation and maintenance for own projects

- Resource searching
- View resource details
- Requirement searching
- Setup of project subteam
- Access notifications

Staffing Manager

- Project schedule creation and maintenance for own resources on own projects
- Resource searching
- View resource details
- Requirement searching
- Resource schedule creation and maintenance for own resources (on own projects)
- Access notifications

Resource

- View their own schedule
- Enter their own administrative assignments
- Requirement searching
- View and update their own resource details
- Access notifications

Resource Manager

- Perform a requirement search
- View the schedules of resources for which they are responsible
- Enter administrative assignments for resources for which they are responsible
- View and update resource details for resources for which they are responsible
- Access notifications

Project Resource Management Super User

The Project Resource Management Super User can access (view and edit) everything on all projects and everything related to all resources.

Overview of Seeded Responsibility Function and Menu Access

The following table indicates whether or not certain function access is enabled for each seeded responsibility:

Seeded Function	Project Manager	Resource Manager	Staffing Manager	Resource	Project Super User
Create Project	Yes	No	No	No	Yes
Project List	Yes	No	Yes	Yes	Yes
My Details (Schedule)	No	No	No	Yes	No
My Competence Profile	No	No	No	Yes	No
Requirement Search	Yes	Yes	Yes	Yes	Yes
Define Team Template	No	No	No	No	Yes
Workflow Notifications	Yes	Yes	Yes	Yes	Yes
Staffing Home	No	Yes	Yes	No	Yes
Utilization	No	Yes	Yes	Yes	Yes
Reports	Yes	Yes	Yes	No	Yes

The following table indicates whether or not the menu access is enabled for each seeded responsibility:

Seeded Menu	Project Manager	Resource Manager	Staffing Manager	Resource	Project Super User
Project Manager	Yes	No	No	No	No
Project Authority	No	No	No	No	Yes
Resource Authority	No	Yes	No	No	Yes
Resource	No	No	No	Yes	No
Resource Pool	Yes	Yes	Yes	Yes	Yes

Detailed Seeded Function Access by Responsibility

This section provides seeded function access grouped by responsibility as well as the menus associated to each responsibility. A list of the seeded menus and their respective functions are provided in the section titled "[Seeded Function Access by Menu](#)" later in this chapter.

Project Manager Responsibility

The seeded functions are:

- Create Project
- Project List
- Requirement Search
- Workflow Notifications
- Required Project Hours Workbook

The following menus are associated with this responsibility:

- Project Manager
- Resource Pool

Staffing Manager Responsibility

The seeded functions are:

- Project List
- Staffing Home
- Requirement Search
- Workflow Notifications
- Resource Utilization
- Scheduled Resource Hours Workbook
- Available Resource Hours Workbook
- Overcommitted Resource Hours Workbook

The following menu is associated with this responsibility:

- Resource Pool

Project Resource Management Super User Responsibility

The seeded functions are:

- Create Project
- Project List
- Requirement Search
- Team Templates
- Workflow Notifications
- Staffing Home
- Organization Utilization
- Scheduled Resource Hours Workbook
- Available Resource Hours Workbook
- Overcommitted Resource Hours Workbook
- Required Project Hours Workbook
- Sales Pipeline Workbook

The following menus are associated with this responsibility:

- Project Authority
- Resource Authority
- Resource Pool

Resource Manager Responsibility

The seeded functions are:

- Staffing Home
- Requirement Search
- Workflow Notifications
- Resource Utilization
- Scheduled Resource Hours Workbook
- Available Resource Hours Workbook
- Overcommitted Resource Hours Workbook

The following menu is associated with this responsibility:

- Resource Pool

Team Member Responsibility

The seeded functions are:

- Project List
- Update My Competence Profile
- My Details (Schedule)
- Requirement Search
- Workflow Notification
- Personal Utilization

The following menu is associated with this responsibility:

- Resource

Organization Manager Responsibility

The seeded functions are:

- Organization Utilization
- Sales Pipeline Workbook

The following menu is associated with this responsibility:

- Utilization Authority

Seeded Function Access by Menu

The seeded menus are as follows:

- [Project Manager](#)
- [Resource](#)
- [Resource Pool](#)
- [Project Authority](#)
- [Resource Authority](#)
- [Utilization Authority](#)

- [Forecast Authority](#)

This section provides a list of the seeded functions for each menu.

Project Manager

The seeded functions for this menu are:

- Projects > Identification > Resource Search
- Projects > Team > View
- Projects > Requirement/Assignment
 - Create and Delete
 - View and Edit Basic Information
 - Edit Schedule
 - View and Edit Forecast Information
- Projects > Options
 - Basic Information
 - Classifications
 - Key Members
 - Additional Information
 - Subteam
 - Pipeline
 - Customers and Contacts
- Projects > Status
 - Change Project Status
 - Approved Statuses
 - Closed Statuses
 - Pending Close Statuses
 - Submitted Statuses
 - Unapproved Statuses
- Projects > Candidates

- View
- Create
- Review Log
- Projects > Forecast
 - View
 - Generate

Resource

The seeded functions for this menu are:

- Projects > Assignment > View Basic Information
- Projects > Administrative Assignment
 - Create and Delete
 - Edit Basic Information
 - Edit Schedule
 - View Basic Information
- Projects > Requirement Search
 - Nominate Self
- Projects > Resource Candidacy
 - View
 - Withdraw Self
- Projects > Identification
 - Requirement Search

Resource Pool

The seeded functions for this menu are:

- Projects > Administrative Assignment
 - View Basic Information
- Projects > Resource Pool
 - View Schedule
 - View Competencies
 - View Work Information

Project Authority

The seeded functions for this menu are:

- Projects > Identification > Resource Search
- Projects > Team > View

- Projects > Requirement/Assignment
 - Create and Delete
 - View and Edit Basic Information
 - Edit Schedule
 - View and Edit Forecast Information
- Projects > Options
 - Basic Information
 - Classifications
 - Project Members
 - Additional Information
 - Subteam
 - Pipeline
 - Customers and Contacts
- Projects > Status
 - Change Project Status
 - Approved Statuses
 - Closed Statuses
 - Pending Close Statuses
 - Submitted Statuses
 - Unapproved Statuses
- Projects > Candidates
 - View
 - Create
 - Review Log
- Projects > Forecast
 - View
 - Generate

Resource Authority

The seeded functions for this menu are:

- Projects > Assignment > Confirm
- Projects > Administrative Assignment
 - View and Edit Forecast Information
 - View and Edit Basic Information
 - Edit Schedule
 - Confirm
- Projects > Resource Pool
 - View Schedule
 - View Competencies
 - View Work Information
- Projects > Requirement Search
 - Nominate
- Projects > Resource Candidacy
 - View
 - Withdraw
- Resource Utilization

Utilization Authority

The seeded functions for this menu are:

- Projects > Resource Utilization
- Projects > Organization Utilization
- Projects > Utilization

Forecast Authority

The seeded functions for this menu are:

- Projects > Assignment > View Basic Information
- Projects > Forecast View

Defining Organizational Authority

Establishing organizational authority enables you to specify the authority for a resource at an organizational level. The key benefit is you do not have to assign roles for people with organizational authority because it provides access to all projects, resources, forecasting and utilization information for the specified organization.

However, you must specify each organization that a user should have authority over. This authority does not acknowledge organizational hierarchies. For example, if you have resource authority over a top organization, you do not automatically have resource authority for all subordinate organization. You have to individually specify each organization to which you want resource authority. This division provides greater flexibility, especially in the case of a reorganization or change in the organizational hierarchy.

You have four levels of organizational authority providing different access:

- **Project Authority**

This authority level enables a user to perform staffing functions on a project. The difference between this authority and the Project Manager role is the Project Manager role only applies to assigned projects. A user with project authority can perform staffing functions on all projects within the organization.

- **Resource Authority**

This authority level provides a user security access similar to the access you would require as a resource manager. You have the ability to perform tasks, such as confirm assignments, for resources for the entire organization.

- **Utilization Authority**

This authority level enables a user to calculate and view utilization for the specified organization.

- **Forecast Authority**

This authority level enables a user to generate and view forecast information for projects within the specified organization.

Defining a Primary Contact

For Resource Authority and Forecast Authority, you can specify a primary contact to handle cases where you have more than one person who has authority for an organization. Specifying the primary contact determines to whom to route workflow approvals for assignments or forecasts.

Note: You can only assign one primary contact per organization.

Assigning Organizational Authority

To establish organizational authority for your users,

1. Select the following menu path:
Setup > Human Resources > Organizational Authority
2. Click Add Organizations.

You can search for organizations based on the following three fields:

- Resource Name
Select the resource for which you want to establish organizational authority.
- Hierarchy
Select the hierarchy in order to establish a list of resource organizations. This field defaults to the expenditure hierarchy of the operating unit of the resource.
- Start Organization
Select the organization to use as the start organization in order to provide a list of subordinate organizations.

You must at least select the name of the resource to perform a search. After you make your entries, click Find Organizations. The search produces all organizations for which the specified resource has organizational authority.

If you selected a hierarchy or organization as criteria for the search, the results display all qualifying organizations. Any organization for which the resource has authority displays with a checkmark. To grant authority over the organization to this resource, click the checkbox next to the desired organization and click Save. You can assign one or more of the following authorities to a resource for each organizations:

- Project Authority

- Resource Authority
- Utilization Authority
- Forecasting Authority

Demonstrating a Security Check

When a user initiates an action by attempting to perform a function in Oracle Project Resource Management, a security check process is invoked. This process searches for the appropriate permissions to allow the user to perform the requested action. The logic of the security checks is as follows:

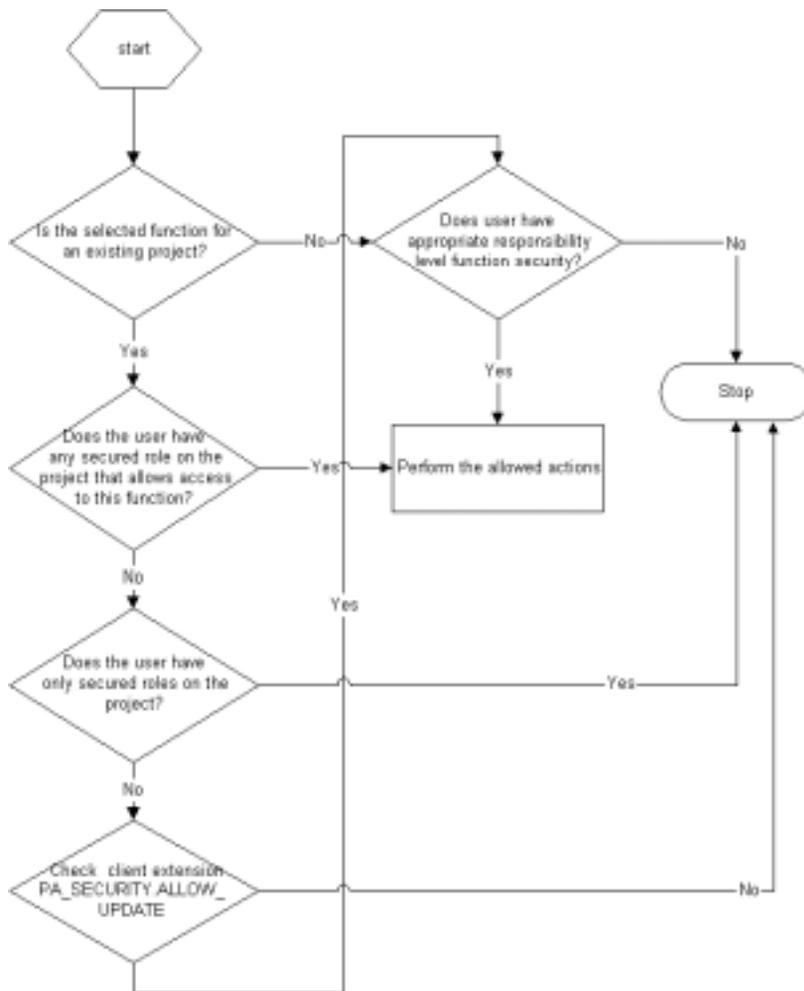
Check to see if the selected function is for a project.

- If the answer is no, check if the user has the appropriate function security under the assigned responsibility.
 - If the answer is no, end the process.
 - If the answer is yes, perform the action.
- If the answer is yes, check if the user has any secured roles on the project that would allow the user to perform this function.
 - If the answer is yes, perform the action.
 - If the answer is no, check if the user has only secured roles on the project.
 - If the answer is yes, end the process. The process ends here because it has been determined that the user does not have access to this functions through any of the assigned secured roles.
 - If the answer is no, check the client extension called PA_SECURITY.ALLOW_UPDATE. If the client extension is set to No, end the process. If it is set to Yes, check if the user has the appropriate function security under the assigned responsibility.
 - If the answer is no, end the process.
 - If the answer is yes, perform the action.

Note: A secured role is a role with defined function security. When the system performs a check for secured roles, it also performs a check on whether or not the user has project authority. If this check returns a true value, then the whole check is considered true.

Figure 5–1, "Security Check Process Flow" demonstrates this process flow.

Figure 5-1 Security Check Process Flow



Defining Your Project Roles

Project roles are the templates for your team roles. This chapter covers defining project roles and associated attributes through the following topics:

- [Definition of a Project Role](#)
- [Overview of Predefined Role Controls](#)
- [Defining Roles](#)
- [Defining Role Lists](#)

Definition of a Project Role

A project role is a collection of default information about a team member role on a project, such as competencies, job information, and security. You will create project roles to represent the typical team member roles needed for projects within your organization.

How Project Roles are Used

You use the project role as a template for your team roles on actual projects. When you create a team role, you specify the project role from which to obtain all the default information. The default information is copied from the project role to the team role. Thereafter, you can modify the information on the team role as appropriate for that role on that particular project. Any changes you make to the team role are exclusive and do not affect the definition of the project role.

For example, you have a project role called DBA. You create a team role on a project called Lead DBA based on the DBA project role. All the defined competencies, job information, and security information is copied from the DBA project role to this new Lead DBA team role. You decide to add more competencies to the Lead DBA team role and to change the job level. These changes are only reflected on this particular team role.

Each role has a security structure determining the features users can access and the functions they can perform. This security structure is referred to as role-based security. Though role-based security is optional, it offers you more flexibility than responsibility-based security because the role of a user can change from project to project. Therefore, the function access a user may require can change from project to project. For more information on security, see [Chapter 5, "Configuring Your Organization Security"](#).

In the application, the team role is the value displayed on most pages. The project role is only available on the assignment and requirement details pages.

Overview of Predefined Role Controls

You use role controls to define an additional dimension of security layering. These controls determine how you (or other users) can use the role. The following predefined controls are available:

- Allow as Scheduled Member
- Allow as Task Member
- Allow as Project Member
- Allow as Contract Member
- Allow View Labor Costs

You can assign as many of these controls to roles as necessary. For example, the control Allow as Scheduled Member indicates that you can schedule any person assigned to the role as their availability permits. You want to assign this control to any role that should be available for scheduling resources on projects. Since role assignments occur at the project level, you must, at a minimum, assign the role control Allow as Project Member to each role.

Note: The role controls Allow as Task Member and Allow as Contract Member are not currently enabled. These two controls will be activated as the appropriate associated functionality is added to Oracle Project Resource Management.

Defining Roles

Prior to defining your roles, establish the following items:

- Competencies
- Jobs
- Role Lists

You use each of these items in defining your roles. The following table lists the information you should define for each role:

Prompt	Description
Role Lists	Identify the role lists to which the role should be assigned.
Access Menu	Identify a security menu that the role can perform on a given project.
Default Competencies	Identify all default competencies required for the role. These competencies are used for requirement definition.
Default Job and Job Group	Identify the default job and job group for the role. Calculations for costing, billing, and transfer pricing use the default job to forecast project resource requirements. This default job can be overridden by a Project Cost Job, Project Billing, and Project Transfer Price Job. You can use job mapping logic to map the default job of the role to the master job if they are in different job groups.
Default Minimum and Maximum Job Levels	Determine the minimum and maximum job levels for this role. The job levels of a requirement are compared to these levels when performing candidate (resource) searches.
Effective Dates	Identify the date range the specified role is effective. In some cases, you may not know the ending effective date because it has not been determined. Therefore, only a start date is required.

Also, assign the appropriate role controls to each role. At a minimum, you must assign the role control Allow as a Project Member. After you have identified all the roles and outlined the required role data for your enterprise, you can create the roles in Oracle Projects through the Define Roles form under Setup.

Defining Role Lists

You use role lists to categorize your roles into logical groupings. For example, you may have a role list called Consulting to which all roles relating to consulting are assigned.

Note: A role list can not be deleted once it has been associated with a project.

To add, modify, or delete role lists, use the Role Lists form under Setup. In this form, you can specify the name, description, and effective dates for a role list. After you define these parameters, you can select the roles you want assigned to this role list.

Defining Calendars and Schedules

Defined calendars are the basis of all schedules. You establish resource schedules based on the calendar assigned to the resource. You can assign a calendar to a resource, or accept the default calendar from the site, organization, or project.

This chapter provides information creating calendars and maintaining schedules through the following topics:

- [Setting Up Calendars](#)
- [Establishing the Availability Calculation](#)

Setting Up Calendars

A calendar provides basic information such as working days, non-working days, and holidays. When a resource is assigned to a specific calendar, that calendar represents the capacity of the resource. Assignments using these calendars provide information such as the scheduled days for the assignment, and determine the availability of the resource.

You can set up an unlimited number of calendars to meet your various scheduling challenges. For example, you may have certain people that work specific days of the week. Therefore, you would create a calendar for each unique work pattern arrangement.

Creating Calendars and Defining Calendar Attributes

You must create a calendar in order to establish the schedule work patterns of your resources. These work patterns determine the availability of a resource for project assignments and scheduling. You can create an unlimited number of calendars to define the work patterns, but you must define at least one.

In order to create a complete calendar, you must first define the following calendar attributes:

- calendar types
- shifts and shift patterns
- calendar exceptions

After defining these attributes, you can create calendars.

Defining Calendar Types

Calendar types enable you to classify your calendars. For example, you may have a calendar type of "Part Time" to which you assign to all calendars that are defined with part time shifts.

To create a calendar type, complete the following steps:

1. Select Setup > Schedule Management > Scheduling Calendar > Define Calendar.
2. Select the Define Calendar Type tab.
3. Enter a code for the calendar type in the New Code field.
4. Enter a meaningful description in the Description field.

5. Enter dates in the From Effective Date and To Effective Date fields, if applicable. You can now use this new calendar type to create a calendar.

Defining Shift and Shift Patterns

Shifts define the daily work hours in a week and are defined for a given range of dates. The effective dates of the shift or shift pattern override any other preset effective dates when used on a schedule.

For example, if a shift or shift pattern is not effective for the period or part of the period for which requirement or assignment schedules are created, then the schedule is not created for that period.

To create shifts and shift patterns, complete the following steps:

1. Select Setup > Schedule Management > Scheduling Calendar > Define Calendar.
2. Select the Define Shifts tab.
3. Enter the name of the shift.
4. Enter the shift description.
5. Enter the effective dates of the shift.

To create shift patterns:

1. Select the desired weekdays.
2. Enter the From and To time range.
3. Enter the effective dates.

Only the total hours for the day are considered for Oracle Project Resource Management. The specific time values do not have any effect.

Note: A day with zero hours specified in the shift is considered a non-working day.

Creating Calendar Exceptions

Exceptions define holidays and are considered non-working days.

To create calendar exceptions, complete the following steps:

1. Select Setup > Schedule Management > Scheduling Calendar > Define Calendar.
2. Select the Calendar Exceptions tab.
3. Complete the fields as necessary for the specific calendar exception.

You must create calendar exceptions for public holidays and general holidays for every year that they occur. For all other types of exceptions, make administrative assignments. As described for shifts, only the total number of hours are considered for Oracle Project Resource Management, not the actual time segments.

Creating a Calendar

To create a calendar, complete the following steps:

1. Select Setup > Schedule Management > Scheduling Calendar > Define Calendar.
2. Select the Define Calendar tab.
3. Complete the required information for the calendar.

Assigning Shifts and Exceptions to Calendar

To assign shifts and exceptions to a calendar, complete the following steps:

1. Select Setup > Schedule Management > Scheduling Calendar > Define Calendar > Calendar Shift/Exceptions.
2. Select the desired calendar.
3. Use the Shifts Tab to assign Shifts to the calendar.
4. Use the Exceptions Tab to assign Exceptions to the calendar.

Changing the Calendar Any changes to the calendar are applied to the schedule work patterns by a periodic process. The changes to calendar will affect the future schedule creations and updates. For more information, see "[Updating Schedules with Calendar Changes](#)" in [Chapter 12, "Maintaining Your Data"](#).

Establishing Default Calendars

You can set up default calendars at two levels:

- the site level
- the organization level

Defining the Default Calendar for the Site

You can select any defined calendar as the default calendar at the site level using the PA: Default Calendar profile option in Oracle Project Resource Management.

This profile option indicates the default calendar for projects, project assignments, and resources in the Oracle Project Resource Management application. You can only update this profile option at the site level.

Defining Default Calendars for Organizations

The calendar assignment at the organization level overrides the calendar assignment at the system site level. You can set up a calendar for a project organization using the Define Organization form in the Additional Information section for the project Expenditure/Event organization classification. This calendar becomes the default calendar for all resources within the organization.

Assigning Calendars

The default calendars you specify for the site and organizations carry down to the projects and resources. You can override these defaults by assigning a calendar directly to the project or resource.

Assigning Calendars to Projects

Assigning a calendar to a project overrides the default calendar retrieved from the project organization or site. To modify the default calendar on a project, use the Project Details page.

Assigning Calendars to Resources

Every resource must have an associated calendar for scheduling purposes. The calendar determines the capacity of the resource. During implementation, you use a process called PRC: Maintain Project Resources to pull the resources from HR tables into Oracle Project Resource Management. This process assigns all resources a default calendar. For more information on this process, see "[Maintaining Project Resources](#)" in [Chapter 12, "Maintaining Your Data"](#).

The default calendar for the resource can come from various sources depending upon how you have set up your system. Oracle Project Resource Management uses the calendar defined for a resource in CRM. If the resource does not have a defined calendar in CRM, the calendar for the resource defaults from the organization. If you do not define a default calendar for the organization, then the calendar for the resource defaults to the entry in the Calendar profile for the site. You can override all these defaults at any time and assign a specific calendar to a resource.

To assign a default calendar to the resource, complete the following steps:

1. Select Setup > Schedule Management > Scheduling Calendar > Define Calendar.
2. Select the Assign Resources tab.
3. Complete the required information on the screen.

Establishing the Availability Calculation

You determine availability of a resource by subtracting the scheduled assigned hours of the resource from the capacity of the resource. The calendar to which the resource is assigned determines the capacity of the resource.

Oracle Project Resource Management calculates resource availability based on a predefined number of years. You set the number of years for availability calculation in a profile option called PA: Availability Duration. Availability from today's date through to the end of the time period you specify. For example, if you enter 2 as the value of this profile option, the availability of your resources is calculated from today to the end of two years.

Resource availability is recalculated every time a new assignment for a resource is made. Therefore, using the above example, if you make an assignment on a resource until the end of April, the availability is recalculated to move out for two years from the end of April.

If you create an assignment for a resource outside of the availability period, such as 10 years in the future, the availability is not recalculated because it is outside of the range defined in the above profile option. If this is a real assignment, then you must break it up into segments of two years. Leaving it at 10 years causes the availability of the resource to get bypassed for recalculation and eliminates the resource as a possibility for resource searches.

The PA: Availability Calculation Period profile option builds the availability hours for each resource. Resource searches use these hours to determine if the resource is a candidate to fill a requirement.

Defining Timeline Options

Define the following profile options to establish how availability will display on your timelines:

- PA: Availability Calculation Period

This profile option enables you to determine the time period segment to use in calculating the availability. Valid choices are Daily or Weekly, and the default value is Weekly.

- PA: Availability Duration

This profile option determines the length of time (in years) for which the application should create timeline availability records. The availability for a

resource is recalculated every time a new assignment is created for the resource. The default value for this profile option is 2.

- **PA: Percentage of Resource's Capacity**

This profile option specifies the lowest percentage threshold in determining availability. The default value is 100.

Defining the Project Environment

The definition of your project environment includes the setup of all the attributes used for creating projects, tracking pipeline projects, and staffing project roles. It also includes the implementation of your approval and notification processes defined through automated Oracle Workflow processes. You define these features using Oracle Projects, Oracle Project Resource Management, and Oracle Workflow.

This chapter elaborates on the definition and usage of these attributes through the following sections:

- [Creating Project Attributes](#)
- [Establishing Probability Information](#)
- [Defining Statuses and Status Profile Options](#)
- [Overview of Predefined Workflows](#)
- [Setting Up Your Self-Service Environment](#)

Creating Project Attributes

In creating a project, your users will use a variety of attributes to define the behavior and future processing of the project. To define the following attributes, you use the Oracle Projects forms:

- work types
- class categories
- class codes
- project statuses
- project types
- project templates
- service types
- customer contact types
- customer relationship codes
- customers and customer addresses
- billing schedules
- pipeline information

This list is a subset of the required project attributes. For a complete list, refer to [Appendix A, "Implementation Steps Checklist"](#). For information on defining work types, see [Chapter 9, "Implementing Resource Utilization"](#).

For information on defining the remaining attributes, refer to "Project Definition" in Chapter 17, "Oracle Projects Setup and Implementation," in the *Oracle Projects User Guide* and the *Oracle Projects 11i Release 11.5.3/Mini Pack B User Guide Supplement*.

Note: You must set up customers in Oracle Projects (or in Oracle Accounts Receivables) in order to assign them to projects.

Establishing Probability Information

When defining a potential project, you can enter pipeline information such as the probability percentage of winning the project, the project value, and the expected approval date. This information is used for calculations such as determining the weighted (discounted) value of all projects in your pipeline. If a project has no defined probability percentage, then it is assumed to be 100% for all calculations performed on the project.

You have control over how percentage values are used on a project through the creation of Probability Lists. The probability list is a list of percentages with descriptions. For example, you create a list called "Quarters" with the following percentages:

- 25% Talks Initiated
- 50% Negotiation
- 75% Contract Proposed
- 100% Approved

You can attach this list to any project type. When you create a project and using a particular project type, these are the values available for selection in the Probability field.

For more information and setup instructions, see the *Oracle Projects 11i Release 11.5.3/Mini Pack B User Guide Supplement*.

Defining Statuses and Status Profile Options

A status is the state of an object. Objects can only have one status at a time. With your implementation of Oracle Project Resource Management, you are provided with basic predefined statuses for the following objects:

- projects
- requirements
- assignments
- candidates
- assignment approval

You can modify the default status controls for each existing user status. You can also create new user statuses based on the available system statuses to meet your business needs and create process flows that support those needs.

However, for each existing user status, you must define the next allowable statuses. Defining the next allowable statuses determines the process flow for your objects. For example, you can specify that a requirement with the user status of Open can have its status changed to the user statuses of either Filled or Cancelled. This example shows that you have just determined two possible process flows of a requirement:

- Open -> Filled
- Open -> Cancelled

The following sections provide new seeded status controls for existing project statuses, as well as the seeded status values for requirements, assignments, assignment approvals, and candidates.

For more information on project status values and status setup instructions, see the *Oracle Projects 11i Release 11.5.3/Mini Pack B User Guide Supplement*.

Note: Statuses are available for your entire enterprise, and are not specific to any business group or operating unit.

Seeded Project Status Controls

The seeded project statuses are:

- Unapproved
- Submitted
- Approved
- Pending Close
- Closed

These project statuses are described in detail in the *Oracle Projects User Guide*.

The Oracle Project Resource Management application introduces the following new status controls for these statuses:

- **Change Project Probability**
You can change the probability of the project when this status control is enabled.
- **Allow Provisional Assignments**
You can create provisional assignments on a project when this status control is enabled.
- **Allow Confirmed Assignments**
You can create confirmed assignments on a project when this status control is enabled.

The project status controls enable you to define specific restrictions or allow certain actions to occur when a status is applied to a project. The following table lists these controls and indicates whether or not the status control is enabled for each status. You can change these defaults to meet your business needs.

Status Control	Unapproved	Submitted	Approved	Pending Close	Closed
Change Project Probability	Y	Y	Y	N	N
Allow Provisional Assignment	Y	Y	Y	N	N
Allow Confirmed Assignments	Y	Y	Y	N	N

For more information on seeded project statuses and existing project status controls, refer to the *Oracle Project User Guide*.

Seeded Requirement Statuses and Status Controls

The following table provides list of the seeded requirement statuses and suggested next allowable statuses.

System Status	User Status	Description	Suggested Next Allowable Statuses
Open	Open	The requirement is available for resource assignments.	<ul style="list-style-type: none"> ■ Filled ■ Cancelled
Filled	Filled	The requirement has an assigned resource.	<ul style="list-style-type: none"> ■ Cancelled
Cancelled	Cancelled	The requirement was cancelled.	None

Three status controls exist for the requirement statuses:

- Include in Project Forecasts
- Visible in Requirement Searches
- Assign Resources to the Requirement

Use these status controls to restrict allowable actions on requirements based on status.

Seeded Assignment Statuses and Status Controls

The following table provides a list of seeded assignment system statuses with suggested next allowable statuses:

System Status	User Status	Description	Suggested Next Allowable Statuses
Provisional	Provisional	A resource is assigned to the assignment on a provisional basis.	<ul style="list-style-type: none"> ■ Confirmed ■ Cancelled
Confirmed	Confirmed	The resource is confirmed and scheduled for the assignment.	<ul style="list-style-type: none"> ■ Cancelled
Cancelled	Cancelled	The assignment was cancelled.	None

Only one status control exists for the assignment statuses:

- Include in Project Forecasts

Use this status control to include assignments in project forecasts based on the status.

Seeded Candidate Statuses and Status Controls

The following table provides a list of the seeded candidate statuses with suggested next allowable statuses:

System Status	User Status	Description	Suggested Next Allowable Statuses
Pending Review	Pending Review	The candidate is nominated for the requirement and is ready for review.	<ul style="list-style-type: none"> ■ Suitable ■ Under Review ■ Declined ■ Withdrawn ■ Assigned
Under Review	Under Review	The candidate is currently in the review process.	<ul style="list-style-type: none"> ■ Suitable ■ Declined ■ Withdrawn ■ Assigned
Suitable	Suitable	The candidate is a suitable match for the requirement.	<ul style="list-style-type: none"> ■ Under Review ■ Declined ■ Withdrawn ■ Assigned
Declined	Declined	The candidate is unsuitable for the requirement. The default status control "Requires Change Reason" requires the user declining the candidate to enter a reason.	<ul style="list-style-type: none"> ■ Under Review ■ Suitable
Withdrawn	Withdrawn	The candidate has withdrawn from consideration for the requirement.	<ul style="list-style-type: none"> ■ Under Review

System Status	User Status	Description	Suggested Next Allowable Statuses
Assigned	Assigned	The candidate is assigned to fill the requirement. This status is used only by the workflow process once the candidate has been assigned to fill the requirement.	None

You can define your own user statuses based on these system statuses, except for the Assigned system status. This system status is reserved for internal processes.

Only one status control exists for the candidate statuses:

- Requires Change Reason

Use this status control to require the user to enter a reason for changing the status of a candidate.

Seeded Assignment Approval Statuses

Assignment approval statuses are used by workflow processes. You cannot add, modify, or delete these statuses. In addition, users cannot manually change these statuses. The status is applied to an assignment based on the action being undertaken.

The following table provides a list of the seeded assignment approval statuses with their associated next allowable status:

System Status	Description	Next Allowable Statuses
Working	The assignment is new and has not yet been submitted, or the assignment has been changed and is waiting to be resubmitted for approval.	<ul style="list-style-type: none"> ■ Submitted
Submitted	The assignment is submitted for approval. Approval can be sought either manually or through an automated workflow process.	<ul style="list-style-type: none"> ■ Approved ■ Rejected
Approved	The assignment is approved and the resource is confirmed.	<ul style="list-style-type: none"> ■ Requires Resubmission
Cancelled	The assignment is cancelled.	None

System Status	Description	Next Allowable Statuses
Rejected	The assignment is rejected. The user can choose to modify the assignment and resubmit it for approval.	<ul style="list-style-type: none">■ Requires Resubmission
Requires Resubmission	The assignment has been changed and requires a resubmission for approval.	<ul style="list-style-type: none">■ Submitted

Status Profile Options

You must define the following profile options to set the status defaults for the respective objects. Each profile option is set at the site level only.

PA: Starting Requirement Status

This profile option defines the default status of newly created requirements.

PA: Starting Assignment Status

This profile option defines the default status of newly created assignments.

PA: Default Filled Requirement Status

This profile option defines the status of all filled requirements.

PA: Default Starting Candidate Status

This profile option defines the status of all newly nominated candidates.

PA: Default Cancelled Requirement Status

This profile option defines the status of cancelled requirements.

PA: Default Cancelled Assignment Status

This profile option defines the status of cancelled assignments.

Overview of Predefined Workflows

With Oracle Workflow, you can set up automated approval and notification processes. The workflow processes depend on actions, such as a status change to trigger the steps of the process. You can customize the messages and approval system using the Oracle Workflow Builder.

The implementation of Oracle Project Resource Management includes default workflow processes. Most of these workflow processes are used for updating information and are invisible to your users. However, the workflow processes described in this section are specifically for providing communication among your users and you can modify them as appropriate for your business.

These workflow processes include the following seeded workflow extension packages:

- [Assignment Approval Workflow Extensions](#)
- [Candidate Notification Workflow Extension](#)

These extension packages are described in this section in relation to the process to which they belong. For more information on defining and modifying workflow processes and modifying client extensions, refer to the following sources:

- Chapter 13, "Integration with Other Oracle Applications," in the *Oracle Projects User Guide*
- Chapter 19, "Client Extensions," in the *Oracle Projects User Guide*
- *Oracle Workflow Guide, Release 2.5.2*

Initiating Deferred Workflow Processes

Deferred workflow processes handle time-consuming tasks that can be automated and placed in the background so that users can continue working in the application without waiting for the requested task to complete. For example, applying the requirements of a team template to a project uses a deferred workflow process and when the task is completed, a notification is sent to the user who initiated the action.

These deferred workflow processes need at least one background engine to monitor background activities in order to ensure consistent processing. Therefore, you must submit a request to enable a concurrent program for workflow background processing.

To submit a request, complete the following steps:

1. Navigate to the Submit Requests form.
2. Submit the Workflow Background Process concurrent program as a request.
3. Schedule the process to repeat itself at appropriate intervals.

For more information, refer to "Submitting a Request" in the *Oracle Applications Users Guide* and "Setting Up Oracle Workflow" in the *Oracle Workflow Guide, Release 2.5.2*.

Seeded Assignment Approval Workflow Process

This workflow process begins when an assignment is created for a resource and is submitted for approval by a person that does not have the authority to approve the resource assignment. This workflow process progresses as the status of the assignment changes. The approvers for this process can include the staffing manager and the resource manager. Upon approval or rejection, FYI notifications are sent to the resource, the resource manager, staffing manager, and the project manager.

The predefined status flows for assignment approval are:

- Working -> Submitted -> Approved
- Working -> Submitted -> Rejected -> Requires Resubmission -> Submitted -> Approved

Actions invoke changes in the assignment approval status. The following table describes how the default assignment approval workflow changes the status based on actions:

Action	Status Change
Assignment is created	Working
Assignment is submitted for approval	Submitted
Assignment is approved	Approved
Assignment is cancelled	Cancelled
Assignment is rejected	Rejected
Assignment is changed	Working
Assignment is resubmitted and the changes do not require approval	Approved
Assignment is resubmitted and the changes require approval	Submitted

Action	Status Change
Rejected assignment is changed	Requires Resubmission

The following changes on an assignment require an approval:

- a change in duration because it affects the schedule and availability of the resource, such as any extension, shortening or moving the start dates forward
- a change in work type because it affects billability or utilization percentage

You can change the order of the status flow for your business using these predefined statuses and creating your own processes. For more information, see ["Assignment Approval Workflow Item Type and Processes"](#) later in this chapter.

The automated Oracle Workflow-based approval process is enabled if the assignment approval status Submitted has been workflow-enabled. Oracle Workflow FYI notifications for Approved and Rejected statuses are enabled if Workflow is enabled for the assignment approval status of Approved or Rejected.

If you do not enable the workflow-based approval process, assignments retain the Submitted status until a user with authority over the resources manually logs in and approves or rejects each assignment. Due to the enforcement of project security, the person logging in should also have authority over the project in order to approve or reject a given assignment. The approver can only be the primary contact or the resource manager.

Assignment Approval Workflow Item Type and Processes

The assignment approval workflow process includes one predefined workflow item type: PA: Project Assignments. This item type includes the following workflow processes:

- PA: Project Assignment Approval - main approval process
- PA: Assignment Approval Notification - approval notification process
- PA: Assignment Rejection Notification - rejected notification process
- PA: Assignment Cancellation Notification - cancelled notification process

These processes activate based on the status of the assignment. The following table provides the default workflow setup of these statuses:

Status	Enable Workflow	Workflow Process	Workflow Success Status	Workflow Failure Status
Working	N	None	None	None
Submitted	Y	PA: Project Assignment Approval	Approved	Rejected
Approved	Y	PA: Assignment Approval Notification	None	None
Cancelled	Y	PA: Assignment Cancellation Notification	None	None
Rejected	Y	PA: Assignment Rejection Notification	None	None
Requires Resubmission	N	None	None	None

You can view or modify these statuses through the Define Statuses form.

You can create your own workflow processes to override these default processes or modify the workflow setup. If you choose to create your own workflow processes, you must specify the item type and process name against the appropriate predefined assignment approval statuses provided in the table above.

Assignment Approval Workflow Notification Messages

The following table displays the notification messages used by the workflow processes. You can modify these messages as appropriate for your business approval processes.

Message	Description	Type	Recipients	Comments
Notify Approval required	Notifies the recipient to approve the approval request with links to the assignment details and the schedule of the resource	Response required	All chosen approvers	None

Message	Description	Type	Recipients	Comments
Notification of assignment approval	Notifies the recipient that the approval request has been approved	FYI only	<ul style="list-style-type: none"> ▪ Resource ▪ Resource Manager ▪ Staffing Manager ▪ Project Manager 	Any comments by the approvers are suppressed in the notification to the resource.
Notification of assignment rejection	Notifies the recipient that the approval request has been rejected	FYI only	<ul style="list-style-type: none"> ▪ Resource ▪ Resource Manager ▪ Staffing Manager ▪ Project Manager 	All comments by the approvers are suppressed in the notification to the resource.

For more information on defining notification messages, see the *Oracle Workflow Guide*.

Assignment Schedule Statuses

Requirement and assignment statuses are referred to as assignment schedule statuses because they reflect the status of the schedule for particular days. The following table provides the default settings for these statuses:

User Status	System Status	Success Status	Failure Status
Proposed	Provisional	Confirmed	Rejected
Provisional	Provisional	Confirmed	Rejected
Confirmed	Confirmed	None	None
Cancelled	Cancelled	None	None
Rejected	Cancelled	None	None

Using the default settings, when a provisional assignment is approved, the status on the assignment is changed to Confirmed. If the provisional assignment is rejected, then the status of the assignment is changed to Rejected.

Assignment schedule statuses do not launch the approval workflow and you cannot enable workflow processes on these statuses. However, you can change the default workflow success and failure statuses for each provisional assignment schedule status.

Note: You cannot define these settings for any cancelled system statuses.

The schedules and timelines reflect all Confirmed and Provisional assignments. Therefore, the provisional assignment schedule status must be set to a confirmed status upon the completion of an approval process whether manual or automated through Oracle Workflow. Since all assignment schedule statuses are user-defined, you must specify the success and failure statuses for each user-defined Provisional status.

Assignment Approval Workflow Extensions

Client extensions relating to the approval of assignments are as follows:

- [Assignment Approval Changes Extension](#)
- [Assignment Approval Notification Extensions](#)

This section covers each extension providing detail on the package and related functions and procedures. For more information on client extensions, see Chapter 19, "Client Extensions," in the *Oracle Projects User Guide*.

Assignment Approval Changes Extension

This client extension enforces the following conditions to determine whether or not an approval is required for an assignment:

- **Change in Duration**
Any extension, shortening, or changing the dates of an assignment requires approval as it effects the schedule and availability of the resource.
- **Change in Work Type**
Any change in the work type on an assignment can have an effect on the billability and utilization percentage of the resource and therefore, requires approval.

Oracle Project Resource Management provides a template package called PA_CLIENT_EXTN_ASGNMT_APPRVL. If you choose to write your own extensions,

print out the following files first. These files are located in the Oracle Project Resource Management admin/sql directory:

- **PARAAPCB.pls**

This file contains the procedures that you can modify to implement the extension.

- **PARAAPCS.pls**

This file contains the specifications of the extension package. If you create procedures outside of the predefined procedure within the PA_CLIENT_EXTN_ASGNMT_APPRVL package, you must also modify this file to include those new procedures.

This package has a function called IS_ASGMT_APPR_ITEMS_CHANGED. This function can return a VARCHAR2 value of either Y or N. The description of the data type for this function are listed in the following table:

Parameter Name	Data Type	Description	Mandatory
P_ASSIGNMENT_ID	NUMBER	The identifier of the assignment	Yes

Assignment Approval Notification Extensions

The circulation of notifications is controlled by the predefined workflow processes. These processes use workflow extensions to provide the lists of contacts for each notification. The client extensions obtain the list of default contacts (recipients) from the workflow process and makes any modifications to the list that the user may have specified through the Oracle Project Resource Management application. The end result is a customized list of recipients for the notification or approval request which the workflow process uses.

Oracle Project Resource Management provides a template package called PA_CLIENT_EXTN_ASGNMT_WF. If you choose to write your own extensions, print out the following files first. The files are located in the Oracle Project Resource Management admin/sql directory:

- **PARAWFCB.pls**

This file contains the procedures that you can modify to implement the extension.

- **PARAWFCS.pls**

This file contains the specifications of the extension package. If you create procedures outside of the predefined procedure within the PA_CLIENT_EXTN_

ASGNMT_WF package, you must also modify this file to include those new procedures.

The description of the USERS_LIST_TBLTYP parameters for this package are listed in the following table:

Parameter Name	Data Type	Description	Mandatory
USER_NAME	VARCHAR2	The workflow user name of the approver	Yes
PERSON_ID	NUMBER	The person ID of the approver	Yes
TYPE	VARCHAR2	The type of user, such as RESOURCE_MANAGER or PRIMARY_CONTACT	Yes
ROUTING_ORDER	NUMBER	The order in which the approvals should be submitted	No For FYI notification recipients, this value is ignored since such notifications are sent to all recipients at the same time.

You can modify the following package procedures as appropriate for your business approval processes:

- **Generate_Assignment_Approvers**

This procedure generates a list of approvers for the assignment. Oracle Project Resource Management sends the list of default approvers to this procedure. The procedure then makes any user-requested changes and provides a modified list accordingly. If no user-requested changes exist, then the default list of approvers is used by the workflow process.

Approvers added through this process are not visible on the Assignment Approver page. However, users can see the name of the current approver on the Assignment Details page.

The following table provides a list of the parameters for this procedure and the details for each parameter:

Parameter Name	Type	Data Type	Description
P_ASSIGNMENT_ID	IN	NUMBER	The unique identifier of the assignment
P_PROJECT_ID	IN	NUMBER	The unique identifier of the project
P_IN_LIST_OF_RECIPIENTS	IN	References the USERS_LIST_TBLTYP	Input list of notification recipients
X_OUT_LIST_OF_RECIPIENTS	OUT	References the USERS_LIST_TBLTYP	Output list of notification recipients
X_NUMBER_OF_RECIPIENTS	OUT	NUMBER	Number of recipients

- **Generate_NF_Recipients**

This client extension procedure generates a list of recipients for the various notifications. Oracle Project Resource Management sends the list of default approvers to this procedure. The procedure then makes any user-requested changes and provides a modified list accordingly. If no user-requested changes exist, then the default list of recipients is used by the workflow process. This client extension procedure is used by the following FYI notifications:

- Assignment Approval Notification
- Assignment Rejection Notification
- Assignment Cancellation Notification

The following table provides a list of the parameters for this procedure and the details for each parameter:

Parameter Name	Type	Data Type	Description
P_ASSIGNMENT_ID	IN	NUMBER	The unique identifier of the assignment
P_PROJECT_ID	IN	NUMBER	The unique identifier of the project
P_NOTIFICATION_TYPE	IN	VARCHAR2	Type of notification; valid values are: <ul style="list-style-type: none"> ■ APPROVAL_FYI ■ REJECTION_FYI

Parameter Name	Type	Data Type	Description
P_IN_LIST_OF_RECIPIENTS	IN	References the USERS_LIST_TBLTYP	Input list of notification recipients
X_OUT_LIST_OF_RECIPIENTS	OUT	References the USERS_LIST_TBLTYP	Output list of notification recipients
X_NUMBER_OF_RECIPIENTS	OUT	NUMBER	Number of recipients

- **Set_Timeout_And_Reminders**

This client extension procedure provides the reminder parameters, such as the waiting period between reminders and the number of reminders before the workflow process is cancelled.

The following table provides a list of the parameters for this procedure and the details for each parameter:

Parameter Name	Type	Data Type	Description
P_ASSIGNMENT_ID	IN	NUMBER	The unique identifier of the assignment
P_PROJECT_ID	IN	NUMBER	The unique identifier of the project
X_WAITING_TIMES	OUT	NUMBER	The maximum amount of time to wait before sending a reminder
X_NUMBER_OF_REMINDERS	OUT	NUMBER	The maximum number of reminders to send before aborting the process

Seeded Candidate Workflow Processes

Oracle Project Resource Management has two seeded notification workflow processes relating to a status change on candidates. These processes are optional.

New Candidate

As a candidate is nominated for a requirement, the candidate is initially given a status of Pending Review. This status invokes a notification process. This process notifies the resource, the manager of the resource, and their staffing manager of the nomination. The person that nominated the candidate does not receive a notification. Therefore, if the nomination was made by the resource, resource manager, or staffing manager, then that person is excluded from the notification process.

Candidate Declined

When a resource is declined as a candidate on a project, the status of the candidate is changed to any user status with a system status of Declined. This status initiates a notification process. This process notifies the candidate, the manager of the resource, and their staffing manager of the change in status. However, a notification is not sent to the person who declined the candidate, if that person is one of these individuals.

Candidate Notification Workflow Extension

The candidate workflow processes use a template package called `PA_CLIENT_EXTN_CAND_WF`. If you choose to write your own extensions, print out the following files first. The files are located in the Oracle Project Resource Management `admin/sql` directory:

- **PARCWFCB.pls**

This file contains the procedures that you can modify to implement the extension.

- **PARCWFCS.pls**

This file contains the specifications of the extension package. If you create procedures outside of the predefined procedure within the `PA_CLIENT_EXTN_CAND_WF` package, you must also modify this file to include those new procedures.

The description of the `USERS_LIST_TBLTYP` parameters for this package are listed in the following table:

Parameter Name	Data Type	Description	Mandatory
USER_NAME	VARCHAR2	The workflow user name of the approver	Yes
PERSON_ID	NUMBER	The person ID of the approver	Yes
TYPE	VARCHAR2	The type of user, such as RESOURCE_MANAGER or PRIMARY_CONTACT	Yes
ROUTING_ORDER	NUMBER	The order in which the approvals should be submitted	No For FYI notification recipients, this value is ignored since such notifications are sent to all recipients at the same time.

This package contains one procedure. You can modify the following package procedure as appropriate for your business notification processes:

- **Generate_NF_Recipients**

This client extension procedure generates a list of recipients for the various notifications. Oracle Project Resource Management sends the list of default approvers to this procedure. The procedure then makes any user-requested changes and provides a modified list accordingly. If no user-requested changes exist, then the default list of recipients is used by the workflow process. This client extension procedure is used by the following FYI notifications:

- Candidate Nominated Notification
- Candidate Declined Notification

The following table provides a list of the parameters for this procedure and the details for each parameter:

Parameter Name	Type	Data Type	Description
P_PROJECT_ID	IN	NUMBER	The unique identifier of the project
P_ASSIGNMENT_ID	IN	NUMBER	The unique identifier of the assignment
P_CANDIDATE_NUMBER	IN	NUMBER	The unique identifier of the candidate

Parameter Name	Type	Data Type	Description
P_NOTIFICATION_TYPE	IN	VARCHAR2	Type of notification; valid values are: <ul style="list-style-type: none">▪ PENDING_REVIEW_FYI▪ DECLINED_FYI
P_IN_LIST_OF_RECIPIENTS	IN	References the USERS_LIST_ TBLTYP	Input list of notification recipients
X_OUT_LIST_OF_RECIPIENTS	OUT	References the USERS_LIST_ TBLTYP	Output list of notification recipients
X_NUMBER_OF_RECIPIENTS	OUT	NUMBER	Number of recipients

Setting Up Your Self-Service Environment

You can set up your self-service environment to accommodate your business needs and the needs of your users. For complete instructions, see the *Oracle Self-Service Web Applications Implementation Manual* for instructions.

The following table lists the required Self-Service Web Applications profiles for the home page setup:

Profile	Description	Value	Example Value
Applications Web Agent	Identifies the location of the Web agent	http://your_web_server:port/<plsql cartridge virtual path>/	http://ap242sun.us.oracle.com: 8000/bis115/plsql/
ICX: Language	Determines the default language	Language	American English
ICX: Date language	Determines the default language in which dates are displayed.	Language	American English
ICX: Date format mask	Determines the date format mask to use	Date Format Mask	The American English default is DD-MON-YYYY; for example, 12-NOV-1997
ICX: Numeric characters	Determines the characters to use to delimit numbers
ICX: Territory	Geographical area	Geographical area	America
ICX: Discoverer Launcher	Identifies the Discoverer Server that runs reports and produces HTML output	http://your_discover_server:port/webdis/html/english/welcome.htm?Connect=[AP PS_SECURE]	http://AP4811PC.us.oracle.com/webdis/html/english/welcome.htm?Connect=[AP PS_SECURE]
ICX: Discoverer End User Layer Schema Prefix	This in combination with the Language code make up the EUL Owner at runtime. For example: If your EUL owner is EUL_US, then your ICX_DEFAULT_EUL profile should be EUL (The language code to derive the complete EUL owner is automatically added).	EUL	EUL

Implementing Resource Utilization

The utilization functionality of Oracle Projects and Oracle Project Resource Management enables you to generate actual and forecast totals of your resource utilization. In addition, you can classify your resource hours to calculate utilization percentages for:

- Actual hours based on time card expenditures
- Forecast hours based on schedule assignments

Oracle Project Resource Management generates forecasts for both provisional and confirmed assignments enabling you to distinguish between real work hours and potential work hours. This chapter discusses the business considerations and setup requirements for resource utilization through the following topics:

- [Defining Your Utilization Strategy](#)
- [Implementing Your Utilization Strategy](#)
- [Defining the Utilization Profile Options](#)

Note: Implementing Oracle Project Resource Management in standalone mode enables you to generate and report the forecast utilization totals. However, if you want to generate actual utilization totals, you must also implement Oracle Projects Costing. For more information on implementing Oracle Projects Costing, see the *Oracle Projects User Guide*.

Defining Your Utilization Strategy

Prior to implementing utilization for your enterprise, you should understand how the Oracle Project Resource Management application generates the utilization totals and evaluate what you want these totals to represent. Through these considerations, you must decide:

- which resources should be included for reporting utilization
- what reporting time periods you want to use
- who will have access to the utilization totals
- how resource hours are summarized for reporting purposes

The actual utilization totals are generated for all hours reported through employee timecards. Forecast utilization totals are generated based on provisional and confirmed assignments entered through Oracle Project Resource Management.

The utilization functionality classifies actual and forecast hours by work types which enables you to:

- identify each work type as Billable/Capitalizable or Non-Billable/Non-Capitalizable
- determine if specific non-billable/capitalizable work types will reduce capacity
- define a weighting percentage for each Work Type for all capacity work types

Note: Work types defined as Non-Capacity always carry a 0% weighting percentage.

The weighting percentage is applied to resource hours when summarizing those hours for the utilization percentage calculation. Two utilization percentages are calculated for both resource utilization categories and organization utilization categories. The calculation for generating these percentages is as follows:

- **Capacity Method** = sum of weighted hours / sum of unweighted capacity hours
- **Total Worked Hours** = sum of weighted hours / total weighted hours

Capacity hours are the total number of hours for the specified time period based on the resource calendar. Actual calendar capacity is modified by subtracting any recorded hours against the project tasks with non-capacity work types. Forecast

capacity is modified by any forecast hours from assignments with non-capacity work types.

Utilization Time Periods

The utilization totals are provided for one or more of the following time periods:

- Global Start Week
- PA Period
- GL Period
- Quarter
- Year

Understanding the Utilization Views

Resource hours are summarized into two distinct groups of utilization reporting categories. These category groupings are used to create the following two utilization views:

- **Resource Utilization View**

This view summarizes actual and forecast utilization hours by Resource Utilization Categories. The resource utilization percentage is calculated by dividing the weighted resource utilization category hours by the specified utilization method.

- **Organization Utilization View**

This view summarizes actual and forecast hours by Organization Resource Categories. The organization utilization percentage is calculated by dividing the weighted organization utilization category hours by the specified utilization method.

These utilization views provide you with two distinct managerial views of the work that resources and their organizations have performed or will perform.

Choosing a Utilization Calculation Method

The calculation method you select determines the denominator for the utilization percentage calculation. You have two methods from which to choose: capacity or total worked hours. These calculation methods provide different percentages for the utilization views.

Using the Capacity Calculation Method

This method uses the capacity hours as the denominator for the utilization percentage calculation. The following table describes the calculation of the utilization percentages for each utilization view using this calculation method.

Utilization View	Numerator (Sum of A)	Denominator (Sum of B)	Percentage (Sum of A)/(Sum of B) * 100
Resource	Sum of Resource Utilization from Category Weighted Hours for all Resources	Sum of Capacity for all Resources	Resource View Percentage
Organization	Sum of Organization Utilization from Category Weighted Hours for all Resources	Sum of Capacity for all Resources	Organization View Percentage

Using the Total Worked Hours Calculation Method

This method uses the total number of hours recorded by time cards or scheduled on assignments as the denominator. For actual utilization totals, the total number of hours is calculated from reported timecard hours. For forecast utilization totals, the total number of hours is calculated from scheduled confirmed assignments. Unlike the capacity method, this method includes non-capacity work type hours.

The following table describes the calculation of the utilization percentages for each utilization view using this calculation method.

Utilization View	Numerator (Sum of A)	Denominator (Sum of B)	Percentage (Sum of A)/(Sum of B) * 100
Resource Utilization View for a Resource	Resource Utilization Category Weighted Hours by Resource	Total worked hours for a resource	Resource View Percentage by Resource

Utilization View	Numerator (Sum of A)	Denominator (Sum of B)	Percentage (Sum of A)/(Sum of B) * 100
Organization Utilization View for a Resource	Organization Utilization Category Weighted Hours by Resource	Total worked hours for a resource	Organization View Percentage by Resource
Organization Utilization View for an Organization	Sum of resource utilization category weighted hours for all resources	Sum of total worked hours for all resources	Resource View by Organization

Understanding the Utilization Reporting

Utilization totals are reported to the following organization roles:

- **Organization Manager**
 Organization utilization reports for all resource hours for the selected time period a resource is assigned to the specific organization. The organization manager can view utilization for the entire organization as well as drill down to the utilization of individual resources.
- **Resource Manager**
 Resource utilization reports for all resource hours for the selected time period where the resource is currently assigned to the resource manager regardless of organization assignment.
- **Individual Resource**
 Resources can monitor their personal performances through viewing all their reported and assigned hours for a selected time period.

You can view utilization totals through the following pages:

- Organization Utilization
- Resource Utilization by Organization Manager
- Resource Utilization by Resource Manager
- Personal Utilization

Each page is described in the following sections.

Reviewing the Organization Utilization Page

This page provides utilization totals for an organization based on a specified time period. The calculations for the totals on this page are defined below.

Employees and Others (Summary) The employee headcount includes a count of all utilizable employees (employees with an assigned job that qualifies for utilization calculations) and resource managers assigned to the organization as of the first day in the selected time period (Year, Quarter, PA Period, GL Period, Global Week). Other headcount includes all utilizable non-employees assigned to the organization as of the first day in the selected time period (Year, Quarter, PA Period, GL Period, Global Week).

For the period types of PA Period, GL Period, and Global Week, the number of employees included in the utilization related numbers is the count of employees assigned to the organization for the period.

For the period types of Year and Quarter, the number of employees included in the utilization related numbers is the total as of the beginning of the period plus any new headcount addition.

Employees and Others (Sub-Organization Details) The employee headcount includes a count of all utilizable employees and resource managers assigned to the organization as of the first day in the selected time period (Year, Quarter, PA Period, GL Period, Global Week). Other headcount includes all utilizable non-employees assigned to the organization as of the first day in the selected time period (Year, Quarter, PA Period, GL Period, Global Week).

Actual Capacity (same as Forecast Capacity) This value represents the net available hours for the organization, which is the total available hours minus reduced capacity hours.

The total available hours is derived from the schedule of each resource. This value can be correlated to the values shown in the Staffing Home for each of the resources within the organization.

The reduced capacity hours are summarized from transactions that are logged against a work type which reduces capacity, such as unpaid leave.

Actual Worked This value is a sum of the hours from the reported timecards of all resources within the organization for the specified time period.

Weighted Actual This value represents the sum total of weighted actual hours for the organization. It is calculated by multiplying the total from each timecard with the

weighting percentage of the organization before summing them all up. The weighting percentage is taken from the organization utilization category as defined for the work type associated with each job.

Actual Utilization (%) This value represents the Weighted Actual Hours as a gross percentage of Actual Capacity or Actual Worked (depending upon the selected filter on the page.) It is calculated by dividing the actual weighted hours by utilization calculation method (capacity or total worked hours) for the organization and specified time period.

Forecast Work This value represents the sum total of scheduled hours for the organization for the specified time period.

Weighted Forecast This value represents the sum total of weighted forecast hours for the organization. It is calculated by multiplying the total hours for each forecast item with the weighting percentage of the organization before summing them all up. The weighting percentage is taken from the organization utilization category as defined for the work type associated with each job.

Forecast Utilization (%) This value represents the Weighted Forecast Hours as a gross percentage of Forecast Capacity or Forecast Work (depending upon the selected filter for the page.) It is calculated by dividing the total forecast weighted hours by the utilization calculation method (capacity or total worked hours) for the organization and specified time period.

Reviewing the Resource Utilization by Organization Manager Page

This page provides utilization totals for all resources under a particular organization manager based on a specified time period. The calculations for the totals on this page are defined below.

Employees and Others (Summary) The employee headcount summary includes a count of all utilizable employees and resource managers assigned to the organization as of the first day in the selected time period (PA Period, GL Period, and Global Week).

For the period types of Year and Quarter, the employee headcount summary includes a count of all utilizable employees and resource managers assigned to the organization as of the beginning of the period plus any headcount addition on the first day of each primary period (GL Period).

Other headcount summary includes all utilizable non-employees assigned to the organization as of the first day in the selected time period (PA Period, GL Period,

and Global Week). For the period types of Year and Quarter, other headcount summary includes all utilizable non-employees assigned to the organization as of the beginning of the period plus any headcount addition on the first day of each primary period (GL Period).

Person Details This link lists all utilizable employees and managers assigned to the organization as of the first day in the selected time period (PA Period, GL Period, and Global Week). For the period types of Year and Quarter, the list includes a count of all utilizable employees and resource managers assigned to the organization as of the beginning of the period plus any headcount addition on the first day of each primary period (GL Period).

Other headcount summary includes all utilizable non-employees assigned to the organization as of the first day in the selected time period (PA Period, GL Period, and Global Week). For the period types of Year and Quarter, other headcount summary includes all utilizable non-employees assigned to the as of the beginning of the period plus any headcount addition on the first day of each primary period (GL Period).

Reviewing the Resource Utilization by Resource Manager Page

This page provides utilization totals for all resources under a particular resource manager. The calculations for the totals on this page are defined below.

Employees and Others This value is a headcount of all utilizable employees reporting to the manager as of the current system date, including future-date employees. Other headcount summary includes all utilizable non-employees assigned to the manager as of the current system date, including future-dated non-employees.

Actual Capacity (same as Forecast Capacity) This value represents the net available hours for the resource (the total available hours minus reduced capacity hours.)

The total available hours is derived from the schedule of each resource. This value can be correlated to the values shown in the Staffing Home for each of the resource within the organization.

The reduced capacity hours are summarized from confirmed assignments that are logged against a work type which reduces capacity, such as unassigned time.

Actual Worked This value represents the sum total of actual worked hours for the resource as reported on submitted timecards.

Weighted Actual This value represents the sum total of weighted actual hours for the resource. It is calculated by multiplying the total hours of each timecard with the weighting percentage of the resource before summing them all up. The weighting percentage is taken from the resource utilization category as defined for the work type of the assigned job.

Actual Utilization (%) This value represents the Weighted Hours as a percentage of Actual Capacity or Actual Worked Hours. It is calculated by dividing the Weighted Actual Hours by the utilization calculation method (capacity or total worked hours).

Forecast Work This value is the total number of hours of the forecast items for the resource.

Weighted Forecast This value represents the sum total of weighted forecast hours for the resource. It is calculated by multiplying the total hours for each forecast item by the weighting percentage for the resource before summing them all up. The weighting percentage is taken from the resource utilization category as defined for the work type of the assigned job.

Forecast Utilization (%) This value represents the weighted hours as a percentage of Forecast Capacity or Forecast Work (depending upon the selected filter for the page.) It is calculated by dividing the Weighted Forecast Hours by the utilization calculation method (capacity or total worked hours).

Reviewing the Personal Utilization Page

This page provides utilization totals for a single resource. The calculations for the totals on this page are defined below.

Capacity Amount Capacity amount represents the total resource available hours minus any assignment hours with a reduced capacity work type, such as unassigned time. The original resource available hours can also be viewed in the Staffing Home page. The actual and forecast worked hours displayed are normal unweighted hours. However, the utilization total is calculated based on the Resource Weighted Hours.

You can specify the default resource utilization calculation method (by total worked hours or capacity) using the profile option: PA: Resource Utilization Calculation Method.

The default resource utilization period type is specified in the profile option: PA: Resource Utilization Period Type.

Capacity Hours This value represents the net available hours for the resource, (the total available hours minus reduced capacity hours.) The total available hours is derived from the schedule of each resource. This value can be correlated to the values shown in the Staffing Home for each resource within the organization.

The reduced capacity hours are summarized from transactions that are logged against a work type which reduces capacity, such as unassigned time.

Worked Hours This value represents the sum total of worked hours for the resource obtained from submitted timecards.

Utilization This value represents the Weighted Hours for the resource as a percentage of Actual Capacity or Actual Worked (depending upon the selected filter for the page.)

(Forecast) Provisional Hours This value represents the sum total of forecast hours for the resource. It is calculated by summing the totals of all forecast items for the resource which have been marked as provisional.

(Forecast) Confirmed Hours This value represents the difference between the Forecast Work Hours and the Provisional Hours (Forecast Work Hours – Provisional Hours.)

(Forecast) Utilization This value represents the Confirmed Weighted Hours for the resource as a percentage of Actual Capacity or Actual Worked (depending upon the selected filter on the page.)

Correlation of Utilization Totals

You can correlate the utilization total in the Resource Utilization by Organization Manager page with the Personal Utilization page by selecting the following filter parameters:

- Utilization view: Resource
- Include only: Confirmed Assignment

Ensure that the selected values for Period Type and Utilization Calculation Method/Show Percentage By parameters are similar to the default profile values for the Personal Utilization page.

You can also correlate the utilization total in the Resource Utilization by Organization Manager page with the total shown in the Resource Utilization by Resource Manager page by selecting the following filter parameter:

- Select Manager = <Manager Name>

Selecting this filter returns the same resources, provided that the resource manager is managing resources in the same organization authorized to the organization manager. The actual and forecast worked hours are the same if the resource works in the same organization during the specified period of time. The number may be different if the resource also works in different organizations during the specified period of time. This difference is because of the following page definitions:

- Resource Utilization by Organization Manager displays utilization for resources with a specific resource manager, period, and organization.
- Resource Utilization by Resource Manager displays utilization for resources with a resource manager who is managing the resources for a specific period.

Implementing Your Utilization Strategy

Implementation options and functions are available for you to tailor the utilization calculations to your business needs as well as provide viewing ability to your users. These options include:

- [Determining Utilization Jobs](#)
- [Establishing Utilization Categories and Work Types](#)
- [Implementing Utilization Forecasting Functionality](#)
- [Establishing Unassigned Time Tracking](#)
- [Choosing Your Reporting Time Period](#)
- [Granting Utilization Authority](#)

Determining Utilization Jobs

All HR jobs have a flag which indicates whether or not the job is tracked for utilization. As resources are assigned to these jobs, you can track their hours in the utilization reports.

To include jobs in utilization, complete the following steps:

1. Login as the Project Resource Management Super User.
2. Navigate to the Jobs form:
Setup > Human Resources > Jobs
3. Select the desired HR Job Group
4. For each job, select Others, then Extra Information.
5. In the Job Category Details window, select Yes or No for Include in Utilization.

Note: The Billable choice is used only for financial forecast reporting. See [Chapter 10, "Implementing Financial Forecasting"](#) for implementation and usage information.

Establishing Utilization Categories and Work Types

In order to use the utilization functionality, you must define work types and utilization categories. These attributes provide a means of classifying and sorting the work into logical and meaningful utilization reports.

Defining Utilization Categories

Utilization categories are classifications of work types for reporting purposes. Work types are summarized into utilization categories and can carry different weighting percentages to provide two distinct Utilization Views:

- **Resource Utilization View** - to provide a utilization view for resources and their managers
- **Organization Utilization View** - to provide business managers a utilization view for their organizations and related resources

These utilization views enable you to create two distinct managerial views of the work that resources and their organizations have performed or will perform. You can use each utilization category for one or both utilization views.

Creating Utilization Categories To create your utilization categories, use the following menu path:

Projects Menu > Setup > Utilization > Utilization Categories

When you define a utilization category, you assign a code, a meaning, and description, as well as the attributes as applicable to the category listed in the following table:

Attribute	Description
Description	Enter a long description for the utilization category. This field is optional.
Reporting Order	Determine the display order for the categories on the screens and reports.
Effective Dates	Enter the beginning and ending date for which the utilization category is effective.

Using Utilization Categories The effectiveness of utilization categories is best illustrated through an example. In the following example, a resource has performed warranty work which is not billable. The challenge is how to reflect that in your utilization reporting so that it does not inflate your revenue-generating utilization.

A resource is assigned to complete some rework (warranty) work on an existing project. The enterprise (project organization) will not receive any revenue for the extra work performed. The assignment has been allocated a work type called "Warranty" which automatically classifies the timecard entries entered by the resource.

As the project organization is responsible for the overall performance of the project, it should not consider rework as receiving utilization credit. Otherwise, the utilization reports provide a false representation of the total number of hours being effectively utilized by the resources of the organization. This company set up the utilization view for the organization to handle this situation. It filters out work hours associated with the Warranty work type by placing a 0% weighting on the organization categories of the work type.

However, the company does not want the contract-related work to negatively affect the personal utilization percentage of the resource. So, the weighting for the resource categories of the Warranty work type was set at 80%. Doing so, ensures the resource receives a discounted credit of the performed effort.

Defining Work Types

Work types are classifications of work. As an example, a professional software services enterprise typically needs work types for the following areas:

- Analysis, Design, Implementation, Support [Billable/Productive work]
- Rework [Non-Billable/Productive work]
- Internal IT Support, Internal Reproduction [Internal Billable/Productive work]
- Bid & Proposal, Marketing [Non-Billable/Selling]
- Sick Pay, Holiday, Jury Duty [Non-Capacity/Non-Productive]

Creating Work Types To create your work types, use the following menu path:

Projects Menu > Setup > Utilization > Work Types

When you define a work type, you assign a name and a description. The following table provides a list of attributes you can define for the work type:

Attribute	Description
Billable/Capitalizable	Check to identify a work type as being eligible for use on a billable capitalizable task.

Attribute	Description
Non-Capacity	Check to calculate capacity summarization by subtracting the work type hours from the total capacity and total work hours. Only Non-Billable/Capitalizable work types may select this option. If this attribute is enabled, you cannot enter weighting values for the work type.
Resource Utilization Category	Select the utilization category in which the work type should be considered for resource utilization calculations.
Resource Weighting Percentage	Enter a value between 0 and 100. The utilization functionality uses this value to define utilization calculations. The default value is 100% if the work type is billable or capitalizable, otherwise, it defaults to 0.
Organization Utilization Category	Select the utilization category in which the work type should be considered for organization utilization calculations.
Organization Weighting Percentage	Enter a value between 0 and 100. The utilization functionality uses this value to define utilization calculations. The default value is 100% if the work type is billable or capitalizable, otherwise, it defaults to 0.
Standard Effective Dates	Enter the date range for which the work type is effective.

Using Work Types You assign work types to project types, projects, tasks, and assignments. The implementation process initially assigns default work types to existing project types. You can modify these defaults as appropriate for your business needs. Work types assigned to project types default to associated projects and templates, and eventually, to the tasks and assignments of the project. You can override a work type at the project, assignment, and task levels. However, an override does not carry down to existing child tasks or assignments. You must update each existing task and assignment individually.

To assign work types for forecast items on assignments, navigate to the Add Assignment page.

To assign work types to tasks for actual items, navigate to:

Project > Task > Options > Task Detail

Note: You can assign Billable/Capitalizable work types only to billable tasks (tasks which have the Billable flag checked.)

Implementing Utilization Forecasting Functionality

Oracle Project Resource Management creates the forecast utilization totals for both both provisional and confirmed assignments. These totals are based on forecast items. Forecast items are generated for each day of an assignment or requirement.

The implementation options determine how forecast items are generated and their default attributes. For more information on the Forecast Implementation Options, see "[Defining Forecasting Options](#)" in [Chapter 10, "Implementing Financial Forecasting"](#).

Establishing Unassigned Time Tracking

Oracle Project Resource Management automatically generates totals for forecast unassigned time for all utilizable resources. The calculation for forecast unassigned time subtracts both forecast provisional and forecast confirmed assignment hours from the forecast total capacity for each available day of the resource. Any remaining hours generated from this calculation are assigned to projects specifically implemented for the purpose of tracking unassigned hours.

For more instructions on how to establish unassigned time tracking, see "[Defining Unassigned Time Tracking](#)" in [Chapter 10, "Implementing Financial Forecasting"](#).

Choosing Your Reporting Time Period

The reporting time period has a direct impact on how your utilization totals are calculated. Therefore, you have a choice on which periods you want to summarize your enterprise and organization utilization totals. Once this choice is made and you have run the utilization summarization program, you cannot change it.

You have three reporting periods on which you can perform utilization reporting: GL Period, PA Period, and Global Week. The GL Period option summarizes the utilization totals into financial general ledger period totals. The PA Period option summarizes the utilization totals in periods distinctly different from your GL Period. The Global Week option summarizes utilization totals by weeks (7 day periods). This particular option is useful for calculation totals across the

organization which have different financial calendar periods. It helps provide an accurate picture of the totals on a enterprise basis.

To define your utilization time periods, complete the following steps:

1. Login as Project Resource Management Super User.
2. Navigate to the Utilization Options form.
3. Select at least one of the following options:
 - PA period
 - GL Period
 - Global Week

Granting Utilization Authority

You can provide your users the ability to view resource or organization utilization totals through:

- assigning specific responsibilities
- assigning HR supervisors to employee assignments
- granting Organization Utilization Authority

Review of Responsibilities

The following predefined responsibilities allow different levels of access to the utilization information:

- **Organization Manager Responsibility**

This responsibility provides access to the Organization Utilization page. This page displays utilization totals for the organizations for which the business manager oversees. It also provides the ability to drill-down to individual summary amounts for resources assigned to the organization or suborganization.
- **Resource Manager Responsibility**

This responsibility provides access to the Resource Utilization page. This page displays utilization totals for all resources reporting to the manager. These resources include any person who has the Resource Manager currently assigned

as their supervisor in their HR assignment. It also provides the ability to drill-down to resources who are subordinates to direct reports.

- **Team Member Responsibility**

This responsibility provides access to the Personal Utilization page to view personal utilization totals.

Granting Organization Utilization Authority

The Organization Utilization Authority enables a user to view the utilization amounts for an organization, all direct resources of the organization, all the suborganizations, and the resources of those suborganizations.

To grant this authority to individual users, navigate to:

Projects menu > Human Resources > Organization Authority

For more information on this authority, see "[Assigning Organizational Authority](#)" in [Chapter 5, "Configuring Your Organization Security"](#).

Defining the Utilization Profile Options

You have control over how utilization totals are processed through the following profile options:

- PA: Global Week Start Day
- PA: Organization Utilization Default Period Type
- PA: Organization Utilization Default Calculation Method
- PA: Resource Utilization Period Type
- PA: Resource Utilization Calculation Method
- PA: Utilization Calculation Begin Date

Each profile option provides a different control on how your utilization totals are calculated and processed. All utilization profile options are set at the site level.

PA: Global Week Start Day

This profile option specifies the weekday you want recognized as the beginning of the week. Set this profile option at the site level. Valid values are 1 through 7 representing the days of the week. The definition of the numeric values are:

- 1 = Sunday
- 2 = Monday
- 3 = Tuesday
- 4 = Wednesday
- 5 = Thursday
- 6 = Friday
- 7 = Saturday

Note: Global weeks use the date of the first day of the defined week as the name of the period. For example, the name of the global week for the week of April 1st through the 7th of the year 2001 is 01-APR-2001.

PA: Organization Utilization Default Period Type

This profile option determines the default period type used when initially entering an organization or resource utilization reporting screen. Your choices are: PA Period, GL Period, Global Week, Quarter, and Year.

You must use one of the period types selected in Utilization Options.

PA: Organization Utilization Default Calculation Method

This profile option determines the default utilization percentage to show when initially entering an organization utilization reporting screen. Your choices are Capacity or Total Worked Hours.

PA: Resource Utilization Period Type

This profile option determines the default period type used when initially entering a resource utilization reporting screen. Your choices are PA Period, GL Period, and Global Week.

You must use one of the period types selected in Utilization Options.

PA: Resource Utilization Calculation Method

This profile option determines the default period type used when initially entering a resource utilization reporting screen for an individual. Your choices are Capacity or Total Worked Hours.

PA: Utilization Calculation Begin Date

This profile option determines the date to begin calculating the utilization hours for both actuals and forecast amounts. No resource hours prior to this date will be included in any of the generated totals.

After setting this particular profile option, you must run a concurrent process called PRC: Identify Transactions for Actuals Utilization to flag all transactions that should be excluded from the summarization of actual utilization hours. When this process is run, any transaction with a date prior to the date specified in this profile option will be flagged as a non-utilization transaction. Therefore, these transactions are ignored when the utilization totals are generated.

This process is an optional one-time implementation step and does not have to be repeated unless you change the date in the PA: Utilization Calculation Begin Date profile option.

Note: Setting this profile option and running the related concurrent process is optional. Only use this profile option and process if you want to exclude a major portion of existing data from the utilization totals.

Implementing Financial Forecasting

Oracle Project Resource Management can produce financial forecasts for your projects based on existing staffing plans. This self-service financial forecast functionality enables you to:

- perform forecasts based on single or multiple projects
- drilldown to find out the distribution of the forecast totals
- regenerate forecasts on adjusted staffing plans

This chapter describes how to set up the required elements for performing forecasting activities through the following topics:

- [Overview of the Financial Forecast Process and Calculations](#)
- [Implementing the Forecast Functionality](#)
- [Establishing Security on Forecast Functionality](#)

Overview of the Financial Forecast Process and Calculations

Oracle Project Resource Management provides a financial forecast process which use calculations based on your predefined bill and cost rates. These rates are evaluated within the time frame of the assignments and requirements and the scheduled work patterns to provide you forecast totals. This section describes the process and calculations used to generate these forecast totals.

Financial Forecast Process

When you invoke the action to generate a forecast, the process evaluates for the project the daily hours of the staffed labor (assignments) and open requirements. The daily hours of the assignments and requirements are summarized based on the time period (GL Period or PA Period) for the life of the project.

These totals are used to derive your total estimated cost, revenue, margin, and margin percentage for the project. For requirements, the forecast cost and bill rates are obtained from the job assigned to the role in Project Resource Management. For assignments, this information is obtained directly from the assigned employee.

After the forecast generation completes, a notification is sent to the user who invoked the process. This notification indicates whether or not the forecast totals were generated successfully. On the Project Forecast page, an indicator appears next to the role or project for which errors on forecast items occurred. A link to the forecast error page is provided on the Project Forecast page. This page provides an explanation of the errors encountered for each assignment or requirement for the project. The user can regenerate the forecast after the errors have been corrected.

Note: The generation of forecast totals is handled through deferred Oracle Workflow processes. As the volume of the forecast items can be large, these processes can require a substantial amount of time to complete the processing of forecast items. You can increase the processing performance by creating additional background process dedicated only to processing the forecast items. For more information, see "[Understanding Data Processing](#)" in [Chapter 12, "Maintaining Your Data"](#).

Forecast Calculations

Each forecast page provides totals for labor hours, cost, revenue, margin, and margin percentage. These totals can vary depending upon how you implement the forecast options. Therefore, it is helpful to review the calculations for each of these totals to assist you with making your implementation decisions.

The calculations used to derive the forecast totals are as follows:

- **Hours** = The number of hours for each requirement or assignment in the Project Resource Management staffing plan, by role and period.
- **Cost** = The labor raw cost represents for each role the cost of the requirements and assignments.

The cost rates for assignments are based on the employee cost rates. The cost rates for requirements is based on the cost rate of the job associated with the role of the requirement.

The burden schedule for the project is applied to the raw cost rates to provide the burdened costs which are reflected in the forecast. The formula to derive the cost rate is as follows:

- **Average Cost Rate** = Total Burdened Cost / Total Hours

This amount appears in the Average Rate column when you select Cost as the Show Amount.

- **Margin** = Revenue - Cost

Margin is calculated at the same level as Revenue for each project.

- **Margin %** = [(Revenue - Cost) / Revenue] * 100%

Margin % is calculated at the same level as Revenue for each project.

Calculating Revenue

Revenue is calculated differently based on the distribution rule assigned to your projects. Using the work-based distribution rule, the revenue for time and material projects is calculated by role. Using the cost and event-based distribution rules, the revenue for fixed-price projects is displayed as one line for the entire project. The formulas for generating the displayed totals are provided below grouped by the distribution rules.

The following sections describe the revenue calculations for each distribution rule. For more information regarding forecasting and the distribution rules, see the *Oracle Projects User Guide*.

Revenue Calculation for Projects Using Work-Based Distribution Rule For projects with a work-based distribution rule, the revenue is derived as follows:

- **Revenue** = Hours * Bill Rate

The bill rate is derived from any project-level bill rate overrides. If no overrides exist, then the bill rate is derived from one of the following based upon how your project has been defined:

- **Rate Schedules**

The rate schedules for both assignments and requirements are retrieved from the associated job. For assignments, the rate schedule is overridden if the assigned employee has a rate in the defined employee-based rate schedule.

- **Burden Schedules**

If a burden schedule is associated with the project, then it is used to determine the revenue by marking up the cost.

After the bill rate is determined, any defined project-level discount percentages are applied. You can set a project-level discount to any project using the following navigation path from the individual project:

Project Options > Bill Rates and Overrides > Standard Billing Schedules

The rates and discount percentage displayed in the forecast pages are derived using the following calculations:

- **Standard Rate** = Job-based bill rate schedule (as of the start of the assignment)
- **Average Rate** = Total Revenue / Total Hours
- **Effective Discount %** = [(Standard Rate - Average Rate) / Standard rate] * 100%

Revenue Calculation for Projects Using Cost-Based Distribution Rule For projects with a cost-based distribution rule, the revenue is calculated as follows:

- **Revenue (For period X)** = [(A / B) * C] - D

Where:

X = Current Period
A = Inception to Period X Total Cost
B = Total Project Cost
C = Total Project Value
D = Inception to Prior Period End (X-1) Revenue

Revenue Calculation for Projects Using Event-Based Distribution Rule For projects with an event-based distribution rule, the revenue is calculated as follows:

- **Revenue = Total Project Value**

This total appears in the last period of the project. All other periods of the project reflect a zero dollar value. If the project does not have an end date, the last period with an assignment or requirement is used

Implementing the Forecast Functionality

In order to generate forecasts totals, you have to define specific information on which the forecasts are based. This section provides details for the following implementation steps to establish the forecast feature:

- [Defining a Job-Based Cost Rate Schedule](#)
- [Defining Bill Rate Schedules](#)
- [Updating Project Types with Employee and Job-Based Bill Rate Schedules](#)
- [Defining Forecast-Related Profile Option](#)
- [Defining Periods](#)
- [Defining Unassigned Time Tracking](#)
- [Defining Forecasting Options](#)

As the forecast totals for requirements depend upon the job bill and cost rates of the requirement, each role within Project Resource Management must have a job associated with it.

For more information on defining roles, see ["Defining Roles"](#) in [Chapter 6, "Defining Your Project Roles"](#). See ["Defining Jobs and Job Mapping"](#) in [Chapter 3, "Establishing Your Enterprise Structure"](#) for more information regarding jobs.

Defining a Job-Based Cost Rate Schedule

Define a job-based cost rate schedule to enable the generation of forecasts on the cost of staffing requirements. To define this schedule, complete the following steps:

1. Navigate to the Rate Schedules form using the following menu path:
Setup > Expenditures > Rate Schedules
2. Enter a schedule name and a description of the schedule.
3. Select the organization that uses the schedule.

You can enter any organization from your hierarchy regardless of classification or start and end dates.

4. Select the Job tab.
5. Select the appropriate jobs and enter their rates.

6. Save your work.

Note: Forecasts must be regenerated to reflect retroactively changed cost rates.

Defining Bill Rate Schedules

Create a job-based bill rate schedule in Oracle Projects to enable the forecast generation of revenue from staffing requirements. You can include bill rate overrides in your forecasts. If you plan to utilize bill rate overrides, you will establish them as they are needed.

For more information on bill rate overrides, see the *Oracle Projects User Guide*.

Updating Project Types with Employee and Job-Based Bill Rate Schedules

For any new project types, manually enter the appropriate job-based bill rate schedule in the remaining field (either Job or employee-based) for each project type.

Defining Forecast-Related Profile Option

Define the profile option PA: Forecasting Period Type as either GL Period or PA Period as applicable to your business using the following menu path through the System Administrator responsibility:

Profile > System

This profile option is set only at the site level and determines the period type for which you will generate forecast totals and the number of periods to display on the forecast screens:

- 13 periods for PA Period
- 6 for GL Period

Defining Periods

In order to create forecast totals for the life of a project, you must define an appropriate number of periods that span the life of your projects. These periods are also necessary to create assignments for time periods in the future. You create these periods through Oracle General Ledger tables and migrate them to Oracle Projects tables.

For more information on defining the time periods, refer to the *Oracle General Ledger User Guide* or the *Oracle Projects User Guide*.

Defining Unassigned Time Tracking

Oracle Project Resource Management automatically generates totals for unassigned time for all utilization jobs. The calculation for unassigned time subtracts both provisional and confirmed assignment hours from the total capacity for each available day. Any remaining hours generated from this calculation are assigned to projects specifically implemented for the purpose of tracking unassigned hours.

To define unassigned time tracking projects, complete the following steps:

1. Login as Project Resource Management Super User.
2. Navigate to the Project Type form:
Setup > Projects > Project Types
3. Create a project type using the indirect project type class.
4. In the Details window, select the following options:
 - Administrative
 - Unassigned Time
5. Create a project template using the unassigned project type using the following path:
Setup > Projects > Project Templates
6. Create a project using the unassigned project template.
Projects > Find Projects

Optionally, you can create two unassigned projects: one for billable jobs and one for non-billable jobs.
7. Complete the options on the Unassigned Time Options tab. For more information, refer to "[Unassigned Time Options](#)".

This type of project is used solely for tracking unassigned time for utilization and forecasting calculations. Therefore, users cannot manually add any scheduled roles to this project and the Add Requirement and Add Assignment options are not available for this project.

Defining Forecasting Options

The Forecast Implementation Options provide implementation settings for both resource utilization and financial forecasting at the operating unit level. You can access these options using the following menu path:

Setup > Forecasting > Options

You have a choice of two tabs: Options and Unassigned Time Options. Complete the options as follows:

1. In the Options tab, select the following options:
 - a. Check Include Admin Projects.
 - b. Enter a value in Max Historical Versions (suggested starting value: 5).
 - c. Enter the desired Utilization Calculation Method (suggested starting entry: By Resource Capacity Hours).
 - d. Select at least one period type.
 - e. Enter the defaults for the Team Role Forecasting Options.
2. Select the Unassigned Time Options tab.
3. In the Billable People region, check Include in Forecast if you want to summarize billable unassigned time in the financial forecasting reports. If you select this option, enter values for the related fields (Unassigned Time Project, Expenditure Type Class, and Expenditure Type.)
4. In the Non-Billable People region, check Include in Forecast if you want to summarize non-billable unassigned time in the financial forecasting reports. If you select this option, enter values for the related fields (Unassigned Time Project, Expenditure Type Class, and Expenditure Type.)

The following sections provide details on the individual options.

Note: All forecast and unassigned time options must be defined for each operating unit.

Implementation Options

The following graphic depicts the Options tab:

The screenshot shows a window titled "Forecasting Implementation Options (Vision Services)". The "Unassigned Time Options" tab is active. The settings are as follows:

- Include Admin Projects:**
- Max Historical Versions:** 10
- Utilization Calculation Method:** By Total Hours Worked
- Period Type:**
 - PA Periods
 - GL Periods
- Forecasting Defaults:**
 - Expenditure Type Class:** Overtime
 - Expenditure Type:** Overtime
 - Transfer Price Amount Type:** Revenue Transfer
- Forecast Generation and Display:**
 - Project Role:** Contract Administrator
 - Job Based Cost Rate Schedule:** Bill Rate by Job
 - Classification:** Product

Some of the fields are not currently in use, but have been provided for features scheduled for future releases. The following table provides a list of fields and their descriptions in the order they appear on the tab:

Field	Description
Include Admin Projects	<p>Check to indicate that you want to include administrative projects in project forecast totals. This field is scheduled for future use in the forecasting functionality.</p> <p>Note: Although this option is for future functionality, you must enable this option for this release in order to avoid errors because the application cannot yet exclude administrative projects.</p>

Field	Description
Max Historical Versions	Enter the maximum number of historical forecast versions that you want to store. This field is scheduled for future use in the forecasting functionality. Note: At minimum, you must enter a value of 1.
Utilization Calculation Method	Enter the desired method of calculating your resource utilization. This field is scheduled for future use in the forecasting functionality only and does not have any affect utilization summarization or reporting. Note: Although this option is for future functionality, a selection is required. Capacity is the recommended selection.
Period Type	Check the desired period type (GL Period or PA Period) that the forecasting process should use to generate the forecast totals. This field is scheduled for future use in the forecasting functionality.
Expenditure Type Class	Select the Expenditure Type Class to classify the forecast items.
Expenditure Type	Select the desired Expenditure Type to apply to all generated forecast items.
Transfer Price Amount Type	For future use in forecasting functionality
Project Role	Enter the role to display as the project owner. This value is displayed in the Project Forecast List page. Note: Defining this value is optional. If you leave this field blank, the Project Owner column is hidden in the Project Forecast List page.
Job-Based Cost Rate Schedule	Select the job-based cost rate schedule to use for assignments.
Classification	Select the classification for which you want to generate forecast totals. You can only select a classification where only one value is allowed. The corresponding class code for each project is displayed in the Project Forecast List page. Only those classifications which are defined as mandatory in the project template appear as choices for this field. Note: Defining this value is optional. If you leave this field blank, the Classification column is hidden in the Project Forecast List page.

For more information on expenditure types and project classifications, see Chapter 17, "Oracle Projects Setup and Implementation," in the *Oracle Project User Guide*.

Unassigned Time Options

The following graphic depicts the Unassigned Time Options tab:



This tab has two regions pertaining to the setup of billable people and non-billable people respectively. The fields are the same for both regions. The following table provides a list of the fields and their descriptions in the order they appear within a region:

Field	Description
Include in Forecast	Check to indicate that you want to summarize unassigned time in the project financial forecast totals.
Unassigned Time Project	Enter the name of the project to which unassigned time should be reported.
Expenditure Type Class	Enter the expenditure type class with which unassigned time should be associated.

Field	Description
Expenditure Type	Enter the expenditure type with which the unassigned time should be associated.

You must enter values for these fields as applicable to billable and non-billable unassigned time.

Establishing Security on Forecast Functionality

Users can view forecast hour and revenue totals for any project on which they are active key members. You can provide viewing access to other users as well. Key members and other users with the appropriate authority or security access can also view project cost, margin, and margin percentage totals and generate project forecast totals.

You can establish security for these features and functionality through granting roles cost viewing access, granting forecast authority, and providing functions and menu access.

Granting Cost Viewing Access to Roles

To grant a specific role the ability to view cost, margin, and margin percentage totals, you can check the View Labor Cost checkbox on the Role Types form. To access this form, use the Project Super User responsibility and follow this menu path:

Setup > Project > Role Types

Granting Forecast Authority

You can grant a user forecast authority. This authority provides users the ability to view all projects in an organization through the Multiple Project Forecast List. Users can drill down on a project to view all amounts for hours, cost, revenue, margin and margin percentage. Labor cost authority is assumed for users assigned this authority. You can grant this authority using the following menu path:

Setup > Human Resources > Organization Authority

Business managers are likely candidates for these authority levels. You may grant users these authorities at the organization level.

Granting Forecast Function Access

You can add functions to menus associated with user roles to provide access to forecast functionality. The forecast-related functions are:

- **Project Level View Forecast Security**
This function provides users the ability to view existing project forecasts.
- **Project Level Edit Forecast Security**
This function provides users the ability to generate project forecasts.

Typical users of the functionality that these security levels provide are project managers or sales directors. For more information on how to edit menu and function access, see "[Understanding Role-Based Security](#)" in [Chapter 5](#), "[Configuring Your Organization Security](#)".

Setting Up for Reporting Capabilities

Oracle Project Resource Management transactional reporting is supported by a web-based Oracle Discoverer solution. The predefined workbooks, worksheets and End User Layer (EUL) provide you and your users the ability to query and manipulate transactional data to proactively measure and analyze corporate performance.

After you implement the reporting solution, users can access the predefined Oracle Discoverer reports from the self-service Project Resource Management menu structure.

This chapter covers the setup and usage of the reporting solution through the following topics:

- [Oracle Discoverer Postinstallation Tasks](#)
- [Test Your Installation and Set Up](#)
- [Overview of the Business Areas and Business Views](#)
- [Security Overview](#)
- [Discoverer Workbooks](#)

Oracle Discoverer Postinstallation Tasks

This section describes the Oracle Discoverer install and setup tasks for integration with Oracle Project Resource Management. To set up the reporting solution, you must use the Administrator Edition or client/server version of Discoverer. To set up the User Edition, you must use the Web Discoverer version, with a few exceptions, which are noted accordingly.

Before you start, you must complete the following activities:

1. Install Oracle Discoverer Administration Edition.

To access the Discoverer workbooks provided with Oracle Project Resource Management, install Oracle Discoverer.

2. Install Oracle Web Discoverer.

For installation instructions, refer to the *Oracle Discoverer 3.1 Installation and Administration Guide*.

Oracle Discoverer Postinstallation Tasks Checklist

The following tasks are covered in this section:

1. Create the End User Layer.
2. Modify the End User Layer Owner's Indexes.
3. Copy files to Discoverer Administration Tier.
4. Connect to Discoverer Administration Edition.
5. Import the End User Layer EEX File.
6. Set up access to Business Areas and End User Discoverer Edition.
7. Refresh Business Areas.
8. Connect to Discoverer User Edition.
9. Install the Reporting workbooks.

When you have completed these steps, verify that:

- The EUL owner (database user) id has a suffix corresponding to the end user language, for example:
`EUL_US`
- The EUL owner has necessary privileges to FND objects.

Refer to the *Oracle Discoverer 3.1 Administration Guide* for details.

- An application mode EUL owner exists. When creating the EUL the /APPS_MODE parameter was added to the command line.
- The ICX profiles in Oracle Applications are correct, for example: ICX_DISCOVERER_LAUNCHER, ICX_DEFAULT_EUL, ICX_DEFAULT_WORKBOOK_OWN, and SESSION_COOKIE_NAME.

These profile options are part of the set up of Oracle Discoverer and the self-service environment for Oracle Project Resource Management. For more information on these and other required ICX profile options, refer to *Oracle Discoverer 3.1 Administration Guide* and the "[Setting Up Your Self-Service Environment](#)" in [Chapter 8, "Defining the Project Environment"](#) within this guide.

Create the End User Layer

Complete the following steps to create the End User Layer.

1. Create a database user that you want to designate as the End User Layer owner and grant database access to it.
2. Create the application mode EUL.

Creating the Database User Set the name of the end user layer owner (database user) to EUL_<language>, for example: EUL_US. Use the following script to perform this task:

```
create user eul_us
identified by eul
default tablespace user_data
temporary tablespace temp;
```

Creating the Applications Mode EUL

1. Issue a set of grants to allow the EUL owner select access to certain Applications Object Library tables. This step is necessary in order for Discoverer to support the structure of Applications user IDs and responsibilities. To do this, connect to the database using the account specified in the FNDNAM environment variable (typically "APPS") and execute the following statements.

```
connect system/manager@<database>
grant connect, resource to &EULOWNER
```

```
connect apps/apps@<database>
grant select on FND_USER to &EULOWNER
grant select on FND_APPLICATION to &EULOWNER
grant select on FND_USER_RESP_GROUPS to &EULOWNER
grant select on FND_RESPONSIBILITY_VL to &EULOWNER
grant select on FND_ORACLE_USERID to &EULOWNER
grant select on FND_DATA_GROUP_UNITS to &EULOWNER
grant select on FND_PRODUCT_INSTALLATIONS to &EULOWNER
grant select on FND_SECURITY_GROUPS_VL to &EULOWNER
grant execute on FND_CLIENT_INFO to &EULOWNER
```

2. Create an Applications mode from the Discoverer Administration Edition.

An Applications mode EUL is one that can be administered using the Oracle Applications security model in place of the database security model. There are two ways of doing this, both invoking the Administration edition from the command line:

```
DIS31ADM.exe /APPS_MODE
```

Starts the Administration Edition in Applications mode. Any EULs created will by default be Applications mode EULs.

```
DIS31ADM.exe /APPS_MODE /CREATE_EUL /CONNECT eul_owner/password@database
```

This command creates an Applications mode EUL from the command line in batch mode.

- 3.** Note that the EUL owner *must* be an Oracle database userid, not an Oracle Applications userid. The easiest way to create an EUL with a new database userid as the owner is to log onto the Discoverer Administration edition as the SYSTEM user, and in step two of the Create EUL Wizard choose “Create a new user.” It is recommended that you create the EUL in a separate schema from the APPS schema that contains the Oracle Applications tables and views. The primary reason for this is that by creating the EUL in a separate schema it is easier to migrate the EUL from test environment to production environment using database import/export.
- 4.** Next you need to ensure that the EUL owner has select access to the appropriate Applications tables and views where the data is stored. If you are interested in creating Discoverer folders that span multiple tables you may want to grant select any table privilege to the EUL owner. Otherwise, grant select access to just the tables you wish to create Discoverer folders on.

Modify the Indexes of the End User Layer Owner

Complete the following steps from the R11 Admin tier to modify the maximum extents of the indexes in the End User Layer.

1. Connect to your database server using SQL/Plus as the End User Layer (for example, EUL_US) owner.
2. At the SQL prompt, enter

```
$BIS_TOP/admin/sql/BISALTIN.sql
```

Copy Files to Discoverer Administration Tier

In order to access Discoverer-related files through the Discoverer Administration and End User Editions, they must be copied to the Discoverer Administration Tier. The file PAPERMEUL.eex is created in the \$AU_TOP/discover/<language>/ directory when you install the Oracle Project Resource Management Reporting product.

1. Copy the file PAPERMEUL.eex from the \$AU_TOP/discover/<language>/ directory to an appropriate directory from where it can be imported into the Discoverer Administration Edition.
2. Copy the sql script BISEULBA.sql from the \$BIS_TOP/admin/sql/ directory into the same temporary directory you used in step 1. Optionally, mount the \$AU_TOP/discover/<language> directory on to the Discovery Administration Tier.
3. Copy the Discoverer Workbooks from the \$AU_TOP/discover/<language>/ directory to a new directory where they can be saved to the database using the Discoverer User Edition. The workbooks installed are:
 - PASCHRES.dis
 - PAAVLRES.dis
 - PAOVCRESDIS.dis
 - PASALPIP.dis
 - PAREQPRJ.dis

Connect to Discoverer Administration Edition

1. Log in to the Discoverer Administration Edition in application mode, for example:

```
D:\orant\DISCVR31\DIS31ADM.EXE /APPS_MODE
```

2. Connect to the database, for example:

```
eul_us/eul@cus115
```

3. Select File > Set Default EUL.

Import the End User Layer EEX File

The Project Resource Management EEX file must be imported into the Discoverer End User Layer. Select the EUL for which you want the EEX file to be imported, for example, EUL_US.

Note: Before beginning the import process, increase the size of the Rollback Segments to a minimum of 10 megabytes. After the import has been completed, reset the Rollback Segments to their original sizes.

To import the EEX file, complete the following steps:

1. Open an MS-DOS command window and navigate to the directory in which the EEX file is located. Enter the following commands at the command prompt:

```
start /wait <ORACLE_HOME>\discvr31\dis3ladm /APPS_MODE  
/CONNECT <EUL_Owner>/EUL_Owner_password@<Connect_string>  
/IMPORT paprmeul.eex /eul<EUL_Owner_in_uppercase> /log eulimport.log
```

Where:

- <ORACLE_HOME> is the top directory for Oracle products installed on the NT server
- <EUL Owner> is the database user created above
- <EUL Owner password> is the database owner password
- <Connect_string> is SQL*Net database connect string
- <EUL_Owner_in_uppercase>

Note: Enter the EUL owner schema in uppercase after the key/EUL when invoking the second command. For example:

```
start /wait d:\orant\discvr31\dis31amd /APPS_MODE
/CONNECT eul_us/eul@apps /IMPORT PAPRMEUL.eex /eul EUL_US
/log eulimport.log
```

2. Check on the progress of the import process by pointing to the Discoverer icon in the right lower corner of your toolbar.

Inspect the eulimport.log file to ensure that the Project Resource Management EEX file was imported into the End User Layer successfully.

Alternatively, you can log in to the Discoverer Administration Edition and select File > Import. Specify the location of the PAPRMEUL.eex file to complete the import.

Set Up Access to Business Areas and End User Discoverer Edition

You must grant users access to the Discoverer Administrator and User Editions in order for the users to open these applications. However, the users also need user and responsibility access to the Business Areas in order to perform any reporting activities on the Project Resource Management data.

To grant user access to Oracle Discover Administration and User Editions:

1. Log in to the Discoverer Administration Edition in application mode, for example:

```
D:\orant\DISCVR31\DIS31ADM.EXE/APPS_MODE
```

2. Select Tools > Privileges.
3. Select the user/responsibility (role) to which you need to grant access, for example, Project Resource Management Super User.
4. Grant the responsibility, either the User Edition or the Administration Edition access.

Reminder: If this responsibility is not a Self-Service Responsibility, it cannot be accessed through the Self-Service logon.

To grant user/responsibilities access to Business Areas:

1. Log in to the Discoverer Administration Edition in application mode, for example:
`D:\orant\DISCVR31\DIS31ADM.EXE/APPS_MODE`
2. Select Tools > Security.
3. Select the user/responsibility (role) to which you need to grant access, for example, Project Resource Management Super User.
4. Select the business areas to which you want to grant this user/responsibility access.
5. Check the Allow Administration checkbox for the business areas if this responsibility needs administration access for tasks such as Refresh from the database.

Refresh Business Areas

The following steps synchronize the information in the Discoverer End User Layer and the underlying Oracle Applications data model.

1. Connect to Discoverer Administration Edition by invoking from the command line `D:\orant\DISCVR31\DIS31ADM.EXE /APPS_MODE`
2. Connect to the database as an application user, for example:
`SERVICES:Project Resource Management Super User:Standard/welcome@cus115`
3. Set Default EUL.
4. Select all your business areas.
5. Select File > Refresh
6. Verify that the folders refresh is successful.

Connect to Discoverer User Edition

To invoke Discoverer User Edition:

1. Log in to the Discoverer User Edition in application mode, for example:
`\orant\DISCVR31\DIS31USR.EXE`
2. Connect to the database, for example:
`SERVICES:Project Resource Management Super User:Standard/welcome@cus115`

3. Select Tools > Options.
4. Select the EUL tab and check the default EUL, for example, EUL_US.

Install the Project Resource Management Reporting Workbooks for Discoverer

The following steps explain how to save the workbooks to your database so that users can access the workbooks through Oracle Web Discoverer.

1. Log in to the Discoverer User Edition in application mode, for example:

```
D:\orant\DISCVR31\DIS31USR.EXE
```

When asked for the login information, select Cancel.

2. While in Discoverer 3.1 User Edition, select Tools > Options and ensure that the checkbox labeled “Display warning when opening workbook saved in a different database account” is checked.
3. Exit from the Discoverer User Edition.
4. To save the Discoverer workbooks from the temporary staging area into the database, open an MS-DOS window and change directories to the staging area where the workbooks were saved. Refer to the section “To copy files to the Discoverer Administration Tier” for more information.
5. Execute the following command from the command prompt:

```
start /wait for %%f in (*.dis) do
  <ORACLE_HOM>\discvr31\dis31usr /connect
  "<EUL_Owner>" /EUL_Owner_password@<Connect_string>
  /savedb %%f /batch
```

For example:

```
start /wait for %%f in (*.dis) do
  c:\orant\discvr31\dis31usr /connect
  "SERVICES:Project Resource Management Super User:Standard" /welcome@apps
  /savedb %%f /batch
```

Important: Use quotation marks when you enter the EUL_Owner parameter in the command string.

Alternatively, log in to the Discoverer User Edition and select File > Open > My computer. Specify the location of the workbook file. After the workbook opens,

select File > Save As > Database to save the workbook in the database. You must repeat this step for all workbooks.

Once the workbooks are saved in the database, change the EUL Owner (eul_us) End User Layer (eul) password from the default password to a new, secure password.

Set Up Access to the Reporting Workbooks

The following steps instruct you on how to set up access to Discoverer workbooks through the Discoverer User Edition.

1. Log in to the Discoverer User Edition in application mode, for example:

```
D:\orant\DISCVR31\DIS31USR.EXE
```

2. Open the workbook to which you need to grant other users/responsibilities access.
3. Select File > Manage Workbooks > Sharing.
4. Select User > Workbook tab.
5. Select the user/responsibility to grant access.
6. Select the workbooks you need to grant access to and move them to the Shared section of the Share workbook dialog box.

Test Your Installation and Set Up

Once you have finished installing the Oracle Project Resource Management Reporting and performing all the postinstallation tasks, you want to verify that the installation was successful. Check to see that you can access Discoverer Workbooks by selecting any workbook from the Self-Service Applications menu.

If you have any problems, review the installation steps to ensure that you have completed all of them correctly.

Overview of the Business Areas and Business Views

This section provides details on the Business Areas and Folders contained within the Oracle Project Resource Management Discoverer reporting solution in the following sections

- [List of Business Areas](#)
- [List of Staffing Business Area Folders](#)
- [List of Financial Business Area Folders](#)
- [List of Business Views](#)

List of Business Areas

The predefined business areas are:

- Staffing
- Financial

Staffing Business Area

The staffing business area provides general staffing information about resources, projects, and organizations. From a supply perspective, you can identify information regarding resource/organization capacity, availability, over-commitment and overall schedule through these folders. From a demand perspective, you can identify information regarding project/organization requirements.

Folders available within the Staffing business area are:

- Staffing Organization Rollup Groups
- Resource Managers
- Fiscal Years
- Fiscal Quarter Numbers
- Calendar Years
- Calendar Months
- Required Project Hours by GL Period
- Required Project Hours by GL Period: Team Role Detail
- Required Project Hours by PA Period

- Required Project Hours by PA Period: Team Role Detail
- Required Project Hours by Global Week
- Required Project Hours by Global Week: Team Role Detail
- Resource Capacity by GL Period
- Resource Capacity by PA Period
- Resource Capacity by Global Week
- Resource Schedule by GL Period
- Resource Schedule by GL Period: Team Role Detail
- Resource Schedule by PA Period
- Resource Schedule by PA Period: Team Role Detail
- Resource Schedule by Global Week
- Resource Schedule by Global Week: Team Role Detail

Financial Business Area

The financial business area provides information about the sales pipeline. Folders available within the Financial business area are:

- Lookup for Class Categories
- Financial Organization Rollup Groups
- Project Managers
- Fiscal Years
- Fiscal Quarter Numbers
- Sales Pipeline by GL Period
- Sales Pipeline by PA Period

List of Staffing Business Area Folders

This section provides descriptions for each of the folders within the Staffing business area.

Staffing Organization Rollup Groups

This folder provides a simplified view of the reporting hierarchy (the hierarchy specified as the default reporting hierarchy). The organizations are secured by operating unit.

Although the hierarchy may be n level, this folder flattens the hierarchy out into two levels. For example, if the original hierarchy is as follows:

Organization 1

 Organization 2

 Organization 4

Organization 3

 Organization 5

it will be represented in this folder as follows:

Organization 1

 Organization 2

 Organization 3

 Organization 4

 Organization 5

This folder includes the items listed in the following table:

Item	Description
Rollup Organization	The name of the rollup organization
Suborganization	The name of the suborganization

Resource Managers

This folder provides all of the managers of people over whom the user has authority. In other words, a user can see all the managers that report to them (directly and indirectly) and, if they have resource authority over an organization, all the managers of people within that organization.

This folder includes the item listed in the following table:

Item	Description
Resource Manager	The full name of the resource manager

Fiscal Years

This folder provides the Fiscal Years in the format YYYY ranging from five Fiscal Years in the past to five Fiscal Years in the future.

It includes the item listed in the following table:

Item	Description
Fiscal Year	The fiscal year

Fiscal Quarter Numbers

This folder provides the Fiscal Quarter numbers.

It includes the item listed in the following table:

Item	Description
Fiscal Quarter	The fiscal quarter

Calendar Years

This folder provides the calendar years in the format YYYY ranging from five years in the past to five years in the future.

It includes the item listed in the following table:

Item	Description
Calendar Year	The calendar year

Calendar Months

This folder provides the calendar month name and number for the twelve months of the year.

It includes the items listed in the following table:

Item	Description
Calendar Month Name	The name of the calendar month
Calendar Month Numbers	The number of the calendar month

Required Project Hours by GL Period

For each GL period, this folder contains the total number of hours that remain unfilled on requirements within Project Resource Management. Hours scheduled in a cancelled status are not included.

This folder includes the items listed in the following table:

Item	Description
Fiscal Year	The fiscal year
Fiscal Quarter	The fiscal quarter
GL Period	The GL Period for which the requirement hours are calculated
Project Manager	The project manager as of the current date
Project Name (Number)	The project of the requirement
Team Role	The team role name of the requirement
Required Hours	The total schedule, in hours, for the GL Period of the requirement

Required Project Hours by GL Period: Team Role Detail

For each GL period, this folder contains the total number of hours that remain unfilled on requirements within Project Resource Management. This folder contains more detailed team role information. Hours scheduled in a cancelled status are not included.

This folder includes the items listed in the following table:

Item	Description
Fiscal Year	The fiscal year
Fiscal Quarter	The fiscal quarter
GL Period	The GL Period for which the requirement hours are calculated
Project Manager	The project manager as of the current date
Project Name (Number)	The project of the requirement
Team Role	The team role name of the requirement
Probability	The probability of the project
Start Date	The start date of the requirement
End Date	The end date of the requirement
Minimum Job Level	The minimum job level of the requirement
Maximum Job Level	The maximum job level of the requirement
Required Hours	The total schedule, in hours, for the GL Period of the requirement

Required Project Hours by PA Period

For each PA period, this folder contains the total number of hours that remain unfilled on requirements within Project Resource Management. Hours scheduled in a cancelled status are not included.

This folder includes the items listed in the following table:

Item	Description
Fiscal Year	The fiscal year
Fiscal Quarter	The fiscal quarter
PA Period	The PA Period for which the requirement hours are calculated
Project Manager	The project manager as of the current date
Project Name (Number)	The project of the requirement
Team Role	The team role name of the requirement
Required Hours	The total schedule, in hours, for the PA Period of the requirement

Required Project Hours by PA Period: Team Role Detail

For each PA period, this folder contains the total number of hours that remain unfilled on requirements within Project Resource Management. This folder contains more detailed team role information. Hours scheduled in a cancelled status are not included.

This folder includes the items listed in the following table:

Item	Description
Fiscal Year	The fiscal year
Fiscal Quarter	The fiscal quarter
PA Period	The PA Period for which the requirement hours are calculated
Project Manager	The project manager as of the current date
Project Name (Number)	The project of the requirement
Team Role	The team role name of the requirement
Probability	The probability of the project
Start Date	The start date of the requirement
End Date	The end date of the requirement
Minimum Job Level	The minimum job level of the requirement
Maximum Job Level	The maximum job level of the requirement
Required Hours	The total schedule, in hours, for the GL Period of the requirement

Required Project Hours by Global Week

For each Global Week, this folder contains the total number of hours that remain unfilled on requirements within Project Resource Management. Hours scheduled in a cancelled status are not included.

This folder includes the items listed in the following table:

Item	Description
Calendar Year	The calendar year
Calendar Month	The calendar month

Item	Description
Global Week End Date	The Global Week for which the hours of the requirement are calculated (identified the end date of the requirement)
Day of Week	The name of the day for which the hours of the requirement are calculated
Date	The date for which the of the requirement are calculated
Project Manager	The project manager as of the current date
Project Name (Number)	The project of the requirement
Team Role	The team role name of the requirement
Required Hours	The total schedule, in hours, for the Global Week of the requirement

Required Project Hours by Global Week: Team Role Detail

For each Global Week, this folder contains the total number of hours that remain unfilled on requirements within Project Resource Management. This folder contains more detailed team role information. Hours scheduled in a cancelled status are not included.

This folder includes the items listed in the following table:

Item	Description
Calendar Year	The calendar year
Calendar Month	The calendar month
Global Week End Date	The Global Week for which the hours of the requirement are calculated (identified the end date of the requirement)
Day of Week	The name of the day for which the hours of the requirement are calculated
Date	The date for which the of the requirement are calculated
Project Manager	The project manager as of the current date
Project Name (Number)	The project of the requirement
Team Role	The team role name of the requirement
Probability	The probability of the project
Start Date	The start date of the requirement

Item	Description
End Date	The end date of the requirement
Minimum Job Level	The minimum job level of the requirement
Maximum Job Level	The maximum job level of the requirement
Required Hours	The total schedule, in hours, for the Global Week of the requirement

Resource Capacity by GL Period

For each GL period, this folder contains the total capacity, in hours, of each person. The capacity of a person is derived from their capacity calendar assignments. It is therefore calculated as, within each GL period, the number of potential working hours attributable to the persons calendar work pattern minus any hours attributable to public holidays.

This folder includes the items listed in the following table:

Item	Description
Resource Manager	The resource manager responsible for the person as of the current date
Resource	The name of the person
Job Name	The job title of the person
Job Level	The global job level of the person as of the current date
Fiscal Year	The fiscal year in which the GL Period exists
Fiscal Quarter	The fiscal quarter in which the GL Period exists
GL Period	The GL Period for which the hours of the person are calculated
Capacity Hours	The capacity of the person, in hours, for the GL Period

Resource Capacity by PA Period

For each PA Period, this folder contains the total capacity, in hours, of each person. A persons capacity is derived from their capacity calendar assignments. It is therefore calculated as, within each PA Period, the number of potential working hours attributable to the persons calendar work pattern minus any hours attributable to public holidays.

This folder includes the items listed in the following table:

Item	Description
Resource Manager	The resource manager responsible for the person as of the current date
Resource	The name of the person
Job Name	The job title of the person
Job Level	The global job level of the person as of the current date
Fiscal Year	The fiscal year in which the PA Period exists
Fiscal Quarter	The fiscal quarter in which the PA Period exists
PA Period	The PA Period for which the hours of the person are calculated
Capacity Hours	The capacity of the person, in hours, for the PA Period

Resource Capacity by Global Week

For each Global Week, this folder contains the total capacity, in hours, of each person. A persons capacity is derived from their capacity calendar assignments. It is therefore calculated as, within each Global Week, the number of potential working hours attributable to the persons calendar work pattern minus any hours attributable to public holidays.

This folder includes the items listed in the following table:

Item	Description
Resource Manager	The resource manager responsible for the person as of the current date
Resource	The name of the person
Job Name	The job title of the person
Job Level	The global job level of the person as of the current date
Calendar Year	The calendar year in which the Global Week exists
Calendar Month	The calendar month in which the Global Week exists
Global Week End Date	The Global Week for which the hours of the person are calculated
Day of Week	The name of the day for which the hours of the person are calculated
Date	The date for which the hours of the person are calculated

Item	Description
Capacity Hours	The capacity of the person, in hours, for the Global Week

Resource Schedule by GL Period

For each GL period, this folder contains the total number of hours each person is scheduled within Project Resource Management. No details of the actual assignments on which the people are scheduled are available in this folder - the lowest level of data is scheduled hours by person by GL period.

Hours scheduled on either delivery assignments and administrative assignments are included in these totals. Hours scheduled in a provisional status and hours scheduled in a confirmed status are totaled separately (hours scheduled in a cancelled status are not included).

Data is only available for people who have a current and valid employment record in Oracle Human Resources.

Historical data is available for either the previous two Fiscal Quarters or for the whole of the current Fiscal Year (whichever provides more data).

Future data is available from the current date until the end of the forecasting duration defined in the site level profile option PA: Availability Duration (the default duration is two years).

This folder includes the items listed in the following table:

Item	Description
GL Period	The GL Period for which the assignment hours are calculated
Total Hours	The total schedule hours of the person, including both provisional and confirmed, for the GL Period
Confirmed Hours	The confirmed schedule hours of the person for the GL Period
Provisional Hours	The provisional schedule hours of the person for the GL Period

Resource Schedule by GL Period: Team Role Detail

For each GL period, this folder contains the total number of hours each person is scheduled on each of their assignments within Project Resource Management. To view details of the actual assignments making up a persons schedule the user should query this folder - the lowest level of data is scheduled hours by assignment by GL period.

The scheduled hours of both delivery assignments and administrative assignments can be viewed. Hours scheduled in a provisional status and hours scheduled in a confirmed status are totaled separately (hours scheduled in a cancelled status are not included).

Data is only available for people who have a current and valid employment record in Oracle Human Resources.

Historical data is available for either the previous two Fiscal Quarters or for the whole of the current Fiscal Year (whichever provides more data).

Future data is available from the current date until the end of the forecasting duration defined in the site level profile option PA: Availability Duration (the default duration is two years).

This folder includes the items listed in the following table:

Item	Description
GL Period	The GL Period for which the assignment hours are calculated
Project Name (Number)	The project to which the assignment belongs
Project Manager	The project manager as of the current date
Probability	The probability of the project
Team Role	The team role name of the assignment
Start Date	The start date of the assignment
End Date	The end date of the assignment
Total Hours	The total schedule hours of the person, including both provisional and confirmed, for the GL Period
Confirmed Hours	The confirmed schedule hours of the person for the GL Period
Provisional Hours	The provisional schedule hours of the person for the GL Period

Resource Schedule by PA Period

For each PA period, this folder contains the total number of hours each person is scheduled within Project Resource Management. No details of the actual assignments on which the people are scheduled are available in this folder - the lowest level of data is scheduled hours by person by PA period.

Hours scheduled on either delivery assignments and administrative assignments are included in these totals. Hours scheduled in a provisional status and hours

scheduled in a confirmed status are totaled separately (hours scheduled in a cancelled status are not included).

Data is only available for people who have a current and valid employment record in Oracle Human Resources.

Historical data is available for either the previous two Fiscal Quarters or for the whole of the current Fiscal Year (whichever provides more data).

Future data is available from the current date until the end of the forecasting duration defined in the site level profile option PA: Availability Duration (the default duration is two years).

This folder includes the items listed in the following table:

Item	Description
PA Period	The GL Period for which the assignment hours are calculated
Total Hours	The total schedule hours of the person, including both provisional and confirmed, for the PA Period
Confirmed Hours	The confirmed schedule hours of the person for the PA Period
Provisional Hours	The provisional schedule hours of the person for the PA Period

Resource Schedule by PA Period: Team Role Detail

For each PA period, this folder contains the total number of hours each person is scheduled on each of their assignments within Project Resource Management. To view details of the actual assignments making up a persons schedule the user should query this folder - the lowest level of data is scheduled hours by assignment by PA period.

The scheduled hours of both delivery assignments and administrative assignments can be viewed. Hours scheduled in a provisional status and hours scheduled in a confirmed status are totaled separately (hours scheduled in a cancelled status are not included).

Data is only available for people who have a current and valid employment record in Oracle Human Resources.

Historical data is available for either the previous two Fiscal Quarters or for the whole of the current Fiscal Year (whichever provides more data).

Future data is available from the current date until the end of the forecasting duration defined in the site level profile option PA: Availability Duration (the default duration is two years).

This folder includes the items listed in the following table:

Item	Description
PA Period	The PA Period for which the assignment hours are calculated
Project Name (Number)	The project to which the assignment belongs
Project Manager	The project manager as of the current date
Probability	The probability of the project
Team Role	The team role name of the assignment
Start Date	The start date of the assignment
End Date	The end date of the assignment
Total Hours	The total schedule hours of the person, including both provisional and confirmed, for the PA Period
Confirmed Hours	The confirmed schedule hours of the person for the PA Period
Provisional Hours	The provisional schedule hours of the person for the PA Period

Resource Schedule by Global Week

For each Global Week, this folder contains the total number of hours each person is scheduled within Project Resource Management. No details of the actual assignments on which the people are scheduled are available in this folder - the lowest level of data is scheduled hours by person by GL period.

Hours scheduled on either delivery assignments and administrative assignments are included in these totals. Hours scheduled in a provisional status and hours scheduled in a confirmed status are totaled separately (hours scheduled in a cancelled status are not included).

Data is only available for people who have a current and valid employment record in Oracle Human Resources.

Historical data is available for either the previous two Fiscal Quarters or for the whole of the current Fiscal Year (whichever provides more data).

Future data is available from the current date until the end of the forecasting duration defined in the site level profile option PA: Availability Duration (the default duration is two years).

This folder includes the items listed in the following table:

Item	Description
Calendar Year	The calendar year in which the Global Week exists
Calendar Month	The calendar month in which the Global Week exists
Global Week End Date	The end date of the Global Week for which the hours of the person are calculated
Global Week End Day	The week day name of the end date of the Global Week
Date	The date for which the hours of the person are calculated
Total Hours	The total schedule hours of the person, including both provisional and confirmed, for the Global Week
Confirmed Hours	The confirmed schedule hours of the person for the Global Week
Provisional Hours	The provisional schedule hours of the person for the Global Week

Resource Schedule by Global Week: Team Role Detail

For each Global Week, this folder contains the total number of hours each person is scheduled on each of their assignments within Project Resource Management. To view details of the actual assignments making up a persons schedule the user should query this folder - the lowest level of data is scheduled hours by assignment by GL period.

The scheduled hours of both delivery assignments and administrative assignments can be viewed. Hours scheduled in a provisional status and hours scheduled in a confirmed status are totaled separately (hours scheduled in a cancelled status are not included).

Data is only available for people who have a current and valid employment record in Oracle Human Resources.

Historical data is available for either the previous two Fiscal Quarters or for the whole of the current Fiscal Year (whichever provides more data).

Future data is available from the current date until the end of the forecasting duration defined in the site level profile option PA: Availability Duration (the default duration is two years).

This folder includes the items listed in the following table:

Item	Description
Calendar Year	The calendar year in which the Global Week exists
Calendar Month	The calendar month in which the Global Week exists
Global Week End Date	The end date of the Global Week for which the hours of the person are calculated
Global Week End Day	The week day name of the end date of the Global Week
Date	The date for which the hours of the person are calculated
Project Name (Number)	The project to which the assignment belongs
Project Manager	The project manager as of the current date
Probability	The probability of the project
Team Role	The team role name of the assignment
Start Date	The start date of the assignment
End Date	The end date of the assignment
Total Hours	The total schedule hours of the person, including both provisional and confirmed, for the Global Week
Confirmed Hours	The confirmed schedule hours of the person for the Global Week
Provisional Hours	The provisional schedule hours of the person for the Global Week

List of Financial Business Area Folders

This section provides descriptions for each of the folders within the Financial business area.

Financial Organization Rollup Groups

Shows a simplified view of the reporting hierarchy (the hierarchy specified as the default reporting hierarchy). The organizations are secured by operating unit and forecasting authority.

Although the hierarchy may be n level, this folder flattens the hierarchy out into just two levels. For example, if the original hierarchy is as follows:

Organization 1

 Organization 2

 Organization 4

Organization 3

 Organization 5

and the user does not have forecasting authority over organization 2 or 5, this folder will represent the following:

Organization 1

Organization 3

Organization 4

This folder includes the items listed in the following table:

Item	Description
Rollup Organization	The name of the rollup organization
Suborganization	The name of the suborganization

Project Managers

This folder provides all people who have or have had the role of a project manager. It includes the item listed in the following table:

Item	Description
Project Manager	The full name of the project manager

Fiscal Years

This folder provides the Fiscal Years in the format YYYY ranging from five Fiscal Years in the past to five Fiscal Years in the future. It includes the item listed in the following table:

Item	Description
Fiscal Year	The fiscal year

Fiscal Quarter Numbers

This folder provides the Fiscal Quarter numbers. It includes the item listed in the following table:

Item	Description
Fiscal Quarter Number	The number of the fiscal quarter

Sales Pipeline by GL Period

For each GL Period, this folder lists projects that are expecting approval and the values associated with them. Both total project value and discounted amount (total project value times project probability) are given.

Only projects with a status of unapproved or submitted and a probability of less than 100 are included in this folder.

This folder lists projects by classification category. Therefore, if a project is classified in two categories, it will appear twice in this folder. Therefore, to avoid double counting project values, it is recommended that queries on this folder should be performed for one classification category at a time.

Historical data is available for either the previous two Fiscal Quarters or for the whole of the current Fiscal Year (whichever provides more data).

Future data is available from the current date until the end of the forecasting duration defined in the site level profile option PA: Availability Duration (the default duration is two years).

This folder includes the items listed in the following table:

Item	Description
Classification Category	The category by which the project is classified

Item	Description
Classification Code	The code by which the project is classified
Project	The name of the project
Project Manager	The current project manager
Probability	The probability of the project
Type	The type of the project
Status	The status of the project
Expected Approval Date	The expected approval date of the project
Fiscal Year	The Fiscal Year in which the GL Period exists
Fiscal Quarter	The Fiscal Quarter in which the GL Period exists
GL Period	The GL Period in which the project is expecting approval
Total Project Value	The total value of the project
Discounted Amount	The total project value multiplied by the probability of the project

Sales Pipeline by PA Period

For each PA Period, this folder lists projects that are expecting approval and the values associated with them. Both total project value and discounted amount (total project value times project probability) are given.

Only projects with a status of unapproved or submitted and a probability of less than 100 are included in this folder.

This folder lists projects by classification category. Therefore, if a project is classified in two categories, it will appear twice in this folder. Therefore, to avoid double counting project values, it is recommended that queries on this folder should be performed for one classification category at a time.

Historical data is available for either the previous two Fiscal Quarters or for the whole of the current Fiscal Year (whichever provides more data).

Future data is available from the current date until the end of the forecasting duration defined in the site level profile option PA: Availability Duration (the default duration is two years).

This folder includes the items listed in the following table:

Item	Description
Classification Category	The category by which the project is classified
Classification Code	The code by which the project is classified
Project	The name of the project
Project Manager	The current project manager
Probability	The probability of the project
Type	The type of the project
Status	The status of the project
Expected Approval Date	The expected approval date of the project
Fiscal Year	The Fiscal Year in which the PA Period exists
Fiscal Quarter	The Fiscal Quarter in which the PA Period exists
PA Period	The PA Period in which the project is expecting approval
Total Project Value	The total value of the project
Discounted Amount	The total project value multiplied by the probability of the project

Lookup for Class Categories

This folder [provides all class categories currently available within the system. It includes the item listed in the following table:

Item	Description
Classification Category	The name of the classification category

List of Business Views

Each folder within the EUL maps to a business view on the database. If you need direct access to these views, the following table provides view and folder mapping:

View Name	Folder Name
pa_rep_proj_reghrs_gl_v	Required Project Hours by GL Period
pa_rep_proj_reghrs_gld_v	Required Project Hours by GL Period: Team Role Detail
pa_rep_proj_reghrs_pa_v	Required Project Hours by PA Period
pa_rep_proj_reghrs_pad_v	Required Project Hours by PA Period: Team Role Detail
pa_rep_proj_reghrs_wk_v	Required Project Hours by Global Week
pa_rep_proj_reghrs_wkd_v	Required Project Hours by Global Week: Team Role Detail
pa_rep_res_cap_gl_v	Resource Capacity by GL Period
pa_rep_res_cap_pa_v	Resource Capacity by PA Period
pa_rep_res_cap_wkd_v	Resource Capacity by Global Week
pa_rep_res_schhrs_gl_v	Resource Schedule by GL Period
pa_rep_res_schhrs_gld_v	Resource Schedule by GL Period: Team Role Detail
pa_rep_res_schhrs_pa_v	Resource Schedule by PA Period
pa_rep_res_schhrs_pad_v	Resource Schedule by PA Period: Team Role Detail
pa_rep_res_schhrs_wk_v	Resource Schedule by Global Week
pa_rep_res_schhrs_wkd_v	Resource Schedule by Global Week: Team Role Detail
pa_rep_proj_sp_gl_v	Sales Pipeline by GL Period
pa_rep_proj_sp_pa_v	Sales Pipeline by PA Period
pa_rep_all_rep_org_v	Staffing Organization Rollup Groups
pa_rep_forecast_org_v	Financial Organization Rollup Groups
pa_proj_manager_v	Project Managers
pa_rep_all_mgr_v	Resource Managers
pa_rep_year_gl_v	Fiscal Years
pa_rep_quarter_gl_v	Fiscal Quarter Numbers
pa_rep_year_cal_v	Calendar Years
pa_rep_month_v	Calendar Months

View Name	Folder Name
pa_rep_proj_sp_cc_v	Lookup for Class Categories

Security Overview

Security is handled using the standard Oracle Applications security model meaning that security is tied to the Applications responsibility that the user selects at login. The user can then only view data and run reports as designated by the profile options, reports, menus, and organizations the responsibility has assigned to it.

Organization Security

A user will only be able to run financial workbooks for organizations that they have forecast authority over.

Resource Manager Security

A user will only be able to run staffing workbooks for resource managers that either report to them or manage people that they have resource authority over.

Discoverer Workbooks

This chapter contains descriptive information for the following predefined Discoverer workbooks included in the Project Resource Management reporting solution:

- [Required Project Hours \(PAREQPRJ\)](#)
- [Scheduled Resource Hours \(PASCHRES\)](#)
- [Available Resource Hours \(PAAVLRES\)](#)
- [Overcommitted Resource Hours \(PAOVCRES\)](#)
- [Sales Pipeline Workbook \(PASALPIP\)](#)

You may find reference to the following Discoverer features:

Null Data Display

Discoverer displays a blank in a dropdown selection box when the field on which the selection is made contains null values. To select a null value, click on the blank in the same way that you select other, non-null values.

Optional Parameters

As is noted below, worksheet parameters can be switched on or off by the user at runtime. For example, to run a report that has a resource manager parameter for all resource managers, the resource manager parameter can be switched off.

Note: While using such parameters is common practice, you should note that your system may experience a decrease in performance when certain parameters are removed from a worksheet.

Required Project Hours (PAREQPRJ)

The required project hours workbook allows you to evaluate the number of hours currently required within Project Resource Management by project. You can view this information by Organization and/or Project Manager.

Worksheets included in this workbook are:

- Required Project Hours by GL Period
- Required Project Hours by PA Period

- Required Project Hours by Global Week

Security

When selecting an organization, the user will be restricted to those within the reporting hierarchy of the operating unit associated with their responsibility.

When selecting a project manager, the user will be restricted to people who are currently managing projects within Project Resource Management.

Required Project Hours by GL Period

Some of the business questions answered by this worksheet are:

- What is the total number of hours of work that I need to find resources to fill in my organization by GL period?
- What does the spread of required hours per GL period look like over time?
- What does the spread of required hours per GL period look like over organizations?

The Required Project Hours by GL Period worksheet helps you answer these questions by letting you analyze and manipulate scheduling information by Organization and Project Manager. Additionally, you can roll the data up to Fiscal Quarter and year.

Parameter Page

Parameters are predefined conditions that you can leave on or switch off by selecting the Conditions dialogue under the Tools menu.

- Organization - You can choose only one organization but the worksheet will then run for the organization chosen and any below it in the reporting hierarchy.
- Project Manager - You can choose one or more Project Managers for whom you want to view data.
- Fiscal Year - You can choose only one year.
- Fiscal Quarter Number - You can choose only one quarter number for the year you have specified.

Conditions

Conditions are filters in the worksheet that you can turn on or off.

There are no conditions (other than those defined for the parameters listed above) predefined on this worksheet.

Column Dimensions

- Fiscal Year - the name of a Fiscal Year
- Fiscal Quarter - the name of a Fiscal Quarter
- GL Period - the name of a GL period
- Required Hours - number of hours required

Row Dimensions

- Organization - the name of an organization.
- Project - the name of a project.
- Team Role - the team role name of the requirement.

Additional Information

If the worksheet returns a value that requires further investigation the user should create a more detailed worksheet based on the folder Required Project Hours by GL Period: Team Role Detail. Using this folder more detailed information about the requirement can be found. The data you can view includes:

- Probability - the probability of the project.
- Start Date - the start date of the assignment.
- End Date - the end date of the assignment.
- Minimum Job Level - the minimum job level of the requirement.
- Maximum Job Level - the maximum job level of the requirement.

Required Project Hours by PA Period

Some of the business questions answered by this worksheet are:

- What is the total number of hours of work that I need to find resources to fill in my organization by PA period?

- What does the spread of required hours per PA period look like over time?
- What does the spread of required hours per PA period look like over organizations?

The Required Project Hours by PA Period worksheet helps you answer these questions by letting you analyze and manipulate scheduling information by Organization and Project Manager. Additionally, you can roll the data up to Fiscal Quarter and year.

Parameter Page

Parameters are predefined conditions that you can leave on or switch off by selecting the Conditions dialogue under the Tools menu.

- Organization - You can choose only one organization but the worksheet will then run for the organization chosen and any below it in the reporting hierarchy.
- Project Manager - You can choose one or more Project Managers for whom you want to view data.
- Fiscal Year - You can choose only one year.
- Fiscal Quarter Number - You can choose only one quarter number for the year you have specified.

Conditions

Conditions are filters in the worksheet that you can turn on or off.

There are no conditions (other than those defined for the parameters listed above) predefined on this worksheet.

Column Dimensions

- Fiscal Year - the name of a Fiscal Year
- Fiscal Quarter - the name of a Fiscal Quarter
- PA Period - the name of a PA period
- Required Hours - number of hours required

Row Dimensions

- Organization - the name of an organization.
- Project - the name of a project.

- Team Role - the team role name of the requirement.

Additional Information

If the worksheet returns a value that requires further investigation the user should create a more detailed worksheet based on the folder Required Project Hours by PA Period: Team Role Detail. Using this folder more detailed information about the requirement can be found. The data you can view includes:

- Probability - the probability of the project.
- Start Date - the start date of the assignment.
- End Date - the end date of the assignment.
- Minimum Job Level - the minimum job level of the requirement.
- Maximum Job Level - the maximum job level of the requirement.

Required Project Hours by Global Week

Some of the business questions answered by this worksheet are:

- What is the total number of hours of work that I need to find resources to fill in my organization by Global Week?
- What does the spread of required hours per Global Week look like over time?
- What does the spread of required hours per Global Week period look like over organizations?

The Required Project Hours by Global Week worksheet helps you answer these questions by letting you analyze and manipulate scheduling information by Organization and Project Manager.

Parameter Page

Parameters are predefined conditions that you can leave on or switch off by selecting the Conditions dialogue under the Tools menu.

- Organization - You can choose only one organization but the worksheet will then run for the organization chosen and any below it in the reporting hierarchy.
- Project Manager - You can choose one or more Project Managers for whom you want to view data.

- Calendar Year - You can choose only one year.
- Calendar Month - You can choose only one calendar month for the year you have specified.

Conditions

Conditions are filters in the worksheet that you can turn on or off. There are no conditions (other than those defined for the parameters listed above) predefined on this worksheet.

Column Dimensions

- Calendar Year - the name of a calendar year
- Calendar Month - the name of a calendar month
- Global Week - the name of a global week
- Day - the name of a day
- Required Hours - number of hours required

Row Dimensions

- Organization - the name of an organization.
- Project - the name of a project.
- Team Role - the team role name of the requirement.

Additional Information

If the worksheet returns a value that requires further investigation the user should create a more detailed worksheet based on the folder Required Project Hours by Global Week: Team Role Detail. Using this folder, you can find more detailed information about the requirement. The data you can view includes:

- Probability - the probability of the project.
- Start Date - the start date of the assignment.
- End Date - the end date of the assignment.
- Minimum Job Level - the minimum job level of the requirement.
- Maximum Job Level - the maximum job level of the requirement.

Scheduled Resource Hours (PASCHRES)

The scheduled resource hours workbook allows you to evaluate the number of hours currently scheduled within Project Resource Management by person. You can view this information by Organization and Resource Manager.

Worksheets included in this workbook are:

- Scheduled Resource Hours by GL Period
- Scheduled Resource Hours by PA Period
- Scheduled Resource Hours by Global Week

Restrictions

- When selecting an organization, the user is restricted to those within the reporting hierarchy of the operating unit associated with their responsibility.
- When selecting a resource manager, the user is restricted to those individuals that report to them or manage people they have resource authority over.

Scheduled Resource Hours by GL Period

This worksheet addresses business questions such as:

- What is the total number of hours scheduled for the people in my organization per GL period?
- What are the total number of hours scheduled for individuals in my organization per GL period?
- What does the spread of scheduled hours per GL period look like over time?
- If there is an issue with a persons scheduled hours, what projects are they assigned to?

The Scheduled Resource Hours by GL Period worksheet helps you answer these questions by letting you analyze and manipulate scheduling information by Organization, Resource Manager and Person. Additionally, you can roll the data up to Fiscal Quarter and year.

Parameter Page

Parameters are predefined conditions that you can leave on or switch off by selecting the Conditions dialogue under the Tools menu.

- Organization - You can choose only one organization but the worksheet will then run for the organization chosen and any below it in the reporting hierarchy.
- Resource Manager - You can choose one or more Resource Managers for whom you want to view data.
- Fiscal Year - You can choose only one year.
- Fiscal Quarter Number - You can choose only one quarter number for the year you have specified.

Conditions

Conditions are filters in the worksheet that you can turn on or off.

There are no conditions (other than those defined for the parameters listed above) predefined on this worksheet.

Column Dimensions

- Fiscal Year - the name of a Fiscal Year
- Fiscal Quarter - the name of a Fiscal Quarter
- GL Period - the name of a GL period
- Capacity Hours - number of hours available to work
- Total Hours - number of hours scheduled in either a provisional or confirmed status
- Provisional Hours - number of hours scheduled in a provisional status

Row Dimensions

- Organization - the name of an organization.
- Resource Manager - the name of a resource manager.
- Person - the name of a person.
- Job Name - the title of the job of the person.
- Job Level - the global job level of the person.

Additional Information

The following table lists items that can be added to the Scheduled Resource Hours by GL Period worksheet:

Business Area	Folder	Item
Staffing	Resource Schedule by GL Period	Confirmed Hours

Suggestion: A useful addition to this worksheet is a user-defined exception highlighting people whose percentage overcommitment is over a certain threshold.

It is common practice for the cells of data points meeting the exception criteria to be shown in red.

If the worksheet returns a value that requires further investigation, you should create a more detailed worksheet based on the folder Resource Schedule by GL Period: Team Role Detail. Using this folder, the actual assignments on which a given person is scheduled can be examined and manipulated. the data you can view includes:

- Project - the name of a project
- Project Manager - the name of the current project manager
- Probability - the probability of the project
- Team Role - the team role name of the assignment
- Start Date - the start date of the assignment
- End Date - the end date of the assignment
- Capacity Hours - number of hours available to work
- Total Hours - number of hours scheduled in either a provisional or confirmed status
- Provisional Hours - number of hours scheduled in a provisional status

Scheduled Resource Hours by PA Period

This worksheet addresses business questions such as:

- What is the total number of hours scheduled for the people in my organization per PA period?
- What are the total number of hours scheduled for individuals in my organization per PA period?

- What does the spread of scheduled hours per PA period look like over time?
- If there is an issue with a persons scheduled hours, what projects are they assigned to?

The Scheduled Resource Hours by PA Period worksheet helps you answer these questions by letting you analyze and manipulate scheduling information by Organization, Resource Manager and Person. Additionally, you can roll the data up to Fiscal Quarter and year.

Parameter Page

Parameters are predefined conditions that you can leave on or switch off by selecting the Conditions dialogue under the Tools menu.

- Organization - You can choose only one organization but the worksheet will then run for the organization chosen and any below it in the reporting hierarchy.
- Resource Manager - You can choose one or more Resource Managers for whom you want to view data.
- Fiscal Year - You can choose only one year.
- Fiscal Quarter Number - You can choose only one quarter number for the year you have specified.

Conditions

Conditions are filters in the worksheet that you can turn on or off.

There are no conditions (other than those defined for the parameters listed above) predefined on this worksheet.

Column Dimensions

- Fiscal Year - the name of a Fiscal Year
- Fiscal Quarter - the name of a Fiscal Quarter
- PA Period - the name of a PA period
- Capacity Hours - number of hours available to work
- Total Hours - number of hours scheduled in either a provisional or confirmed status
- Provisional Hours - number of hours scheduled in a provisional status

Row Dimensions

- Organization - the name of an organization.
- Resource Manager - the name of a resource manager.
- Person - the name of a person.
- Job Name - the title of the job of the person.
- Job Level - the global job level of the person.

Additional Information

The following table lists items that can be added to the Scheduled Resource Hours by PA Period worksheet:

Business Area	Folder	Item
Staffing	Resource Schedule by PA Period	Confirmed Hours

Suggestion: A useful addition to this worksheet is a user-defined exception highlighting people whose percentage over-commitment is over a certain threshold.

It is common practice for the cells of data points meeting the exception criteria to be shown in red.

If the worksheet returns a value that requires further investigation, you should create a more detailed worksheet based on the folder Resource Schedule by PA Period: Team Role Detail. Using this folder, the actual assignments on which a given person is scheduled can be examined and manipulated. The data you can view includes:

- Project - the name of a project.
- Project Manager - the name of the current project manager.
- Probability - the probability of the project.
- Team Role - the team role name of the assignment.
- Start Date - the start date of the assignment.
- End Date - the end date of the assignment.

- Capacity Hours - number of hours available to work
- Total Hours - number of hours scheduled in either a provisional or confirmed status
- Provisional Hours - number of hours scheduled in a provisional status

Scheduled Resource Hours by Global Week

This worksheet addresses business questions such as:

- What is the total number of hours scheduled for the people in my organization per Global Week?
- What are the total number of hours scheduled for individuals in my organization per Global Week?
- What does the spread of scheduled hours per Global Week look like over time?
- If there is an issue with a persons scheduled hours, what projects are they assigned to?

The Scheduled Resource Hours by Global Week worksheet helps you answer these questions by letting you analyze and manipulate scheduling information by Organization, Resource Manager and Person. Additionally, you can drill down to view the data by day (to view the hours per day).

Parameter Page

Parameters are predefined conditions that you can leave on or switch off by selecting the Conditions dialogue under the Tools menu.

- Organization - You can choose only one organization but the worksheet will then run for the organization chosen and any below it in the reporting hierarchy.
- Resource Manager - You can choose one or more Resource Managers for whom you want to view data.
- Calendar Year - You can choose only one year.
- Calendar Month - You can choose only one calendar month for the year you have specified.

Conditions

Conditions are filters in the worksheet that you can turn on or off.

There are no conditions (other than those defined for the parameters listed above) predefined on this worksheet.

Column Dimensions

- Calendar Year - the name of a calendar year
- Calendar Month - the name of a calendar month
- Global Week - the name of a global week
- Day - the name of a day
- Capacity Hours - number of hours available to work
- Total Hours - number of hours scheduled in either a provisional or confirmed status
- Provisional Hours - number of hours scheduled in a provisional status

Row Dimensions

- Organization - the name of an organization.
- Resource Manager - the name of a resource manager.
- Person - the name of a person.
- Job Name - the title of the job of the person.
- Job Level - the global job level of the person.

Additional Information

The following table lists items that can be added to the Scheduled Resource Hours by Global Week worksheet:

Business Area	Folder	Item
Staffing	Resource Schedule by Global Week	Confirmed Hours

Suggestion: A useful addition to this worksheet is a user-defined exception highlighting people whose percentage overcommitment is over a certain threshold.

It is common practice for the cells of data points meeting the exception criteria to be shown in red.

If the worksheet returns a value that requires further investigation, you should create a more detailed worksheet based on the folder Resource Schedule by Global Week: Team Role Detail. Using this folder, the actual assignments on which a given person is scheduled can be examined and manipulated. The data you can view includes:

- Project - the name of a project
- Project Manager - the name of the current project manager
- Probability - the probability of the project
- Team Role - the team role name of the assignment
- Start Date - the start date of the assignment
- End Date - the end date of the assignment
- Capacity Hours - number of hours available to work
- Total Hours - number of hours scheduled in either a provisional or confirmed status
- Provisional Hours - number of hours scheduled in a provisional status

Available Resource Hours (PAAVLRES)

The Available Resource Hours workbook allows you to evaluate the number of capacity hours that are currently not scheduled within Project Resource Management. You can view this information by Organization and/or Resource Manager.

Worksheets included in this workbook are:

- Available Resource Hours by GL Period
- Available Resource Hours by PA Period
- Available Resource Hours by Global Week

Restrictions

- When selecting an organization, the user will be restricted to those within the reporting hierarchy of the operating unit associated with their responsibility.

- When selecting a resource manager, the user will be restricted to those that report to them or manage people they have resource authority over.

Available Resource Hours by GL Period

This worksheet addresses business questions such as:

- What is the total number of hours, per GL period, that people in my organization are available to work but are not scheduled?
- What are the total number of hours, per GL period, that people who report to me are available to work but are not scheduled?
- What does the spread of availability look like over time?

The Available Resource Hours by GL Period worksheet helps you answer these questions by letting you analyze and manipulate availability information by Organization, Resource Manager and Person. Additionally, you can roll the data up to Fiscal Quarter and year.

Parameter Page

Parameters are predefined conditions that you can leave on or switch off by selecting the Conditions dialogue under the Tools menu.

- Organization - You can choose only one organization but the worksheet will then run for the organization chosen and any below it in the reporting hierarchy.
- Resource Manager - You can choose one or more Resource Managers for whom you want to view data.
- Fiscal Year - You can choose only one year.
- Fiscal Quarter Number - You can choose only one quarter number for the year you have specified.

Conditions

Conditions are filters in the worksheet that you can turn on or off.

There are no conditions (other than those defined for the parameters listed above) predefined on this worksheet.

Column Dimensions

- Fiscal Year - the name of a Fiscal Year
- Fiscal Quarter - the name of a Fiscal Quarter

- GL Period - the name of a GL period
- Available Hours (Potential) - the number of hours unscheduled or scheduled in a provisional status
- Available Hours (Definite) - the number of hours unscheduled
- Availability % (Potential) - the number of hours unscheduled or scheduled in a provisional status divided by the capacity
- Availability % (Definite) - the number of hours unscheduled divided by capacity

Row Dimensions

- Organization - the name of an organization.
- Resource Manager - the name of a resource manager.
- Person - the name of a person.
- Job Name - the title of the job of the person.
- Job Level - the global job level of the person.

Additional Information

The following table lists items that can be added to the Available Resource Hours by GL Period worksheet:

Business Area	Folder	Item
Staffing	Resource Schedule by GL Period	Confirmed Hours
Staffing	Resource Schedule by GL Period	Provisional Hours
Staffing	Resource Schedule by GL Period	Total Hours
Staffing	Resource Capacity by GL Period	Capacity Hours

Available Resource Hours by PA Period

This worksheet addresses business questions such as:

- What is the total number of hours, per PA period, that people in my organization are available to work but are not scheduled?

- What are the total number of hours, per PA period, that people who report to me are available to work but are not scheduled?
- What does the spread of availability look like over time?

The Available Resource Hours by PA Period worksheet helps you answer these questions by letting you analyze and manipulate availability information by Organization, Resource Manager and Person. Additionally, you can roll the data up to Fiscal Quarter and year.

Parameter Page

Parameters are predefined conditions that you can leave on or switch off by selecting the Conditions dialogue under the Tools menu.

- Organization - You can choose only one organization but the worksheet will then run for the organization chosen and any below it in the reporting hierarchy.
- Resource Manager - You can choose one or more Resource Managers for whom you want to view data.
- Fiscal Year - You can choose only one year.
- Fiscal Quarter Number - You can choose only one quarter number for the year you have specified.

Conditions

Conditions are filters in the worksheet that you can turn on or off.

There are no conditions (other than those defined for the parameters listed above) predefined on this worksheet.

Column Dimensions

- Fiscal Year - the name of a Fiscal Year
- Fiscal Quarter - the name of a Fiscal Quarter
- PA Period - the name of a PA period
- Available Hours (Potential) - the number of hours unscheduled or scheduled in a provisional status
- Available Hours (Definite) - the number of hours unscheduled
- Availability % (Potential) - the number of hours unscheduled or scheduled in a provisional status divided by the capacity

- Availability % (Definite) - the number of hours unscheduled divided by capacity

Row Dimensions

- Organization - the name of an organization.
- Resource Manager - the name of a resource manager.
- Person - the name of a person.
- Job Name - the title of the job of the person.
- Job Level - the global job level of the person.

Additional Information

The following table lists items that can be added to the Available Resource Hours by PA Period worksheet:

Business Area	Folder	Item
Staffing	Resource Schedule by PA Period	Confirmed Hours
Staffing	Resource Schedule by PA Period	Provisional Hours
Staffing	Resource Schedule by PA Period	Total Hours
Staffing	Resource Capacity by PA Period	Capacity Hours

Available Resource Hours by Global Week

Some of the business questions answered by this worksheet are:

- What is the total number of hours, per Global Week, that people in my organization are available to work but are not scheduled?
- What are the total number of hours, per Global Week, that people who report to me are available to work but are not scheduled?
- What does the spread of availability look like over time?

The Available Resource Hours by Global Week worksheet helps you answer these questions by letting you analyze and manipulate availability information by Organization, Resource Manager and Person. Additionally, you can drill down to view availability by day.

Parameter Page

Parameters are predefined conditions that you can leave on or switch off by selecting the Conditions dialogue under the Tools menu.

- Organization - You can choose only one organization but the worksheet will then run for the organization chosen and any below it in the reporting hierarchy.
- Resource Manager - You can choose one or more Resource Managers for whom you want to view data.
- Calendar Year - You can choose only one year.
- Calendar Month - You can choose only one month for the year you have specified.

Conditions

Conditions are filters in the worksheet that you can turn on or off.

There are no conditions (other than those defined for the parameters listed above) predefined on this worksheet.

Column Dimensions

- Calendar Year - the name of a calendar year
- Calendar Month - the name of a Fiscal Quarter
- Global Week - the name of a Global Week
- Day - the name of a day
- Available Hours (Potential) - the number of hours unscheduled or scheduled in a provisional status
- Available Hours (Definite) - the number of hours unscheduled divided by capacity
- Availability % (Potential) - the number of hours unscheduled or scheduled in a provisional status divided by the capacity
- Availability % (Definite) - the number of hours unscheduled divided by capacity

Row Dimensions

- Organization - the name of an organization
- Resource Manager - the name of a resource manager

- Person - the name of a person
- Job Name - the title of the job of the person
- Job Level - the global job level of the person

Additional Information

The following table lists items that can be added to the Available Resource Hours by Global Week worksheet in the Staffing business area:

Folder	Item
Resource Schedule by Global Week	Confirmed Hours
Resource Schedule by Global Week	Provisional Hours
Resource Schedule by Global Week	Total Hours
Resource Capacity by Global Week	Capacity Hours

Overcommitted Resource Hours (PAOVCREs)

The overcommitted resource hours workbook allows you to evaluate the number of hours people are currently scheduled over their capacity. You can view this information by Organization and Resource Manager.

Worksheets included in this workbook are:

- Overcommitted Resource Hours by GL Period
- Overcommitted Resource Hours by PA Period
- Overcommitted Resource Hours by Global Week

Restrictions

- When selecting an organization, the user will be restricted to those within the reporting hierarchy of the operating unit associated with their responsibility.
- When selecting a resource manager, the user will be restricted to those that report to them or manage people they have resource authority over.

Overcommitted Resource Hours by GL Period

This worksheet addresses business questions such as:

- What is the total number of overcommitted hours for the people in my organization per GL period?
- What are the total number of overcommitted hours for individuals in my organization per GL period?
- What does the spread of overcommitted hours per GL period look like over time?
- If a person is overcommitted, what assignments have caused this?

The Overcommitted Resource Hours by GL Period worksheet helps you answer these questions by letting you analyze and manipulate capacity and overcommitment information by Organization, Resource Manager and Person. Additionally, you can roll the data up to Fiscal Quarter and year.

Parameter Page

Parameters are predefined conditions that you can leave on or switch off by selecting the Conditions dialogue under the Tools menu.

- Organization - You can choose only one organization but the worksheet will then run for the organization chosen and any below it in the reporting hierarchy.
- Resource Manager - You can choose one or more Resource Managers for whom you want to view data.
- Fiscal Year - You can choose only one year.
- Fiscal Quarter Number - You can choose only one quarter number for the year you have specified.

Conditions

Conditions are filters in the worksheet that you can turn on or off.

There are no conditions (other than those defined for the parameters listed above) predefined on this worksheet.

Column Dimensions

- Fiscal Year - the name of a Fiscal Year
- Fiscal Quarter - the name of a Fiscal Quarter
- GL Period - the name of a GL period
- Capacity Hours - number of hours available to work

- Confirmed Hours - number of hours scheduled with a confirmed status
- Overcommitted Hours - number of hours scheduled with a confirmed status minus capacity
- Overcommitted percentage - number of over-committed hours divided by capacity

Row Dimensions

- Organization - the name of an organization.
- Resource Manager - the name of a resource manager.
- Person - the name of a person.
- Job Name - the title of the job of the person.
- Job Level - the global job level of the person.

Additional Information

The table that follows lists items that can be added to the Scheduled Resource Hours by GL Period worksheet in the Staffing business area:

Folder	Item
Resource Schedule by GL Period	Total Hours
Resource Schedule by GL Period	Provisional Hours

Suggestion: A useful addition to this worksheet is a user-defined exception highlighting people whose percentage overcommitment is over a certain threshold.

It is common practice for the cells of data points meeting the exception criteria to be shown in red.

If the worksheet returns a value that requires further investigation, you should create a more detailed worksheet based on the folder Resource Schedule by GL Period: Team Role Detail. Using this folder, the actual assignments on which a given person is scheduled can be examined and manipulated. The data you can view includes:

- Project - the name of a project.

- Project Manager - the name of the current project manager
- Probability - the probability of the project
- Team Role - the team role name of the assignment
- Start Date - the start date of the assignment
- End Date - the end date of the assignment
- Confirmed Hours - number of hours scheduled in a confirmed status

Overcommitted Resource Hours by PA Period

This worksheet addresses business questions such as:

- What is the total number of overcommitted hours for the people in my organization per PA period?
- What are the total number of overcommitted hours for individuals in my organization per PA period?
- What does the spread of overcommitted hours per PA period look like over time?
- If a person is overcommitted, what assignments have caused this?

The Resource Hours by PA Period worksheet helps you answer these questions by letting you analyze and manipulate capacity and overcommitment information by Organization, Resource Manager and Person. Additionally, you can roll the data up to Fiscal Quarter and year.

Parameter Page

Parameters are predefined conditions that you can leave on or switch off by selecting the Conditions dialogue under the Tools menu.

- Organization - You can choose only one organization but the worksheet will then run for the organization chosen and any below it in the reporting hierarchy.
- Resource Manager - You can choose one or more Resource Managers for whom you want to view data.
- Fiscal Year - You can choose only one year.
- Fiscal Quarter Number - You can choose only one quarter number for the year you have specified.

Conditions

Conditions are filters in the worksheet that you can turn on or off. There are no conditions (other than those defined for the parameters listed above) predefined on this worksheet.

Column Dimensions

- Fiscal Year - the name of a Fiscal Year
- Fiscal Quarter - the name of a Fiscal Quarter
- PA Period - the name of a PA period
- Capacity Hours - number of hours available to work
- Confirmed Hours - number of hours scheduled with a confirmed status
- Overcommitted Hours - number of hours scheduled with a confirmed status minus capacity
- Overcommitted percentage - number of overcommitted hours divided by capacity

Row Dimensions

- Organization - the name of an organization
- Resource Manager - the name of a resource manager
- Person - the name of a person
- Job Name - the title of the job of the person
- Job Level - the global job level of the person

Additional Information

The following table lists items that can be added to the Overcommitted Resource Hours by PA Period worksheet in the Staffing business area:

Folder	Item
Resource Schedule by GL Period	Total Hours
Resource Schedule by GL Period	Provisional Hours

Suggestion: A useful addition to this worksheet is a user-defined exception highlighting people whose percentage over-commitment is over a certain threshold.

It is common practice for the cells of data points meeting the exception criteria to be shown in red.

If the worksheet returns a value that requires further investigation, you should create a more detailed worksheet based on the folder Resource Schedule by PA Period: Team Role Detail. Using this folder, the actual assignments on which a given person is scheduled can be examined and manipulated. The data you can view includes:

- Project - the name of a project
- Project Manager - the name of the current project manager
- Probability - the probability of the project
- Team Role - the team role name of the assignment
- Start Date - the start date of the assignment
- End Date - the end date of the assignment
- Confirmed Hours - number of hours scheduled in a confirmed status

Overcommitted Resource Hours by Global Week

This worksheet addresses business questions such as:

- What is the total number of overcommitted hours for the people in my organization per Global Week or Day?
- What are the total number of overcommitted hours for individuals in my organization per Global Week or Day?
- What does the spread of overcommitted hours per Global Week or Day look like over time?
- If a person is overcommitted, what assignments have caused this?

The Overcommitted Resource Hours by Global Week worksheet helps you answer these questions by letting you analyze and manipulate capacity and overcommitment information by Organization, Resource Manager and Person. Additionally, you can drill down to view the data by day (to view the hours per day).

Parameter Page

Parameters are predefined conditions that you can leave on or switch off by selecting the Conditions dialogue under the Tools menu.

- Organization - You can choose only one organization but the worksheet will then run for the organization chosen and any below it in the reporting hierarchy.
- Resource Manager - You can choose one or more Resource Managers for whom you want to view data.
- Calendar Year - You can choose only one year.
- Calendar Month - You can choose only one calendar month for the year you have specified.

Conditions

Conditions are filters in the worksheet that you can turn on or off.

There are no conditions (other than those defined for the parameters listed above) predefined on this worksheet.

Column Dimensions

- Calendar Year - the name of a calendar year
- Calendar Month - the name of a calendar month
- Global Week - the name of a global week
- Day - the name of a day
- Capacity Hours - number of hours available to work
- Confirmed Hours - number of hours scheduled with a confirmed status
- Overcommitted Hours - number of hours scheduled with a confirmed status minus capacity
- Overcommitted percentage - number of over-committed hours divided by capacity

Row Dimensions

- Organization - the name of an organization.
- Resource Manager - the name of a resource manager.
- Person - the name of a person.
- Job Name - the title of the job of the person.
- Job Level - the global job level of the person.

Additional Information

The following table lists items that you can add to the Overcommitted Resource Hours by Global Week worksheet in the Staffing business area:

Folder	Item
Resource Schedule by GL Period	Total Hours
Resource Schedule by GL Period	Provisional Hours

Suggestion: A useful addition to this worksheet is a user-defined exception highlighting people whose percentage over-commitment is over a certain threshold.

It is common practice for the cells of data points meeting the exception criteria to be shown in red.

If the worksheet returns a value that requires further investigation, you should create a more detailed spreadsheet based on the folder Resource Schedule by Global Week: Team Role Detail. Using this folder, the actual assignments on which a given person is scheduled can be examined and manipulated. The data you can view includes:

- Project - the name of a project
- Project Manager - the name of the current project manager
- Probability - the probability of the project
- Team Role - the team role name of the assignment
- Start Date - the start date of the assignment
- End Date - the end date of the assignment
- Confirmed Hours - number of hours scheduled in a confirmed status

Sales Pipeline Workbook (PASALPIP)

The Sales Pipeline workbook allows you to view the value of projects currently within your pipeline (those that are in an unapproved status and have a probability of less than 100%). You can view this information by Organization and/or Resource Manager.

Worksheets included in this workbook are:

- [Sales Pipeline by Fiscal Year](#)
- [Sales Pipeline by Fiscal Quarter](#)
- [Sales Pipeline by GL Period](#)
- [Sales Pipeline by PA Period](#)

In all worksheets, null values are displayed as 0.

Restrictions

- When selecting an organization, the user is restricted to those they have forecasting authority over and that are also within the reporting hierarchy of the operating unit associated with their responsibility.

Sales Pipeline by Fiscal Year

This worksheet addresses business questions such as:

- What is my organization's total/discounted Sales Pipeline up to and including a particular Fiscal Year?
- What is the total/discounted Sales Pipeline of project's I will manage up to and including a particular Fiscal Year?
- How is the sales pipeline spread across all industries up to and including a particular Fiscal Year?

The Sales Pipeline by Fiscal Year worksheet helps you answer these questions by letting you analyze and manipulate project value and probability information by Class Category, Organization and/or Project Manager.

Parameter Page

Parameters are predefined conditions that you can leave on or switch off by selecting the Conditions dialogue under the Tools menu.

- Organization - You can choose only one organization but the worksheet will then run for the organization chosen and any below it in the reporting hierarchy.
- Classification Category - You can choose only one classification category. Your sales pipeline will then be displayed by the classification codes within the category chosen.
- Fiscal Year - You can choose only one year but the worksheet will also include any projects still in the pipeline that have expected approval dates prior to the year specified.
- Project Manager - You can choose one or more project managers. Sales pipeline will only be shown for projects managed by the project managers selected.
- Include Values Over - a currency value that the total sales pipeline figure must be greater than in order for the project to be displayed.

Conditions

Conditions are filters in the worksheet that you can turn on or off.

- Include Probabilities Under - a numeric value that the project probability must be less than in order for the project to be displayed. Defaults to 100.

Column Dimensions

- Fiscal Year - the name of the Fiscal Year
- Total Value - the total project value
- Discounted Value - the total project value multiplied by the probability of the project.

Row Dimensions

- Organization - the name of an organization.
- Classification Code - the classification code within the classification category.
- Project - the name of a project.
- Project Manager - the name of the current project manager.
- Project Probability - the current project probability.
- Type - the name of the project type on which the project is based.
- Status - the status of the project
- Expected Approval Date - the date on which the project approval is expected

Sales Pipeline by Fiscal Quarter

This worksheet addresses business questions such as:

- What is my organization's total/discounted Sales Pipeline up to and including a particular Fiscal Quarter?
- What is the total/discounted Sales Pipeline of project's I will up to and including a particular Fiscal Quarter?
- How is the sales pipeline spread across all industries up to and including a particular Fiscal Quarter?

The Sales Pipeline by Fiscal Quarter worksheet helps you answer these questions by letting you analyze and manipulate project value and probability information by Class Category, Organization and/or Project Manager.

Parameter Page

Parameters are predefined conditions that you can leave on or switch off by selecting the Conditions dialogue under the Tools menu.

- **Organization** - You can choose only one organization but the worksheet will then run for the organization chosen and any below it in the reporting hierarchy.
- **Classification Category** - You can choose only one classification category. Your sales pipeline will then be displayed by the classification codes within the category chosen.
- **Fiscal Year** - You can choose only one year but the worksheet will also include any projects still in the pipeline that have expected approval dates prior to the year specified.
- **Fiscal Quarter Number** - You can choose only one quarter number but the worksheet will also include any projects still in the pipeline that have expected approval dates prior to the quarter specified.
- **Project Manager** - You can choose one or more project managers. Sales pipeline will only be shown for projects managed by the project managers selected.
- **Include Values Over** - a currency value that the total sales pipeline figure must be greater than in order for the project to be displayed.

Conditions

Conditions are filters in the worksheet that you can turn on or off.

- **Include Probabilities Under** - a numeric value that the project probability must be less than in order for the project to be displayed. Defaults to 100.

Column Dimensions

- **Fiscal Year** - the name of the Fiscal Year
- **Fiscal Quarter** - the name of the Fiscal Quarter
- **Total Value** - the total project value
- **Discounted Value** - the total project value multiplied by the probability of the project.

Row Dimensions

- **Organization** - the name of an organization.
- **Classification Code** - the classification code within the classification category.
- **Project** - the name of a project.
- **Project Manager** - the name of the current project manager.

- Project Probability - the current project probability.
- Type - the name of the project type on which the project is based.
- Status - the status of the project

Sales Pipeline by GL Period

This worksheet addresses business questions such as:

- What is my organization's total/discounted Sales Pipeline up to and including a particular GL period?
- What is the total/discounted Sales Pipeline of project's I will manage up to and including a particular GL period?
- How is the sales pipeline spread across all industries up to and including a particular GL period?

The Sales Pipeline by GL period worksheet helps you answer these questions by letting you analyze and manipulate project value and probability information by Class Category, Organization and/or Project Manager.

Parameter Page

Parameters are predefined conditions that you can leave on or switch off by selecting the Conditions dialogue under the Tools menu.

- Organization - You can choose only one organization but the worksheet will then run for the organization chosen and any below it in the reporting hierarchy.
- Classification Category - You can choose only one classification category. Your sales pipeline will then be displayed by the classification codes within the category chosen.
- Fiscal Year - You can choose only one year but the worksheet will also include any projects still in the pipeline that have expected approval dates prior to the year specified.
- Fiscal Quarter Number - You can choose only one quarter number but the worksheet will also include any projects still in the pipeline that have expected approval dates prior to the quarter specified.
- Project Manager - You can choose one or more project managers. Sales pipeline will only be shown for projects managed by the project managers selected.

- Include Values Over - a currency value that the total sales pipeline figure must be greater than in order for the project to be displayed.

Conditions

Conditions are filters in the worksheet that you can turn on or off.

- Include Probabilities Under - a numeric value that the project probability must be less than in order for the project to be displayed. Defaults to 100.

Column Dimensions

- Fiscal Year - the name of the Fiscal Year
- Fiscal Quarter - the name of the Fiscal Quarter
- GL Period - the name of the GL period
- Total Value - the total project value
- Discounted Value - the total project value multiplied by the probability of the project.

Row Dimensions

- Organization - the name of an organization.
- Classification Code - the classification code within the classification category.
- Project - the name of a project.
- Project Manager - the name of the current project manager.
- Project Probability - the current project probability.
- Type - the name of the project type on which the project is based.
- Status - the status of the project

Sales Pipeline by PA Period

This worksheet addresses business questions such as:

- What is my organization's total/discounted Sales Pipeline up to and including a particular PA period?
- What is the total/discounted Sales Pipeline of project's I will manage up to and including a particular PA period?
- How is the sales pipeline spread across all industries up to and including a particular PA period?

The Sales Pipeline by PA period worksheet helps you answer these questions by letting you analyze and manipulate project value and probability information by Class Category, Organization and Project Manager.

Parameter Page

Parameters are predefined conditions that you can leave on or switch off by selecting the Conditions dialog under the Tools menu.

- Organization - You can choose only one organization but the worksheet will then run for the organization chosen and any below it in the reporting hierarchy.
- Classification Category - You can choose only one classification category. Your sales pipeline will then be displayed by the classification codes within the category chosen.
- Fiscal Year - You can choose only one year but the worksheet will also include any projects still in the pipeline that have expected approval dates prior to the year specified.
- Fiscal Quarter Number - You can choose only one quarter number but the worksheet will also include any projects still in the pipeline that have expected approval dates prior to the quarter specified.
- Project Manager - You can choose one or more project managers. Sales pipeline will only be shown for projects managed by the project managers selected.
- Include Values Over - a currency value that the total sales pipeline figure must be greater than in order for the project to be displayed.

Conditions

Conditions are filters in the worksheet that you can turn on or off.

- Include Probabilities Under - a numeric value that the project probability must be less than in order for the project to be displayed. Defaults to 100.

Column Dimensions

- Fiscal Year - the name of the Fiscal Year
- Fiscal Quarter - the name of the Fiscal Quarter
- PA Period - the name of the PA period
- Total Value - the total project value
- Discounted Value - the total project value multiplied by the probability of the project.

Row Dimensions

- Organization - the name of an organization
- Classification Code - the classification code within the classification category
- Project - the name of a project
- Project Manager - the name of the current project manager
- Project Probability - the current project probability
- Type - the name of the project type on which the project is based
- Status - the status of the project
- Expected Approval Date - the date on which the project approval is expected

Discoverer Query Tips

The following suggestions provide you with guidance while you are performing reporting activities.

Avoid Blind Queries

A blind query is a query that selects most or all of the items from a business view folder without specifying any conditions.

Why avoid Blind Queries? Since no condition is specified in a blind query, the query is not able to efficiently use the indexes created for the underlying tables. You may encounter poor query performance if your database contains a large amount of data.

Capacity, Schedule and Sales Pipeline Views

When you create a workbook using any of the folders listed below, we suggest that you create the conditions outlined below. In particular, by restricting the time period for which the workbook is run it's performance will be improved.

Sales Pipeline Folders

- Always join to the Classification Categories folder and specify one particular category
- Always specify a period of time (such as a quarter, period, or month)

Resource Schedule Folders

- Always specify a period of time (such as a quarter, period, or month)

Use the OR statement in your condition rather than the IN statement. For example, you should use:

```
Period Name = Feb-99 OR Period Name = Mar-99
```

instead of:

```
Period Name IN (Feb-99, Mar-99)
```

Maintaining Your Data

As your data increases and changes to meet the demands of your projects, maintaining data integrity becomes more imperative. In order to ensure the accuracy of your data as changes are made, you should understand how additions and changes affect the overall structure of your data.

Note: If you make changes to information through Oracle forms that you want reflected in a poplist, you must stop and restart the Web server.

This chapter discusses the impact of specific data modifications. It also describes the built-in administrative processes that when run ensure that these changes are reflected throughout the application. In order to run any of the processes described in this chapter, you must have Project Super User responsibility.

The covered topics are:

- [Understanding Data Processing](#)
- [Understanding the Impact of Changes to HRMS-Based Information](#)
- [Maintaining Project Resources](#)
- [Maintaining Schedules](#)
- [Maintaining Utilization Values](#)
- [Maintaining Forecast Information](#)

Understanding Data Processing

Oracle Project Resource Management uses deferred workflow processes and administrative processes to manage changes to your data. You must configure and manage the engines for both types of processes in order to handle the volume of changes happening within your system. For more information on these technologies, refer to:

- *Oracle Workflow User Guide*
- *Oracle Application Object Library User Guide*

Most of the changes you make to your data automatically update related information within the application. These changes occur without any intervention on your part. However, some changes require the use of administrative processes to ensure that the change is reflected accurately. In particular, two situations require this level of maintenance:

- If the automatic processes encounter errors due to missing or invalid setup information, or due to technical failures

In this case, an administrative user is notified of the problem, and advised to run an administrative process to complete the changes.

- If the changed information is not expected to be done frequently enough to warrant an automatic process

For example, if a change is made to a calendar, you must run the Create Calendar Schedules process to reflect the calendar change throughout the system.

Note: You must assign at least one user to the seeded application user Projects Application Administrator. This user receives notifications regarding any encountered workflow processing errors. This user should also have the appropriate authority to run the administrative processes which assist in the correction of some of the errors.

Deferred Forecast Item Creation Process

One of the activities deferred to the background is the creation of forecast items for assignments and requirements. Since the volume of transactions can be large, this processing task can require a substantial amount of time to complete. You can improve the performance of this task by adding a background process dedicated solely to the task of generating forecast items.

To submit a request, complete the following steps:

1. Navigate to the Submit Requests form.
2. Submit the Workflow Background Process concurrent program as a request.
3. Enter in the Item Type parameter: PA Forecast Item Generation Workflow.
4. Schedule the process to repeat itself at appropriate intervals.

For more information, see "Submitting a Request" in the *Oracle Applications Users Guide*.

Understanding the Impact of Changes to HRMS-Based Information

You will modify various setup and transaction data during the course of using the Oracle Project Resource Management application. Changes on the following data items automatically trigger deferred workflow processes to complete the update. These workflow processes migrate the changes throughout your data set.

Changing Job Information

Changing job information such as job levels, billability, or utilization can have a direct impact on utilization reporting and forecast results.

Job Levels Job levels determine the experience level of a particular job. For example, you can have three engineers with varying levels of experience and skill. You can change job levels by:

- changing the sequence (level) associated with the grade
- assigning a new grade to a job
- mapping a job to a new master job with a higher sequence

As you have the ability to search for resources by job levels, the job levels must be reflected accurately on the resources. Therefore, any changes to the job levels will also occur on the job levels assigned to the resources.

Job Billability Oracle Project Resource Management uses the HR jobs entities to indicate whether or not jobs are billable. This billable status also determines the billability of resources based on their assignments. Therefore, project forecasting is affected by changes to the billability status of a job.

Utilization Calculation You can indicate whether or not to include a resource during the calculation of utilization. If you change the value of this checkbox, the utilization totals will reflect your change the next time the utilization totals are recalculated.

Changing Organization Information

The default operating unit (OU) and the default calendar are stored at the organization level. All resources, as well as their assignments, inherit these defaults. Therefore, if the default operating unit of the organization changes during the active

period of an assignment, the assignment will inherit the new operating unit for the entire assignment period.

Note: Only resources belonging to organizations identified as Expenditure organizations inherit the default operating unit from the organization.

Changing Organizational Hierarchy Information

Oracle Project Resource Management stores organizations in the reporting hierarchy to facilitate searching for resources by organizations. Therefore, changes to the organization hierarchy impact resource searches.

Note: An end date is entered on a resource if the organization to which the resource belongs is removed from the expenditure hierarchy. As a result, the resource is neither accessible for searches nor accessible for viewing through the Resource List page.

Changing Resource Information

Oracle Project Resource Management acquires information from the HRMS people tables for resources assigned to Expenditure organizations and all people acting as key members on a project. This acquisition occurs automatically whenever changes are made to the resource name or address. A deferred workflow process is triggered to synchronize the Oracle HRMS data with the Oracle Project Resource Management data.

Changing an Assignment

Oracle Project Resource Management stores only the primary assignment information. Information changes on this assignment, such as the effective dates, organization, job, or supervisor changes, trigger a deferred workflow process to synchronize the Oracle HRMS data with the Oracle Project Resource Management data.

Maintaining Project Resources

Oracle Project Resource Management acquires information from the HRMS people tables for resources assigned to Expenditure organizations and all people acting as key members on a project. This acquisition occurs automatically whenever changes are made to the resource name or address. It also occurs when a person that exists in the HRMS system is not yet established as a resource and this person is being added as a project member on a project within Project Resource Management.

This acquisition is in the form of a deferred workflow process to synchronize the Oracle HRMS data with the Oracle Project Resource Management data. The following criteria must be met in order for a person to be acquired from the HRMS system:

- The resource must have an active and current primary assignment.
- The resource must have a person type of Employee, or a person type that maps to the system type of Employee.
- The end date of the assignment should be later than the current (system) date.
- The primary assignment must have a defined job. This job must be mapped to to a master job group with an associated job level.
- The primary assignment organization must:
 - have a default operating unit; this operating unit must implement Oracle Projects
 - have a specified default calendar or, the profile option PA: Default Calendar must have a defined value
 - have the classification of Project Expenditure/Event Organization
 - belong to the project expenditure hierarchy

These conditions are checked by the PRC: Maintain Project Resources process to ensure that the resource has the necessary information to be an active resource pool member.

Copying Resources and Resource-Related Information

A process called PRC: Maintain Project Resources is available to copy your resources and their associated attributes from the Oracle HRMS tables to Oracle Project Resource Management data tables. This process identifies valid resources and project-related information that are set up or modified in the Oracle HRMS

Assignment forms and the CRM resource calendar forms. Run this process for upgrades or when you encounter workflow processing errors.

To run this process, complete the following steps:

1. Navigate to the Submit Request screen.
2. Choose Submit > PRC: Maintain Project Resources.
3. Enter the desired organization.
4. Click Submit.

Maintaining Schedules

Every resource, requirement, and assignment has a schedule. The schedules are comprised of work patterns that include working hours and exceptions, such as vacation days. Each schedule is based on the master calendar for the organization or an individually assigned calendar.

Changes to these calendars impact the schedules of the resources, requirements, and assignments differently. Oracle Project Resource Management provides the following two administrative processes to help manage these changes and to maintain consistent schedule information throughout the application:

- PRC: Generate Calendar Schedules
- PRC: Rebuild Resource Timeline

These processes update the schedules and timelines tables with changes to the calendars. For more information on setting up calendars and schedules, see [Chapter 7, "Defining Calendars and Schedules"](#).

Updating Schedules with Calendar Changes

Changes to the master calendar appear on the schedules and timelines of the resources, requirements, and assignments only after you run a process called PRC: Generate Calendar Schedules.

Existing assignments on resource calendars are not impacted. For example, if you add a holiday to the master calendar and run the PRC: Generate Calendar Schedules, you might notice that the change reflects differently on various resource calendars.

The calendar of a person with a current assignment over the holiday date does not change. However, the availability of a person who has no assignment over the holiday is reduced by the number of hours in the holiday period.

You can run the PRC: Generate Calendar Schedules process for a single calendar or a range of calendars. You should run this process each time one or more of the following events occur:

- a new calendar is created
- the work pattern for an existing calendar has changed, such as different working days or hours
- new exceptions have been applied to an existing calendar, such as the addition or deletion of a public holiday

To run this process, complete the following steps:

1. Navigate to the Submit Request screen.
2. Choose Submit and select either PRC: Generate Calendar Schedule for a Single Calendar or PRC: Generate Calendar Schedule for a Range of Calendars.
3. Enter the calendar name. If you are running the process for a range of calendars, enter the starting and ending calendar names, or leave blank to process all calendars.
4. Click Submit.

Updating Schedules and Timelines to Reflect a New Calendar

Timeline data is transformed schedule data. Therefore, the timeline data is stored in separate tables. Most processes automatically update both the schedule and timeline tables without your interference.

However, changing the calendar on a resource requires assistance in this synchronization process. You must first run the PRC: Generate Calendar Schedules administrative process in order to reflect the new calendar in the schedules of the resources, requirements, and assignments as is appropriate. Then, you can run a process called PRC: Rebuild Resource Timeline to reflect the change in calendar and resource availability in the timeline. This process rebuilds the timeline data of one or more resources incorporating changes made to the calendar or schedule.

To run this process, complete the following steps:

1. Navigate to the Submit Request screen.
2. Choose Submit and select either PRC: Rebuild Resource Timeline for a Single Resource or PRC: Rebuild Timeline for a Range of Resources.
3. Enter the resource name. If you want to run the process for a range of resources, enter the starting and ending resource names, or leave the fields blank to run the process for all resources.
4. Click Submit.

Maintaining Utilization Values

The utilization screens provide totals on your resource utilization hours. In order to view updated totals, you must run a batch process called PRC: Generate Utilization on a regular basis. This report set contains processes which create summary amounts for both forecast and actual utilization. The forecast totals are derived from the resource schedules. The actual totals are derived from submitted timecards.

To run this process, complete the following steps:

1. Navigate to the Submit Request screen.
2. Choose Submit > Request Set > PRC: Generate Utilization.
3. Enter the desired Actuals date range.

A default value for the Actuals From Date is entered. This default value is the start date of the first period of the year in which the system date belongs. You can change this date as appropriate for your needs.

4. Enter the desired Forecast date range.

A default value for the Forecast From Date is entered. This default value is the start date of the first period of the year in which the system date belongs. You can change this date as appropriate for your needs.

5. Enter the desired summary method for your organization.

The summary method offers two choices: Incremental or Refresh. The Incremental method updates existing totals. The Refresh method deletes the organization summary totals and re-calculates the new organization summary totals. Incremental is the default value.

Note: If you have made any changes to the default reporting organization hierarchy, you should select Refresh.

6. Click Submit.

Maintaining Forecast Information

Oracle Project Resource Management creates forecast information based on schedule assignments and requirements through workflow processes. Each day of an assignment is treated as a potential forecast transaction and is considered for forecast calculation based on the defined calculation period such as GL Period or PA Period. An error is generated for each assignment that does not have a defined calculation period.

These transactions are excluded from the project forecast values during the forecast generation process. You can review and correct these forecast exceptions through the following two processes:

- PRC: List Forecast Exceptions
- PRC: Process Forecast Exceptions

Running a List of Forecast Exceptions

The PRC: List Forecast Exceptions process produces a report listing all requirement and assignment forecast items that are excluded from the project forecast. The requirement and assignment forecast items appearing on this report have either experienced a processing error or determined not to be valid items for the project forecast.

To run this process, complete the following steps:

1. Navigate to the Submit Request screen.
2. Choose Submit > PRC: List Forecast Exceptions.
3. Enter the desired organization.
4. Enter the desired forecast date range.
5. Click Submit.

Reprocess Forecast Exceptions

After you run your list of exceptions and make the appropriate corrections, you want to update your forecast amounts to include the corrected transactions. A process called PRC: Process Forecast Exceptions evaluates eligible forecast items and recreates the item for inclusion in the project forecast. Eligibility criteria for forecast items are as follows:

- forecast item date is between the specified forecast from and to date parameters

If the forecast item is not included in the current project forecast, a new forecast item is created for that period. If the forecast item has been previously summarized, the item is reversed and the rate is recalculated.

To run this process, complete the following steps:

1. Navigate to the Submit Request screen.
2. Choose Submit > PRC: Process Forecast Exceptions.
3. Enter the desired organization.
4. Enter the desired forecast date range.
5. Click Submit.

Implementation Steps Checklist

The Oracle Projects products include Oracle Projects Costing, Oracle Projects Billing, and Oracle Project Resource Management. Each of these products require a set of implementation steps, some of which are optional. Since these products share functionality and data, this appendix provides checklists that include all the tasks to complete the implementation of all three products.

This appendix covers the following topics:

- [Overview of the Implementation Environment](#)
- [Implementation Considerations](#)
- [Overview of the Oracle Projects Implementation Checklists](#)
- [Oracle Projects Implementation Checklist](#)
- [Oracle Applications Implementation Checklist for Oracle Projects Integration](#)

Overview of the Implementation Environment

Prior to beginning the implementation process, you should define Oracle Applications responsibilities and users for the implementation. Oracle Projects provides a seeded super user responsibility for each of the three related applications as follows:

- Projects Costing Super User
- Projects Billing Super User
- Project Resource Management Super User

You can assign this responsibility to users as appropriate for your implementation needs. For more information, see "Defining a Responsibility" in the *Oracle Applications System Administrator's Guide*.

Oracle Applications Implementation Wizard

If you are implementing more than one Oracle Applications product, you can use the Oracle Applications Implementation Wizard to coordinate your setup activities. The Implementation Wizard guides you through the setup steps for the applications you have installed, suggesting a logical sequence that satisfies cross-product implementation dependencies and reduces redundant setup steps. The wizard also identifies steps that can be completed independently, by several teams working in parallel, to help you manage your implementation process most efficiently.

You can use the implementation wizard as a resource center to see a graphical overview of setup steps, read online help for a setup activity, and to open the appropriate setup window. You can also document your implementation for future reference or review using the wizard to record your comments for each step.

For more information, refer to the Oracle Applications Implementation Wizard User's Guide.

Setting Up Underlying Oracle Applications Technology

The setup steps in the Oracle Projects Implementation Checklist guide you through implementing the parts of Oracle Applications specific to the Oracle Projects products. The Oracle Applications Implementation Wizard guides you through the entire Oracle Applications setup, including system administration. However, if you do not use the Wizard, you must complete several other setup steps, including:

- performing system-wide setup tasks such as configuring concurrent managers and printers

- managing data security, which includes setting up responsibilities to allow access to a specific set of business data and complete a specific set of transactions, and assigning individual users to one or more of these responsibilities

For more information, see *Oracle Applications System Administrator's Guide*

Also, if your implementation uses Oracle Workflow to manage data changes, you must set up Oracle Workflow processes. For more information, refer to the Oracle Workflow User's Guide. For information relating to the deferred or approval processes in Project Resource Management, refer to [Chapter 8, "Defining the Project Environment"](#).

Implementation Considerations

As you determine your implementation data, you should consider the AutoAccounting feature if you are implementing Oracle Project Costing or Oracle Project Billing. The AutoAccounting feature in Oracle Projects derives values for account combinations based on project information for all accounting transactions in Oracle Projects. Consequently, the way you organize your chart of accounts affects your implementation data. For example, if you charge several expense accounts for varied expenditures such as meals, travel and lodging, and airfare, then you need to implement an expenditure type that corresponds to each expense account. You can use most of the implementation data that you define for Oracle Projects as inputs to the Auto Accounting rules that you define.

After you complete most implementation steps, you can submit reports to review your work and confirm that you have successfully completed the step. For example, after you complete entering Agreement types, you can submit the Agreement Types Listing. See "Implementation Listings" in the *Oracle Projects User Guide* for more information.

To aid you with your implementation of either Projects Costing or Projects Billing, you can refer to "About Fremont Corporation: An Example of Setting Up Oracle Projects" in Chapter 17 of the *Oracle Project User Guide*.

Note: Fremont Corporation may not have implemented all the features available in the current release of Oracle Projects.

Overview of the Oracle Projects Implementation Checklists

Two checklists are provided for your implementation:

- [Oracle Projects Implementation Checklist](#)
- [Oracle Applications Implementation Checklist for Oracle Projects Integration](#)

Each checklist indicates, for each step, whether it is required, optional, or conditional. Required indicates that the step is necessary for the implementation of the product to be successful. Optional indicates that you can determine whether or not the step applies to your particular implementation. Conditional indicates that the step is required to use a feature of the product, and the related feature is provided in the step description.

The implementation checklists summarize the steps for implementing products in the Oracle Projects suite. You can implement any of the Projects products individually. However, the following products are dependent on Oracle Projects Costing:

- Oracle Projects Billing
- Oracle Activity Management Gateway
- Oracle Project Connect

The checklists include setup steps for data that may be shared with other Oracle Applications, but are required by the Oracle Projects products. If you have already defined this information when setting up other Oracle Applications, you can skip those steps. This shared data includes:

- Set of Books
- Employees and Organizations
- Customers

Since some implementation steps build upon information you define in other implementation steps, you should perform the steps in the order listed.

Oracle Projects Implementation Checklist

The following table provides the Oracle Projects implementation checklist:

Step Number	Step Description	Project Costing	Project Billing	Project Resource Management
Licensing				
1.	Set the profile option PA: Licensed to Use Project Billing. See: PA: Licensed to Use Project Billing (<i>Oracle Projects User Guide</i>)	n/a	Required	n/a
2.	Set the profile option PA: Licensed to Use Project Resource Management.	n/a	n/a	Required
3.	Specify additional profile option values. See: Profile Options (in Chapter 17 of the <i>Oracle Projects User Guide</i>)	Optional	Optional	Optional
Set of Books and Currencies				
4.	Define your set of books. See Oracle Applications Set of Books (<i>Oracle General Ledger User Guide</i>)	Required	Required	Required
5.	Enable additional currencies that you plan to use. See Currencies Window (<i>Oracle General Ledger User Guide</i>) Required to use multiple currencies.	Conditional	Conditional	Conditional
Human Resources – Work Structures				
6.	Set the profile option HR: Cross Business Group. See: HR: Cross Business Group (in Appendix B of the <i>Oracle Projects User Guide</i>) Required to use Cross Business Group Access.	Conditional	Conditional	Conditional
7.	Define locations. See Locations (in Chapter 17 of the <i>Oracle Projects User Guide</i>)	Required	Required	Required
8.	Define organizations. See: Organizations (in Chapter 17 of the <i>Oracle Projects User Guide</i>)	Required	Required	Required
9.	Define default operating unit for the project and expenditure organizations. See Chapter 3, "Establishing Your Enterprise Structure" .	n/a	n/a	Required

10.	Define organization hierarchies and global organization hierarchies. See: Organization Hierarchies (in Chapter 17 of the <i>Oracle Projects User Guide</i>).	Required	Required	Required
11.	Specify a project burdening hierarchy for each business group. See: Specifying Project Burdening Hierarchies (in Chapter 17 of the <i>Oracle Projects User Guide</i>).	Conditional	Conditional	Conditional
12.	Define job groups. See: "Define Job Groups" (<i>Oracle Projects 11i Release 11.5.3/Mini Pack B User Guide Supplement</i>) and "Define Job Groups" in <i>Implementing Oracle HRMS</i> . Required to process labor.	Conditional	Conditional	Required
13.	Define jobs. See: "Define Jobs" (in Chapter 17 of the <i>Oracle Projects User Guide</i>) and "Define Jobs" in the <i>Implementing Oracle HRMS</i> . Required to process labor.	Conditional	Conditional	Required
14.	Define job levels. See "Defining Job Levels" (<i>Implementing Oracle HRMS</i>).	n/a	n/a	Required
15.	Define job mapping. See: Job Mapping (in Chapter 17 of the <i>Oracle Projects User Guide</i>). Required to use project jobs.	Conditional	Conditional	Required
16.	Define competencies. See: Competencies (Oracle Human Resources Documentation Update for Patch Numbers 1383905 and 1377992 Global Competencies).	n/a	n/a	Required
17.	Define rating scales. See: "Define Rating Scales" (<i>Implementing Oracle HRMS</i>).	n/a	n/a	Required
18.	Assign competencies to resources. See: " Assigning Competencies " in Chapter 4, " Defining Your People ".	n/a	n/a	Required
Calendars for Schedule and Capacity Management				
19.	Define calendar types. See: " Defining Calendar Types " in Chapter 7, " Defining Calendars and Schedules ".	n/a	n/a	Required
20.	Define calendar shift and shift patterns. See: " Defining Shift and Shift Patterns " in Chapter 7, " Defining Calendars and Schedules ".	n/a	n/a	Required

21.	Define calendar exceptions. See: "Creating Calendar Exceptions" in Chapter 7, "Defining Calendars and Schedules".	n/a	n/a	Required
22.	Define calendars. See: "Creating a Calendar" in Chapter 7, "Defining Calendars and Schedules".	n/a	n/a	Required
23.	Assign calendar shifts. See: "Assigning Shifts and Exceptions to Calendar" in Chapter 7, "Defining Calendars and Schedules".	n/a	n/a	Required
24.	Set the following profile options: <ul style="list-style-type: none"> ■ PA: Default Calendar ■ PA: Global Week Start Day ■ PA: Availability Calculation Period ■ PA: Percentage of Resource's Capacity ■ PA: Availability Duration See: Chapter 7, "Defining Calendars and Schedules".	n/a	n/a	Required
25.	Run calendar generation process: PRC: Generate Calendar Schedule for a Range of Calendars. See Chapter 7, "Defining Calendars and Schedules".	n/a	n/a	Required
26.	Define default calendar for the project and expenditure organizations. See Chapter 3, "Establishing Your Enterprise Structure".	n/a	n/a	Required
Implementation Options and PA Periods				
27.	Define PA periods. See: PA Periods (<i>Oracle Projects User Guide</i>).	Required	Required	Required
28.	Define implementation options. See: Implementation Options (<i>Oracle Projects User Guide</i>).	Required	Required	Required
Employees				
29.	Define employees, including address, assignment, job, and supervisor. See: Chapter 4, "Defining Your People" and "Employees" and "Employee Assignments" (in Chapter 17 of the <i>Oracle Projects User Guide</i>)	Required	Required	Required
30.	Run project resource process PRC: Maintain Project Resources. See: Chapter 4, "Defining Your People" and "Maintaining Project Resources" in Chapter 12, "Maintaining Your Data".	n/a	n/a	Required

Project Staffing				
31.	Define requirement, candidate, assignment approval, and assignment scheduling statuses. See: "Defining Statuses and Status Profile Options" in Chapter 8, "Defining the Project Environment".	n/a	n/a	Required
32.	Set the following profile options: <ul style="list-style-type: none"> ■ PA: Starting Requirement Status ■ PA: Starting Assignment Status ■ PA: Default Filled Requirement Status ■ PA: Default Starting Candidate Status See: "Defining Statuses and Status Profile Options" in Chapter 8, "Defining the Project Environment".	n/a	n/a	Required
33.	Define team templates. See: "Creating and Applying Team Templates" in Oracle Project Resource Management online help.	n/a	n/a	Optional
34.	Define staffing priority codes.	n/a	n/a	Optional
Expenditure Setup				
35.	Define expenditure categories. See: Expenditure Categories (<i>Oracle Projects User Guide</i>). Required if you use financial forecasting.	Required	Required	Conditional
36.	Define revenue categories. See: Revenue Categories (<i>Oracle Projects User Guide</i>). Required to use financial forecasting.	Required	Required	Conditional
37.	Define units. See: Units (<i>Oracle Projects User Guide</i> .)	Required	Required	n/a
38.	Define expenditure types. See: Expenditure Types (<i>Oracle Projects User Guide</i>). Required to use financial forecasting.	Required	Required	Conditional
39.	Define non-labor resources. See: Non-Labor Resources (<i>Oracle Projects User Guide</i>). Required to use Usages.	Conditional	Conditional	n/a
40.	Define transaction sources. See: Transaction Sources (<i>Oracle Projects User Guide</i>). Required to use Transaction Import.	Conditional	Conditional	n/a

41.	Implement transaction control extension. See: Transaction Control Extensions (<i>Oracle Projects User Guide</i>).	Optional	Optional	n/a
42.	Implement AutoApproval extension. See: AutoApproval Extension (<i>Oracle Projects User Guide</i>).	Optional	Optional	n/a
Non-Labor Costing Setup				
43.	Define cost rates for expenditure types. See: Cost Rates for Expenditure Types (<i>Oracle Projects User Guide</i>).	Conditional	Conditional	n/a
44.	Define usage cost rate overrides. See: Usage Cost Rate Overrides (<i>Oracle Projects User Guide</i>).	Optional	Optional	n/a
Labor Costing Setup				
45.	Define compensation rules. See: Compensation Rules (<i>Oracle Projects User Guide</i>). Required to process labor.	Conditional	Conditional	Conditional
46.	Define employee cost rates. See: Employee Cost Rates (<i>Oracle Projects User Guide</i>). Required to process labor.	Conditional	Conditional	Conditional
47.	Define labor cost multipliers. See: Labor Cost Multipliers (<i>Oracle Projects User Guide</i>).	Optional	Optional	n/a
48.	Implement labor costing extension (advanced implementation step). See: Labor Costing Extensions (<i>Oracle Projects User Guide</i>).	Optional	Optional	Optional
49.	Implement labor transaction extension (advanced implementation step). See: Labor Transaction Extensions (<i>Oracle Projects User Guide</i>).	Optional	Optional	n/a
50.	Implement overtime processing (advanced implementation step). See: Overview of Implementing Overtime (<i>Oracle Projects User Guide</i>).	Optional	Optional	n/a
51.	Implement the overtime calculation extension. See: Overtime Calculation Extension (<i>Oracle Projects User Guide</i>).	Optional	Optional	n/a
Budget Setup				
52.	Define additional budget types. See: Budget Types (<i>Oracle Projects User Guide</i>). Required to use budgeting.	Conditional	Conditional	n/a

53.	Define budget entry methods. See: Budget Entry Methods (<i>Oracle Projects User Guide</i>). Required to use budgeting.	Conditional	Conditional	n/a
54.	Define budget change reasons. See: Budget Change Reasons (<i>Oracle Projects User Guide</i>).	Optional	Optional	n/a
55.	Define resource lists. See: Resources and Resource Lists (<i>Oracle Projects User Guide</i>). Required to use budgeting.	Conditional	Conditional	n/a
56.	Implement budget calculation extension. See: Budget Calculation Extensions (<i>Oracle Projects User Guide</i>).	Optional	Optional	n/a
57.	Implement budget verification extension. See: Budget Verification Extension (<i>Oracle Projects User Guide</i>).	Optional	Optional	n/a
58.	Implement budget workflow extension. See: Budget Workflow Extension (<i>Oracle Projects User Guide</i>).	Optional	Optional	n/a
Burden Costing Setup				
59.	Define cost bases and cost base types. See: Cost Bases and Cost Base Amount Types (<i>Oracle Projects User Guide</i>). Required to use burdening.	Conditional	Conditional	Conditional
60.	Define burden cost codes. See: Burden Cost Codes (<i>Oracle Projects User Guide</i>). Required to use burdening.	Conditional	Conditional	Conditional
61.	Define burden structures. See: Burden Structures (<i>Oracle Projects User Guide</i>). Required to use burdening.	Conditional	Conditional	Conditional
62.	Define burden schedules. See: Burden Schedules (<i>Oracle Projects User Guide</i>). Required to use burdening.	Conditional	Conditional	Conditional
63.	Implement the Burden Costing extension. See: Burden Costing Extension (<i>Oracle Projects User Guide</i>).	Optional	Optional	Optional
Billing Setup				

64.	Specify Receivables System Options. See: Specifying System Options (<i>Oracle Projects User Guide</i>).	Optional	Required	Optional
65.	Set up output tax codes for customer invoices. See: Setting Up Invoice Line Tax Codes (<i>Oracle Projects User Guide</i>).	n/a	Required	n/a
66.	Define billing cycles. See: Billing Cycles (<i>Oracle Projects User Guide</i>).	n/a	Required	n/a
67.	Implement billing cycle extension (advanced implementation step). See: Billing Cycle Extension (<i>Oracle Projects User Guide</i>).	n/a	Optional	n/a
68.	Define payment terms. See: Payment Terms (<i>Oracle Projects User Guide</i>).	n/a	Required	n/a
69.	Define agreement types. See: Agreement Types (<i>Oracle Projects User Guide</i>).	n/a	Required	n/a
70.	Define bill rate schedules. See: Bill Rate Schedules (<i>Oracle Projects User Guide</i>). Required if your Transfer Price Schedules or Project Billing setup are based on Rates.	Conditional	Conditional	Conditional
71.	Define invoice formats. See: Invoice Formats (<i>Oracle Projects User Guide</i>).	n/a	Required	n/a
72.	Define credit types. See: Transfer Pricing (<i>Oracle Projects User Guide</i>).	n/a	Required	n/a
73.	Define event types. See: Event Types (<i>Oracle Projects User Guide</i>).	n/a	Conditional	n/a
74.	Assign event types for cost-to-cost revenue. See: Assigning Event Types for Cost-to-Cost Revenue (<i>Oracle Projects User Guide</i>).	n/a	Conditional	n/a
75.	Define customers. See: Customers (<i>Oracle Projects user Guide</i>).	Optional	Required	Optional
76.	Implement Percent Complete Revenue Accrual and Invoicing. See: Setup Requirements for Percent Complete Revenue and Invoicing (<i>Oracle Projects User Guide</i>).	n/a	Conditional	n/a
77.	Implement labor billing extension. See: Labor Billing Extensions (<i>Oracle Projects User Guide</i>).	n/a	Optional	Optional
78.	Implement billing extensions. See: Billing Extensions (<i>Oracle Projects User Guide</i>).	n/a	Optional	n/a

79.	Implement automatic invoice approve/release extension. See: Automatic Invoice Approve/Release Extension (<i>Oracle Projects User Guide</i>).	n/a	Optional	n/a
80.	Implement AR transaction type extension. See: AR Transaction Type Extension (<i>Oracle Projects User Guide</i>).	n/a	Optional	n/a
81.	Implement the output tax extension. See: Output Tax Extension (<i>Oracle Projects User Guide</i>).	n/a	Optional	n/a
82.	Implement Revenue-Based Cost Accrual extension. See: Revenue-Based Cost Accrual (<i>Oracle Projects User Guide</i>).	n/a	Optional	n/a
83.	Implement cost accrual billing extension. See: Cost Accrual Billing Extension (<i>Oracle Projects User Guide</i>).	n/a	Optional	n/a
84.	Implement customer invoice printing strategy. See: Determining Your Invoice Printing Method (<i>Oracle Projects User Guide</i>).	n/a	Optional	n/a
Role Setup				
85.	Define role lists. See: Chapter 6, "Defining Your Project Roles" .	Optional	Optional	Required
86.	Define roles and role types. See: Chapter 6, "Defining Your Project Roles" and "Project Roles" in the <i>Oracle Projects User Guide</i> .	Optional	Optional	Required
Project Setup				
87.	Define project statuses. See: " Defining Statuses and Status Profile Options " in Chapter 8, "Defining the Project Environment" and "Statuses" in the <i>Oracle Projects User Guide</i> .	Optional	Optional	Optional
88.	Define additional class categories and class codes. See: Project Classifications (<i>Oracle Projects User Guide</i>).	Optional	Optional	Optional
89.	Define service types. See: Service Types (<i>Oracle Projects User Guide</i>).	Required	Required	Required
90.	Define project customer relationships. See: Project Customer Relationships (<i>Oracle Projects User Guide</i>).	Optional	Required	Optional
91.	Define contact types. See: Contact Types (<i>Oracle Projects User Guide</i>).	Optional	Optional	Optional

92.	Define probability lists. See: "Establishing Probability Information" in Chapter 8, "Defining the Project Environment" and "Probability Lists" in the <i>Oracle Projects User Guide</i> .	Optional	Optional	Optional
93.	Define project types. See: Project Types (<i>Oracle Projects User Guide</i>).	Required	Required	Required
94.	Define project templates. See: Project Templates (<i>Oracle Projects User Guide</i>).	Required	Required	Required
95.	Implement project verification extension. See: Project Verification Extension (<i>Oracle Projects User Guide</i>).	Optional	Optional	Optional
96.	Implement project workflow extension. See: Project Workflow Extension (<i>Oracle Projects User Guide</i>).	Optional	Optional	Optional
97.	Implement verify organization change extension. See: Verify Organization Change Extension (<i>Oracle Projects User Guide</i>).	Optional	Optional	Optional
Project and Organizational Security				
98.	Define security profiles and global security profiles. See: Define Security Profiles (<i>Oracle Projects 11i Release 11.5.3/Mini-Pack B User Guide Supplement</i>) and Define Security Profiles (<i>Implementing Oracle HRMS</i>). Required to restrict organization access.	Conditional	Conditional	Conditional
99.	Define organization-based security. See: "Understanding Responsibility-Based Security" in Chapter 5, "Configuring Your Organization Security".	n/a	n/a	Optional
100.	Define role-based security. See: "Understanding Role-Based Security" in Chapter 5, "Configuring Your Organization Security".	n/a	n/a	Optional
101.	Implement project and labor cost security extension. (advanced implementation step) See: Project Security Extension (<i>Oracle Projects User Guide</i>).	Optional	Optional	Optional
Inter-Project Billing: Global Setup				
102.	In Oracle Payables, define suppliers for the provider operating units.	n/a	Conditional	n/a

103.	Define expenditure types for inter-project Payables invoices. See Setup for Inter-Project Billing (<i>Oracle Projects User Guide</i>). Optional if you have completed project costing setup.	n/a	Conditional	n/a
104.	Define customers in Oracle Receivables for the receiver operating units. See <i>Oracle Receivables User Guide</i> . Required to use inter-project billing.	n/a	Conditional	n/a
105.	Define inter-project agreement types. See: Setup for Inter-Project Billing (<i>Oracle Projects User Guide</i>). Optional if you have completed project billing setup.	n/a	Optional	n/a
106.	Define inter-project billing cycles. See: Billing Cycles (<i>Oracle Projects User Guide</i>). Optional if you have completed project billing setup.	n/a	Optional	n/a
107.	Define inter-project invoice formats. See: Invoice Formats (<i>Oracle Projects User Guide</i>). Optional if you have completed project billing setup.	n/a	Optional	n/a
108.	Customize the Payables Open Interface Workflow so that you can override the default attributes for currency conversion. See: Customizing the Payables Open Interface Workflow (<i>Oracle Projects User Guide</i>).	n/a	Optional	n/a
109.	Define inter-project supplier types. See: Setup for Inter-Project Billing (<i>Oracle Projects User Guide</i>).	n/a	Optional	n/a
Inter-Project Billing: Operating Unit Setup				
110.	Define internal billing implementation options. See: Setup for Inter-Project Billing (<i>Oracle Projects User Guide</i>). Required to use inter-project billing.	n/a	Conditional	Optional
111.	Define supplier sites for internal suppliers. See: Setup for Inter-Project Billing (<i>Oracle Projects User Guide</i>). Required for each receiver operating unit, if you are using inter-project billing.	n/a	Conditional	n/a

112.	Define customer bill and ship sites for internal customers. See: Defining Customer Bill and Ship Sites for Internal Customers (<i>Oracle Projects User Guide</i>). Required for each receiver operating unit, if you are using inter-project billing.	n/a	Conditional	n/a
113.	Define provider and receiver controls. See: Setup for Inter-Project Billing (<i>Oracle Projects User Guide</i>). Required to use inter-project billing.	n/a	Conditional	n/a
114.	In Oracle Receivables, define tax account codes for the tax amounts on internal Receivables invoices. See: Defining Automatic Accounting in Oracle Receivables (<i>Oracle Projects User Guide</i>). Required for each receiver operating unit, if you are using inter-project billing.	n/a	Conditional	n/a
115.	Define tax codes for internal Payables invoices. See: Setup for Inter-Project Billing (<i>Oracle Projects User Guide</i>). Required for each receiver operating unit, if you are using inter-project billing.	n/a	Conditional	n/a
116.	Verify that Receivables and Payables share the same tax codes. See: Setup for Inter-Project Billing (<i>Oracle Projects User Guide</i>). Required for each provider and receiver operating unit pair, if you are using inter-project billing.	n/a	Conditional	n/a
117.	Modify the Supplier Invoice Charge Account process. See: Setup for Inter-Project Billing (<i>Oracle Projects User Guide</i>). Required for each receiver operating unit, if you are using inter-project billing.	n/a	Conditional	n/a
118.	Define receiver projects. See: Setup for Inter-Project Billing (<i>Oracle Projects User Guide</i>). Required to use inter-project billing.	n/a	Conditional	n/a
119.	Define provider projects. See: Setup for Inter-Project Billing (<i>Oracle Projects User Guide</i>). Required to use inter-project billing.	n/a	Conditional	n/a

Cross Charge - Borrowed and Lent				
120.	Define transfer price rules. See: Defining Transfer Price Rules (<i>Oracle Projects User Guide</i>). Required to use borrowed and lent processing.	Conditional	Conditional	n/a
121.	Define transfer price schedules. See: Defining Transfer Price Schedules (<i>Oracle Projects User Guide</i>). Required to use borrowed and lent processing.	Conditional	Conditional	n/a
122.	Define cross charge implementation options for all operating units using borrowed and lent processing. See: Defining Cross Charge Implementation Options (<i>Oracle Projects User Guide</i>).	Conditional	Conditional	n/a
123.	Define additional expenditure types for borrowed and lent processing. See: Expenditure Types (<i>Oracle Projects User Guide</i>).	Optional	Optional	n/a
124.	Define transaction sources for borrowed and lent processing. See: Defining Transaction Sources for Cross Charge Processing (<i>Oracle Projects User Guide</i>).	Optional	Optional	n/a
125.	Define provider and receiver controls. See: Defining Provider and Receiver Controls (<i>Oracle Projects User Guide</i>).	Conditional	Conditional	n/a
126.	Implement the cross charge client extensions. See: Cross Charge Client Extensions (<i>Oracle Projects User Guide</i>).	Optional	Optional	n/a
Cross Charge - Intercompany Billing				
127.	Define transfer price rules. See: Defining Transfer Price Rules (<i>Oracle Projects User Guide</i>). Required to use cross charge processing.	Conditional	Conditional	n/a
128.	Define transfer price schedules. See: Defining Transfer Price Schedules (<i>Oracle Projects User Guide</i>). Required to use cross charge processing.	Conditional	Conditional	n/a
129.	Define inter-company supplier types. See: Defining Cross Charge Implementation Options (<i>Oracle Projects User Guide</i>).	n/a	Optional	n/a
130.	In Oracle Payables, define suppliers for the provider operating units. Required to use intercompany billing.	n/a	Conditional	n/a

131.	Define supplier sites for internal suppliers. See: Defining Supplier Sites for Internal Suppliers (<i>Oracle Projects User Guide</i>).	n/a	Conditional	n/a
132.	Define customers in Oracle Receivables for the receiver operating units. See: <i>Oracle Receivables User Guide</i> .	n/a	Conditional	n/a
133.	Define customer bill and ship sites for internal customers. See: Defining Customer Bill and Ship Sites for Internal Customers (<i>Oracle Projects User Guide</i>). Required for each receiver operating unit, if you are using intercompany billing.	n/a	Conditional	n/a
134.	Define intercompany billing expenditure types. See: Defining Expenditure Types for Cross Charge Processing (<i>Oracle Projects User Guide</i>). Optional if you have completed project billing setup.	n/a	Optional	n/a
135.	Define intercompany billing invoice formats. See: Invoice Formats and About Invoice Formats for Intercompany Billing (<i>Oracle Projects User Guide</i>). Optional if you have completed project billing setup.	n/a	Optional	n/a
136.	Define intercompany billing cycles. See: Billing Cycles (<i>Oracle Projects User Guide</i>). Optional if you have completed project billing setup.	n/a	Optional	n/a
137.	Define agreement types for cross charge processing. See: Defining Agreement Types for Cross Charge Processing (<i>Oracle Projects User Guide</i>). Optional if you have completed project billing setup.	n/a	Optional	n/a
138.	Define internal transaction sources. See: Defining Transaction Sources for Cross Charge Processing (<i>Oracle Projects User Guide</i>).	n/a	Optional	n/a
139.	Customize the Payables Open Interface Workflow. See: Customizing the Payables Open Interface Workflow (<i>Oracle Projects User Guide</i>).	Conditional	Conditional	Conditional
140.	Implement the cross charge client extensions. See: Cross Charge Client Extensions (<i>Oracle Projects User Guide</i>).	n/a	Optional	n/a

Cross Charge - Intercompany Billing: Operating Unit Setup				
141.	Define internal billing implementation options. See: Defining Internal billing Implementation Options (<i>Oracle Projects User Guide</i>). Required to use intercompany billing.	n/a	Conditional	n/a
142.	Define a project type for intercompany billing projects. See: Defining a Project Type for Intercompany Billing Projects (<i>Oracle Projects User Guide</i>). Required for each provider operating unit, if you are using intercompany billing.	n/a	Conditional	n/a
143.	Define project templates for intercompany billing projects. See: Defining Project Templates for Intercompany Billing Projects (<i>Oracle Projects User Guide</i>).	n/a	Conditional	n/a
144.	Define intercompany billing projects. See: Defining Intercompany Billing Projects (<i>Oracle Projects User Guide</i>). Required for each provider operating unit, if you are using intercompany billing.	n/a	Conditional	n/a
145.	Define agreements for intercompany billing projects. See: Defining Agreements for Intercompany Billing Projects (<i>Oracle Projects User Guide</i>). Required for each provider operating unit, if you are using intercompany billing.	n/a	Conditional	n/a
146.	Define provider and receiver controls. See: Defining Provider and Receiver Controls (<i>Oracle Projects User Guide</i>). Required to use intercompany billing.	n/a	Conditional	n/a
147.	Define tax account codes for internal Receivables invoices. See: Defining Tax Codes for Internal Receivables Invoices (<i>Oracle Projects User Guide</i>). Required for each provider operating unit, if you are using intercompany billing.	n/a	Conditional	n/a

148.	Define Payables tax codes to apply separate tax distributions on internal Payables invoices. See: Defining Tax Codes for Internal Payables Invoices (<i>Oracle Projects User Guide</i>). Required for each provider operating unit, if you are using intercompany billing.	n/a	Conditional	n/a
149.	Verify that Receivables and Payables share the same tax codes for internal invoices. See: Verify the Receivables and Payables Share the Same Tax Codes (<i>Oracle Projects User Guide</i>). Required for each provider operating unit, if you are using intercompany billing.	n/a	Conditional	n/a
150.	Modify the Supplier Invoice Charge Account process. See: Modifying the Supplier Invoice Charge Account Process (<i>Oracle Projects User Guide</i>). Required for each provider operating unit, if you are using intercompany billing.	n/a	Conditional	n/a
151.	Define cross charge setup information for projects and tasks. See: Defining Cross Charge Setup (<i>Oracle Projects User Guide</i>).	n/a	Conditional	n/a
Allocations Setup				
152.	Define allocation rules. See: Defining Cross Charge Setup (<i>Oracle Projects User Guide</i>). Required to use allocations.	Conditional	Conditional	n/a
AutoAllocations Setup				
153.	Create AutoAllocation sets. See: Defining Cross Charge Setup (<i>Oracle Projects User Guide</i>). Required to use AutoAllocations.	Conditional	Conditional	n/a
154.	Set up Workflow for Allocations. See: Setting Up Workflow for Step-Down AutoAllocations (<i>Oracle Projects User Guide</i>). Required to use AutoAllocations.	Conditional	Conditional	n/a
155.	Implement the Allocation Extensions. See: Allocation Extensions (<i>Oracle Projects User Guide</i>).	Optional	Optional	n/a
Utilization				
156.	Define utilization categories. See Chapter 9, "Implementing Resource Utilization" .	n/a	n/a	Required

157.	Define work types. See Chapter 9, "Implementing Resource Utilization" .	n/a	n/a	Required
158.	Define utilization options. See Chapter 9, "Implementing Resource Utilization" .	n/a	n/a	Required
159.	Set the profile options for utilization: <ul style="list-style-type: none"> ■ PA: Utilization Records Per Set ■ PA: Organization Utilization Default Period Type ■ PA: Organization Utilization Default Calculation Method ■ PA: Resource Utilization Period Type ■ PA: Resource Utilization Calculation Method ■ PA: Utilization Calculation Begin Date See: Chapter 9, "Implementing Resource Utilization" .	n/a	n/a	Required
Financial Forecasting				
160.	Define forecasting options. See: Chapter 10, "Implementing Financial Forecasting" . Required to use financial forecasting.	Conditional	Conditional	Optional
161.	Define expenditure categories. See: <i>Expenditure Categories (Oracle Projects User Guide)</i> . Optional if you have already defined expenditure categories.	Conditional	Conditional	Optional
162.	Define revenue categories. See: <i>Revenue Categories (Oracle Projects User Guide)</i> . Required to use financial forecasting.	Conditional	Conditional	Optional
163.	Define expenditure types. See: <i>Expenditure Types (Oracle Projects User Guide)</i> . Required to use financial forecasting.	Conditional	Conditional	Optional
164.	Define compensation rules. See: <i>Compensation Rules (Oracle Projects User Guide)</i> . Required to use financial forecasting.	Conditional	Conditional	Optional
165.	Define employee cost rates. See: <i>Employee Cost Rates (Oracle Projects User Guide)</i> . Required to use financial forecasting.	Conditional	Conditional	Optional

166.	Implement labor costing extension. See: Labor Costing Extensions (<i>Oracle Projects User Guide</i>).	Optional	Optional	Optional
167.	Define cost bases and cost base types. See: Cost Bases and Cost Base Amount Types (<i>Oracle Projects User Guide</i>).	Optional	Optional	Optional
168.	Define burden cost codes. See: Burden Cost Codes (<i>Oracle Projects User Guide</i>).	Optional	Optional	Optional
169.	Define burden structures. See: Burden Structures (<i>Oracle Projects User Guide</i>).	Optional	Optional	Optional
170.	Define burden schedules. See: Burden Schedules (<i>Oracle Projects User Guide</i>).	Optional	Optional	Optional
171.	Define rate schedules. See: Bill Rate Schedules (<i>Oracle Projects User Guide</i>) Required to use financial forecasting.	Conditional	Conditional	Conditional
Project Status Inquiry Setup				
172.	Define derived columns. See: Derived Columns for Project Status Inquiry (<i>Oracle Projects User Guide</i>).	Optional	Optional	n/a
173.	Define displayed columns. See: Non-Default Configuration for Project Status Inquiry (<i>Oracle Projects User Guide</i>).	Optional	Optional	n/a
174.	Implement commitments from external systems. See Implementing Commitments from External Systems (<i>Oracle Projects User Guide</i>).	Optional	Optional	n/a
175.	Implement custom reporting strategy. See Custom Reporting Using Project Summary Accounts (<i>Oracle Projects User Guide</i>).	Optional	Optional	n/a
176.	Implement the commitment changes extension. See Commitment Changes Extension (<i>Oracle Projects User Guide</i>).	Optional	Optional	n/a
177.	Implement the project status inquiry extension. See Project Status Inquiry Extension (<i>Oracle Projects User Guide</i>).	Optional	Optional	n/a
Capital Projects Extensions				
178.	Implement the Asset Assignment Extension. See: Asset Assignment Extension (<i>Oracle Projects User Guide</i>).	Optional	n/a	n/a

179.	Implement the CIP Grouping Extension. See: CIP Grouping Extension (<i>Oracle Projects User Guide</i>).	Optional	n/a	n/a
Additional Setup				
180.	Define descriptive flexfields. See: Descriptive Flexfields (<i>Oracle Projects User Guide</i>).	Optional	Optional	Optional
181.	Define request groups for report and process security. See: <i>Oracle Applications System Administrator's Guide</i> .	Optional	Optional	Optional
182.	Define additional users. See: <i>Oracle Applications System Administrator's Guide</i> .	Optional	Optional	Optional
183.	Define responsibilities for functional users. See: Security Profiles (<i>Oracle Projects User Guide</i>).	Optional	Optional	Optional
184.	Define frequently-used folders. See: Customizing the Presentation of Data (<i>Oracle Applications User's Guide</i>) and Administering Folders (<i>Oracle Applications System Administrator's Guide</i>). To see which windows are folder-enabled, see Oracle Projects Navigation Paths (<i>Oracle Projects User Guide</i>).	Optional	Optional	Optional
AutoAccounting for Costs				
ATTENTION: If you have a multiple organization installation, you must repeat these steps for each operating unit.				
185.	Set up accounting for labor costs. See: Accounting for Labor Costs (<i>Oracle Projects User Guide</i>).	Conditional	Conditional	n/a
186.	Set up accounting for expense report costs. See: Accounting for Expense Report Costs (<i>Oracle Projects User Guide</i>).	Conditional	Conditional	n/a
187.	Set up accounting for usage costs. See: Accounting for Usage Costs (<i>Oracle Projects User Guide</i>).	Conditional	Conditional	n/a
188.	Set up accounting for miscellaneous costs. See: Expenditure Type Classes (<i>Oracle Projects User Guide</i>).	Conditional	Conditional	n/a
189.	Set up accounting for burden transactions. See: Expenditure Type Classes (<i>Oracle Projects User Guide</i>).	Conditional	Conditional	n/a

190.	Set up accounting for WIP and Inventory costs, if you are using these expenditure type classes for costs other than those originating in Oracle Manufacturing and Oracle Inventory. See: Expenditure Type Classes (<i>Oracle Projects User Guide</i>).	Conditional	Conditional	n/a
191.	Set up accounting for supplier invoice adjustment costs. See: Accounting for Supplier Invoice Adjustment Costs (<i>Oracle Projects User Guide</i>).	Conditional	Conditional	n/a
192.	Set up accounting for total burdened costs. See: Accounting for Burdened Costs (<i>Oracle Projects User Guide</i>).	Conditional	Conditional	n/a
AutoAccounting for Revenue and Billing				
ATTENTION: If you have a multiple organization installation, you must repeat these steps for each operating unit.				
193.	Define AutoAccounting for cross charge transactions processed for intercompany billing. See: Defining AutoAccounting for Cross Charge Transactions Processed for Intercompany Billing (<i>Oracle Projects User Guide</i>).	n/a	Conditional	n/a
194.	Define AutoAccounting for provider cost reclassifications. See: Define AutoAccounting for Provider Cost Reclassifications (<i>Oracle Projects User Guide</i>).	n/a	Optional	n/a
195.	Define AutoAccounting for borrowed and lent transactions. See: Defining AutoAccounting for Borrowed and Lent Transactions (<i>Oracle Projects User Guide</i>).	Conditional	Conditional	n/a
196.	Set up accounting for labor revenue. See: Accounting for Labor Revenue (<i>Oracle Projects User Guide</i>).	n/a	Conditional	n/a
197.	Set up accounting for expense report revenue. See: Accounting for Expense Report Revenue (<i>Oracle Projects User Guide</i>).	n/a	Conditional	n/a
198.	Set up accounting for usage revenue. See: Accounting for Usage Revenue (<i>Oracle Projects User Guide</i>).	n/a	Conditional	n/a
199.	Set up accounting for miscellaneous revenue. See: Expenditure Type Classes (<i>Oracle Projects User Guide</i>).	n/a	Conditional	n/a

200.	Set up accounting for burden transactions revenue. See: Expenditure Type Classes (<i>Oracle Projects User Guide</i>).	n/a	Conditional	n/a
201.	Set up accounting for inventory revenue. See: Expenditure Type Classes (<i>Oracle Projects User Guide</i>).	n/a	Conditional	n/a
202.	Set up accounting for work in process revenue. See: Expenditure Type Classes (<i>Oracle Projects User Guide</i>).	n/a	Conditional	n/a
203.	Set up accounting for supplier invoice revenue. See: Accounting for Supplier Invoices Revenue (<i>Oracle Projects User Guide</i>).	n/a	Conditional	n/a
204.	Set up accounting for event revenue. See: Accounting for Event Revenue (<i>Oracle Projects User Guide</i>).	n/a	Conditional	n/a
205.	Set up accounting for unbilled receivables, unearned revenue, and receivables. See: Accounting for Revenue and Invoices (<i>Oracle Projects User Guide</i>).	n/a	Conditional	n/a
206.	Define Invoice Rounding account. See: Invoice Rounding (<i>Oracle Projects User Guide</i>).	n/a	Conditional	n/a
207.	Set up accounting for invoice write-offs. See: Accounting for Revenue and Invoices (<i>Oracle Projects User Guide</i>).	n/a	Conditional	n/a

Oracle Applications Implementation Checklist for Oracle Projects Integration

The following checklist includes the setup steps for other Oracle Applications that affect the integration of Oracle Projects with those applications. You should understand the implications of integration with Oracle Projects as you perform these setup steps for other Oracle Applications.

Refer to the Setup chapter in each product's User Guide for comprehensive implementation information for the product. You only need to complete the steps for the applications that you are implementing with Oracle Projects.

The following table provides the Oracle Projects integration checklist:

Step Number	Step Description	Project Costing	Project Billing	Project Resource Management
Oracle Payables				
1.	Install and implement Oracle Payables. See: <i>Oracle Payables User Guide</i>	Conditional	Conditional	n/a
2.	Define your Payables Options for expense reports. See: <i>Payables Options (Oracle Projects User Guide)</i> .	Conditional	Conditional	n/a
3.	Specify profile options for project-related invoice entry. See: <i>Updating Profile Options for Integration with Other Products (Oracle Projects User Guide)</i> .	Conditional	Conditional	n/a
4.	Set up the Account Generator to generate the supplier invoice account. See: <i>The Account Generator in Oracle Projects (Oracle Projects User Guide)</i> .	Conditional	Conditional	n/a
5.	Define project-related distribution sets. See: <i>Project Related Distribution Sets (Oracle Projects User Guide)</i> .	Optional	Optional	n/a
6.	Implement the descriptive flexfield mapping extension. See: <i>Descriptive Flexfield Mapping (Oracle Projects User Guide)</i> .	Optional	Optional	n/a
Oracle Purchasing				
7.	Install and implement Oracle Purchasing. See: <i>Oracle Purchasing User Guide</i>	Conditional	Conditional	n/a

8.	Specify profile options for project-related document entry. See: Updating Profile Options for Integration with Other Products (<i>Oracle Projects User Guide</i>).	Conditional	Conditional	n/a
9.	Set up the Account Generator to generate the project-related accounts in Oracle Purchasing. See: The Account Generator in Oracle Projects (<i>Oracle Projects User Guide</i>).	Conditional	Conditional	n/a
Oracle Receivables				
10.	Install and implement Oracle Receivables. See: <i>Oracle Receivables User Guide</i> .	Conditional	Conditional	n/a
11.	Specify system options for project invoice processing. See: Specifying System Options (<i>Oracle Projects User Guide</i>).	n/a	Conditional	n/a
12.	Define transaction types. See: Transaction Types for Invoice Processing (<i>Oracle Projects User Guide</i>).	n/a	Conditional	n/a
13.	Specify profile options for project invoices. See: Updating Profile Options for Integration with Other Products (<i>Oracle Projects User Guide</i>).	n/a	Conditional	n/a
14.	Define Automatic Accounting in Receivables. See: Automatic Accounting in Oracle Receivables (<i>Oracle Projects User Guide</i>).	n/a	Conditional	n/a
15.	Define salespersons for sales credit. See: Salespersons and Credit Types (<i>Oracle Projects User Guide</i>).	n/a	Optional	n/a
16.	Set up tax codes for project invoices. See: Applying Tax to Project Invoices (<i>Oracle Projects User Guide</i>).	n/a	Conditional	n/a
17.	Implement the Receivables installation override extension. See: Receivables Installation Override (<i>Oracle Projects User Guide</i>).	n/a	Optional	n/a
Oracle Inventory				
18.	Install and implement Oracle Inventory. See: <i>Oracle Inventory User Guide</i> .	Conditional	Conditional	n/a
19.	Define project-related transaction types in Oracle Inventory. See: <i>Oracle Inventory User's Guide</i> .	Conditional	Conditional	n/a
Oracle Project Manufacturing				

20.	Install and implement Oracle Project Manufacturing. See: <i>Oracle Project Manufacturing User's Guide</i> .	Conditional	Conditional	n/a
Oracle Workflow				
21.	Install and implement Oracle Workflow. See: <i>Oracle Workflow Guide</i> .	Conditional	Conditional	Conditional
22.	Implement Project Workflow. See: <i>Implementing Project Workflow (Oracle Projects User Guide)</i> .	Conditional	Conditional	Conditional
23.	Implement Budget Workflow. See: <i>Implementing Budget Workflow (Oracle Projects User Guide)</i> .	Conditional	Conditional	n/a
24.	Implement Project Assignment Workflow. See: <i>Oracle Workflow Guide</i> .	n/a	n/a	Required
25.	Implement project workflow extension. See: <i>Project Workflow Extension (Oracle Projects User Guide)</i> .	Optional	Optional	Optional
26.	Implement budget workflow extension. See: <i>Budget Workflow Extension (Oracle Projects User Guide)</i> .	Optional	Optional	n/a
27.	Implement Project Assignment Workflow extension. See: " Overview of Predefined Workflows " in Chapter 8, "Defining the Project Environment" .	n/a	n/a	Optional
28.	Implement Candidate Notification Workflow extension. See: " Overview of Predefined Workflows " in Chapter 8, "Defining the Project Environment" .	n/a	n/a	Optional
Oracle Activity Management Gateway				
29.	Specify profile option for product licensing. See: <i>Updating Profile Options for Integration with Other Products (Oracle Projects User Guide)</i> .	Conditional	Conditional	n/a
30.	Set up controls over imported data. See: <i>Control Actions Window (Oracle Projects User Guide)</i> .	Conditional	Conditional	n/a
31.	Set up source products. See: <i>Source Products Window (Oracle Projects User Guide)</i> .	Conditional	Conditional	n/a
Oracle Internet Time				
32.	Install and implement Oracle Internet Time. See: <i>Oracle Self-Service Time Implementation Guide</i> .	Conditional	Conditional	n/a

33.	Implement the pre-import and post-import extensions for Internet Time. See: Pre-Import Client Extension for Internet Time and Post-Import Client Extension for Internet Time (<i>Oracle Projects User Guide</i>).	Optional	Optional	n/a
Oracle Cash Management				
34.	Install and implement Oracle Cash Management. See: <i>Oracle Cash Management User Guide</i> .	Conditional	Conditional	n/a
35.	Implement Oracle Projects integration with Oracle Cash Forecasting. See: Integrating with Cash Management (<i>Oracle Projects User Guide</i>).	Conditional	Conditional	n/a

Glossary

administrative assignment

Activity on an administrative project such as personal holiday, sick day, or jury duty. Administrative assignments can also represent administrative work such as duties on an internal project. Such assignments are charged to the administrative project which is determined by the administration flag on the project type.

Analysis Workbook

A display of enterprise information in a graphical and tabular format. The Analysis Workbook uses Discoverer to allow the user to modify the selection criteria, drill into dimension hierarchies or link to other data elements.

assignment forecast item

The assignment forecast item is the smallest unit of forecasting information for the assignment. In this entity, the smallest time unit is a day. Forecast items are created for each day of every provisional and confirmed assignment for every billable resource.

availability

The percentage of the availability of a resource to work on an assignment based on the calendar of the resource, as well as any scheduled assignments for that resource.

billable resource

A resource that has a current billable job assignment. Billable jobs are defined in the job definition screen where the Job Billability Flag is equal to Y.

Business View

Component of the application database that sorts underlying applications data into an understandable and consolidated set of information. By masking the complexity of the database tables, Business Views provide a standard set of interfaces to any tool or application that retrieves and presents data to the user.

calendar

Working capacity defined by work patterns and calendar exceptions.

capacity

Capacity is based on a amount of schedulable hours from the calendar of a resource. In the case of Labor, capacity is defined in work hours. The capacity of an Organization is the sum total of the capacity of assigned resources.

competence

A technical skill or personal ability such as JAVA programming, customer relations, and project billing.

competence match

A numerical comparison of the competence of a resource to the mandatory and optional competencies of a requirement

Cross Business Group Access (CBGA)

The ability to view data in operating units that are not associated with the current operating unit's business group.

Cross Business Group Access mode (CBGA mode)

An installation that has selected CBGA in the profile options is operating in **CBGA mode**.

delivery assignment

Filled work position on a project.

dimension

Dimensions are used to calculate and monitor performance measures. Some of the dimensions are organization and time.

Discoverer

An Oracle Tool that allows users to retrieve data from a database. Discoverer provides a user friendly method for creating database queries and displaying information.

duration

The total number of days between the start date and end date of a team role.

effort

The total number of hours of a team role.

End User Layer

Component of discoverer that translates business view column names into industry standard terminology and provides links between related data tables. Discoverer accesses information through the End User Layer (EUL).

global hierarchy

An organization hierarchy that includes one or more business groups. A global hierarchy can be used by installations that are in CBGA mode.

global security profile

An HR security profiles that is not associated with a business group. A global security profile can secure organizations and people throughout a global (cross business group) organization hierarchy.

HR job

In HRMS, the HR job for a resource (person) is the job linked to the primary assignment of the person.

job group

A collection of jobs defined for a specific purpose. Jobs in a job group have the same key flexfield structure.

Logical Data Model

A representation of the End User Layer. Available in a readable format, the Logical Data Model gives the relationship between folders, allowing a Discoverer user to determine the data elements needed for a specific analysis.

master job group

The job group that is used as an intermediate mapping group between other job groups.

master job

A job in a master job group.

non-capacity work type

Work types assigned to forecast assignment items or actual expenditure items reduce the total capacity of a given resource for the specified time period.

requirement

Unfilled work position on a project.

responsibility

A security feature of Oracle applications that groups forms and procedures under the user application.

schedule

The working hours defined by the calendar and schedule exceptions.

Single Business Group Access mode (SBGA mode)

An installation that has selected *No* for the profile option **HR: Cross Business Group** is operating in **SBGA mode**.

team role

Specific position on a project representing either requirements or assignments as appropriate for the context in which it is used within the application.

utilization

A measure of how effectively a resource was used or is projected to be used.

utilization method

Capacity Utilization Method compares the actual (productive) work performed and forecasted (productive) work to be performed by the resource to the capacity of a resource.

Worked Hours Utilization Method compares the actual (productive) work performed and forecasted (productive) work to be performed by the resource to the total number of hours recorded (actuals) or assigned (forecasted) of a resource.

utilization category

An implementation-defined category used for utilization reporting. This reporting grouping combines one or more work types for organization and resource utilization views.

utilization view

Utilization views enables you to measure a resource or organization utilization percentage based on different groupings of work types.

work type

Work types are an implementation-defined classification of work performed. Work types are used to classify both actual and forecast amounts. They differ from expenditure types which are a classification of cost expended. Work types are also grouped together by Utilization Categories.

worksheet

A specific grouping of information within an Analysis Workbook. A workbook is composed of one or more worksheets, each with its own set of data and graphs. Conceptually this is similar to the “sheets” and “workbook” concept within a spreadsheet application.

unassigned time

The net amount of hours for a given period for which a resource does not have any scheduled assignments (capacity hours minus scheduled hours.)

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