Oracle Project Portfolio Management Cloud
Using Project Execution Management
This guide also applies to on-premise implementations

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Preface

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

Oracle Fusion Applications Help

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

Note

If you don’t see any help icons on your page, then click the Show Help icon button in the global area. However, not all pages have help icons.

You can add custom help files to replace or supplement the provided content. Each release update includes new help content to ensure you have access to the latest information. Patching does not affect your custom help content.

Oracle Fusion Applications Guides

Oracle Fusion Applications guides are a structured collection of the help topics, examples, and FAQs from the help system packaged for easy download and offline reference, and sequenced to facilitate learning. To access the guides, go to any page in Oracle Fusion Applications Help and select Documentation Library from the Navigator menu.

Guides are designed for specific audiences:

- **User Guides** address the tasks in one or more business processes. They are intended for users who perform these tasks, and managers looking for an overview of the business processes. They are organized by the business process activities and tasks.

- **Implementation Guides** address the tasks required to set up an offering, or selected features of an offering. They are intended for implementors. They are organized to follow the task list sequence of the offerings, as displayed within the Setup and Maintenance work area provided by Oracle Fusion Functional Setup Manager.

- **Concept Guides** explain the key concepts and decisions for a specific area of functionality. They are intended for decision makers, such as chief
financial officers, financial analysts, and implementation consultants. They are organized by the logical flow of features and functions.

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

These guides cover specific business processes and offerings. Common areas are addressed in the guides listed in the following table.

<table>
<thead>
<tr>
<th>Guide</th>
<th>Intended Audience</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Common User Guide</td>
<td>All users</td>
<td>Explains tasks performed by most users.</td>
</tr>
<tr>
<td>Common Implementation Guide</td>
<td>Implementors</td>
<td>Explains tasks within the Define Common Applications Configuration task list, which is included in all offerings.</td>
</tr>
<tr>
<td>Functional Setup Manager User</td>
<td>Implementors</td>
<td>Explains how to use Oracle Fusion Functional Setup Manager to plan, manage, and track your implementation projects, migrate setup data, and validate implementations.</td>
</tr>
<tr>
<td>Guide</td>
<td>System administrators, application developers, and technical members of implementation teams</td>
<td>Explain how to install, patch, administer, and customize Oracle Fusion Applications.</td>
</tr>
</tbody>
</table>

*Note* Limited content applicable to Oracle Cloud implementations.


**Other Information Sources**

**My Oracle Support**


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

Oracle Enterprise Repository for Oracle Fusion Applications provides details on service-oriented architecture assets to help you manage the lifecycle of your software from planning through implementation, testing, production, and changes.

In Oracle Fusion Applications, you can use Oracle Enterprise Repository at http://fusionappsoer.oracle.com for:

• Technical information about integrating with other applications, including services, operations, composites, events, and integration tables. The classification scheme shows the scenarios in which you use the assets, and includes diagrams, schematics, and links to other technical documentation.

• Other technical information such as reusable components, policies, architecture diagrams, and topology diagrams.

Documentation Accessibility

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

Comments and Suggestions

Your comments are important to us. We encourage you to send us feedback about Oracle Fusion Applications Help and guides. Please send your suggestions to oracle_fusion_applications_help_ww_grp@oracle.com. You can use Send Feedback to Oracle from the Settings and Actions menu in Oracle Fusion Applications Help.
Use Oracle Fusion Project Integration Gateway to integrate Oracle Fusion Project Foundation with Oracle Fusion Project Management.

The integration enables project accountants, project billing specialists, and executives to centrally perform project costing, billing, accounting, and executive reporting tasks in Oracle Fusion Project Foundation and other Project Financial Management applications while enabling project managers to use Oracle Fusion Project Management to plan, progress, and manage projects.

Oracle Fusion Project Integration Gateway ensures data security, integrity, and efficiency by:

- Enabling you to create an integration for a specific project unit
- Defining a set framework in which data is transferred between Oracle Fusion Project Foundation and Oracle Fusion Project Management

Managing Integration Options

Determine how Oracle Fusion Project Foundation and Oracle Fusion Project Management interact. When defining integration options you do the following:

- Specify the integration name and project unit.
- Select an integration planning resource breakdown structure.
- Define how rates are derived when exporting resources.
- Specify how data is processed during import and export.

Exporting Planning Resources

Export labor resources and financial resources from the integration planning resource breakdown structure in Oracle Fusion Project Foundation to create project enterprise resources in Oracle Fusion Project Management.
Exporting Project and Task Information

Activate integration and export your project and tasks to Oracle Fusion Project Management after you build out the task structure to the required reporting level in Oracle Fusion Project Foundation.

Restriction

You cannot export projects if you previously exported them to another scheduling application using Oracle Fusion Project Integration Gateway.

The initial export links project and task information in the two applications, and enables you to incrementally export project and task data to Oracle Fusion Project Management. In Oracle Fusion Project Management, you can add subtasks under the exported tasks. You can also assign resources to the subtasks to complete detailed planning.

Restriction

After you export a project, you cannot delete the exported tasks, increase or decrease indent, or move the exported tasks within the project plan in either application.

Importing Project Plan and Progress Information

After you export a project, build out the project plan, add subtasks under integrated tasks, assign resources, and complete planning to the desired detail. When you are ready, import the updated project plan and progress information into Oracle Fusion Project Foundation.

When you import a project, the application summarizes planning and progress information for each resource across all subtasks within the hierarchy of each integrated task. Summarized amounts are imported into a single task assignment created for the resource on the integrated task.

A baseline project plan is automatically created in Oracle Fusion Project Foundation and progress is captured and published. Based on project plan planning options, a baseline budget version can be generated using baseline project plan values and a forecast version generated based on published progress.

Note

The current date is always used as the progress as-of date for published progress.
Manage Project Requirements

Project Requirements: Explained

Requirements enable you to analyze, define, track, and prioritize the intended outcomes of a successful project.

You can perform the following actions to manage your requirement:

• Create Requirements
• Import Requirements from Excel
• Manage Requirement Details

Creating Requirements

Create requirements in Manage Requirement UI using the three-level requirement hierarchy that consists of investment area, feature, and backlog item.

Note

You can change requirement level names during implementation.

Create requirements at different levels to focus planning, review, and execution of project work. For example, you can associate requirements with sprints based on when they are developed and set the requirement priority. You can also create project tasks based on lowest-level requirements called backlog items.

Importing Requirements from Microsoft Excel

Create requirements in a spreadsheet to use desktop integration for Microsoft Excel and export the backlog items to Oracle Fusion Project Management.

Note

You cannot edit then export existing requirements from Microsoft Excel. Use the Manage Requirements page to edit requirements.
Managing Requirement Details

Use the following optional requirement details to capture user stories, acceptance criteria, and additional details for a backlog item.

<table>
<thead>
<tr>
<th>Requirement Detail</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Story</td>
<td>Capture information about your backlog item. User story is a free text field that is only made available for backlog items. You can upload user stories when creating backlog items from Microsoft Excel.</td>
</tr>
<tr>
<td>Acceptance Criteria</td>
<td>Define the boundaries of user stories, and are used to confirm when a story is completed and working as intended. You can enter up to 10 acceptance criteria for the backlog item.</td>
</tr>
<tr>
<td>Additional Details</td>
<td>Use to capture any additional details for the backlog item.</td>
</tr>
</tbody>
</table>

FAQs for Manage Project Requirements

How can I create requirements at any level from a project plan?

You can only create backlog items, the lowest-level requirements, for the project plan.

How can I update multiple requirements at the same time?

Select multiple requirements and click the Mass Update button. Use seeded requirements from the list to make changes to the backlog item selected.
Define Project

Import Project Plan Process

The Import Project Plans process imports project plans from third-party applications in the interface table to Oracle Fusion Project Management. The process creates project plans based on the data loaded into the open interface table.

You must load the import data to the PJT_PROJECT_PLAN_XFACE interface table and run this process. For more information on each interface table, see the Oracle Enterprise Repository for Oracle Fusion Applications.

**Note**
You can load data to interface tables using predefined templates and the Load Interface File for Import scheduled process, which are both part of the External Data Integration Services for Oracle Cloud feature. For more information, see the Documentation tab for the Load Interface File for Import process in Oracle Enterprise Repository for Oracle Fusion Applications.

From the navigator, select the Scheduled Processes menu and specify the process name, date and time to run the Import Project Plans process.

The process validates the project plan data and creates project plans in Oracle Fusion Project Management. The errors and warnings for the invalid project plan data are tracked in a report for the Import Project Plan process. Review the errors and fix the issues. Load the data from CSV file into the interface table again and resubmit the process.

**Importing Project Plan Process Report**

After the Import Project Plan process completes, review the output report to view the successful transactions and the errors and warnings. If errors exist, review and resolve the issues before submitting the process again. If warnings exist, take note of the details, and make corresponding corrections directly in Oracle Fusion Project Management in the Manage Project Plan page. You can broadly classify the errors into the following types:

- Basic data validation errors such as some mandatory attribute missing, or invalid values.
- Data consistency between records, such as task with the same identifier having different names in different records.
- Data referential issues, such as a specified parent task identifier does not exist.
• Data integrity issues with the current application data, such as import of a project fails because a project with the same name already exists in the target database.

**Microsoft Project and Oracle Fusion Project Management: How They Work Together**

Oracle Fusion Project Management integration with Microsoft Project enables you to create projects, complete initial scheduling, and perform what-if analysis offline in Microsoft Project before exporting the project plan to Oracle Fusion Project Management. Use Oracle Fusion Project Management to manage resource assignments, track progress, and collaborate with team members.

Following is a brief overview of installing Microsoft Project Integration, importing task codes into Microsoft Project, importing projects, and exporting project plan information to Oracle Fusion Project Management.

**Installing Integration with Microsoft Project**

Install the Oracle Fusion Project Management Integration for Microsoft Project feature from the Project Manager dashboard or the Manage Project Plan page. After installation, specify Oracle Fusion Project Management environment details using the **Change Environment** menu option.

**Tip**
The URL must contain the string `projectsManagement`. The application truncates text after that string.

You can change the environment URL at any time to support subsequent server changes.

**Importing Values into Microsoft Project**

Use the **Import List of Values** menu option on the Oracle Fusion Projects menu to import values defined for three task codes. The following table lists the task codes and the associated Microsoft Project fields.

<table>
<thead>
<tr>
<th>Task Code</th>
<th>Associated Microsoft Project Fields</th>
</tr>
</thead>
<tbody>
<tr>
<td>TASK_EXT_TEXT01</td>
<td>Text1</td>
</tr>
<tr>
<td>TASK_EXT_CODE01</td>
<td>OutlineCode1</td>
</tr>
<tr>
<td>TASK_EXT_NUM01</td>
<td>Number1</td>
</tr>
</tbody>
</table>

**Tip**
Use the **View Attribute Mapping** menu option on the Oracle Fusion Projects menu to review how Oracle Fusion Project Management attributes map to Microsoft Project fields.

**Importing Projects**

Import projects from Oracle Fusion Project Management to create a new project file in Microsoft Project. The following table describes how some important attributes are imported or set.
Tip
View attribute mapping for details of all imported or exported attributes.

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task attributes</td>
<td>Some of the key attributes that are imported are: Planned and actual dates, percent complete, total planned and actual quantity.</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong></td>
</tr>
<tr>
<td></td>
<td>If calendar or scheduling settings differ, Microsoft Project recalculates effort or units to retain imported dates.</td>
</tr>
<tr>
<td></td>
<td>Enterprise project codes or task codes are not imported.</td>
</tr>
<tr>
<td></td>
<td>The task type for all imported tasks is set to Fixed Units.</td>
</tr>
<tr>
<td>Task constraints and dependencies</td>
<td>Oracle Fusion Project Management does not support the constraint types As Late As Possible and As Soon As Possible. Other constraints are imported based on the mapping described in the section on exporting project plan information of this topic.</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong></td>
</tr>
<tr>
<td></td>
<td>If you assign start and finish dates to a task, then a Must Start On constraint is created for the task when you import the project into Microsoft Project.</td>
</tr>
<tr>
<td>Resources</td>
<td>All labor and expense resources on the project are imported.</td>
</tr>
<tr>
<td>Resource assignments</td>
<td>The following attributes are imported for all resource assignments:</td>
</tr>
<tr>
<td></td>
<td>• Planned and actual dates</td>
</tr>
<tr>
<td></td>
<td>• Actual, planned, and remaining effort</td>
</tr>
<tr>
<td></td>
<td>Actual costs are imported for labor resources.</td>
</tr>
<tr>
<td></td>
<td>Actual and planned costs are imported for expense resources.</td>
</tr>
</tbody>
</table>

Exporting Project Plan and Scheduling Information

Export projects to Oracle Fusion Project Management after initial scheduling is complete in Microsoft Project. During export, project, task, assignment, and resource details are transferred to Oracle Fusion Project Management.

Important attributes exported or recreated at the task level include task name and dates, task codes, dependencies, and constraints.

Task date constraints are recreated in Oracle Fusion Project Management based on the following mapping:
<table>
<thead>
<tr>
<th>Microsoft Project Constraint Type</th>
<th>Oracle Fusion Project Management Constraint Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>As Late As Possible</td>
<td>No constraint created in Oracle Fusion Project Management</td>
</tr>
<tr>
<td>As Soon As Possible</td>
<td>No constraint created in Oracle Fusion Project Management</td>
</tr>
<tr>
<td>Finish No Earlier Than</td>
<td>Finish On or After</td>
</tr>
<tr>
<td>Finish No Later Than</td>
<td>Finish By</td>
</tr>
<tr>
<td>Must Finish On</td>
<td>Finish On</td>
</tr>
<tr>
<td>Must Start On</td>
<td>Start On</td>
</tr>
<tr>
<td>Start No Earlier Than</td>
<td>Start On or After</td>
</tr>
<tr>
<td>Start No Later Than</td>
<td>Start By</td>
</tr>
</tbody>
</table>

### Exporting Resource Assignments and Resource Information

Important attributes transferred or recreated at the resource assignment level when you export projects include the resource name, planned and actual dates, and total planned work and remaining work.

**Important**

The task type of all exported tasks is set to Fixed Effort in Oracle Fusion Project Management (corresponding to the Microsoft Project task type of Fixed Work). However, resource assignment dates are not revised based on task type in Oracle Fusion Project Management until you explicitly roll up data or schedule tasks.

The following table describes how resources are exported to Oracle Fusion Project Management.

**Restriction**

Resources on the resource list that are not linked to a resource assignment in Microsoft Project are not exported.

<table>
<thead>
<tr>
<th>Oracle Fusion Project Management Resource Type</th>
<th>Microsoft Project Resource Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Labor</td>
<td>Work</td>
<td>Resources associated with resource assignments are linked to existing project enterprise labor resources if the e-mail address provided in Microsoft Project and Oracle Fusion Project Management match. Else, a new planning only resource is created at the project level in Oracle Fusion Project Management.</td>
</tr>
</tbody>
</table>

**Tip**

Resources created in Microsoft Project but not assigned to tasks are not exported to Oracle Fusion Project Management.
Define Project

3-5

Manage Project Spaces

Updating Project Resources and Space Roles: Points to Consider

Space membership is determined by the members of the primary project associated with the space. If you modify the project roles, the application automatically updates the space member roles.

Space member roles are impacted if a project manager makes any of the following changes to a project that has a primary relationship with a space:

- Adds a project resource
- Removes a project resource
- Changes the role of an existing project resource

Adding a Project Resource

The following table describes the impact of adding a project resource to a project with a primary space relationship.

<table>
<thead>
<tr>
<th>Action</th>
<th>Impact to Project Space</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add a project manager to the project.</td>
<td>The project manager becomes a space moderator.</td>
</tr>
<tr>
<td>Add another project resource to the project.</td>
<td>The project resource becomes a space participant. If the project resource is also a project manager, the space moderator role is assigned to the user.</td>
</tr>
</tbody>
</table>

Removing a Project Resource

The following table describes the impact of removing a project manager or project team member from a project with a primary space relationship.

<table>
<thead>
<tr>
<th>Action</th>
<th>Impact to Project Space</th>
</tr>
</thead>
<tbody>
<tr>
<td>Remove a project manager from the project.</td>
<td>The former project manager retains the space moderator role.</td>
</tr>
<tr>
<td>Remove a project resource from the project.</td>
<td>The former project resource is removed from the space.</td>
</tr>
</tbody>
</table>
Changing a Project Role

The following table describes the impact of changing project roles on a project with a primary space relationship.

<table>
<thead>
<tr>
<th>Action</th>
<th>Impact to Project Space</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change a project manager to a project team member.</td>
<td>The space moderator becomes a space participant.</td>
</tr>
<tr>
<td>Change a project resource to a project manager.</td>
<td>The space participant becomes a space moderator.</td>
</tr>
</tbody>
</table>

FAQs for Manage Project Spaces

What's a primary project and space relationship?

A space can contain multiple projects. You create a primary relationship between one project and a space to automatically assign space member roles in accordance with the project roles. The application automatically assigns space member roles to the project manager and project resources of the primary project. The application does not assign space member roles to the project manager or project resources of any other projects that are associated with the space.

The application assigns all project managers to the space moderator role, and assigns other project resources to the space participant role.

How are project space roles mapped to project resources?

The application automatically assigns each project resource to a project space role on the associated project space. The project manager is assigned the role of project space moderator. All other project resources are project space participants.

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

Why can't I create a primary project and space relationship?

The primary relationship option is disabled if you are not the project manager. Only the project manager can create a primary relationship. The option is also disabled if a primary relationship for the project and space already exists.
Define Project Plan Tasks and Schedule

Project and Resource Calendars: Explained

Project and resource calendars define the standard working and nonworking time for projects and resources. Working times are the days and total hours in a calendar during which work can occur. Nonworking times in a calendar are days and total hours for which work should not be scheduled, such as weekends and holidays.

Features of project and resource calendars include:
- Default calendars
- Project calendars
- Resource calendars
- Standard calendar

Default Calendars
Your implementation team selects a default project calendar and resource calendar on the Define Project Management Implementation Options page. The default project calendar is automatically assigned to new projects, and the default resource calendar is automatically assigned to new project enterprise labor resources.
If the default project calendar does not meet the schedule requirements for a specific project, a project manager can select another calendar during project creation. Similarly, if the default resource calendar does not meet the scheduling requirements for a specific project enterprise labor resource, the project application administrator can assign another calendar to the resource.

Project Calendars
A project manager can select the calendar for a project during project creation or when managing the project plan.
The working days and total hours in the calendar are used to schedule the project plan. The calendar also works with the project start and finish dates to determine the project duration.

Resource Calendars
The project application administrator can select a resource calendar when creating or editing a project enterprise resource. The working days and total working hours in a resource calendar are used to determine resource availability.
Oracle Fusion Project Resource Management uses the resource calendar to determine a resource’s available hours for a project. The Update Resource
Utilization Data process calculates the resource's projected utilization with the available hours.

**Standard Calendar**

Oracle Fusion Project Execution Management provides a standard calendar of 8 hours per day, 5 days per week that you can assign to projects and resources.

**Scheduling a Project Plan: Explained**

You use scheduling when you change task dependencies or constraints in the project plan. Manually scheduled tasks are not updated in this process.

Dates for automatically scheduled tasks are updated as follows:

- Dependent tasks are scheduled based on the changes you make to predecessor task dates.
- Tasks with constraints are scheduled based on the type of constraint. If the constraint type is **Start on or after** or **Finish on or after**, the constraint date takes priority over the calculated start or finish date of the task.

The application schedules the project plan using the latest date between the project start date and the current date. You may have scenarios where tasks have only dependencies, only constraints, or both dependencies and constraints. The example shows tasks in a project plan with task start and finish dates, and constraints and dependencies assigned. You can understand how the application schedules task dates when you make changes.

<table>
<thead>
<tr>
<th>Task Name</th>
<th>Start Date</th>
<th>Finish Date</th>
<th>Predecessor</th>
<th>Constraint</th>
<th>Schedule Mode</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task 1</td>
<td>19-Nov-2012</td>
<td>21-Nov-2012</td>
<td>None</td>
<td>None</td>
<td>Manual</td>
</tr>
</tbody>
</table>

You can also provide a number of days of time lag when you create a dependency. The lag allows you to have a gap of a few additional days between two dependent tasks. In the example, if you assign a lag time of one day in the Finish-to-Start dependency between Task 1 and Task 2, then the start date of Task 2 moves to November 23, and the finish date moves to November 26.

**Tasks with Dependencies**

If you manually change the task dates of a predecessor task, the successor task dates are not changed automatically. The task dates of all automatically scheduled tasks are adjusted during scheduling. If a task has more than one predecessor task, the task date of the predecessor task with the latest date is assigned.

The example shows that Task 1 has a new finish date of November 22. Due to the dependency you assigned to Task 2, this change causes the start date of Task 2 to move to November 23.

<table>
<thead>
<tr>
<th>Task Name</th>
<th>Start Date</th>
<th>Finish Date</th>
<th>Predecessor</th>
<th>Constraint</th>
<th>Schedule Mode</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task 1</td>
<td>19-Nov-2012</td>
<td>22-Nov-2012</td>
<td>None</td>
<td>None</td>
<td>Manual</td>
</tr>
</tbody>
</table>
Tasks with Constraints

If you assigned a constraint to a task such as **Start on** or **Finish by**, and you assign new task dates, the new task dates override the constraint dates. An icon at the row header of a task indicates that the task has a constraint assigned. If the constraint is violated an exclamation mark appears next to the icon. You can hover on the icon to know the constraint type and date.

The example shows Task 2 has a **Finish by** constraint on November 23. The calculated task finish date is November 26. The application assigns November 26 as the finish date of the task.

<table>
<thead>
<tr>
<th>Task Name</th>
<th>Start Date</th>
<th>Finish Date</th>
<th>Predecessor</th>
<th>Constraint</th>
<th>Schedule Mode</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task 1</td>
<td>19-Nov-2012</td>
<td>22-Nov-2012</td>
<td>None</td>
<td>None</td>
<td>Manual</td>
</tr>
</tbody>
</table>

Tasks with Dependency and Start on or after Constraint

If you manually change the predecessor task date of a task that has a dependency, and a **Start on or after** constraint, and the calculated task date exceeds the constraint date, the constraint date overrides the task start date.

The example shows Task 2 has a **Start on or after** constraint on November 26. The finish date of Task 1 is moved to November 22. The start date of Task 2, which is dependent on Task 1, is November 22. However, the start date assigned by the constraint is retained so the start date is November 26.

<table>
<thead>
<tr>
<th>Task Name</th>
<th>Start Date</th>
<th>Finish Date</th>
<th>Predecessor</th>
<th>Constraint</th>
<th>Schedule Mode</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task 1</td>
<td>19-Nov-2012</td>
<td>20-Nov-2012</td>
<td>None</td>
<td>None</td>
<td>Manual</td>
</tr>
<tr>
<td>Task 2</td>
<td>26-Nov-2012</td>
<td>27-Nov-2012</td>
<td>Task 1 (Finish-to-Start dependency)</td>
<td>Start on or after 26-Nov-2012</td>
<td>Automatic</td>
</tr>
</tbody>
</table>

Tasks with Dependency and Finish on or after Constraint

If you manually change the predecessor task date of a task that has a dependency, and a **Finish on or after** constraint, and the calculated task date is before the constraint date, the constraint date overrides the task finish date.

The example shows Task 2 has a **Finish on or after** constraint on November 30. The finish date of Task 1 is moved to November 22. The calculated finish date of Task 2, which is dependent on Task 1, is November 26. However, the date assigned by the constraint is retained so the finish date is November 30.

<table>
<thead>
<tr>
<th>Task Name</th>
<th>Start Date</th>
<th>Finish Date</th>
<th>Predecessor</th>
<th>Constraint</th>
<th>Schedule Mode</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task 1</td>
<td>19-Nov-2012</td>
<td>22-Nov-2012</td>
<td>None</td>
<td>None</td>
<td>Manual</td>
</tr>
<tr>
<td>Task 2</td>
<td>29-Nov-2012</td>
<td>30-Nov-2012</td>
<td>Task 1 (Finish-to-Start dependency)</td>
<td>Finish on or after 30-Nov-2012</td>
<td>Automatic</td>
</tr>
<tr>
<td>--------</td>
<td>--------------</td>
<td>--------------</td>
<td>--------------------------------------</td>
<td>---------------------------------</td>
<td>-----------</td>
</tr>
</tbody>
</table>

**Project Expenses: Examples**

Plan for expenses on a task and keep track of actual and remaining amounts. View and update planned and actual project expenses for expense and labor resources during project planning. Review the remaining cost during project execution.

**Planning Expenses on Projects**

Dave Brown is traveling to conduct product training to consultants. The following is an example of expenses planned for a task for Dave to travel to a different location and conduct product training.

<table>
<thead>
<tr>
<th>Expense</th>
<th>Planned (USD)</th>
<th>Actual (USD)</th>
<th>Remaining (USD)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Airfare</td>
<td>2000</td>
<td>2200</td>
<td>-200</td>
</tr>
<tr>
<td>Accommodation</td>
<td>10000</td>
<td>9990</td>
<td>10</td>
</tr>
<tr>
<td>Meals</td>
<td>500</td>
<td>450</td>
<td>50</td>
</tr>
</tbody>
</table>

Amounts are rolled up and displayed against the task associated with the expenses. The following are the total expenses incurred on the task.

<table>
<thead>
<tr>
<th>Expense</th>
<th>Total Amounts (USD)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expense Amount</td>
<td>12500</td>
</tr>
<tr>
<td>Actual Expense Amount</td>
<td>12640</td>
</tr>
<tr>
<td>Remaining Expense Amount</td>
<td>-140</td>
</tr>
</tbody>
</table>

Dave's cost rate is USD 150 per hour. Effort to complete the task is 72 hours. Therefore, costs are calculated as follows.

Total actual labor cost = 72 x USD 150 = USD 10800
Total actual cost = total actual labor cost + total actual expense amount = USD 23440

Dave's assignment cost the project a total of USD 23440.

**Project Plans: How They are Transferred from Oracle Fusion Project Management**

Perform detailed project planning and resource assignments in Oracle Fusion Project Management before importing the project plan.

**Settings That Affect Import of Project Plans**

You must designate the project as a planning project to import project plan information.

The following table describes other project options that affect how project plan information is imported, and are therefore set to an appropriate value automatically.
### How Project Plans Are Imported

Importing project plan information overrides all planning information already in Oracle Fusion Project Foundation. For example, any task assignments you create directly in Oracle Fusion Project Foundation are updated if corresponding resource assignments exist in Oracle Fusion Project Management or are deleted if no corresponding resource assignment exists.

As illustrated in the following diagram, before import, assignment information is summarized up to the level of the integrated task. Then, for each integrated task, import processing creates a single task assignment in Oracle Fusion Project Foundation for every resource assigned within the hierarchy of the integrated task, irrespective of the number of assignments.

#### Restriction

If a resource is assigned to multiple subtasks within an integrated task in Oracle Fusion Project Management and assignment dates do not overlap, then separate task assignments are imported. Import processing creates the separate task assignments based on financial periods in Oracle Fusion Project Foundation.

<table>
<thead>
<tr>
<th>Option</th>
<th>Level</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary planning resource breakdown structure</td>
<td>Project Definition</td>
<td>Set to the integration planning resource breakdown structure.</td>
</tr>
<tr>
<td>Automatically roll up planned dates for tasks</td>
<td>Task settings on the project plan planning options</td>
<td>Option is selected.</td>
</tr>
<tr>
<td>Use task planned dates as task assignment dates</td>
<td>Task settings on the project plan planning options</td>
<td>Option is deselected because imported task assignment dates may be different from task dates.</td>
</tr>
<tr>
<td>Enable costs for project plan</td>
<td>Plan settings on the project plan planning options</td>
<td>Option is selected so that import processing can calculate costs based on imported effort.</td>
</tr>
</tbody>
</table>
The following information is imported and assigned to task assignments.

<table>
<thead>
<tr>
<th>Resource Type</th>
<th>Planned Dates</th>
<th>Actual Dates</th>
<th>Planned Amounts</th>
</tr>
</thead>
</table>
| Integrated labor (named person) resources | Earliest start date and latest finish date of all occurrences of the resource within the hierarchy of the integrated task  
Earliest start date and latest finish date of all occurrences of the resource within the hierarchy of the integrated task | Earliest start date and latest finish date of all occurrences of the resource within the hierarchy of the integrated task  
If actual dates are unavailable in Oracle Fusion Project Management, task assignment dates are set to the imported planned dates. | At completion effort is summarized for the resource across the hierarchy of the integrated task  
Costs are calculated based on the project plan planning options.                                                                                                                                                  |
| Integrated expense types                  | Earliest start date and latest finish date of all occurrences of the resource within the hierarchy of the integrated task                                                                                                                                 | Earliest start date and latest finish date of all occurrences of the resource within the hierarchy of the integrated task  
If actual dates are unavailable in Oracle Fusion Project Management, they are left blank on the task assignment.                                  | At completion cost is summarized and imported as planned quantity (where unit of measure is Currency)  
Note  
If the project currency and project ledger currency are different in Oracle Fusion Project Foundation, then the raw and burdened costs in project currency are calculated based on settings in the project planning options. |
| Nonintegrated resources                   | Earliest start date and latest finish date of all occurrences of the resource within the hierarchy of the integrated task  
Actual dates set based on resource type                                                                                                                   | Actual dates set based on resource type                                                                                                                | Costs or effort imported based on resource type  
Note  
Task assignment is created using a resource class level resource.                                                                                                                                                 |

**Important**

The following rules apply when importing task assignment information:

- Resource assignments without start or finish dates are not included in the import.
- If planning in Oracle Fusion Project Foundation is by period, then import processing allocates summarized amounts to periods based on the spread curve for the planning resource.
- If you delete a resource assignment in Oracle Fusion Project Management, then integration processing checks if the task assignment can be deleted.
Apart from imported data, the following logic is used to provide information for task assignment-related attributes.

<table>
<thead>
<tr>
<th>Task Assignment Attribute</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spread curve</td>
<td>Set to default value specified for the planning resource in the planning resource breakdown structure.</td>
</tr>
<tr>
<td>Progress estimate-to-complete (ETC) method</td>
<td>Set to Remaining Plan. If you change this value, it reverts to Remaining Plan during the next import.</td>
</tr>
<tr>
<td>Rate overrides</td>
<td>Value not set automatically. If you enter an override, then this information persists after subsequent import.</td>
</tr>
<tr>
<td>Planning currency</td>
<td>Set to the project ledger currency.</td>
</tr>
<tr>
<td>Unplanned resource</td>
<td>Option deselected. All task assignments coming from Oracle Fusion Project Management are considered planned.</td>
</tr>
</tbody>
</table>

**FAQs for Define Project Plan Tasks and Schedule**

**What’s the difference between project calendars and resource calendars?**

Project calendars determine standard working and nonworking times for resources working on projects. For example, a project calendar can designate the total number of working hours per day and any holidays that occur during the project dates. A project calendar is used to schedule project tasks, and to estimate project duration.

Resource calendars determine the total available working hours for resources.

**Note**

Your implementation team defines the default project and resource calendars that are automatically assigned to new projects and resources. However, a project manager can assign another calendar to a project. Similarly, a project application administrator can assign a different calendar to a resource.

**How can I change the project calendar after the project is created?**

Select the top-level task of a project, and change the calendar from the Project Details region on the Manage Project Plan page.
What's the difference between scheduling tasks and rolling up task data?

You schedule a project in Oracle Fusion Project Management to update the top-level task dates based on revised dates, dependencies, and constraints.

You roll up project plan data to the top-level task after team members have reported their actual hours of work on tasks.

Why didn't task dates change when predecessor task dates changed?

Task dates of dependent tasks do not change automatically if the tasks are manually scheduled tasks. Manually scheduled tasks are tasks whose dates you have modified. Task dates of manually scheduled tasks do not change automatically when dates of predecessor or successor tasks change.

Why did the task dates change after I assigned a resource to the task?

Task dates are updated based on the resource calendar. For example, a task that takes four days to complete starts on Monday and finishes on Thursday. If you assign a resource who is going on vacation on Wednesday, the task finish date moves to Friday.

What's a planning only resource assignment status?

A resource with a Planning only status indicates that the resource was directly added to a project without first submitting a project resource request to a resource manager in Oracle Fusion Project Resource Management.

You can also submit a request for a resource to be assigned to your project. The resource manager proposes a project enterprise labor resource to fulfill the request. If you approve the request, the resource is assigned to your project with an Assigned status.

What happens if a planning only resource is assigned to a project?

You can directly add resources to a project for planning purposes without involving a resource manager. You can assign resources directly to tasks and the application automatically adds them to the project. Alternatively, you can add resources to the project and then assign them to tasks. These resources have the status of Planning Only. If you manage the availability and staffing for the
resource, then you must submit a project resource request to have the resource officially assigned to work on the project.

**Why does the allocation for a resource assigned to a task show as less than 100 percent?**

The allocation percentage of an assigned resource is determined by their available capacity based on allocation to other projects. The resource allocation percentage value comes from the assigned allocation on the Manage Project Resources page.

**Can I change the project currency for a project?**

Yes, you can change the project currency from the Project Details region in the Basic Information tab by selecting the top-level task.

**Can I copy and paste tasks to create new tasks?**

You can copy and paste a task to reuse attributes of an existing task in a new task.

---

**Note**

You cannot copy top-level tasks.

After you copy a task, select another task and paste the copied task. The pasted task becomes a peer task to the selected task.

After you paste a task, the following information is copied:

- Task attributes such as effort, start, and finish dates.
- Resources assigned to tasks.
- Dependencies if you selected dependent tasks to copy.
- Constraints assigned to tasks such as Start On or Finish By.
- Subtasks of collapsed tasks that you selected to copy.

After you paste the tasks, you can modify the effort, start, and finish dates of the new task. The application calculates the duration and the values roll up to the summary task and top-level task.

**Can I cut and paste tasks to another position in the task hierarchy?**

Yes, you can paste tasks to another position in the task hierarchy. After pasting a task, a row is added immediately below the selected task. The moved task
is a peer task to the selected task. Attributes of the original task are retained, including constraints and dependencies. Oracle Fusion Project Management updates effort and dates of the top-level task.

**How can I view tasks that violated a constraint?**

Tasks having constraints assigned to them are indicated with an icon in the row header. You can hover on the icon to see the constraint type and date. When a task violates a constraint, a red exclamation mark appears next to the constraint icon. Alternatively, you can filter for tasks having constraint violations.

**Can a task have more than one predecessor or successor task?**

Yes, a single task can have more than one predecessor or successor task. However, there can be only one dependency between two tasks. For example, two tasks cannot have both finish-to-finish and start-to-start dependencies.
Assignment statuses indicate the status of the resource's relationship to a project. This table describes assignment statuses.

<table>
<thead>
<tr>
<th>Assignment Statuses</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Planning Only</td>
<td>You create a resource assignment with a Planning Only status when you add the resource to the project using either of these methods:</td>
</tr>
<tr>
<td></td>
<td>• Allocate the resource directly to the project on the Manage Project Resources page</td>
</tr>
<tr>
<td></td>
<td>• Add a resource to a project task on the Manage Project Plan page</td>
</tr>
<tr>
<td></td>
<td>• Add the resource by importing a project plan in Microsoft Project into Oracle Fusion Project Management</td>
</tr>
<tr>
<td>Assigned</td>
<td>You create a resource assignment with an Assigned status when you approve a resource to fulfill a project resource request in Oracle Fusion Project Resource Management. An existing resource assignment changes to an Assigned status when you approve, reject, or cancel a pending assignment adjustment.</td>
</tr>
</tbody>
</table>
Pending Adjustment

A resource assignment changes to a Pending Adjustment status in either of these circumstances:

- After the resource manager performs the Cancel Assignment or Change Assignment Dates adjustment action and before the project manager approves or rejects the adjustment.
- After the project manager performs the Change Assignment Dates adjustment action and before the resource manager approves or rejects the adjustment.

A resource assignment that is pending adjustment approval will have a value in the Adjustment Type field of Change Assignment Dates or Cancel Assignment. When you approve or reject the adjustment action, then the application clears the adjustment type value for the assignment.

Canceled

A resource assignment changes to a Canceled status after a resource manager performs the Cancel Assignment adjustment action and the project manager approves the cancellation request. If a project manager creates the cancellation adjustment, then no further approval is required and the assignment status changes to Canceled.

You cannot cancel a resource assignment in any of these circumstances:

- A task assignment exists for this resource
- The resource is the primary project manager
- The resource assignment status is Planning Only or Pending Adjustment

Example 1: Project Manager Adjusts Assignment Dates

This figure shows the assignment status progression when a project manager adjusts resource assignment dates, and the resource manager approves the adjustment.

<table>
<thead>
<tr>
<th>Action</th>
<th>Assignment Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project manager approves a resource proposal to fulfill a project resource request. This action creates an assignment.</td>
<td>Assigned</td>
</tr>
<tr>
<td>Project manager adjusts the resource assignment dates.</td>
<td>Pending Adjustment</td>
</tr>
<tr>
<td>Resource manager approves the assignment date change.</td>
<td>Assigned</td>
</tr>
</tbody>
</table>
In this example, the project manager approves a resource proposal to fulfill a project resource request. This action creates an assignment with a status of Assigned. Later the project manager adjusts the dates for this resource assignment. This action changes the assignment status to Pending Adjustment. When the resource manager approves the assignment adjustment, the assignment status changes back to Assigned.

**Example 2: Resource Manager Cancels Assignment**

This figure shows the assignment status progression when a resource manager cancels a resource assignment, and the project manager approves the cancellation.

In this example, the project manager approves a resource proposal to fulfill a project resource request. This action creates an assignment with a status of Assigned. Later the resource manager initiates a cancellation for this resource assignment. This action changes the assignment status to Pending Adjustment. When the project manager approves the assignment cancellation, the assignment status changes to Canceled.

**Import Project Enterprise Resources**

The Import Project Enterprise Resources process imports the resources from third-party applications in the interface table to Oracle Fusion Project Management. The process creates project enterprise resources for example, labor or expense type, based on the data loaded into the PJT_PRJ_ENT_RES_INTERFACE open interface table.

**Note**

You can load data to interface tables using predefined templates and the Load Interface File for Import scheduled process, which are both part of the External Data Integration Services for Oracle Cloud feature. For more information, see the Documentation tab for the Load Interface File for Import process in Oracle Enterprise Repository for Oracle Fusion Applications.
From the navigator, select the Scheduled Processes menu and specify the process name, date and time to run the Import Project Enterprise Resources process.

The process validates the resources and creates project enterprise resources in Oracle Fusion Project Management. The exceptions for the invalid resources are tracked in a report for the Import Project Enterprise Resources process. Review the errors and fix the issues. Load the data from CSV file into the interface table again and resubmit the process.

**Import Project Enterprise Resources Execution Report**

After the Import Project Enterprise Resources process completes, review the output report to view the successful transactions, errors, and warnings. View the summary report and detailed report and track the details by resource type, labor and expense type. If errors exist, review and resolve the issues before submitting the process again.

**FAQs for Define Project Staffing Plan**

**How can I create a resource that is restricted to just one project?**

You can create a project-specific resource by adding a new resource to the Manage Project Resources page and clicking the Project-Specific Resource check box in the Create Project Enterprise Resource window. For example, if you want to add a private contractor to your project, but the contractor is not available for other projects, then create the resource as a project-specific resource.

**What happens if a resource is allocated multiple times to a project with different rates?**

The application uses the highest rate to calculate the cost and bill amounts of the resource.

**Why can't I see the cost and bill rates for a resource?**

The cost and bill rates for a project enterprise labor resource must be in the same currency as the project currency to appear on the Manage Project Resources page. A project enterprise resource labor rate is blank on the project if the resource currency is different currency than the project currency. You can also manually update the rates as needed; the updated rate will be stored only as the project rate for that resource, not updated in project enterprise labor resource.
Project Deliverables: Explained

Project deliverables are the output produced after completing a project or task. A deliverable can result from the need to satisfy an external contractual obligation, or the need to fulfill an internally-planned activity.

The following sections describe how you create and manage deliverables, and how to associate them with requirements, projects, and tasks.

**Important**
You must be a project enterprise labor resource to create, update, or own deliverables.

**Creating and Managing Deliverables**

The following table describes the important attributes that you enter and update when managing deliverables.

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deliverable type</td>
<td>Use to classify and report your deliverable. Depending on application setup, you can create your own deliverable types. Otherwise, you must use predefined values.</td>
</tr>
<tr>
<td>Priority</td>
<td>Assign a high, medium, or low priority depending on the anticipated impact on work.</td>
</tr>
<tr>
<td>Status</td>
<td>Use to define the status of the deliverable within the lifecycle. Valid statuses are New, Working, and Closed.</td>
</tr>
<tr>
<td>Attachments</td>
<td>Add one or more attachments to a deliverable. Attachments can be the actual output where the deliverable is a document or other associated information.</td>
</tr>
</tbody>
</table>

**Note**
You can complete deliverables without adding an attachment.
Associating Deliverable with Tasks and Requirements

Associate deliverables with one or many tasks or requirements at any level. Associate existing deliverables to tasks or requirements or create deliverables directly for tasks or requirements.

Note
You can delete a deliverable in New status if it is not associated with tasks or requirements.

FAQs for Define Project Requirements

What's the difference between the name and short name of a deliverable?

Use the deliverable name to provide a general description, up to 150 characters long, for the deliverable.

Provide a short name, a maximum of 30 characters long, to identify the deliverable for reporting purposes.

Can deliverables for projects and tasks be inherited from associated requirements?

No. A deliverable associated with a requirement is not automatically associated with the tasks created for that requirement. You associate a deliverable with a task independent of associating a requirement with a task.

Can I delete a deliverable?

Yes. You can delete a deliverable in New status and is not associated with a project, task, or requirement.

Can I delete a deliverable associated with a task?

No. You can only delete deliverables that are in New status and are not associated with tasks. You can disassociate deliverables from tasks.

Can I view deliverables created by another project team member?

No. As a project team member, you can only view deliverables that you own or create. Project managers can view all deliverables associated with their projects.
What happens when I duplicate a deliverable?

All information including associations with tasks and requirements is duplicated. However, attachments are not duplicated. The status of the duplicated deliverable is set to New.
Task Management: Explained

Oracle Fusion Task Management provides team members with a central location to collaborate with each other on tasks they own, are assigned to, or follow. Review and edit to-do tasks and project tasks.

You can view and edit the following elements of a task:

- Task list
- Task details and progress
- Followers
- Task dependencies and deliverables
- Recent task activities in Oracle Social Network Cloud Service

**Task List**

The task list displays tasks that you are assigned to work on and tasks that your follow. Filter tasks by project, priority, date, task type, and whether or not there are exceptions.

Create tasks from the task list. New tasks are to-do tasks by default. You can edit the task from the **Task Details** region on the **Manage Tasks** page, and add the task to an existing project if you are a team member on the project.

**Task Details and Progress**

Review task details and enter progress for the task. The following table describes each attribute.

<table>
<thead>
<tr>
<th>Task Attribute</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Date</td>
<td>The proposed start date for the task.</td>
</tr>
<tr>
<td>Finish Date</td>
<td>The proposed finish date for the task.</td>
</tr>
<tr>
<td>Project</td>
<td>For project tasks, the name of the project that the task is associated with.</td>
</tr>
<tr>
<td>Creator</td>
<td>Name of the team member who created the task.</td>
</tr>
<tr>
<td>---------</td>
<td>-----------------------------------------------</td>
</tr>
<tr>
<td>Priority</td>
<td>The priority assigned to the task. Tasks with a higher priority appear higher in your task list.</td>
</tr>
<tr>
<td>Owner</td>
<td>Name of the team member who is responsible for the overall management of the task.</td>
</tr>
<tr>
<td>Total Hours Worked to Date</td>
<td>The total number of hours worked on the task until today.</td>
</tr>
<tr>
<td>Estimated Hours at Completion</td>
<td>The estimated total number of hours required for a person to complete the task.</td>
</tr>
<tr>
<td>Percent Complete</td>
<td>Percent complete for the task. You can enter either hours or a percentage. The following formula calculates percent complete for a task: Percent Complete = (Total Hours to Date + Hours Since Last Updated) / Estimated Hours at Completion</td>
</tr>
</tbody>
</table>

**Followers**

Followers are persons who are not working on the task, but have an interest in reviewing the task progress. Only the task owner and other followers can add followers to a task. Oracle Fusion Task Management automatically sets the task owner as a follower.

**Task Dependencies and Deliverables**

Project tasks can have peer tasks, task dependencies, and deliverables.

- Peer tasks exist in the same project task hierarchy as your task.
- Dependencies are relationships between tasks. When tasks are linked on the project plan, the predecessor task must be completed before you begin work on the successor tasks.
- View the existing deliverables or add deliverables to the task. A deliverable can result from the need to satisfy an external contractual obligation, or the need to fulfill an internal planned activity.

**Integration with Oracle Social Network**

Access Oracle Social Network from the **Task Details** region on the Manage Tasks page, and review task activities performed by all team members and followers.

You can view the following events for a task:

- When the task was created.
- Deliverable changes.
- Status updates.
- Changes to the task owner.
- Changes to the start date and finish date.
- Changes to the proposed start date and proposed end date.
- Changes to dependencies.
- Changes to followers.

**FAQs for Execute Project Tasks and Deliverables**

**What's the difference between my tasks and tasks that I follow?**

Use the **My Tasks** tab on the **Manage Tasks** page to manage tasks that are assigned to you. You can edit the task details and enter progress for your tasks.

When you follow a task, you can view the task details and see the task activity stream. You receive e-mail notifications of changes that team members make to the task.

You do not have to be a team member to follow a task. However, only the task owner can edit a task. Followers can access Oracle Social Network from the **Task Details** region of the **Manage Tasks** page to collaborate on a task and to add other users as followers.

If the task owner assigns the task to another team member, then the previous owner automatically becomes a follower.

**How can I add followers to a task?**

The task owner and followers can add other followers to a task. Enter the name of the follower in the **Task Details** region on the **Manage Tasks** page.

Alternatively, if the task owner assigns the task to another team member, the new task owner automatically becomes a follower.

**What happens if I create a new task from my task list?**

Tasks that you create on the **Manage Tasks** page are to-do tasks, and are not associated with a project.

You can edit a to-do task and assign it to a project if you are a project team member. The task will be a top-level task in the project.

**Why can't I edit a task?**

You are a follower on the task. Only the task owner can edit a task.
Why can't I view the dependencies and deliverables for a task?

The task is a to-do task. Only a project task can have peer tasks, dependencies, and deliverables.

Why can't I open a peer task?

You can only open peer tasks that you own or follow. If you do not own or follow a peer task, then you can only view the high-level task details from the Manage Tasks page.

How can I view activities for all of my tasks?

Open the Manage Tasks tab on the My Work page. The My Tasks sub tab contains a list of all your tasks that you can filter by various attributes such as project, task type, and tasks that you are scheduled to work on today or in the future.

How can I collaborate with my project team to complete tasks assigned to me?

Use the Social link in the Manage Tasks page to have conversations with team members about task-related matters. The Social link is available if you have enabled integration with Oracle Social Network Cloud Service.

Consider the following example. You are a consultant and a team member on a project to implement software for a customer. The project manager assigns you a task to migrate the customer's legacy data into the new application. You are new to the legacy application and have questions about available services. You create a conversation and invite the project manager and other consultants on the project to a discussion. You also invite other consultants in your company with experience on the legacy application. The conversation participants give their opinion, provide information, and upload documents. Information is shared as if everyone was working together in the same room.
Track Project Progress

Entering Task Progress: Examples

You can use several methods to enter progress for your tasks in Oracle Fusion Task Management. Use these scenarios to understand the differences between entering progress from the following locations:

- Team Member Dashboard
- Enter Progress page
- Manage Tasks page

**Team Member Dashboard**

Use the Quick Progress region on the Team Member Dashboard to mark your tasks as started or completed. You cannot enter additional progress attributes from this region.

**Enter Progress Page**

Use the Enter Progress page to enter the following progress attributes for your tasks:

- Actual hours
- Remaining hours
- Percent complete
- Health status
- Proposed start date
- Proposed finish date

**Manage Tasks Page**

Use the Manage Tasks page to enter the following progress attributes for a task:
• Mark a task as started.
• Mark a task as completed.
• Percent complete.
• The number of hours you worked on a task.

**Grouping and Filtering Project Execution Progress: Examples**

You can review project progress entries that your team members reported for their tasks in Oracle Fusion Project Execution Management. To locate project progress for a specific resource or attribute, you can group or filter the progress entries. Use the following scenarios to understand the differences between grouping and filtering progress entries on the **Review Project Progress** page.

**Grouping Project Progress**

Group tasks by resources to locate and display the tasks assigned to a specific team member. When you group the tasks by resource, the team member names are displayed instead of task names. You can expand the row for a resource and review or edit the progress details, analytics, and Gantt chart for each resource. For example, if a team member is out of the office and unable to report progress for a task, you can group by resource, and enter progress for the tasks the team member is assigned to.

**Note**

If you group tasks by resource and change the values for the **Start Date**, **Finish Date**, **Duration**, or **Effort**, then you cannot preview the impact of the proposed changes to the project plan. However, you can compare the current values to the proposed values on the **Details** tab.

**Filtering Project Progress**

Expand the **Filter By** region to locate and display tasks with specific attributes. You can select one or more enterprise task codes, apply the filter, and view a list of tasks that contain the enterprise task codes. Select one or more task codes and apply the filter to update your results.

**Proposed Task Changes: Points to Consider**

Project managers need to review certain changes to tasks that team members proposed when they entered progress. To see the effects of a proposed task change, a project manager can preview the impact the change would have on the project plan before deciding whether or not to accept the change.

After previewing the impact to the project plan, a project manager can accept, save, decline, or cancel the proposed task change.
Note

Project managers can also accept or decline task changes from the Review Progress page without previewing the impact.

---

Accept

Accept the proposed change if you agree with the impact. When you accept the change, the proposed dates for the task replace the current dates. Oracle Fusion Project Management recalculates the progress and duration for the task and project.

Important

You must also save the change to apply the update to the project plan.

Alternatively, you can change the proposed dates to different dates than the team member proposed. Save your changes to apply the updates to the project plan.

Decline

Decline the proposed change if you want to retain the original planned dates and reject the proposed changes. When you decline the change, the proposed dates are replaced with the original dates, and changes to the task are disregarded. Oracle Fusion Project Management recalculates the progress and duration for the project plan using the original values.

Cancel

Cancel the proposed change to return to the project plan without accepting any changes. When you cancel the change, the values for the proposed and planned dates do not change.

Save

Save the proposed change to replace the planned dates with the proposed dates, and commit the change to the project plan.

---

FAQs for Track Project Progress

How can I report progress on a project task that is not in the project plan?

Create a new task for your project while you are entering progress. Enter your actual hours for the new task.

You can only add one task at a time with this method. Additionally, the task hierarchy is not available for selection when you create tasks while entering progress.
Why can't I create a task for a project?

Only the resources who are assigned to a project can create new tasks. If you are assigned to a project, then you can create tasks for yourself while you enter your progress for the project. You cannot assign tasks to other team members.

Why can't I view progress for all tasks on a project?

Project managers have the option of accessing progress review from the task exceptions for a project. Only the lowest-level tasks that have exceptions on the project are displayed.

Why do some tasks have exceptions for progress entries?

A team member entered a proposed start date, proposed finish date, or an increase to the planned hours for the task that exceeds the progress thresholds defined in the project management implementation options.
Manage Project Performance

Sprint Burndown: Explained

The **Sprint Burndown** graph shows you if the team will complete all planned backlog items in a sprint. Hours assigned to tasks are evenly distributed across the sprint duration to calculate the ideal remaining hours. The development team consumes a certain number of hours to complete a certain number of backlog items. You must plan the number of backlog items the team can achieve in a sprint. The graph shows how efficiently a project team consumes the available hours in a sprint.

You can measure how hours are ideally consumed during the sprint and compare it to how the project team is actually consuming hours. If the actual hours remaining deviates from the ideal hours remaining, it means that you must assess how many backlog items can realistically be achieved in a sprint. Consider why progress was less or more than anticipated during the sprint retrospective.

**Sprint Burndown: How It Is Calculated**

The **Sprint Burndown** graph plots the ideal hours remaining based on the estimated number for hours for a sprint. It uses planned effort from the project plan and captures the actual hours from the progress reported by your team members.

**Settings That Affect Sprint Burndown Graph**
The graph requires the product backlogs, sprints, and story points to be identified and entered in the product requirements. Actual hours are sourced from the progress entered by team members on a daily basis.

**How Sprint Burndown Is Calculated**
The **Sprint Burndown** graph calculates the ideal and actual hours remaining at the end of a sprint. Ideal and actual hours remaining are calculated as follows.

actual hours remaining = planned hours - actual reported hours
ideal hours remaining = planned hours - ideal hours consumed

**Process Runs Daily**
Your team members enter progress at the end of each day. The process of capturing the hours entered runs at the end of the day and the graph is updated based on the latest information.
Process Runs On Request
Your team member did not enter progress for certain days. You can run the Capture Progress Data process for the days that progress was not reported and ensure the graph is showing the most updated information.

Analyzing Sprint Burndown: Examples

Use sprint burndown to evaluate if the number of backlog items achievable in a sprint is accurate. Review team progress during product development. Observe the deviation between the ideal and actual hours remaining.

Important
Before you analyze the graph, you must ensure that team members have reported progress regularly on project tasks. If team members missed reporting progress on certain days, you can capture progress for those days using the Capture Progress Data and Refresh Graph option in the Actions menu.

The following example scenarios are based on the story points assigned to backlog items at the start of the sprint.

Actual Hours are Greater Than Ideal Hours
The team consumes more hours on tasks in the sprint than originally planned. This figure shows that the actual hours remaining line is above the ideal hours remaining line, and the distance between the two lines is increasing. This means that you over estimated the backlog items the team can achieve in a sprint, and some of the backlog items planned for the sprint will not be completed. Any backlog items not complete in the current sprint are moved to the next sprint and prioritized with the backlog items in the next sprint.

Some possible reasons why the hours consumed is greater than the ideal hours:
- Over estimation of planned backlog items for the sprint based on complexity.
- Unknown issues that took time to resolve.
- Dependencies on deliverables of other teams.
**Actual Hours are Ideal**

The team consumes the expected number of hours on tasks in the sprint.

This figure shows that the actual hours remaining line overlaps the ideal hours remaining line. This indicates that your team is able to complete the planned backlog items on the last day of the sprint and the planned hours are reduced to zero.

The possible reason why the hours consumed are ideal is that you accurately assessed backlog item complexity and correctly estimated effort to complete the backlog.

**Actual Hours are Less Than Ideal Hours**

The team consumes less hours on tasks in the sprint than originally planned.

This figure shows that the actual hours remaining line is below the ideal hours remaining line, and the distance between the two lines is increasing. This means that the team will complete the planned backlog items for the sprint early and they can work with the product owner to identify the next most important backlog item from the product backlog.
The possible reason why hours consumed are less than ideal is that you underestimated planned backlog item complexity.

**Project Resource Allocation: How It Is Calculated**

You can monitor resource capacity and work allocated to resources on your projects for the next 13 weeks. Compare the work allocation of your resources with their allocation on other projects to understand why certain resources are overallocated or underallocated. Drill down to modify the allocation percentage for your resources and plan the distribution of work on your projects. Gain visibility into the weekly work allocation of resources compared to their capacity. View resource manager name, project role, allocation hours, allocation percentage, and capacity hours of your project resources.

**Settings That Affect Resource Allocation**

Values for project assignments and allocation percentage for resources come from the Manage Project Resources page.

You can also set the acceptable threshold percentage range for the workweek thresholds that determine which values are indicated as overallocated, underallocated, or normally allocated. Optionally, select the colors the application uses to indicate allocation.

**How Resource Allocation Is Calculated**

The application calculates the resource allocation hours based on the capacity hours and allocation percentage.

**Calculating Resource Allocation**

Calculate resource allocation using the following formula.

\[\text{project allocation hours} = \text{allocation percentage} \times \text{capacity hours}\]
The following example shows the project allocation for a week is calculated.

<table>
<thead>
<tr>
<th>Capacity Hours</th>
<th>Project Allocation Hours</th>
<th>Allocation Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>40</td>
<td>32</td>
<td>80</td>
</tr>
<tr>
<td>40</td>
<td>20</td>
<td>50</td>
</tr>
</tbody>
</table>

**Reviewing Task Exceptions: Explained**

View overdue tasks and the number of exceptions in each of your projects. Drill down to view tasks modified by team members, review the impact on the project schedule, and take action to accept or reject the changes. Resolve exceptions by adjusting dates, resource assignments, effort, and allocation of resources.

Review the exception graphs of all your projects or switch to a table view.

If the Task Exceptions region displays no information, possible reasons are:

- You are currently not a project manager of any project.
- Your projects have not started.
- All your projects are complete.

**Review Exception Graph**

View the number of exceptions of each type including delayed start date, delayed finish date, and increase in planned hours. Drill down to review project progress and understand the reasons why certain tasks have exceptions in the project plan.

**Review Exception Table**

View exceptions in a table showing the project name, exception type, and the number of exceptions of a certain type in a project. Review the number of overdue exceptions such as delayed start date and delayed finish date. Drill down from the exception count to review project progress and assess the impact of the exceptions on the project schedule.

**FAQs for Manage Project Performance**

**What's the difference between target percent complete and actual percent complete?**

Percentage of work that your project team is expected to complete as-of a certain date is the target percent complete.
Percentage of work that your team actually completes as-of a certain date is the actual percent complete.

How can I view a team member's allocation to my projects?

Use the Project Resources region on the Project Manager Dashboard to view the resources allocated to your projects. View all projects that your resources are allocated including projects that you do not manage.

What happens if resource rates are missing?

The information that appears on the project allocation and assignment bars is inaccurate. The application does not calculate amounts for tasks that are assigned to resources with no labor cost and bill rates. You must go to the Manage Project Resources page and add cost and bill rates for resources in your project.

Where do the project allocation and task assigned amounts come from?

The application calculates project amounts using cost and bill rates that are assigned to project labor resources and expense amounts that are allocated to expense resources. Rolled up task assigned amounts in the Manage Project Plan page appear in the Project Amounts region. You can filter the graph to compare allocated and assigned amounts for labor cost, labor bill amount, expense amount, and the total cost.

Why are resources with 40 hours of allocated work shown as overallocated?

The acceptable threshold you set is less than 100 percent. The application indicates overallocated and underallocated resources based on the acceptable threshold range you set. Verify the acceptable threshold range outside which resources are overallocated or underallocated.

FAQs for Agile Graphs

Why did the ideal remaining hours change in the middle of the sprint?

You or your team member modified, added, or deleted task planned hours due to scope changes.
What happens if I capture progress data?

The Capture Progress Data and Refresh Graph action captures the latest planned hours and actual hours reported by team members, and calculates the remaining hours for project tasks for a particular day. The remaining hours are stored by the application for historical records. Project managers use this action to capture critical progress data entered after the scheduled process completes. The ideal and actual hours remaining is recalculated and the Sprint Burndown graph is refreshed to display the updated information.

When is the Capture Progress Data and Refresh Graph process triggered?

You can schedule the process to run daily. If a team member wants to report progress after the daily capture is taken, you can also run it from the Sprint Burndown graph region.

What’s sprint velocity?

Rate at which story points are achieved in sprints. Use sprint velocity to predict how many story points you can achieve in coming sprints.

For example, you observe that your product development team is able to complete on average 20 story points in a sprint. That makes the sprint velocity of your team 20. Assuming that the total backlog story points of your product is 200, you can predict that all product backlog items will be completed in 10 sprints.

Why can’t I see certain sprints on the Sprint Velocity graph?

Sprints that do not have any story points associated with them do not appear on the Sprint Velocity graph. Such sprints are excluded from sprint velocity calculations.

What’s a story point?

Indicates the relative size of a user story based on its complexity. Use story points to measure the effort required to implement a story in an Agile development process.

You consider story points to be achieved when backlog items for your product are complete. Story points are assigned using a number series that reflect the relative size of one backlog item as compared to another. Relative sizing
and increasing numbers are used to indicate complexity of a backlog item. A commonly used number series in the Agile development process is 0, 1/2, 1, 2, 3, 5, 8, 13, 20, 40, 100. You must assign a lower story point number to a relatively simple backlog item when compared to a complex backlog item. For example, you create two product development backlog items and estimate the number of story points needed to complete each item. The table shows two product development backlog items and the story points assigned to each backlog item. Backlog Item 1 is simpler and requires only 2 story points, but backlog item 2 is complex and requires 13 story points.

<table>
<thead>
<tr>
<th>Requirement Number</th>
<th>Requirement Name</th>
<th>Story Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Change default sort order of project list table</td>
<td>2</td>
</tr>
<tr>
<td>2</td>
<td>Create Project Expenses region</td>
<td>13</td>
</tr>
</tbody>
</table>

Backlog items with lower story point numbers assigned are expected to be completed faster than backlog items with greater number of story points.

**What's total backlog story point?**

The total number of story points that must be completed for the completion of product development.

For example, your product has 10 backlog items. You assign story points to each backlog item based on the complexity. The sum of all the story points on your product backlog gives you the total number of story points that your team must achieve to complete the development of the product.
Manage Project Issues

Project Issues: Explained

Use project issues to record, manage, and resolve concerns related to your work.

To manage issues, you can do the following:

- Create issues and assign actions required to resolve them.
- Search for issues using the global text search at the project level. As a team member or issue owner, search for and view issue details.
- As a project manager, view issue analytics.
- Resolve action items and close issues.

**Important**

You must be a project enterprise labor resource to create, update, or own issues or action items.

The following sections describe how you create, manage, and locate issues.

**Creating and Managing Issues**

The following table describes the important attributes you enter and update when managing issues.

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Issue type</td>
<td>Use to classify and report your issues. Depending on application setup, you can create your own issue types. Otherwise, you must use predefined values.</td>
</tr>
<tr>
<td>Priority</td>
<td>Assign a high, medium, or low priority depending on the anticipated impact on work.</td>
</tr>
<tr>
<td>Status</td>
<td>Use to define the status of the issue within the lifecycle. Valid statuses are New, Working, and Closed.</td>
</tr>
<tr>
<td>Action items</td>
<td>Create action items for new or in progress issues and assign them to project team members or other interested parties.</td>
</tr>
</tbody>
</table>

**Note**

You must complete all action items associated with an issue before closing the issue.
Viewing Issues

The following table describes the issues that are viewable on the Project Management and Team Member dashboards.

<table>
<thead>
<tr>
<th>Dashboard</th>
<th>Issues Available</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Management</td>
<td>All issues on projects managed by the project manager. For other projects, issues that are owned or created by the project manager, or on which the project manager has action items.</td>
</tr>
<tr>
<td>Team Member</td>
<td>Issues that are owned or created by the team member, on which the team member has action items.</td>
</tr>
</tbody>
</table>

Project Issue Notifications: Explained

Send notifications when creating, updating, closing, or reopening issues and issue action items.

The aspects of project issue notifications described here are:

- Notification options
- Actions requiring notification

Notification Options

Use the e-mail notification settings that are available on the My Profile region on the Team Member and Project Manager dashboards to determine the notifications you receive. Set notifications separately for projects you work on and projects you manage.

Actions Requiring Notification

The following table lists the recipients of the notifications based on action.

<table>
<thead>
<tr>
<th>Action</th>
<th>Who Receives the Notification</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creating or updating issues</td>
<td>• Issue owner &lt;br&gt; • Project manager, if the issue is associated with a project &lt;br&gt; • Issue creator, if the issue is reassigned &lt;br&gt; • Previous owner, if ownership for the issue is changed</td>
</tr>
<tr>
<td>Closing issues</td>
<td>• Issue owner &lt;br&gt; • Project manager, if the issue is associated with a project &lt;br&gt; • Issue creator, if the issue is reassigned</td>
</tr>
</tbody>
</table>

10-2 Oracle Project Portfolio Management Cloud Using Project Execution Management
Reopening issues

- Issue owner
- Project manager, if the issue is associated with a project
- Issue creator, if the issue is reassigned

Creating or updating action items

- Action item owner
- Project manager, if the issue is associated with a project

Closing action items

- Action item owner
- Issue owner
- Project manager, if the issue is associated with a project

Note
The project manager receives a daily digest of all the issues for the projects he manages depending on the notification settings.

FAQs for Manage Project Issues

What happens if I filter issues by other projects?

The filter displays issues for projects, to which users do not have direct access but has a role in the issue. The user either is the issue owner or has an action item for the issue.

Can I reopen a closed issue?

Yes. The default status of reopened issues is In Progress. Optionally, change the status and enter the reason for reopening the issue.

What's an issue action item?

A task assigned to a person that must be performed in a given time frame to resolve an issue.

What's the difference between an action item, task, issue, and deliverable?

Tasks are activities that are assigned to a resource for project completion.
Action items are tasks that are defined for issues that facilitates issue resolution.

Issues are concerns, problems, or outstanding questions that prevents a user from completing a task.

Deliverables are the output that must be produced to complete a task or project.

**How do I close an issue?**

You must close all related action items before you close an issue. Also, you must enter date and reason for closing an issue.

**What happens when I duplicate an issue?**

All information including action items is duplicated. The status of the issue is set to New. The status of associated action items is set to Not Started.

**Who can I assign issues or action items to?**

You can assign issues or action items to any project enterprise labor resource.
Manage Resource Supply

Manage Project Resources: Overview

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

The following diagram illustrates the flow of business activities in the Manage Project Resources business process.

The following table provides a high level summary of the tasks in each activity in the Manage Project Resources business process.
<table>
<thead>
<tr>
<th>Activity</th>
<th>Summary of Tasks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage Resource Demand</td>
<td>Submit requests for resources to work on project assignments. Specify request details including the requested dates, qualifications and proficiencies, keywords, and the project role. Automatically notify the resource manager of open project resource requests. Cancel and withdraw project resource requests. Monitor open project resource requests to ensure that the requests are fulfilled in a timely manner.</td>
</tr>
<tr>
<td>Manage Resource Supply</td>
<td>Establish a supply of project enterprise labor resources and manage the availability and staffing of the resources. Maintain key resource information for each resource, including the resource calendar, cost and bill rates, resume attachment, and resource pool membership.</td>
</tr>
<tr>
<td>Evaluate and Assign Resources</td>
<td>Receive open project resource requests and find resources to assign to projects. Search for resources from resource pools to fulfill the requests. Evaluate the suitability of resources to fulfill a request based on how each resource meets the requested qualifications and proficiencies. Evaluate the available capacity of resources to fulfill a request over the requested date range. Filter the results based on qualifications, available capacity, location, and project role. Compare a selected subset of resources in detail. Review project assignments and nonproject events for resources. Add prospective candidates to a shortlist. Modify search criteria and review results. Propose a resource to fulfill a request and automatically notify the project manager to review the resource for approval.</td>
</tr>
<tr>
<td>Maintain Resource Assignments</td>
<td>Review assignments for resources and projects. Add descriptive assignment information. Cancel project assignments. Change project assignment dates. Submit project assignment cancellations and date changes for review and approval to the project manager.</td>
</tr>
<tr>
<td>Manage Resource Utilization and Analytics</td>
<td>Navigate the resource pool hierarchy to view summarized utilization information by resource pool. Drill down to review detailed utilization information for a resource pool and pool members. Compare projected and target utilization percentages over a selected display range and analyze the details about resource project assignments and nonproject events. Import resource actual hours and compare actual and target utilization percentages over a selected display range. Track resources that are currently unassigned or have assignments that end soon. Review open project resource requests. Create reports to analyze resource supply, demand, and assignments.</td>
</tr>
</tbody>
</table>

Select **Navigator - Project Resources** to manage resource supply and demand, evaluate and assign resources, and maintain resource assignments. Select **Navigator - Resource Manager Dashboard** to manage resource utilization and analytics.
Project Resource Search Index: How It Is Maintained

The Maintain Project Resource Search Index job set consists of processes that facilitate efficient and rapid searching for qualified resources to fulfill project resource requests.

The job set maintains the search index of project resource qualifications, qualification proficiencies, and filters. The application uses the index to calculate resource Qualification scores and filter counts during the search for resources, and to display resource details.

These actions depend on indexed resource data:

- Initiating a search for resources for a project resource request
- Modifying search criteria on the Search and Evaluate Resources page and conducting a new search
- Modifying the resource pools that the search uses
- Increasing the resource match thresholds for the Qualification or Available Capacity scores
- Selecting new search filters, such as competencies, languages, locations, and project roles
- Displaying resource details

How the Project Resource Search Index Is Maintained

You can run or schedule the Maintain Project Resource Search Index job set on the Scheduled Processes page. In addition, the Maintain Project Resource Search Index job set starts automatically after you run the Maintain Project Enterprise Labor Resources process to create resources or remove resource availability for staffing.

The Maintain Project Resource Search Index job set starts the following processes to update the search index.

- Maintain Project Resource Qualification Index process
  Maintains the index of active qualifications and qualification proficiencies for project resources. A qualification is indexed if the date the process runs is within the effective dates of the qualification. The index is used to calculate project resource qualification scores when searching for qualified resources to fulfill a project resource request.

- Maintain Project Resource Qualification Filters process
  Maintains the qualification filters and count of resources that have each qualification.

- Maintain Project Resource Single Attribute Filters process
Maintains the filters for attributes for which a resource can have only a single value, such as location and project role. Maintains the count of resources that have each attribute.

Run the Maintain Project Resource Search Index job set often enough to account for the following changes:

- Changes in qualifications and proficiencies for an HCM person who is associated with a project enterprise labor resource.
- Enabling a resource's eligibility to fulfill project resource requests, which is indicated on the resource profile with the option to manage the resource availability and project staffing.
- New or terminated resources.

For example, assume that you require resources to update their qualifications when they complete a project, and the average project duration is two weeks. You can schedule the Maintain Project Resource Search Index job set to run once every two weeks to update the index with the latest resource qualification changes.

**Important**

Resource managers cannot search for resources or view resource details if the search index is not available. The search index will not be available if the Maintain Project Resource Search Index process fails, or during the time that the process is running.

**FAQs for Manage Resource Supply**

**What happens if project resource request dates are outside the resource calendar effective dates?**

The application cannot calculate a resource's available capacity if the project resource request dates are outside of the resource calendar effective dates. The resource will have no Available Capacity score.

**Can I change the default value for the resource calendar that appears when I create a project enterprise labor resource?**

Yes. On the Define Project Management Implementation Options page, you select a default resource calendar that the application automatically assigns to new project enterprise labor resources. If the default resource calendar does not meet the requirements for a specific project enterprise labor resource, then you can assign a different calendar to the resource.
Who can be a member of a resource pool?

To be a member of a resource pool, you must be a managed project enterprise labor resource whose availability and staffing are managed in Oracle Fusion Project Resource Management.

A resource who was previously eligible for staffing and fulfilled a project resource request will remain a member of the pool even if the Manage Resource Availability and Staffing option is subsequently disabled for the resource.

What's the difference between a project enterprise labor resource and a managed project enterprise labor resource?

A project enterprise labor resource is a resource that you can assign to multiple projects.

A managed project enterprise labor resource is a project enterprise resource who is associated with a named person in HCM, and whose availability and staffing are managed in Oracle Fusion Project Resource Management. You use managed project enterprise labor resources to fulfill project resource requests.
Import Project Resource Requests

The Import Project Resource Requests process creates project resource requests based on data from third-party applications that you load into the Project Resource Requests Interface table.

Once in the interface table, the request details are validated and processed by the Import Project Resource Requests process and any exceptions are reported in the output of that process.

Run the Import Project Resource Requests process from the Scheduled Processes Overview page.

Before running this process, you must:

- Load import data to the PJR_RES_REQ_INTERFACE table. For more information on the interface table, see Oracle Enterprise Repository for Oracle Fusion Applications.
  
  You can load data to interface tables using predefined templates and the Load Interface File for Import scheduled process, which are both part of the External Data Integration Services for Oracle Cloud feature. For more information, see the Documentation tab for the Load Interface File for Import process in Oracle Enterprise Repository for Oracle Fusion Applications.

Parameters

Project Resource Requests to Import

Determines whether the import process imports all requests, requests with projects, or requests without projects. The default value is All Requests.

Project

Name of the project for which a resource is requested.

Request Staffing Owner

Name of the project enterprise labor resource who is responsible for finding a resource to fulfill the request.
Execution Report

The Import Project Resource Requests Execution report summarizes the number of processed, accepted, and rejected items encountered when you imported the project resource requests. The report contains details for all requests that generated errors during the import process.

Review the error message details for each project resource request and fix the issues. Load the data that you fixed in the CSV file into the interface table again and resubmit the Import Project Resource Requests process.

FAQs for Manage Resource Demand

Can I specify a resource for a project resource request?

A resource manager can specify a resource on a project resource request without conducting a search. A project manager can use the Special Instructions field on the request to suggest a specific resource.

Can I withdraw a project resource request to submit at a later date?

A project manager can withdraw project resource requests that are in Open status. When you withdraw a request, the application changes the request status to Draft. You can enter comments about the withdrawal in the Special Instructions field on the project resource request.

Project resource requests that are in Draft status, including withdrawn requests, are not included in projected utilization calculations.

Are project resource request dates affected if I change the project on a request?

No. When you change the project on an open project resource request, the application does not automatically update the request start and finish dates. You can adjust the request dates to match the new project dates.

What happens if I cancel a project resource request?

When a project manager or resource manager cancels a project resource request, the application:

- Prompts for a cancellation reason
- Records the user name with the cancellation date and reason
• Changes the request status to Canceled
• Retains the request for viewing

If you select more than one project resource request to cancel, the cancellation applies to all selected requests. You cannot reopen a canceled request.

**What happens if I duplicate a project resource request?**

The application copies the source project resource request information to a new request except for the request name, assigned or named resource, resources on the shortlist, staffing remarks, target cost and bill rates, and attachments. The new request is created in Draft status.

**When are project resource requests that project managers create visible to resource managers?**

A project manager must submit a project resource request for the request to be visible in the Resource Management work area. Requests that you create in the Project Management work area that are in Draft status are not visible in the Resource Management work area.

**When is a named resource on a project resource request visible to project managers in the Project Management work area?**

A project resource request must be in a status of Resource Proposed, Fulfilled, or Pending Adjustment for a proposed resource to be visible on the request in the Project Management work area.

A resource name that you enter on a project resource request in the Resource Management work area is not visible in the Project Management work area if the request is in an Open status.
Prerequisites for Searching for Suitable Resources: Explained

Before you can evaluate the suitability of resources to fulfill project resource requests based on how each resource meets the requested qualifications and date range, prerequisite steps must be completed.

The following objects must be defined before you begin searching for resources.

- Project and Resource Calendars
- Managed Project Enterprise Labor Resources
- Resource Qualifications
- Resource Pool Memberships
- Resource Search Index

**Project and Resource Calendars**

Projects and resources must have active calendars for the application to determine the standard working days and the total number of working hours per day. The application uses the project calendar and resource calendar to calculate the available capacity of a resource for a new project assignment. The Available Capacity score is the percentage of time that a resource is available to work on a project assignment during the requested time period.

**Note**

The effective dates of the project and resource calendars must span the date range of the project resource request for the application to calculate Available Capacity scores.

Setting up calendars includes setting up project shifts, workday patterns, schedules, and schedule exceptions. Calendars that you set up must have a schedule type of Elapsed with one workday pattern for 7 days and one project shift.
You can set up calendars to assign to projects and resources, or use the predefined calendar with eight hours per day and five days per week with no holidays.

**Managed Project Enterprise Labor Resources**

Only managed project enterprise labor resources are eligible to fulfill project resource requests. To create a managed project enterprise labor resource, associate the resource with an HCM person and enable the option to manage the resource’s availability and staffing in Oracle Fusion Project Resource Management.

You can create resources in a batch based on a set of resource creation conditions, or manually create resources one at a time.

**Resource Qualifications**

Define qualification requirements for a project assignment by entering values on the project resource request for competencies, languages, degrees, honors and awards, licenses and certifications, and memberships. You can also specify the level of expertise that a project assignment requires for a specific competency or language. Specify keywords on the request that represent general qualification requirements.

Resources enter their qualifications and proficiency levels on individual resource profiles. A Qualification score is based on whether a resource has the requested qualifications and proficiency levels, and the number of occurrences of a keyword in the resource’s profile compared to the resources in the search results.

**Resource Pool Memberships**

All managed project enterprise labor resources are members of a resource pool. When you search for resources to fulfill a project resource request, you select one or more resource pools to focus the search to specific groups of resources.

The predefined resource pools are named All Resources, which contains all resource pools and resources, and Resources with No Pool Membership, which contains resources that do not belong to a resource pool. New resources are assigned to the Resources with No Pool Membership pool by default. You can move resources to other resource pools that you define. For example, you can set up resource pools in logical groups, such as by location, operation, or functional area.

**Resource Search Index**

The Maintain Project Resource Search Index job set maintains the search index of project resource qualifications, qualification proficiencies, and filters. The application uses the index to calculate resource Qualification scores and filter counts during the search for resources, and to display resource details.

You must run the Maintain Project Resource Search Index job set often enough to account for changes in resource qualifications and proficiencies, changes in a resource’s eligibility to fulfill project resource requests, and new or terminated resources.
Resource Schedule: Explained

Oracle Fusion Project Resource Management provides a schedule to manage the project and nonproject commitments for each managed project enterprise labor resource. Project assignments are added to the schedule when a resource is assigned to a project by fulfilling a project resource request. Nonproject events are added to the schedule when you create training, paid time off, or other events in Oracle Fusion Project Management.

Resource managers use the resource schedule to determine if the resource has scheduling conflicts during the time frame on a project resource request. Information that is stored on a resource schedule is used to determine the Available Capacity score when you search and evaluate resources to fulfill project resource requests.

Note

Weeks in the resource schedule begin on Sunday and end on Saturday.

Use resource schedules in the following work areas:

- Search and Evaluate Resources Page, Resource Cards View
- Search and Evaluate Resources page, Available Capacity View
- Compare Resources page, Resource Schedule Region
- Resource Details page, Resource Schedule Region

Search and Evaluate Resources Page, Resource Cards View

The resource card shows a resource’s total weekly available capacity for 5 weeks beginning with the first week of the project resource request.

The total weekly available capacity is calculated as follows:

- For any week that has requested hours, a resource’s availability is the number of hours that the resource is available divided by the number of hours requested for that week.
- If the start date for a project resource request is in the middle of a week, the application calculates a resource’s availability for the first week as the number of hours that the resource is available for the entire week divided by the number of hours requested in that week.
- If the finish date for a project resource request is in the middle of a week, the application calculates a resource’s availability for the last week as the number of hours that the resource is available for the entire week divided by the number of hours requested in that week.

The total weekly available capacity is color-coded on the resource card as follows:

- Green indicates that the resource has a total available capacity for 80% or more for the week.
- Yellow indicates that the resource is available between 50% and 79% of the week.
• Red indicates that the resource is available less than 50% of the week.

**Search and Evaluate Resources page, Available Capacity View**

View the schedule of project assignments and nonproject events and the Available Capacity score for resources in the search results.

**Note**

Project assignments must be in an Assigned status to appear on the resource schedule.

You can adjust the calendar time scale and scroll to 1 month prior to the requested start date and 3 months after the requested finish date. This helps you determine whether a resource is available in the expanded time frame.

View additional details about the resource and scheduled commitments as follows:

• Select a resource to view the resource’s primary project role, resource pool, location, job title, and the Overall and Qualification scores.

• Select a project assignment to view the assignment dates, project, project role, and project manager.

• Select a nonproject event to view the event category, dates, name, duration, and event description.

**Compare Resources page, Resource Schedule Region**

The Resource Schedule region on the Compare Resource page has the same functionality as the Search and Evaluate Resources page, Available capacity view. However, the schedule on the Compare Resources page shows only the resources that you selected on the Search and Evaluate Resources page to compare. This enables you to focus your evaluation on just the selected resources.

**Resource Details page, Resource Schedule Region**

The Resource Schedule region on the Resource Details page has the same functionality as the Search and Evaluate Resources page, Available capacity view. However, the Resource Details page shows the schedule for a specific resource.

**Project Resource Request Statuses: Explained**

Statues track the lifecycle of a project resource request and restrict available actions.

The project resource request type determines the available statuses for a request. The project resource request types are:

• New Resource

• Assignment Date Change

• Assignment Cancellation
The following figure shows an example of a project resource request status progression for a request type of New Resource.

This table describes the statuses for a project resource request with a New Resource request type, and lists the permitted actions for each status.

<table>
<thead>
<tr>
<th>Request Status</th>
<th>Description</th>
<th>Available Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Draft</td>
<td>Initial status of a request or the status after the requester withdraws the request.</td>
<td>• Edit request&lt;br&gt;• Submit request&lt;br&gt;• Duplicate request&lt;br&gt;• Delete request&lt;br&gt;• Cancel request</td>
</tr>
<tr>
<td>Open</td>
<td>Status after the requester submits the request for fulfillment or rejects a proposed resource for the request. Indicates that the request is ready for evaluation of resources to fulfill the request.</td>
<td>• Edit request&lt;br&gt;• Search and evaluate resources&lt;br&gt;• Assign resource&lt;br&gt;You must select a resource for the request to perform this action.&lt;br&gt;• Delete request&lt;br&gt;• Cancel request&lt;br&gt;• Withdraw request&lt;br&gt;• Duplicate request</td>
</tr>
</tbody>
</table>
Resource Proposed | Status after the staffing owner submits a resource for approval to fulfill the request. | • Approve resource  
This action is available for the requester in the Project Management work area in the context of the project.  
• Reject resource  
This action is available for the requester in the Project Management work area in the context of the project.  
• Duplicate request

Fulfilled | Status after the requester approves the resource for the assignment, or the staffing owner with approval privileges submits and approves the resource for the assignment. | Duplicate request

Canceled | Status after the requester or staffing owner cancels the request. | • Duplicate request  
• Delete request

### Statuses for a Request Type of Assignment Date Change

This table describes the statuses for a project resource request with an Assignment Date Change request type, and lists the permitted actions for each status.

<table>
<thead>
<tr>
<th>Request Status</th>
<th>Description</th>
<th>Available Actions</th>
</tr>
</thead>
</table>
| Pending Adjustment     | Status after a resource manager initiates an assignment date change in Oracle Fusion Project Resource Management, or a project manager initiates an assignment date change in Oracle Fusion Project Management.  
The application creates a project resource request with a status of Pending Adjustment.  
The adjustment type on the assignment is set to Change Assignment Dates, and the assignment status changes to Pending Adjustment. | • Approve adjustment  
• Reject adjustment  
• Edit adjustment comments |

Note

The action to cancel an adjustment is on the assignment.
### Evaluate and Assign Resources

#### Statuses for a Request Type of Assignment Date Change

This table describes the statuses for a project resource request with an Assignment Date Change request type, and lists the permitted actions for each status.

<table>
<thead>
<tr>
<th>Request Status</th>
<th>Description</th>
<th>Available Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approved Adjustment</td>
<td>Status after a project manager approves an assignment date change that a resource manager initiated, or a resource manager approves an assignment date change that a project manager initiated. The assignment status changes to Assigned.</td>
<td>None</td>
</tr>
<tr>
<td>Canceled Adjustment</td>
<td>The project manager or resource manager canceled the assignment adjustment. The assignment status reverts to Assigned.</td>
<td>None</td>
</tr>
<tr>
<td>Rejected Adjustment</td>
<td>The project manager or resource manager rejected the assignment adjustment. The assignment status reverts to Assigned.</td>
<td>None</td>
</tr>
</tbody>
</table>

### Note

You cannot delete, duplicate, or cancel project resource requests with a request type of Assignment Date Change.

### Statuses for a Request Type of Assignment Cancellation

This table describes the statuses for a project resource request with an Assignment Cancellation request type, and lists the permitted actions for each status.

<table>
<thead>
<tr>
<th>Request Status</th>
<th>Description</th>
<th>Available Actions</th>
</tr>
</thead>
</table>
| Pending Adjustment   | Status after a resource manager initiates an assignment cancellation in Oracle Fusion Project Resource Management. The application creates a project resource request with a status of Pending Adjustment. The adjustment type on the assignment is set to Cancel Assignment, and the assignment status changes to Pending Adjustment. | • Approve adjustment  
• Reject adjustment  
• Edit adjustment comments |

### Note

The action to cancel an adjustment is on the assignment.
<table>
<thead>
<tr>
<th>Approved Adjustment</th>
<th>The following two scenarios result in a request with an Approved Adjustment status:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1. A project manager initiates the assignment cancellation in Oracle Fusion Project Management.</td>
</tr>
<tr>
<td></td>
<td>The application creates a project resource request with a status of Approved Adjustment. The assignment status changes to Canceled.</td>
</tr>
<tr>
<td></td>
<td>2. A project manager approves a request that is in a Pending Adjustment status.</td>
</tr>
<tr>
<td></td>
<td>The assignment status changes to Canceled.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Canceled Adjustment</th>
<th>The resource manager canceled the assignment adjustment.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>The assignment status reverts to Assigned.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Rejected Adjustment</th>
<th>The project manager rejected the assignment adjustment.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>The assignment status reverts to Assigned.</td>
</tr>
</tbody>
</table>

**None**

**Note**
You cannot delete, duplicate, or cancel project resource requests with a request type of Assignment Cancellation.

### Project Resource Management Workflow Notifications: Explained

Workflow notifications perform the following actions in Oracle Fusion Project Resource Management:

- Notify the staffing owner when a requester submits a project resource request for fulfillment. This notification is for information only.
- Notify the requester of a project resource request when a resource is proposed to fulfill the assignment. The requester must approve or reject the proposed resource. The workflow notification process starts when the staffing owner assigns a resource to fulfill a project resource request.

The requester can approve or reject the proposed resource by using any of these methods:

- **Approve** or **Reject** buttons in the notification in the Worklist: Notifications and Approvals region
- **Approve** or **Reject** links in the e-mail notification
- **Actions** menu on the project resource request
• Notify the staffing owner when the requester approves or rejects the proposed resource for the assignment. This notification is for information only.

• Notify the resource pool owner when a resource is no longer eligible to fulfill project resource requests. If you deselect the option to manage resource availability and staffing for a project enterprise labor resource, then the resource is no longer managed in Oracle Fusion Project Resource Management. The application sends a notification to the owner of the resource pool to which the resource belongs. The notification is for information only.

Project Resource Management Notification Settings

You must select the Notify requester when a resource is proposed to fulfill a project resource request option on the Manage Project Resource Management Implementation Options page to enable workflow notifications when a resource is proposed, approved, or rejected for a project resource request.

Note

If you do not enable the workflow implementation option, then the requester can approve or reject the resource on the project resource request.

Workflow notifications are automatically enabled in the application to notify a resource pool owner when a resource is no longer eligible to fulfill project resource requests. No implementation setup is required for this type of workflow.

Project Resource Request Workflow Notification Example

The following figure shows an example project resource request flow that uses workflow notifications.
In this example, a project manager submits a request for a new project resource. The resource manager searches for qualified, available candidates and finds a resource that is a good match for the project. The resource manager specifies the resource name on the request and submits the request for the project manager to approve the proposed resource. The project manager receives an e-mail notification requesting approval of the resource, and approves the resource. This action fulfills the project resource request, assigns the resource to the project, and launches an e-mail notification to inform the resource manager that the resource is approved.

**Review Resource Suitability for Position**

**Resource Available Capacity Score: How It Is Calculated**

The Resource Available Capacity Score is a measure of a resource's suitability to fulfill a project resource request. The score is the percentage of time that a resource is available to work on a project assignment during the requested time period.

**Calendars Used to Calculate Resource Available Capacity Scores**

The application uses the resource calendar, and either the project calendar or the hours per day specified on the project resource request, to calculate the available
capacity of a resource for a new project assignment. On the project resource request you can select the project calendar to determine the requested hours per day, or specify the number of hours per day if they are different from the project calendar. The resource calendar determines the hours that a resource is available to work each day.

The resource calendar is a schedule of a resource’s daily working hours. The number of hours that a resource is available to fulfill a project resource request is the working hours for the day minus the number of hours that the resource is committed to project assignments and nonproject events for that day. Examples of nonproject events are paid time off and training.

Available capacity is calculated only for active project and resource calendars with a schedule type of Elapsed, one workday pattern for 7 days, and one project shift. Alternatively, a predefined standard calendar is available for use as a resource or project calendar.

**How Resource Available Capacity Score Is Calculated**

The application calculates a Resource Available Capacity Score as follows.

1. For the requested time period on a project resource request, determine the working days and number of hours for each day based on either the project calendar or the number of hours per day specified on the project resource request.

2. Determine the days and number of hours during the requested time period that the resource is committed to project assignments or nonproject events. These are hours that the resource is not available to fulfill the request.

3. For each work day in the requested time period, divide the number of available hours for the resource by the number of requested hours in the day, and multiply the result by 100. This determines the resource available capacity for each day, expressed as a percentage.

4. Divide the sum of the available capacity for each day by the number of days in the requested time period. The result is the Resource Available Capacity Score for the project resource request.

**Note**

The maximum available capacity is 100%, even if the number of available hours for a resource exceeds the number of requested hours for the day. For example, if a resource is available to work 10 hours a day and the request is for 8 hours a day, the available capacity for the resource is 100%.

**Resource Qualification Score: How It Is Calculated**

The Resource Qualification score is a measure of a resource’s suitability to fulfill a project resource request. You define qualification requirements for a project resource request by entering values for structured content types such as competencies, degrees, and language skills. In addition, you can specify keywords on the request that represent general qualification requirements.
The Resource Qualification score is the sum of each individual competency score divided by the total number of competencies on the request.

**Objects that Impact the Resource Qualification Score**

Following are the primary objects that impact the Resource Qualification score calculation.

- **Structured qualifications**
  Structured qualifications are attributes of a resource, such as a competencies, languages, degrees, honors and awards, licenses and certifications, and memberships. You set up structured qualifications when you set up the workforce in Oracle Fusion HCM.

- **Proficiencies**
  A proficiency can be associated with a competency or language to indicate the level of expertise that a resource has, or that a project assignment requires for the particular qualification.
  Proficiency levels for languages are separate for reading, speaking, and writing skills. For example, you can request a resource with a High proficiency level for speaking Spanish and a Moderate proficiency level for reading or writing the language.

- **Unstructured keywords**
  Unstructured keywords are words or phrases on a project resource request that represent general qualification requirements.

- **Project resource request**
  The project resource request contains structured qualifications and unstructured keywords that identify the attributes that a resource needs for the project assignment.

- **Resource profile**
  Resources maintain a resource profile of their qualifications and proficiencies. A profile represents a resource’s knowledge, skill, and expertise, and is used in the Resource Qualification calculation to determine if the resource has the requested qualifications and proficiencies. The score calculation also takes into account the number of occurrences of an unstructured keyword in the resource’s profile.

**How the Resource Qualification Score Is Calculated**

A Resource Qualification score is made up of two scores: a score for structured content types, such as competencies and language qualifications, and a score for unstructured keywords.

If the qualifications on a project resource request consist only of structured content types, then the Resource Qualification score is the sum of the resource’s individual structured content scores divided by the total number of qualifications.

If the qualifications on a project resource request consist only of unstructured keywords, then the Resource Qualification score is the sum of the resource’s individual keyword scores divided by the total number of qualifications.

If the qualifications on a project resource request consist of both structured content types and unstructured keywords, then the Resource Qualification score
is the average of the structured content score and keyword score. For example, if a resource has a structured content score of 100% and a keyword score of 80%, then the Resource Qualification score is 90% for the project resource request.

There is no Resource Qualification score for project resource requests that have no qualifications.

The following table lists the business rules that determine a resource’s score for a structured qualification on a project resource request.

<table>
<thead>
<tr>
<th>Project Resource Request</th>
<th>Resource Profile</th>
<th>Structured Qualification Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request contains a qualification with a specified proficiency</td>
<td>Resource has the requested qualification with a proficiency that meets the requested proficiency</td>
<td>100%</td>
</tr>
<tr>
<td>Request contains a qualification with a specified proficiency</td>
<td>Resource has the requested qualification with a proficiency that is lower or higher than the requested proficiency</td>
<td>50%</td>
</tr>
<tr>
<td>Request contains a qualification with or without a specified proficiency</td>
<td>Resource does not have the requested qualification</td>
<td>0%</td>
</tr>
<tr>
<td>Request contains a qualification; no proficiency is specified</td>
<td>Resource has the requested qualification</td>
<td>100%</td>
</tr>
</tbody>
</table>

The following table lists the business rules that determine a resource's score for a structured language qualification.

<table>
<thead>
<tr>
<th>Project Resource Request</th>
<th>Resource Profile</th>
<th>Structured Language Qualification Score</th>
</tr>
</thead>
</table>
| Request contains a language qualification with specified proficiencies for reading, speaking, and writing | Resource has the requested language with proficiencies that meet the requested proficiencies for reading, speaking, and writing | Reading 100%  
Speaking 100%  
Writing 100% |

**Note**
Separate scores for reading, speaking, and writing skills are calculated for the Languages content type if you specify proficiency levels for those skills.

| Request contains a language qualification with specified proficiencies for reading and speaking; no proficiency is specified for writing | Resource has the requested language with proficiencies that meet the requested proficiencies for reading and speaking | Reading 100%  
Speaking 100%  |

**Note**
In this scenario, proficiencies are specified for reading and speaking, but not for writing. Therefore, no score is calculated for the writing skill.
To determine a resource’s score for all structured qualifications on a request, the application divides the sum of individual qualification scores by the total number of structured qualifications on the request.

The qualification score for each keyword on a project resource request is a relative value. The application compares the number of occurrences of a keyword in a resource’s profile to the number of keyword occurrences in the profiles of all resources in the search results. The application calculates a resource’s score for an individual keyword by dividing the number of keyword occurrences in the resource’s profile by the highest number of keyword occurrences for any resource in the search results.

The application searches the resource’s profile for keywords that are contained in the resource’s competencies, languages, degrees, honors and awards, licenses and certifications, and memberships. For example, if you enter the keyword Financial on a project resource request, and a resource profile contains a competency of Financial Industry, the application counts it as a keyword occurrence for the resource.

The following table shows examples of resource scores for the keyword Java. Resource A has 10 occurrences of the word Java, which is the highest number of occurrences for all resources in the search results. Therefore, the scores for all resources in the search results are calculated by dividing the number of keyword occurrences in each resource profile by 10.

<table>
<thead>
<tr>
<th>Keyword Occurrences in Resource Profile</th>
<th>Resource A</th>
<th>Resource B</th>
<th>Resource C</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>5</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Keyword Qualification Score Calculation</td>
<td>10 / 10 = 100%</td>
<td>5 / 10 = 50%</td>
<td>0 / 10 = 0%</td>
</tr>
</tbody>
</table>

To determine a resource’s score for all keywords on a request, the application divides the sum of individual keyword scores by the total number of keywords on the request.

**Resource Qualification Score Example**

In this example, a project resource request contains structured content items for a competency, degree, and language, and one keyword. The resource manager
is evaluating the suitability of three resources to fulfill the request based on the Resource Qualification scores. The following table lists the individual qualification scores that make up each Resource Qualification score.

<table>
<thead>
<tr>
<th></th>
<th>Resource A</th>
<th>Resource B</th>
<th>Resource C</th>
</tr>
</thead>
<tbody>
<tr>
<td>Competency: Java</td>
<td>Java, Expert: 100%</td>
<td>0%</td>
<td>Java, Intermediate: 50%</td>
</tr>
<tr>
<td>Proficiency: Expert</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Degree: Master of</td>
<td>Master of Business Administration: 100%</td>
<td>0%</td>
<td>Master of Business Administration: 100%</td>
</tr>
<tr>
<td>Business Administration</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Language: French</td>
<td>French, Speaking Proficiency Intermediate: 100%</td>
<td>French, Speaking Proficiency Beginner: 50%</td>
<td>French, Speaking Proficiency Intermediate: 100%</td>
</tr>
<tr>
<td>Speaking Proficiency:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Intermediate</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Keyword: Financial</td>
<td>10 keyword occurrences / 10 maximum occurrences = 100%</td>
<td>5 / 10 = 50%</td>
<td>0 / 10 = 0%</td>
</tr>
<tr>
<td>Resource</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Qualification Score Calculation**

- **Structured content item score:** 300% / 3 = 100%
- **Keyword score:** 100% / 1 = 100%
- **Resource Qualification score:** (100% + 100%) / 2 = 100%

In this example, Resource A is the most qualified person to fulfill the project resource request.

- **Structured content item score:** 50% / 3 = 17%
- **Keyword score:** 50% / 1 = 50%
- **Resource Qualification score:** (17% + 50%) / 2 = 33.5%

Resource Overall Match Score: How It Is Calculated

The Resource Overall Match score is a measure of a resource’s suitability to fulfill a project resource request. It takes into account the Resource Available Capacity score and Resource Qualification score.

**How the Resource Overall Match Score Is Calculated**

The Resource Overall Match score is the average of the Resource Available Capacity score and Resource Qualification score. For example:

- If a resource has an Available Capacity score of 50% and a Qualification score of 80%, the Resource Overall Match score is (50% + 80%) / 2 = 65%.

- If a resource has an Available Capacity score of 0% and a Qualification score of 80%, the Resource Overall Match score is (0% + 80%) / 2 = 40%.

If no Qualification score exists because the project resource request contains no qualifications or keywords, then the Resource Overall Match score is equal to the Available Capacity score.
If a resource does not have a valid calendar to calculate the Available Capacity score, then the Resource Overall Match score is the average of the Qualification score and 0% for the Available Capacity score.

**Matching Resource to Resource Request: Example**

This example illustrates how a resource manager can search and evaluate qualified resources to fulfill a project resource request.

The search for resources is an iterative process. If you do not find qualified resources to fulfill a project resource request with your initial search on the Search and Evaluate Resources page, then you can change the resource pools, qualification score and availability score thresholds, assignment qualifications, proficiency levels, keywords, and dates, and continue searching.

**Scenario**

A project manager created and submitted a project resource request for a project engineer on an assignment for a strategic client project. You are a resource manager who must find the right resource for the assignment.

The project application administrator for your organization previously set up the project engineer role with default qualifications, proficiency levels, and keywords, which populated the request when the project manager selected the project engineer role.

You search and evaluate resources to determine who is qualified and available to work on the assignment.

**Search for Resources**

You begin by navigating to the Manage Project Resource Requests page and clicking the Search and Evaluate Resources icon for the project resource request. Oracle Fusion Project Resource Management evaluates the resources in the resource pools that you own to find a match between the resource skill profiles in Oracle Fusion HCM and the requested qualifications, proficiency levels, and keywords. The application uses the resource and project calendars to calculate the available capacity of resources for the assignment.

On the Search and Evaluate Resources page, you review the resource cards in the initial search results. Each card shows the qualification, availability, and overall scores for a resource. The calendar bar on the resource card shows the resource’s availability for the first five weeks of the requested date range.

**Analysis**

To evaluate more resources, you click the Manage link in the Resource Pools region to expand the list of resource pools from which you want to search for qualified resources. You use the Resource Match Thresholds region to expand the thresholds to include a wider range of qualification and available capacity scores to bring more resources into the view. To focus the resources in the view, you use the Filters region to select specific competencies, languages, locations, and project roles. Only resources with the selected attributes appear in the view.
You determine that one of the default qualifications for the project engineer role is not a requirement for this particular assignment. You click the **Edit Requested Criteria** button to remove the unnecessary qualification. While in the Edit Requested Criteria window, you also change the requested start date. You review the resources on the Search and Evaluate Resources page based on the revised requested criteria.

During the evaluation, you find some resources that may be a good fit for the assignment. You want to evaluate more resources before making a decision, so you click the **Add to Shortlist** button on the resource cards for the potential candidates to move them to the Resource Shortlist. The shortlist enables you to keep a list of candidates that are a potential fit without having to search for them again. You continue to search for resources by changing the list of resource pools and score thresholds.

To view a side-by-side comparison of the potential candidates, you select the resources in the Resource Shortlist and click the **Compare** icon. On the Compare Resources page you view the qualification and availability scores, how well the resources match each requested qualification and keyword, and the project and nonproject commitments for each resource during the requested date range.

### Select a Resource

You determine which resource is the best fit for the assignment, and click the **Assign Resource** icon to submit the proposed resource to the project manager for approval.

### FAQs for Review Resource Suitability for Position

**Why is there no Availability score for a resource?**

Any of the following circumstances causes a resource to have no Available Capacity score.

- Project resource request dates are outside of the project or resource calendar effective dates.
- Number of working days on the project or resource calendar is zero.
- Project or resource calendar was deleted from the application or is no longer available.
- Project or resource calendar is complex. For example, the calendar does not contain seven days, or it contains more than one pattern and shift.

**What are the color-coded indicators for the qualification, available capacity, and overall scores for a project resource request?**

Color coding of Qualification, Available Capacity, and Overall scores indicates how well a resource matches a project resource request.

- If a score is 80% to 100%, the indicator is green.
- If a score is 50% to 79%, the indicator is yellow.
- If a score is below 50%, the indicator is red.
FAQs for Evaluate and Assign Resources

Can a resource manager approve a resource assignment to fulfill a project resource request?

Yes. The **Submit and Approve** button is visible on the Assign Resource page for resource managers who have the security privilege to approve a resource assignment.

Can I search for resources in resource pools that I do not own?

Yes. There is no restriction to the resource pools that you can search to find qualified resources to fulfill project resource requests.

Can I change the search criteria on a project resource request while reviewing search results?

Yes. You can temporarily change the start and end dates, qualifications, keywords, and proficiencies while you are searching for resources to fulfill a project resource request. Changes that you make to the requested criteria on the Search and Evaluate Resources page are not saved to the project resource request. The changed criteria reverts to the original search criteria when you click the **Reset** button on the Search and Evaluate Resources page or leave the page to return to the request.

Can I search for qualified resources without a project?

Yes. You can submit a project resource request and evaluate resources against requested qualifications and keywords before you associate the request with a project. You can add a project to the request at any time, or associate a project with the assignment when you fulfill the request.

**Note**

The application does not calculate available capacity scores for a project resource request without a project.

What are the color-coded indicators for keyword matches in a resource profile?

Color coding of keyword matches in a resource profile indicates how well a resource matches a project resource request. The application counts the number
of matches found in the resource profile for each specified keyword, and compares the count to the maximum number of matches for any resource listed on the Compare Resources page.

- If a resource has 80% to 100% of the maximum number of keyword matches, the indicator is green.

- If a resource has 50% to 79% of the maximum number of keyword matches, the indicator is yellow.

- If a resource has less than 50% of the maximum number of keyword matches, the indicator is red.
Maintain Resource Assignments

Project Resource Assignment Statuses: Explained

Assignment statuses indicate the status of the resource’s relationship to a project. This table describes assignment statuses.

<table>
<thead>
<tr>
<th>Assignment Statuses</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Planning Only</td>
<td>You create a resource assignment with a Planning Only status when you add the resource to the project using either of these methods:</td>
</tr>
<tr>
<td></td>
<td>• Allocate the resource directly to the project on the Manage Project Resources page</td>
</tr>
<tr>
<td></td>
<td>• Add a resource to a project task on the Manage Project Plan page</td>
</tr>
<tr>
<td></td>
<td>• Add the resource by importing a project plan in Microsoft Project into Oracle Fusion Project Management</td>
</tr>
<tr>
<td>Assigned</td>
<td>You create a resource assignment with an Assigned status when you approve a resource to fulfill a project resource request in Oracle Fusion Project Resource Management.</td>
</tr>
<tr>
<td></td>
<td>An existing resource assignment changes to an Assigned status when you approve, reject, or cancel a pending assignment adjustment.</td>
</tr>
</tbody>
</table>
| Pending Adjustment | A resource assignment changes to a Pending Adjustment status in either of these circumstances:
- After the resource manager performs the Cancel Assignment or Change Assignment Dates adjustment action and before the project manager approves or rejects the adjustment.
- After the project manager performs the Change Assignment Dates adjustment action and before the resource manager approves or rejects the adjustment.

A resource assignment that is pending adjustment approval will have a value in the Adjustment Type field of Change Assignment Dates or Cancel Assignment. When you approve or reject the adjustment action, then the application clears the adjustment type value for the assignment.

| Canceled | A resource assignment changes to a Canceled status after a resource manager performs the Cancel Assignment adjustment action and the project manager approves the cancellation request. If a project manager creates the cancellation adjustment, then no further approval is required and the assignment status changes to Canceled.

You cannot cancel a resource assignment in any of these circumstances:
- A task assignment exists for this resource
- The resource is the primary project manager
- The resource assignment status is Planning Only or Pending Adjustment

**Example 1: Project Manager Adjusts Assignment Dates**

This figure shows the assignment status progression when a project manager adjusts resource assignment dates, and the resource manager approves the adjustment.

<table>
<thead>
<tr>
<th>Action</th>
<th>Assignment Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project manager approves a resource proposal to fulfill a project resource request. This action creates an assignment.</td>
<td>Assigned</td>
</tr>
<tr>
<td>Project manager adjusts the resource assignment dates.</td>
<td>Pending Adjustment</td>
</tr>
<tr>
<td>Resource manager approves the assignment date change.</td>
<td>Assigned</td>
</tr>
</tbody>
</table>
In this example, the project manager approves a resource proposal to fulfill a project resource request. This action creates an assignment with a status of Assigned. Later the project manager adjusts the dates for this resource assignment. This action changes the assignment status to Pending Adjustment. When the resource manager approves the assignment adjustment, the assignment status changes back to Assigned.

**Example 2: Resource Manager Cancels Assignment**

This figure shows the assignment status progression when a resource manager cancels a resource assignment, and the project manager approves the cancellation.

![Diagram showing assignment status progression](image)

In this example, the project manager approves a resource proposal to fulfill a project resource request. This action creates an assignment with a status of Assigned. Later the resource manager initiates a cancellation for this resource assignment. This action changes the assignment status to Pending Adjustment. When the project manager approves the assignment cancellation, the assignment status changes to Canceled.

**Adjusting Project Resource Assignments: Explained**

A resource manager or project manager can change the start and finish dates for project resource assignments and cancel assignments that are in an Assigned status.

When you initiate an assignment adjustment, the application creates a project resource request to communicate and track the adjustment approval. The assignment is updated when the request is approved. For example, when a request to adjust an assignment start date is approved, the new start date appears on the assignment.

You can add comments to an assignment at any time. No approval is required to add comments.

**Assignment Adjustment Types**

The project resource assignment adjustment types are:
- Cancel Assignment
- Change Assignment Dates

When you initiate an assignment date change, the application creates a project resource request with a request type of Assignment Date Change. When you initiate an assignment cancellation, the application creates a project resource request with a request type of Assignment Cancellation.

**Initiating Assignment Adjustments**

The methods to initiate assignment adjustments are:

- On the Edit Project Resource Assignment page for the resource manager, in the *Actions* menu, click *Adjust* and select an adjustment type.
- On the Edit Project Resource Assignment page for the project manager, click the *Adjust* menu and select an adjustment type.
- On the Manage Project Resource Assignments page, select an assignment, select an adjustment type, and click the *Adjust* button.
- On the Project Resource Assignments Ending Soon region of the Project Resources work area, Overview page, select an assignment and click the *Change Assignment Date* button.

The following table lists the approval requirements for assignment adjustments.

<table>
<thead>
<tr>
<th>Action</th>
<th>Required Approver</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project manager initiates an assignment date change.</td>
<td>Resource manager</td>
</tr>
<tr>
<td>Project manager initiates an assignment cancellation.</td>
<td>No approval required</td>
</tr>
<tr>
<td>Project manager cancels an adjustment that was initiated by the project manager in Oracle Fusion Project Management.</td>
<td>No approval required</td>
</tr>
<tr>
<td><strong>Note</strong></td>
<td></td>
</tr>
<tr>
<td>An adjustment that a project manager initiates can be canceled only by the project manager.</td>
<td></td>
</tr>
<tr>
<td>Resource manager initiates an assignment adjustment either directly on the assignment or from the Manage Project Resource Assignments page.</td>
<td>Project manager</td>
</tr>
<tr>
<td>Resource manager initiates an assignment date change on the Project Resource Assignments Ending Soon region of the Project Resources work area, Overview page.</td>
<td>No approval required</td>
</tr>
<tr>
<td>Resource manager cancels an adjustment that was initiated by the resource manager in Oracle Fusion Project Resource Management.</td>
<td>No approval required</td>
</tr>
<tr>
<td><strong>Note</strong></td>
<td></td>
</tr>
<tr>
<td>An adjustment that a resource manager initiates can be canceled only by the resource manager.</td>
<td></td>
</tr>
</tbody>
</table>
Approving and Rejecting Assignment Adjustments

The methods to approve or reject assignment adjustments are:

- Directly on the project resource request that is associated with the adjustment, click the Actions menu and click Approve Adjustment or Reject Adjustment.

- On the Manage Project Resource Requests page, search for project resource requests that are in a Pending Adjustment status. Select a request and click Approve Adjustment or Reject Adjustment.

FAQs for Maintain Resource Assignments

What's a project resource request type?

An attribute that is assigned by the application to track the progress and purpose of a project resource request.

For example:

- The New Resource request type identifies requests that you create to find resources for a project.

- The Assignment Date Change request type identifies requests that the application creates to track assignment date change adjustments.

- The Assignment Cancellation request type identifies requests that the application creates to track assignment cancellation adjustments.

Why can't I cancel a resource assignment?

You cannot cancel a resource assignment in any of these circumstances:

- A task assignment exists for this resource
- The resource is the primary project manager
- The resource assignment status is Planning Only or Pending Adjustment
Manage Resource Utilization and Analytics

Import Resource Actual Hours

The Import Resource Actual Hours process imports actual hours based on data from third-party applications that you load into the Resource Actual Hours Interface table.

Once in the interface table, the actual hours are validated and processed by the Import Resource Actual Hours process and any exceptions are reported in the output of that process.

Run the Import Resource Actual Hours process from the Scheduled Processes Overview page.

Before running this process, you must:

- Load import data to the PJR_ACTUAL_HOURS_INTERFACE table. For more information on the interface table, see Oracle Enterprise Repository for Oracle Fusion Applications.

  You can load data to interface tables using predefined templates and the Load Interface File for Import scheduled process, which are both part of the External Data Integration Services for Oracle Cloud feature. For more information, see the Documentation tab for the Load Interface File for Import process in Oracle Enterprise Repository for Oracle Fusion Applications.

Parameters

Actual Hours Worked Category

Type of activity that is represented by the actual hours worked. Examples are Project Work, Paid Time Off, Training, and Other. The default value is All Categories.

Resource

Name of the project enterprise labor resource who reported the actual hours worked.

Project
Name of the project for which the project enterprise labor resource reported actual hours worked.

**Actual Hours Worked Through Date**

Date through which the project enterprise labor resource worked.

**Execution Report**

The Import Resource Actual Hours Execution report summarizes the number of processed, accepted, and rejected items encountered when you imported resource actual hours. The report contains details for all actual hours that generated errors during the import process.

Review the error message details for the actual hours and fix the issues. Load the data that you fixed in the CSV file into the interface table again and resubmit the Import Resource Actual Hours process.

**Important**

After you import actual hours, you must run the Update Resource Utilization Data process to summarize actual utilization that appears on the Resource Manager Dashboard.

### Resource Actual Utilization: How It Is Calculated

Resource actual utilization is the percentage of hours worked or projected to work compared to available hours. The Update Resource Utilization Data process calculates actual utilization for individual resources and resource pools.

**Important**

Run the Update Resource Utilization Data process often enough to account for new resources and assignments, and updated actual hours.

### Settings That Affect Resource Actual Utilization

The following factors affect Resource Actual Utilization:

- The Import Resource Actual Hours process imports actual hours based on data from third-party applications. Ensure that the most recent resource actual hours are imported into the application before you run the Update Resource Utilization Data process.
- During import processing you indicate which actual hours are eligible to be included in utilization calculations for the resource. Eligible actual hours can include time spent on project assignments, or nonproject events such as training and paid time off.
- The application determines the current quarter by the Utilization Data Updated date shown on the Resource Manager dashboard, which is the last date that the Update Resource Utilization Data process ran.
- A resource's available hours are based on the resource calendar. An example of a resource calendar is Monday through Friday, 8 hours a day. The application does not consider company holidays when determining a resource's available hours.
• The number of hours that a resource is assigned to work on project assignments includes assignments that are in a status of Assigned or Pending Adjustment.

How Resource Actual Utilization Is Calculated

The Update Resource Utilization Data process uses actual hours that are designated as eligible for utilization.

Actual utilization for the current quarter is the percentage of actual hours worked at the beginning of the quarter, plus projected project assignment hours from the date the process ran through the end of the current quarter, compared to the available hours. For the current quarter, the process uses actual hours worked through the day before the Utilization Data Updated date shown on the Resource Manager dashboard, and for the remainder of the quarter the process uses the hours that resources are projected to work on project assignments through the end of the current quarter.

For previous quarters, resource actual utilization is the percentage of actual hours worked compared to the available hours.

Example

Following is an example of an actual utilization calculation for the current quarter.

Example scenario:

• Resource name: Abraham Mason
• Current quarter date range: January 1 - March 31, 2013
• Today’s date: February 15, 2013
• Latest run date of the Update Resource Utilization Data process: February 15, 2013
• Work category that is eligible for utilization: Project Assignment
• Work categories that are not eligible for utilization: Training and Paid Time Off

Abraham Mason is available to work for 8 hours a day, 5 days a week. Weekends are non work days.

The following table lists the actual, projected, and available hours in the current quarter for Abraham Mason:

<table>
<thead>
<tr>
<th>Work Dates by Week</th>
<th>Work Category</th>
<th>Eligible for Utilization</th>
<th>Project Name</th>
<th>Worked Hours</th>
<th>Projected Hours</th>
<th>Available Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>January 1 (holiday)</td>
<td></td>
<td></td>
<td></td>
<td>0</td>
<td>8</td>
<td></td>
</tr>
<tr>
<td>January 2-4</td>
<td>Assignment</td>
<td>Yes</td>
<td>Electrical</td>
<td>24</td>
<td>24</td>
<td></td>
</tr>
<tr>
<td>January 5-6 (weekend)</td>
<td>Assignment</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>January 7-9</td>
<td>Assignment</td>
<td>Yes</td>
<td>Electrical</td>
<td>24</td>
<td>24</td>
<td></td>
</tr>
<tr>
<td>January 10-11</td>
<td>Training</td>
<td>No</td>
<td></td>
<td>16</td>
<td></td>
<td>16</td>
</tr>
<tr>
<td>Date</td>
<td>Description</td>
<td>Assigned</td>
<td>Task</td>
<td>Hours Worked</td>
<td></td>
<td></td>
</tr>
<tr>
<td>-----------------</td>
<td>--------------</td>
<td>----------</td>
<td>------------</td>
<td>--------------</td>
<td></td>
<td></td>
</tr>
<tr>
<td>January 12-13</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>January 14-18</td>
<td>Assignment</td>
<td>Yes</td>
<td>Electrical</td>
<td>24 (worked partial days)</td>
<td>40</td>
<td></td>
</tr>
<tr>
<td>January 19-20</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>January 21-25</td>
<td>Assignment</td>
<td>Yes</td>
<td>Hardware</td>
<td>40</td>
<td>40</td>
<td></td>
</tr>
<tr>
<td>January 26-27</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>January 28-31</td>
<td>Paid Time Off</td>
<td>No</td>
<td></td>
<td>32</td>
<td>32</td>
<td></td>
</tr>
<tr>
<td>February 1</td>
<td>Training</td>
<td>No</td>
<td></td>
<td>8</td>
<td>8</td>
<td></td>
</tr>
<tr>
<td>February 2-3</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>February 4-8</td>
<td>Assignment</td>
<td>Yes</td>
<td>Hardware</td>
<td>40</td>
<td>40</td>
<td></td>
</tr>
<tr>
<td>February 9-10</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>February 11-14</td>
<td>Assignment</td>
<td>Yes</td>
<td>Hardware</td>
<td>32</td>
<td>32</td>
<td></td>
</tr>
<tr>
<td>February 15</td>
<td>Assignment</td>
<td>Yes</td>
<td>Hardware</td>
<td>8</td>
<td>8</td>
<td></td>
</tr>
<tr>
<td>February 16-17</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>February 18-22</td>
<td>Assignment</td>
<td>Yes</td>
<td>Hardware</td>
<td>40</td>
<td>40</td>
<td></td>
</tr>
<tr>
<td>February 23-24</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>February 25-March 1</td>
<td>Assignment</td>
<td>Yes</td>
<td>Hardware</td>
<td>40</td>
<td>40</td>
<td></td>
</tr>
<tr>
<td>March 2-3</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>March 4-8</td>
<td></td>
<td></td>
<td></td>
<td>0 (no projected work)</td>
<td>40</td>
<td></td>
</tr>
<tr>
<td>March 9-10</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>March 11-15</td>
<td>Assignment</td>
<td>Yes</td>
<td>Install</td>
<td>40</td>
<td>40</td>
<td></td>
</tr>
<tr>
<td>March 16-17</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>March 18-22</td>
<td>Assignment</td>
<td>Yes</td>
<td>Install</td>
<td>40</td>
<td>40</td>
<td></td>
</tr>
<tr>
<td>March 23-24</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>March 25-29</td>
<td></td>
<td></td>
<td></td>
<td>0</td>
<td>40</td>
<td></td>
</tr>
<tr>
<td>March 30-31</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Results for the current quarter example:
• Actual worked hours that are eligible for utilization: 184
• Projected assignment work hours: 168
• Available hours: 512
• Resource actual utilization: \( \frac{184 + 168}{512} = 68.75\% \)

**Resource Projected Utilization: How It Is Calculated**

Resource projected utilization is the percentage of hours that project enterprise labor resources are assigned to work on project assignments compared to their available hours. The Update Resource Utilization Data process updates projected utilization for individual resources and resource pools for the current week and cumulative intervals for the next 2 weeks, 4 weeks, 8 weeks, and 13 weeks.

**Important**

Run the Update Resource Utilization Data process often enough to account for new resources and assignments, and changes in resource calendars.

**Factors That Affect Resource Projected Utilization**

The following factors affect Resource Projected Utilization.

• The Update Resource Utilization Data process defines a week as Sunday through Saturday. The current week includes all 7 days from Sunday through Saturday, regardless of the day that you run the process.

• If you run the Update Resource Utilization Data process after Sunday, the first day of the current week is the preceding Sunday.

• If you run the process on Sunday, the current week begins that day.

• A resource’s available hours are based on the resource calendar. An example of a resource calendar is Monday through Friday, 8 hours a day. The application does not consider company holidays when determining a resource’s available hours.

• The number of hours that a resource is assigned to work on project assignments includes assignments that are in a status of Assigned or Pending Adjustment.

• All managed project enterprise labor resources are members of a resource pool.

**How Resource Projected Utilization Is Calculated**

Projected utilization is calculated for individual resources in a resource pool and rolled up to a projected utilization for the pool.

To calculate a resource’s projected utilization for the current week and the next 12 weekly intervals, the Update Resource Utilization Data process divides the number of hours that a resource is assigned to work on project assignments each week by the number of available hours for the resource that week.
The process also calculates cumulative projected utilization for the 13 week period. For example, the process calculates projected utilization for a 4 week interval by dividing the sum of hours that a resource is assigned to work on project assignments by the number of available hours for the resource for the current week and the next 3 weeks.

On the Resource Manager Dashboard you can view projected utilization for resources or resource pools for the current week and cumulative intervals for the next 2 weeks, 4 weeks, 8 weeks, and 13 weeks.

Example

The following table shows the projected utilization components for three resources, and the resource pool to which they belong, over two weekly intervals.

<table>
<thead>
<tr>
<th>Resource and Resource Pool</th>
<th>Week 1 Hours on Project Assignments</th>
<th>Week 1 Available Hours on Resource Calendar</th>
<th>Week 1 Projected Utilization Calculation</th>
<th>Week 2 Hours on Project Assignments</th>
<th>Week 2 Available Hours on Resource Calendar</th>
<th>Week 2 Projected Utilization Calculation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resource A</td>
<td>40</td>
<td>40</td>
<td>100%</td>
<td>40</td>
<td>40</td>
<td>100%</td>
</tr>
<tr>
<td>Resource B</td>
<td>20</td>
<td>40</td>
<td>50%</td>
<td>48</td>
<td>40</td>
<td>120%</td>
</tr>
<tr>
<td>Resource C</td>
<td>10</td>
<td>20</td>
<td>50%</td>
<td>20</td>
<td>20</td>
<td>100%</td>
</tr>
<tr>
<td>Resource Pool</td>
<td>70</td>
<td>100</td>
<td>70%</td>
<td>108</td>
<td>100</td>
<td>108%</td>
</tr>
</tbody>
</table>

Resource Target Utilization Percentage: How It Is Determined

Target utilization is the percentage of hours that project enterprise labor resources are expected to work on project assignments compared to their available hours. The project administrator specifies the default target utilization for the enterprise, and then specifies target utilization overrides for individual jobs.

Factors That Affect Resource Target Utilization Percentage

The following factors affect the Resource Target Utilization Percentage.

- Enterprise Target Utilization Percentage: Target utilization percentage that applies to all managed project enterprise labor resources in the enterprise unless specific override percentages exist for a resource’s job.

- Target Utilization Percentage Overrides: Target utilization percentages that override the enterprise target utilization percentage for resources with specific jobs.

How the Resource Target Utilization Percentage Is Determined

The application uses the enterprise target utilization percentage for a resource if no override percentage exists for the resource’s job. The default target utilization
is 100%. The project application administrator can enter a new value in the Enterprise Target Utilization Percentage field on the Manage Target Utilization Percentages page.

If you enter a target utilization percentage override on the Manage Target Utilization Percentages page for a resource's job, then the application uses that percentage to compare to the resource’s projected utilization on the Resource Manager Dashboard. The job is based on the resource’s active primary HCM assignment.

Target utilization percentages can be whole numbers from 0 - 100. You can enter one override percentage for each job.

**Example**

Assume that the target utilization for the enterprise is 80%. To set up the target utilization, change the default enterprise target utilization percentage from 100% to 80% on the Manage Target Utilization Percentages page.

Also assume that Senior Architects spend half their time on internal activities. To set up the target utilization for Senior Architects, enter 50% as the target utilization override for the job of Senior Architect.

The application will use 50% as the target utilization for all project enterprise labor resources with the job of Senior Architect, and 80% utilization for all other project enterprise labor resources.

**Resource Target Hours: How They Are Calculated**

Resource target hours are the available hours multiplied by the target utilization percentage for the resource. Target hours for a resource pool include the target hours of all resources in the pool. The Update Resource Utilization Data process updates target hours for individual resources and resource pools for the current week and cumulative intervals for the next 2 weeks, 4 weeks, 8 weeks, and 13 weeks.

**Important**

Run the Update Resource Utilization Data process often enough to account for new resources and assignments, and changes in resource calendars.

**Factors That Affect Resource Target Hours**

The following factors affect Resource Target Hours.

- A resource's available hours are based on the resource calendar. An example of a resource calendar is Monday through Friday, 8 hours a day. The application does not consider company holidays when determining a resource's available hours.

- The Update Resource Utilization Data process defines a week as Sunday through Saturday. The current week includes all 7 days from Sunday through Saturday, regardless of the day that you run the process.
• If you run the Update Resource Utilization Data process after Sunday, the first day of the current week is the preceding Sunday.
• If you run the process on Sunday, the current week begins that day.
• All managed project enterprise labor resources are members of a resource pool.

How Resource Target Hours Are Calculated

To calculate a resource's target hours for the current week and the next 12 weekly intervals, the Update Resource Utilization Data process multiplies the target utilization percentage for the resource by the number of available hours on the resource calendar for the week.

To calculate the target hours for a resource pool, the process adds together the weighted average of target hours of all resources in the resource pool.

Example

The following example shows the calculation of target hours for three resources, and the resource pool to which they belong, for a 1 week period.

<table>
<thead>
<tr>
<th>Resource and Resource Pool</th>
<th>Resource Target Utilization</th>
<th>Available Hours on Resource Calendar</th>
<th>Resource Target Hours Calculation</th>
<th>Target Utilization Percentage for Pool</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resource A</td>
<td>75%</td>
<td>40</td>
<td>30</td>
<td></td>
</tr>
<tr>
<td>Resource B</td>
<td>80%</td>
<td>40</td>
<td>32</td>
<td></td>
</tr>
<tr>
<td>Resource C</td>
<td>80%</td>
<td>30</td>
<td>24</td>
<td></td>
</tr>
<tr>
<td>Resource Pool</td>
<td></td>
<td>40 + 40 + 30 = 110</td>
<td>30 + 32 + 24 = 84</td>
<td>84 / 110 = 76%</td>
</tr>
</tbody>
</table>

FAQs for Manage Resource Utilization and Analytics

Can I change the page that opens first when I enter the Resource Manager Dashboard?

Yes. Use the Personalization global menu to edit the current dashboard landing page.

1. Navigate to the Resource Manager Dashboard.
2. Click Personalization - Edit Current Page.
3. Click the tab for the page that you want to open first when you enter the dashboard, either the Resource Pool Hierarchy or Resource Manager Dashboard.
4. Click Close to close the Editing page.

To revert to the original dashboard landing page, click Personalization - Reset to Default Content and Layout.
How can I update utilization data for resources and resource pools on the Resource Manager Dashboard?

Use the Scheduled Processes page to run or schedule the Update Resource Utilization Data process to summarize the target, projected, and actual utilization for resources and resource pools.

What's the order of resource pools and resources in the Projected Utilization and Actual Utilization regions?

The selected resource pool appears at the top of the list in the region, followed by child resource pools that belong to the selected pool. Child resource pools are listed in order of the most unfavorable variance first to the most favorable variance last. In the Projected Utilization region, an unfavorable variance occurs when projected utilization is less than target utilization in the formula

\[ \text{projected utilization} - \text{target utilization} \]

In the Actual Utilization region, an unfavorable variance occurs when actual utilization is less than target utilization in the formula

\[ \text{actual utilization} - \text{target utilization} \]

Resource pools with the same variance are listed in alphabetic order by resource pool name.

Following the resource pools is the list of resources that are members of the selected pool. The resources are also sorted with the most unfavorable variance between the projected and target utilization (or actual and target utilization) at the top of the resource list. Resources with the same variance are listed in alphabetic order by resource name.

What's a work week in Oracle Fusion Project Resource Management?

Work weeks are based on a Sunday to Saturday schedule.
acceptable threshold
Percentage range outside which resources are considered overallocated or underallocated in a project. For example, you set the acceptable threshold range to 80 to 85 percent. If you allocate less than 32 hours of work in a week they are underallocated. If you allocate more than 34 hours of work in a week they are overallocated.

action item
A task assigned to a person that must be performed in a given time frame to resolve an issue.

actual hours
Hours worked on a task during the reporting cycle.

actual hours remaining
Hours remaining after the hours worked on a task during the reporting cycle are deducted from the task planned hours.

actual utilization
Actual utilization for previous quarters is the percentage of actual hours worked compared to the available hours. For the current quarter, actual utilization is the percentage of actual hours worked through the day before the Utilization Data Updated date shown on the Resource Manager dashboard, plus projected project assignment hours from the Utilization Data Updated date through the end of the current quarter, compared to the available hours.

allocation hours
Number of hours in a week that a resource is allocated to the project. For example, a resource has a weekly capacity of 40 hours and 20 of those hours are allocated to one project.

allocation percentage
Percentage of work hours that a resource is allocated to the project. For example, a resource is available to work 50 percent on a project based on existing allocation to other projects.

available capacity score
The amount of requested time in a project resource request, expressed as a percentage, that a resource is available to fulfill.

available hours
Hours on the resource's calendar that have been, or can be, consumed with project assignments and nonproject events.
capacity hours
Number of hours that a resource is available for work. For example, a resource's capacity for work in a week is 40 hours.

competency
A type of qualification that represents a piece of knowledge, a skill, an aptitude, or an attribute that is measurable and demonstrated by a resource in the work context.

deliverable
Output that must be produced to complete a requirement, project, or task.

follower
In Oracle Fusion Task Management, a person who can view the details and activity stream of a task. Followers can collaborate on a task with the task owner and other followers using Oracle Social Network. Also, followers receive e-mail notifications when changes are made to a task.

HCM person
A named person in the HCM database with a person type of Employee or Contingent Worker and an active assignment. In Oracle Fusion Project Resource Management, if you associate an HCM person with a project enterprise labor resource, you can enable the resource's eligibility to fulfill project resource requests.

ideal hours remaining
Calculated based on the planned hours with the assumption that work is evenly distributed throughout a sprint. If you update the planned hours the ideal remaining hours are recalculated.

keyword
A word or phrase, entered as free-form, unstructured text on a project resource request, that does not exist as a predefined qualification content item. Keywords are matched against the resource's qualifications and the results are included in the qualification score calculation.

managed project enterprise labor resource
A project enterprise labor resource who is associated with a named person in HCM, and whose availability and staffing are managed in Oracle Fusion Project Resource Management. You use managed project enterprise labor resources to fulfill project resource requests.

project calendar
Defines the work schedule for project assignments. The project calendar includes working days and hours, such as Monday through Friday for 8 hours a day, and any exceptions, such as holidays.
**project enterprise labor resource**
A labor resource that you can assign to multiple projects.

**project resource request**
List of criteria used to find a qualified resource to fulfill an open resource demand on a project. Project resource requests include qualifications, keywords, requested date range, and other assignment information, such as project role and work location.

**project task code**
Enables the capture of organization-specific information for tasks. Implementors can decide whether users must select a value from a predefined value set, enter numeric values, or enter free form text.

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

**projected utilization**
Percentage of hours that a resource or resources are assigned to work on project assignments compared to the available hours.

**proposed finish date**
Suggested date by a resource to complete work on a task.

**proposed start date**
Suggested date by a resource to begin work on a task.

**qualification**
Items in structured content types such as competencies, degrees, and language skills that have specific values and proficiency ratings.

**qualification score**
A comparison of a resource’s qualifications to the requested qualifications and keywords on a project resource request, expressed as a percentage.

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

**resource calendar**
A schedule of a resource’s available work days and hours, such as Monday through Friday, 8 hours a day.
resource pool
A logical group of resources organized in a hierarchy for purposes of staffing, management, and reporting on utilization.

target utilization
Percentage of hours that a resource or resources are expected to work on project assignments compared to the available hours.

task date constraint
A restriction that you place on a task to control the task start or end date. For example, you can specify that a task must start on or finish on a particular date.

task dependency
A relationship between two tasks in which the start or end date of one task depends on the start or end date of another task. The task that depends on the other task is the successor, and the task that it depends on is the predecessor. The four types of task dependencies are Finish-to-Start, Start-to-Start, Finish-to-Finish, and Start-to-Finish.

to-do task
Task used by team members to manage collaborative work, for example Attend Training. A to-do task is not associated with a project.

total backlog story points
The total number of story points that must be completed for the completion of product development.

workweek hours percentage
Percentage of hours a resource is available to work in a week.