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PeopleSoft FSCM 9.2: In-Memory Project Discovery

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PeopleSoft FSCM 9.2: In-Memory Project Discovery
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Preface.

Understanding the PeopleSoft Online Help and PeopleBooks

The PeopleSoft Online Help is a website that enables you to view all help content for PeopleSoft Applications and PeopleTools. The help provides standard navigation and full-text searching, as well as context-sensitive online help for PeopleSoft users.

PeopleSoft Hosted Documentation

You access the PeopleSoft Online Help on Oracle's PeopleSoft Hosted Documentation website, which enables you to access the full help website and context-sensitive help directly from an Oracle hosted server. The hosted documentation is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support, because that documentation is now incorporated into the hosted website content. The Hosted Documentation website is available in English only.

Locally Installed Help

If your organization has firewall restrictions that prevent you from using the Hosted Documentation website, you can install the PeopleSoft Online Help locally. If you install the help locally, you have more control over which documents users can access and you can include links to your organization's custom documentation on help pages.

In addition, if you locally install the PeopleSoft Online Help, you can use any search engine for full-text searching. Your installation documentation includes instructions about how to set up Oracle Secure Enterprise Search for full-text searching.

See *PeopleTools 8.53 Installation* for your database platform, "Installing PeopleSoft Online Help." If you do not use Secure Enterprise Search, see the documentation for your chosen search engine.

Note: Before users can access the search engine on a locally installed help website, you must enable the Search portlet and link. Click the Help link on any page in the PeopleSoft Online Help for instructions.

Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format. The content in the PeopleBook PDFs is the same as the content in the PeopleSoft Online Help, but it has a different structure and it does not include the interactive navigation features that are available in the online help.

Common Help Documentation

Common help documentation contains information that applies to multiple applications. The two main types of common help are:

- Application Fundamentals

- Using PeopleSoft Applications

Most product lines provide a set of application fundamentals help topics that discuss essential information about the setup and design of your system. This information applies to many or all applications in the PeopleSoft product line. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of the appropriate application fundamentals help. They provide the starting points for fundamental implementation tasks.

In addition, the *PeopleTools: PeopleSoft Applications User's Guide* introduces you to the various elements of the PeopleSoft Pure Internet Architecture. It also explains how to use the navigational hierarchy, components, and pages to perform basic functions as you navigate through the system. While your application or implementation may differ, the topics in this user's guide provide general information about using PeopleSoft Applications.

Field and Control Definitions

PeopleSoft documentation includes definitions for most fields and controls that appear on application pages. These definitions describe how to use a field or control, where populated values come from, the effects of selecting certain values, and so on. If a field or control is not defined, then it either requires no additional explanation or is documented in a common elements section earlier in the documentation. For example, the Date field rarely requires additional explanation and may not be defined in the documentation for some pages.

Typographical Conventions

The following table describes the typographical conventions that are used in the online help.

<i>Typographical Convention</i>	<i>Description</i>
Key+Key	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For Alt+W, hold down the Alt key while you press the W key.
... (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ().
[] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.
⇒	This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character.

ISO Country and Currency Codes

PeopleSoft Online Help topics use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft documentation. Reference to an ISO country code in your documentation does not imply that your application includes every ISO country code. The following example is a country-specific heading: "(FRA) Hiring an Employee."

The PeopleSoft Currency Code table (CURRENCY_CD_TBL) contains sample currency code data. The Currency Code table is based on ISO Standard 4217, "Codes for the representation of currencies," and also relies on ISO country codes in the Country table (COUNTRY_TBL). The navigation to the pages where you maintain currency code and country information depends on which PeopleSoft applications you are using. To access the pages for maintaining the Currency Code and Country tables, consult the online help for your applications for more information.

Region and Industry Identifiers

Information that applies only to a specific region or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a region-specific heading: "(Latin America) Setting Up Depreciation"

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in the PeopleSoft Online Help:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in the PeopleSoft Online Help:

- USF (U.S. Federal)
- E&G (Education and Government)

Access to Oracle Support

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

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

Using and Managing the PeopleSoft Online Help

Click the Help link in the universal navigation header of any page in the PeopleSoft Online Help to see information on the following topics:

- What's new in the PeopleSoft Online Help.
 - PeopleSoft Online Help accessibility.
 - Accessing, navigating, and searching the PeopleSoft Online Help.
 - Managing a locally installed PeopleSoft Online Help website.
-

PeopleSoft FSCM Related Links

Financial and Supply Chain Management information for Secure Enterprise Search (SES) can be found in PeopleSoft Application Fundamentals documentation. For application specific information, see the "Understanding Search Pages within Components (*PeopleSoft FSCM 9.2: Application Fundamentals*)" topic.

[My Oracle Support](#)

[PeopleSoft Information Portal on Oracle.com](#)

[PeopleSoft Training from Oracle University](#)

[PeopleSoft Video Feature Overviews on YouTube](#)

Contact Us

[Send us your suggestions](#) Please include release numbers for the PeopleTools and applications that you are using.

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Chapter 1

Getting Started with PeopleSoft Project Discovery

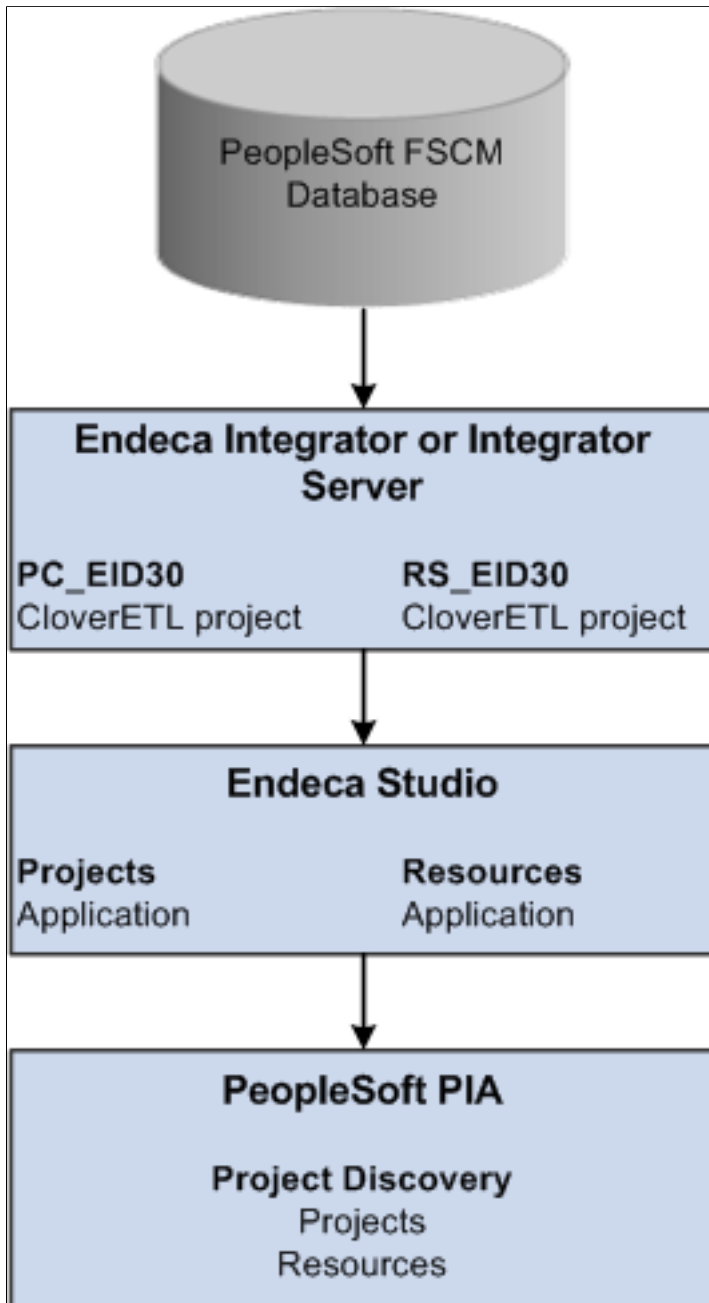
PeopleSoft Project Discovery Business Processes

Using the speed and scalability of Oracle Exalytic Hardware and the intuitive, flexible user interface offered by Oracle Endeca, Project Discovery provides organizations the ability to instantaneously filter and analyze millions of rows of data in PeopleSoft Enterprise Service Automation (ESA) applications. The Endeca technology enables you to examine unstructured and structured PeopleSoft ESA data in order

to answer key project and resource business questions rapidly and to identify business data relationships and drivers of business results.

Image: Project Discovery Business Process Flow

This diagram illustrates the business process flow for In-Memory Project Discovery.



The ETL Process

The Extract, Transform, Load (ETL) process extracts data from PeopleSoft, transforms the data, and loads it into Endeca. The analytics displayed on Endeca pages are only as fresh as the last time the ETL ran.

There are two ETL process streams:

- *Full Load*: Loads all rows from PeopleSoft to the Endeca data sources.

- *Incremental Load:* Loads new and updated rows in PeopleSoft since the last time the ETL process ran.

Some changes in PeopleSoft are not captured in the incremental load. For example, if the currency conversion rate changes and the Resources bill rates are impacted by the rate change, this is not captured with the incremental load. Also, some effective-dated control data, such as status changes or location changes, are not captured with the incremental load. Oracle recommends scheduling full loads once a week to update all the weekly availability, utilization data, and effective-dated control data. Schedule the incremental loads as often as needed to refresh the data.

For additional information about setting up and scheduling the ETL process, see the *PeopleSoft Financials and Supply Chain In-Memory Project Discovery Installation* documentation, Scheduling ETL Processes.

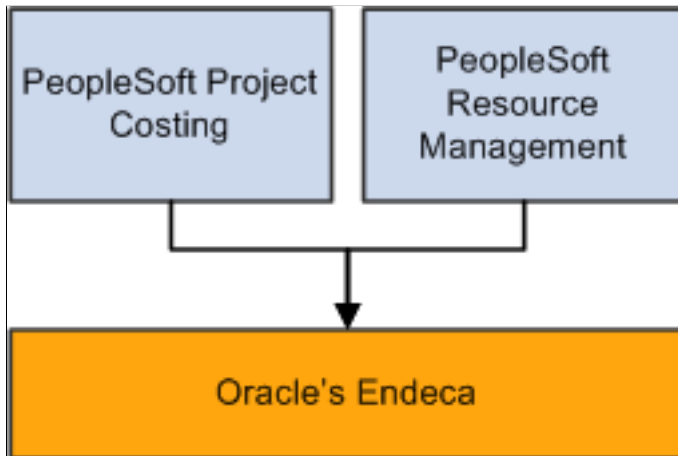
PeopleSoft Project Discovery Integrations

These products integrate with Oracle's Endeca through In-Memory Project Discovery:

- PeopleSoft Project Costing
- PeopleSoft Resource Management

Image: Project Discovery Integration with Endeca

This diagram illustrates the PeopleSoft Products that integrate with Oracle's Endeca.



Note: In addition to PeopleSoft Project Costing, it is recommended that PeopleSoft Resource Management and Program Management is installed.

In addition, these conditions apply:

- Only the English language is supported.
- Only one currency code is supported.

When integrating with Projects, you select the Project Costing business unit prior to accessing the Endeca page. The data displayed on the Endeca page is in the base currency of the business unit selected.

When integrating with Resources, resource rates are displayed in the reporting currency code selected.

- For this release of PeopleSoft In-Memory Project Discovery, the extract processes are utilizing the Project Costing summary table (PC_SUMMARY_TBL) instead of PROJ_RESOURCE for project transactions.

This table contains summarized data from PROJ_RESOURCE and is used throughout Project Costing and Program Management for reporting purposes and to ease the demands on this important, high-volume table. By using the summary table, the performance of PeopleSoft In-Memory Project Discovery is improved with minimal functional compromise.

Important! Mozilla Firefox is the recommended browser for Project Discovery. Internet Explorer 8 (with compatibility mode disabled) and Internet Explorer 9 are also supported. For additional information about supported browsers, see the *Endeca Information Discovery Getting Started Guide*, [System Requirements](#)

Additional information about Oracle's Endeca can be found in the [Endeca Information Discovery Studio: Studio User's Guide](#).

PeopleSoft Project Discovery Implementation

When implementing PeopleSoft In-Memory Project Discovery use the *PeopleSoft Financials and Supply Chain Management In-Memory Project Discovery Installation* guide.

Chapter 2

Integrating with Project Discovery and PeopleSoft

Common Elements Used with Endeca

This topic describes the elements and sections that are common across multiple PeopleSoft application when using Endeca. Additional information about Oracle's Endeca can be found in the [Endeca Information Discovery Studio: Studio User's Guide](#).

Common Elements

These elements are common when working with Endeca:



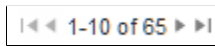
(Print icon)

Click the Print icon to print the chart data.



(Export icon)

Click the Export icon to export the chart data as a .csv file.



(First page, Previous page, Next page, Last page icons)

Click the First page, Previous page, Next page, and Last page icons to scroll through the chart.

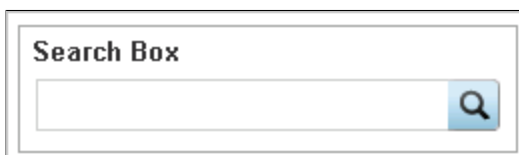
Search Box

Use the Search Box to search any text field on the data source. You can use the Search Box with the Guided Navigation filters and type ahead is supported in the Search Box field. The search box allows two types of searches:

- *Record Search*: Use this search method to search across all attributes. Enter keyword(s) into the Search Box and then click the magnifying glass icon or press Enter. This method searches across all attributes and returns results highlighting the keywords found. The charts, maps, and tables display the data based on the Record Search criteria.

Image: Search Box

This example illustrates the fields and controls on the Search Box.



- *Filter Refinement Search:* Use this search method to search by selecting the filters displayed in the Refine by box. When you enter a keyword, the Refine by box returns matches for the keyword entered. Select one of the filters in the Refine by box to perform a Filter Refinement Search. The charts, maps, and tables display the data based on the Filter Refinement Search criteria.

Image: Filter Refinement Search

This example illustrates the fields and controls for Filter Refinement Search on the Resources page.



Projects

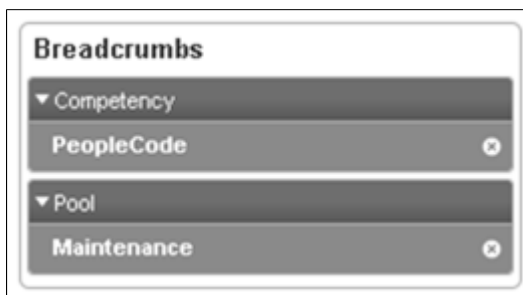
Project attachments are not supported at this time.

Breadcrumbs

Use the Breadcrumbs to view or remove selection criteria that have been selected.

Image: Example: Resources - Breadcrumbs

This example illustrates the fields and controls on the Resources Breadcrumbs section. The groupings and options in the Breadcrumbs section are different for each application. Therefore, for application-specific examples, see the Analyzing <application-specific> Using Endeca topic.



As filter options are selected, the Breadcrumbs section displays the selection criteria that are in effect. Filter conditions can be removed by clicking the “x” to the right of the condition.

Bookmarks

Use the Bookmarks to save filter conditions that are frequently used. Filter conditions can be removed by clicking the X to the right of the condition. You can do the following using Bookmarks.

- Create New Bookmark - Creates a new book mark based on the current filter refinements that is in effect.
- Delete - Delete a bookmark.

- Edit - Edit a bookmark.
- Create Link - Generates a URL for bookmark.
- E-mail - Send an e-mail with the bookmark name and URL.

Image: Example: Projects - Bookmarks

This example illustrates the fields and controls on the Project Bookmarks section. The options in the Bookmarks section are different for each application. Therefore, for application-specific examples, see the Analyzing <application-specific> Using Endeca topic.

Bookmarks			
Filter bookmarks...			
▼ My Bookmarks			
Na...	De...	Da...	Actions
PR...		Tue...	✕ ✎ ✏ ✉
BU...	BO...	Frid...	✕ ✎ ✏ ✉
test33		We...	✕ ✎ ✏ ✉
JPN...		Mon...	✕ ✎ ✏ ✉
jpn0...	jpn0...	Mon...	✕ ✎ ✏ ✉
test	test...	Frid...	✕ ✎ ✏ ✉
▼ Shared Bookmarks			
Na...	De...	Da...	Actions
BIL...	BIL...	Frid...	✎ ✉
AAA	AAA	Frid...	✎ ✉
Create New Bookmark			

Projects

When you save a bookmark, the system saves the current refinement selection including the business unit filter. Therefore, bookmarks are project business unit specific. However, you cannot see the business unit in the Name column. Therefore, it is recommended that you prefix the name of the bookmark with the business unit so you know to only use bookmarks for the business unit that you are viewing.

Guided Navigation

Use the Guided Navigation to refine the scope of data being displayed.

Image: Example: Projects: Guided Navigation

This example illustrates the fields and controls on the Projects - Guided Navigation section. The options in the Guided Navigation section are different for each application. Therefore, for application-specific examples, see the Analyzing <application-specific> Using Endeca topic.

The screenshot shows a 'Guided Navigation' window with the following structure:

- Guided Navigation** (Title bar with settings, refresh, and close icons)
- Project Filters** (Collapsible section)
 - Project ID
 - Project Name
 - Effective Status** (Expanded)
 - Search for specific value... (Search input)
 - A (1695)
 - T (12)
 - I (7)
 - P (2)
 - Project Type
 - Project Manager
 - Project Status
- Transaction Filters** (Collapsible section)
 - Analysis Type
 - Billing Status
 - GL Distribution Status
 - Source Type
 - Source Category
 - Source SubCategory
 - Employee
- Date Filters** (Collapsible section)
 - Accounting Date
 - Transaction Date

Projects

Use this section to filter your data. There are three categories for the filters: Project Filters, Transaction Filters, and Date Filters. Click on the filter name and the system displays a search field where you can enter a specific value and displays a section that has all values to choose from.

Resources

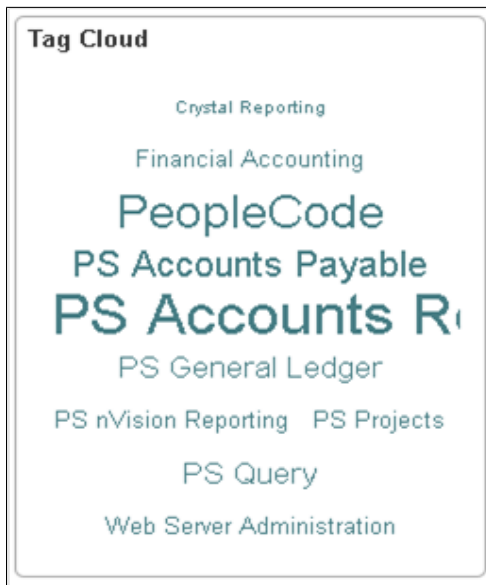
For Resources, Guided Navigation is available in the Resources page and in the Supply and Demand page. For more information, see the *Guide Navigation* section in [Analyzing Resources Using Endeca](#).

Tag Cloud

Use the Tag Cloud to view up to 10 key words in alphabetical order based on the current filter criteria in effect. The more key word rows, the larger the font.

Image: Example: Resources - Tag Cloud

This example illustrates the fields and controls on the Resources - Tag Cloud section. The options in the Tag Cloud section are different for each application. Therefore, for application-specific examples, see the Analyzing <application-specific> Using Endeca topic.



Projects

The Project Tag Cloud section lists up to 10 project names in alphabetical order based on the current filter criteria in effect; the more rows that a project has, the larger the font.

Resources

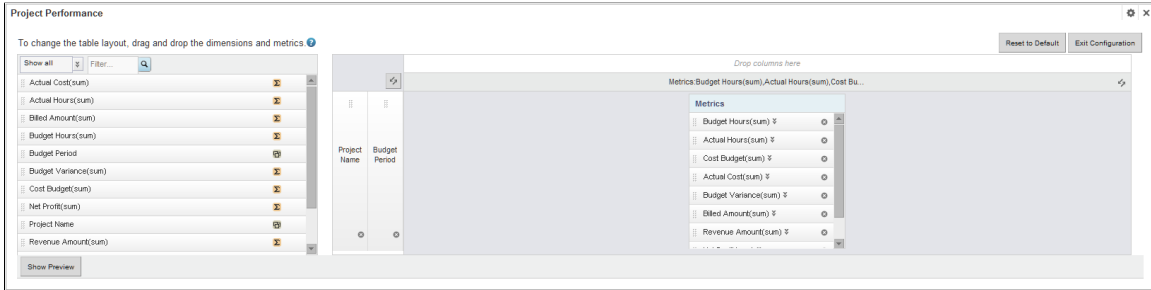
Use the Tag Cloud to view up to 10 competency descriptions in alphabetical order based on the current filter criteria in effect. The font size increases with the number of employees (records) that have the same competency.

Pivot Tables in Endeca

When viewing Pivot Tables in Endeca, you can add or remove dimensions and metrics, change your view options, and select action options. To perform these actions, use the Configure button in the upper left corner of a Pivot Table.

Image: Example: Details Page: Project Performance - Configure

This example illustrates the fields and controls on the Details Page: Project Performance - Configure.



(swap rows and columns)

Click the swap rows and columns button to swap the orientation of the table so that dimensions run across the top and the metrics run down the side. For additional information, see the Endeca Studio Users’ guide.

View Options

The View Options drop down list box enables you to select or deselect these options:

- *Conditional Formatting*: Select to highlight cells based on conditions, such as a budget variance.
- *Summaries*: Select to display subtotals.
- *Grand Summary*: Select to view the grant total at the bottom of the table.

Actions

Select an option to export or print the data.

Setting Up the Integration between Project Discovery and PeopleSoft

To set up the integration between Project Discovery and PeopleSoft.

Pages Used to Set Up the Integration between Project Discovery and PeopleSoft

Page Name	Definition Name	Navigation	Usage
Endeca Application Permission List	EID_CM	Set Up Financials/Supply Chain, Common Definitions, Endeca, Endeca Applications	Add permission lists for each Endeca application ID. For additional information about this page, see <i>PeopleSoft Financials and Supply Chain Management 9.2 In-Memory Project Discovery Installation</i> .
Endeca Data Source Security Filter	EID_DS	Set Up Financials/Supply Chain, Common Definitions, Endeca, Endeca Data Sources	Enter the data source information for all Endeca Data Source IDs being used. For additional information about this page, see <i>PeopleSoft Financials and Supply Chain Management 9.2 In-Memory Project Discovery Installation</i> .
Discovery Applications	N/A	Set Up Financials/Supply Chain, Common Definitions, Endeca, Customize Endeca Applications	Add applications that are to be interfaced with Endeca. For additional information about this page, see <i>PeopleSoft Financials and Supply Chain Management 9.2 In-Memory Project Discovery Installation</i> .
Installation Options - Products	INSTALLATION_FS	Set Up Financials/Supply Chain, Install, Installation Options. Select the Products tab.	To select the Project Discovery product. For additional information about the Installation Options - Products page, see <i>PeopleSoft FSCM Application Fundamentals</i> , Setting Installation Options for PeopleSoft Applications, Setting Up Cross-Application Installation Options.
Load Geocodes	PC_GEOCODE	Set Up Financials/Supply Chain, Common Definitions, Endeca, Load Geocodes	To load the Geocodes table (GEOCODE_TBL) from an Excel .csv file.
URL Maintenance	URL_TABLE	PeopleTools, Utilities, Administration, URL.	To set up the URL to the Endeca Studio.

Load Geocodes Page

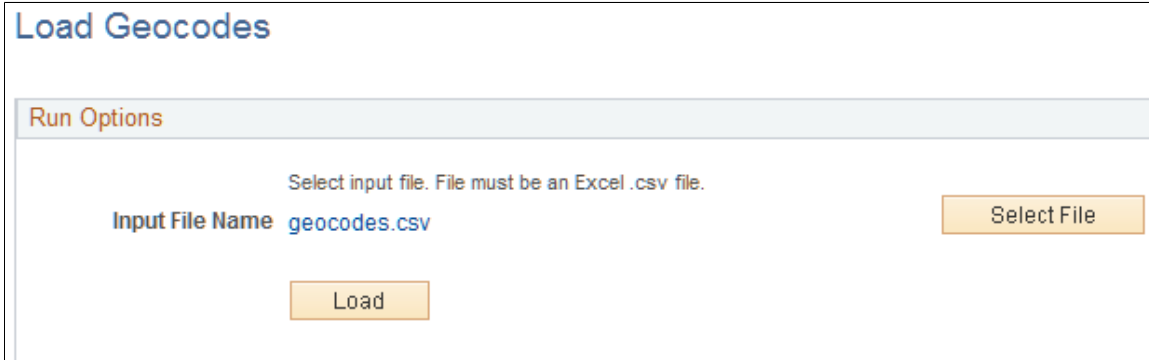
Use the Load Geocodes page (PC_GEOCODE) to load the Geocodes table (GEOCODE_TBL) from an Excel .csv file. Geo codes are used alongside the Map feature available in Endeca that helps you to view the locations of resources on a map.

Navigation

Set Up Financials/Supply Chain, Common Definitions, Endeca, Load Geocodes

Image: Load Geocodes page

This example illustrates the fields and controls on the Load Geocodes page.



Geocodes are longitude and latitude mappings for any address, and may be used to plot resource and project locations using the Project Discovery (Endeca) mapping feature. Typically, this process needs to run one time because city locations don't normally change. However, it may be necessary to download and import a new file when new cities or postal codes are added to geocode databases.

The geocodes file is not delivered with PeopleSoft. This file should contain postal codes, cities, states, latitude, and longitude for the countries to which your organization operates. Many web sites offer these files for free or for a small fee. You can also subscribe to a geocoder web service and create your own geocoded files. The key is to create a file containing (in order): postal code, city, state, country, latitude, and longitude in a CSV (spreadsheet) format: This table provides an example:

Postal	City	State	Country	Latitude	Longitude
15721	BURNSIDE	PA	US	41.05438	-78.411
15722	CARROLLTOWN	PA	US	40.58303	78.72.85
15723	CHAMBERSVILLE	PA	US	40.70564	79.1615

Run Options

Input File Name

Displays the file name after using the Select File button. If the file selected does not have the .CSV extension, an error message is displayed. When an appropriate file is selected, you can click on the filename to view the contents of the file.

Select File

Click this button to select the geocode .CSV file.

Load

Click this button to load the content of the file displayed in the Input File Name field into the GEOCODE_TBL table. This is a destructive load, which means the GEOCODE_TBL is first cleared out before the new data is loaded.

Note: This process does not do any editing of the data before it is loaded. However, if the country code on the input file is in 2-char format (such as US), the load process will convert it to the 3-char format (such as USA).

URL Maintenance Page

Use the URL Maintenance page (URL_TABLE) to set up the URL to the Endeca Studio.

Navigation

PeopleTools, Utilities, Administration, URL.

Image: URL Maintenance page

This example illustrates the fields and controls on the URL Maintenance page.

The screenshot shows the 'URL Maintenance' page with the following fields and values:

- URL Identifier:** EID_STUDIO
- *Description:** Endeca Studio
- *URLID:** http://<hostName>:<portNumber>/endeca
- Comments:** URL for Endeca Studio

At the bottom of the form, there is a link labeled 'URL Properties'.

URL Identifier Enter EID_STUDIO when setting up the URL Maintenance value for Project Discovery.

URLID Enter the URL to the Endeca Studio server.

For additional information about the URL Maintenance page, see *PeopleSoft PeopleTools: System and Server Administration*, Using Administration Utilities, URL Maintenance Page.

Integrating between Project Discovery and PeopleSoft Project Costing

Understanding the Integration with PeopleSoft Project Costing

The Extract, Transform, Load process is important to understand and important to know when the process is scheduled. This process loads data into Endeca, which is then used when displaying the Endeca pages. When displaying project pages in Endeca, project metrics are calculated when analyzing project data. It is important to understand the definition of and the calculation for each metric.

This section provides an explanation of:

- The Extract, Transform, Load process.
- Project metrics.

The Extract, Transform, Load Process

The Extract, Transform, Load (ETL) process extracts data from PeopleSoft, transforms the data, and loads it into Endeca. The analytics displayed on Endeca pages are only as fresh as the last time the ETL ran. There are two ETL process streams:

- *Full Load:* Loads all rows from PeopleSoft to the Endeca data sources.
- *Incremental Load:* Loads new and updated rows in PeopleSoft since the last time the ETL process ran.

Some changes in PeopleSoft are not captured in the incremental load. For example, some effective-dated control data, such as status changes or location changes, are not captured with the incremental load. Oracle recommends scheduling full loads once a week to update all the effective-dated control data. Schedule the incremental loads as often as needed to refresh the data.

For additional information about setting up and scheduling the ETL process, see the *PeopleSoft Financials and Supply Chain In-Memory Project Discovery Installation* documentation, Scheduling ETL Processes.

A high-level description of the ETL process is:

1. The system reads the last Endeca Run date and time.

If you are running a full load, the last ETL run is set to 01-01-1900.

2. The system reads data from PeopleSoft into Endeca.

Based on the last ETL run date and time, only new or updated rows are loaded or updated in Endeca. If running a Baseline (full load), since the last ETL run is set to 01-01-1900, all rows from PSFT qualify to be loaded.

3. The system updates the last Endeca ETL Run date and time.

Project Metrics

This table lists all metrics used, a general description, and in some cases how it is calculated.

# Projects	Displays the number of unique projects being reviewed.
Revenue Budget	Displays the budgeted revenue amount. This is the sum of all transaction amounts (RESOURCE_AMOUNT) that have an analysis type in the Revenue Budget analysis group defined at the project level.
Revenue Amount	Displays the revenue recognized amount. This is the sum of all transaction amounts that have an analysis type in the Actual Revenue analysis group defined at the project level, and where the GL_DISTRIB_STATUS is <i>D</i> .
Revenue Variance	Displays the difference between the Revenue Budget amount and the Revenue Amount.
Planned Cost	Displays the estimated costs for a project based on the resources that are assigned to the project. This is the sum of all cost amounts from the activity team (PROJ_ACT_TEAM) for a project. Cost amounts are calculated online and saved from the resources' rate and quantity.
Cost Budget	Displays the budget cost amount. This is the sum of all transaction amounts that have a analysis type in the Cost Budget analysis group defined at the project level.
Actual Cost	Displays the actual cost amount. This is the sum of all transaction amounts that have an analysis type in the Actual Cost analysis group defined at the project level.
Budget Variance	Displays the difference between the Cost Budget amount and the Actual Cost amount.
Currency	Displays the base currency of the business unit.
Number of Risks	Displays the number of actual and potential risks for a project. This is the number of risks for a project where RISK_STATUS is <i>A</i> (active) or <i>P</i> (potential). Inactive risks are not counted.
Percent Complete	Displays the percent complete. This is the percent on the activity.
Budget Hours	Displays the number of hours that are budgeted. This is the sum of all transaction quantities (RESOURCE_QUANTITY) that

have an analysis type in the Cost Budget analysis group defined at the project level and where the UNIT_OF_MEASURE is *MHR* or *MDY*. If entered in days (*MDY*), the quantity is converted to hours by multiplying the quantity by PC_HOURS_PER_DAY on the Project definition.

Note: Project Budgeting does not support budgeting by hours (only amount). However, budget hours can be loaded using the Third-Party Loader.

Actual Hours

Displays the actual number of hours recorded for the project. This is the sum of all transaction quantities (RESOURCE_QUANTITY) that have an analysis type in the Actual Cost analysis group defined at the project level, and where the UNIT_OF_MEASURE is *MHR* or *MDY*. If entered in days (*MDY*), the quantity is converted to hours by multiplying the quantity by PC_HOURS_PER_DAY on the Project definition.

Billed Amount

Displays the amount billed. This includes transactions that have been invoiced and those where the billing worksheet has been created. This is the sum of all transaction amounts that have an analysis type in the ANALYSIS_TYPE column of the PSBLD analysis group and where the BI_DISTRIB_STATUS is *W* (worksheet) plus all transactions amounts that have an analysis type in the ANALYSIS_TYPE_MAP column of the PSBLD analysis group and where the BI_DISTRIB_STATUS is *D* (invoiced).

Budget Period

Displays the budget period based on the budgeting calendar defined at the Projects Installation level. The period is determined by finding the budget period where the transaction's accounting date (ACCOUNTING_DT) falls between the budget period BEGIN_DT and END_DT.

Net Profit

Displays the difference between the Revenue Amount and Actual Cost amount.

Analyzing Projects Using Endeca

The Project Discovery - Projects page displays analytical data that includes metrics, charts, and maps, and enables you to analyze project and activity data from PeopleSoft Project Costing. In addition, by using Filters Options, you can iterate the data displayed on the Projects page and render the metrics by various dimensions for analysis.

Analytic data displayed on the Projects page is retrieved from the Endeca application. The Extract, Transform, Load (ETL) process extracts data from PeopleSoft, transforms the data, and loads it into Endeca. The data displayed on the Projects page is only as fresh as the last time the ETL process ran.

Additional information about Oracle's Endeca can be found in the *Endeca Information Discovery Studio: Studio User's Guide*.

Page Used to Use Project Discovery for Projects

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Project Discovery	PC_PROJ_DISCOVERY	Project Discovery , Projects	To determine the Project Costing business unit that you want to run Project Discovery.
Projects	(This is an Endeca Component)	Project Discovery, Projects. Select a Project business unit and click the Search button.	Access the Endeca Studio to review an overview of project data.
Details	(This is an Endeca Component)	Project Discovery, Projects. Select a Project business unit and click the Search button. Select the Details link.	Access the Endeca Studio to review detailed project data.

Project Discovery Page

Use the Project Discovery page (PC_PROJ_DISCOVERY) to determine the Project Costing business unit that you want to run Project Discovery against.

Navigation

Project Discovery , Projects

Image: Project Discovery page

This example illustrates the fields and controls on the Project Discovery page.

After entering the Project Costing business unit, the system redirects you to Endeca, where the Projects page is filtered by the business unit entered. After you have accessed Endeca, if you want to change your Project Costing business unit, you must re-navigate using Project Discovery , Projects, and you can change your business unit.

Projects Page

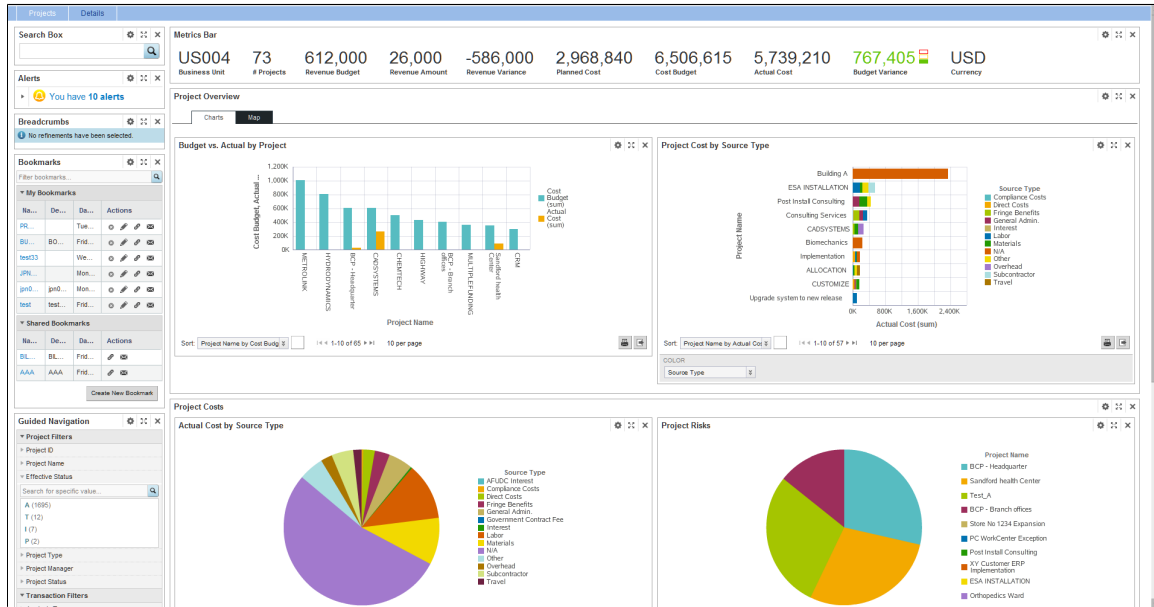
Use the Projects page to access the Endeca Studio for Project data.

Navigation

Project Discovery , Projects. Select a Project business unit and click the Search button.

Image: Projects page

This example illustrates the fields and controls on the Projects page.



This page has multiple sections. Each section is described separately in this documentation.

Information about these sections can be found in the [Common Elements Used with Endeca](#) topic.

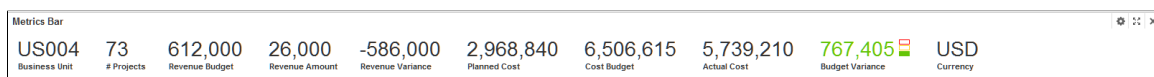
- Search Box
- Breadcrumbs
- Bookmarks
- Guided Navigation
- Tag Cloud
- Pivot Tables

Projects Page: Metrics Bar

Use the Projects Page: Metrics Bar to view high level metrics for the information that is displayed in the charts and information displayed below.

Image: Projects Page: Metrics Bar

This example illustrates the fields and controls on the Projects Page: Metrics Bar.



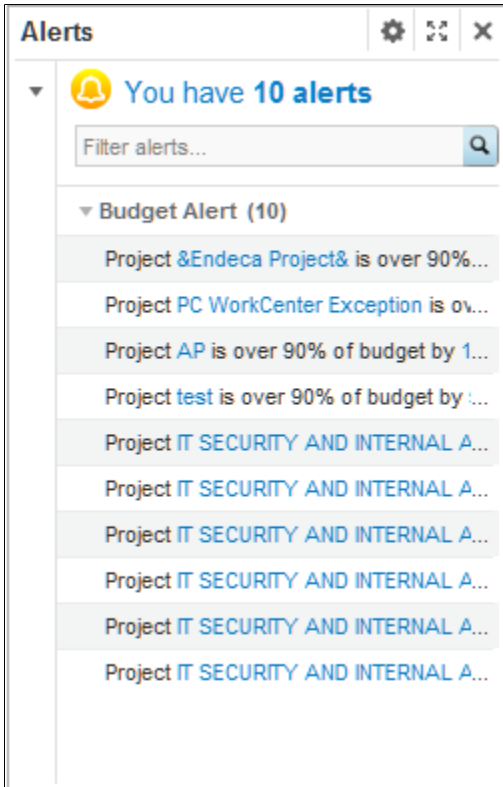
For a definition of each metric displayed in this section, see the [Project Metrics](#) topic.

Projects Page: Alerts

Use the Projects Page: Alerts to view project alerts.

Image: Projects Page: Alerts

This example illustrates the fields and controls on the Projects Page: Alerts.



This section displays projects where the Actual Cost is within 10% of the cost budget (see [Project Metrics](#)). If you hover your mouse over an alert row, the system displays the entire alert message.

Projects Page: Project Overview

Use the Projects Page: Project Overview to view charts and maps.

Image: Projects Page: Project Overview

This example illustrates the fields and controls on the Projects Page: Project Overview.



Budget vs. Actual by Project

This bar chart displays the cost budget for one or more projects and the corresponding actual cost for one or more projects (see [Project Metrics](#) for metric definitions).

If you hover your mouse over the Cost Budget (sum) and the Actual Cost (sum) legend (to the right of the chart), then the alternate option fades. If you hover your mouse over a Cost Budget bar, then the system displays the Project Name and Cost Budget amount. If you hover your mouse over an Actual Cost bar, then the system displays the Project Name and Actual Cost amount.

If you click one of the bars, the system changes the chart to display only that selection. In addition, the Metrics Bar, Alerts, Breadcrumbs Guided Navigation and other chart sub-pages display the option selected. To return to the previous view, use the Breadcrumbs subpage to remove the option selected.

Sort

Select a sort order using the sort box at the bottom left of the chart display. Options include *Project Name*, *Project Name by Cost Budget*, and *Project Name by Actual Cost (sum)*. The default sort order is by cost budget in descending order. (greatest to smallest).

Project Cost by Source Type

This bar chart displays the actual cost of projects based on the source type of the project transaction (see [Project Metrics](#) for metric definitions).

Sort

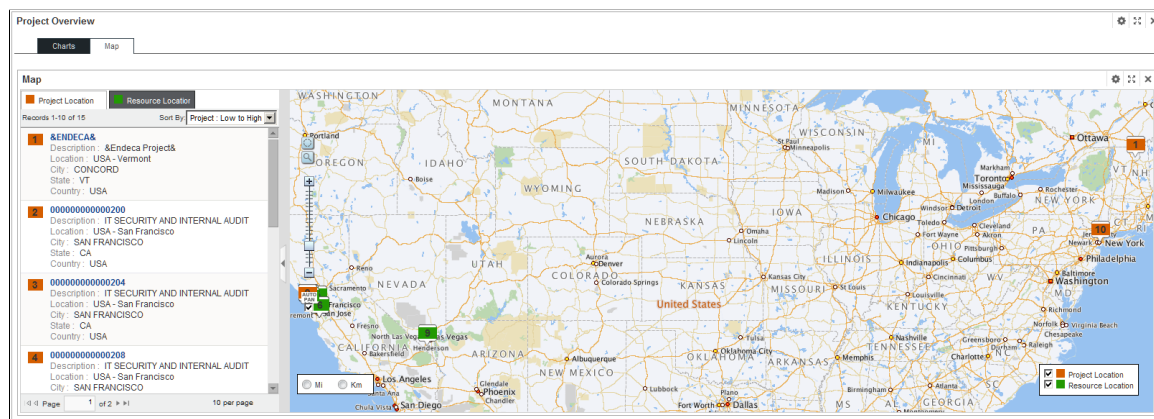
Select a sort order using the sort box at the bottom left of the chart display. Options include *Project Name* and *Project Name by Actual Cost (sum)*.

Projects Page: Project Overview - Map

Use the Projects Page: Project Overview - Map to view project and resource locations on a map.

Image: Projects Page: Project Overview - Map

This example illustrates the fields and controls on the Projects Page: Project Overview - Map.



Project locations are plotted on a map using orange markers and resource locations are plotted on a map using green markers. Only named labor resources are displayed. Generic labor resources do not have addresses associated with them and cannot be plotted.

When you click one of the plot numbers on the map:

- If it's a project location, the system displays the project id, project description, location, city, state, and country.
- If it's a resource location, the system displays the resource name, role, hourly rate, city, state, and country

At the bottom of the map:

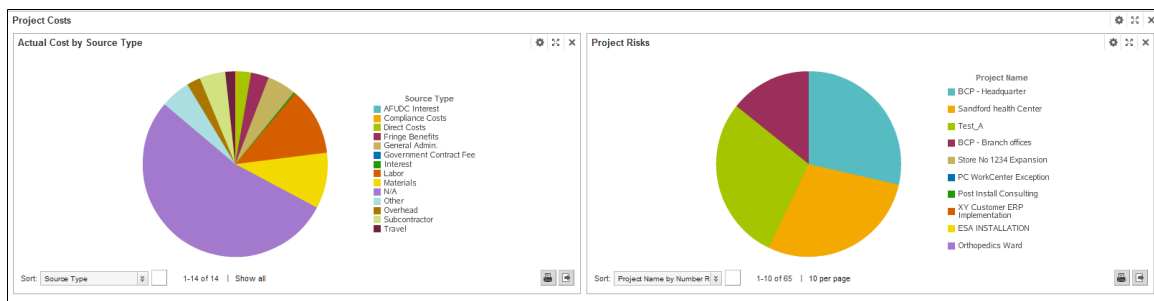
- Select the Project Location check box to display the orange project markers.
- Select the Resource Location check box to display the green resource markers.

Projects Page: Project Costs

Use the Projects Page: Project Costs to view project actual costs by source type and project risks.

Image: Projects Page: Project Costs

This example illustrates the fields and controls on the Projects Page: Project Costs.



Actual Cost by Source Type

The system displays the actual cost based on the source type in a pie format. This pie chart does not break costs down by project. It is an overview of spending for all projects selected in the current refinement.

Project Risks

The system displays the number of Risks (see [Project Metrics](#)) where the pie wedges indicate the number of risks for the project.

Sort

Select a sort order using the sort box at the bottom left of the chart display. Options include *Project Name* and *Project Name by Number Risks (max)*. The default sort order is by number of risks. The chart can be blank if the projects that are included in the filter do not have risks.

Details Page: Financial Analysis - Cost by Source Type

Use the Details Page: Financial Analysis - Cost by Source Type to view a activity costs by source type.

Image: Details Page: Financial Analysis - Cost by Source Type

This example illustrates the fields and controls on the Details Page: Financial Analysis - Cost by Source Type.

Project Name	Activity Name	Source Type	Budget Hours	Actual Hours	Cost Budget	Actual Cost	Budget Variance	Billed Amount	Revenue Amount	Net Profit
333	test	Travel	0.00	0.00	0	10,000	11,660	0	0	-10,000
		Labor	0.00	34.00	0	1,020	-1,020	0	0	-1,020
		N/A	0.00	34.00	0	0	0	0	0	0
ALLOCATION	Allocation Act...	Travel	0.00	0.00	0	75,000	-75,000	0	0	-75,000
		Other	0.00	0.00	0	55,000	-55,000	0	0	-55,000
		Materials	0.00	0.00	0	35,000	-35,000	0	0	-35,000
		Labor	0.00	0.00	0	15,000	-15,000	0	0	-15,000
AP	Analyst-Busin...	N/A	0.00	0.00	0	100	-100	0	0	-100
		Labor	32.00	0.00	1,150	0	1,150	0	26,000	26,000
BCP - Branch o...	Construction	Labor	0.00	0.00	168,000	0	168,000	0	0	0
		N/A	0.00	0.00	112,000	0	112,000	0	0	0
		Labor	0.00	0.00	32,000	0	32,000	0	0	0
BCP - Branch o...	Implementation	N/A	0.00	0.00	8,000	0	8,000	0	0	0
		Labor	0.00	0.00	80,000	0	80,000	0	0	0

Use this table to view a project analysis by source type at the activity level. Sub-totalling is available at the project level, but are not displayed by default. You can turn sub-totalling on using the View Options drop down box. Select the Drill to Detail tab to see transaction details.

Details Page: Financial Analysis - Drill to Details

Use the Details Page: Financial Analysis - Drill to Details to view the transaction details.

Image: Details Page: Financial Analysis - Drill to Details

This example illustrates the fields and controls on the Details Page: Financial Analysis - Drill to Details.

Business Unit	Project ID	Project Name	Activity ID	Activity Name	Analysis Type	Source Type	Source Type Code	Source Category	Source SubCategory
US004	0000000000196	PC WorkCenter Exception	000000000000001	Act01	BL	N/A	N/A	N/A	N/A
US004	0000000000196	PC WorkCenter Exception	000000000000001	Act01	ACT	N/A	N/A	N/A	N/A
US004	0000000000196	PC WorkCenter Exception	000000000000001	Act01	GLT	N/A	N/A	N/A	N/A
US004	000000109	Demo Project	000000000000001	Activity 1	TLX	N/A	N/A	N/A	K00
US004	000000109	Demo Project	000000000000001	Activity 1	BUD	N/A	N/A	N/A	N/A
US004	000000109	Demo Project	000000000000002	Activity 2	TLX	N/A	N/A	N/A	K00
US004	000000109	Demo Project	000000000000002	Activity 2	BUD	N/A	N/A	N/A	N/A
US004	PASSET4	Many Assets fr Many Act...	ACT3	Asset 6	ACT	Materials	MATER	ADVER	N/A
US004	PASSET4	Many Assets fr Many Act...	ACT3	Asset 6	ACT	Labor	LABOR	ADVER	N/A
US004	PASSET4	Many Assets fr Many Act...	ACT3	Asset 6	ACT	Labor	LABOR	ANAL	OTME
US004	PASSET4	Many Assets fr Many Act...	ACT3	Asset 6	ACT	Materials	MATER	ADMIN	KEYBD
US004	PASSET4	Many Assets fr Many Act...	ACT3	Asset 6	ACT	N/A	N/A	ARCH	RTIME
US004	PASSET4	Many Assets fr Many Act...	ACT1	Asset 6	ACT	Materials	MATER	ADVER	N/A
US004	PASSET4	Many Assets fr Many Act...	ACT1	Asset 6	ACT	Labor	LABOR	ADVER	N/A
US004	PASSET4	Many Assets fr Many Act...	ACT1	Asset 6	ACT	Labor	LABOR	ANAL	OTME
US004	PASSET4	Many Assets fr Many Act...	ACT1	Asset 6	ACT	Materials	MATER	ADMIN	KEYBD
US004	PASSET4	Many Assets fr Many Act...	ACT1	Asset 6	ACT	N/A	N/A	ARCH	RTIME
US004	IMPLEMENT	Implementation	EXPENSES	Expenses	ACT	Other	OTHER	N/A	K00
US004	PASSET4	Many Assets fr Many Act...	ACT2	Asset 7	ACT	Materials	MATER	ADVER	N/A
US004	PASSET4	Many Assets fr Many Act...	ACT2	Asset 7	ACT	Labor	LABOR	ADVER	N/A



(chain link icon)

Click the chain link icon to drill back to the PeopleSoft Project Transaction List page for the project and activity in the selected row. This icon opens the Transaction List page in a new window.

Details Page: Project Performance

Use the Details Page: Project Performance to view and analyze performance at the project and activity levels.

Navigation

Project Discovery , Projects. Click the Detail link in the upper left corner of the page.

Image: Details Page: Project Performance

This example illustrates the fields and controls on the Details Page: Project Performance.

Project Name	Budget Period	Budget Hours	Actual Hours	Cost Budget	Actual Cost	Budget Variance	Billed Amount	Revenue Amount	Net Profit
&Endeca Proj...	2013M06	0.00	0.00	0	10,000	-10,000	11,660	0	-10,000
	&Endeca Proj...	0.00	0.00	0	10,000	-10,000	11,660	0	-10,000
333	2013M06	0.00	68.00	0	1,020	-1,020	0	0	-1,020
	333 Summary	0.00	68.00	0	1,020	-1,020	0	0	-1,020
ALLOCATION	2003M10	0.00	0.00	0	180,000	-180,000	0	0	-180,000
	ALLOCATION S...	0.00	0.00	0	180,000	-180,000	0	0	-180,000
AP	2012M12	0.00	0.00	0	100	-100	0	0	-100
	AP Summary	0.00	0.00	0	100	-100	0	0	-100
Analysts	2013M06	0.00	0.00	0	0	0	0	26,000	26,000
	2013M07	32.00	0.00	1,150	0	1,150	0	0	0
	Analysts Sum...	32.00	0.00	1,150	0	1,150	0	26,000	26,000
	2005M05	0.00	0.00	0	1,700	-1,700	0	0	-1,700
	2005M09	0.00	0.00	40,000	0	40,000	0	0	0
	2006M10	0.00	0.00	40,000	0	40,000	0	0	0

Click the project name to view the same data for the activities within the project. At the project level, project data is displayed by period and has a subtotal at the project level. At the activity level, activity data is displayed by period and has a subtotal at the activity level. A grand total is displayed at the bottom of each table.

Chapter 4

Integrating between Project Discovery and PeopleSoft Resource Management

Understanding the Integration with PeopleSoft Resource Management

To view Resource Management data in Endeca, you must do the following:

- Set up the Integration between Project Discovery and PeopleSoft Resource Management. See [Setting Up the Integration with Resource Management](#)
- Run the ETL (Extract, Transform, Load) Process.

Understanding the Extract, Transform, Load Process

The Extract, Transform, Load (ETL) process extracts data from PeopleSoft, transforms the data, and loads it into Endeca. The analytics displayed on Endeca pages are only as fresh as the last time the ETL ran.

ETL Process Flow

A high-level description of the ETL Process for Resources is :

1. The system executes these tasks:
 - a. Saves the current system date and time as the ETL start date and time.
 - b. Invokes IAS to crawl the resume attachments.
 - c. Copies the RS_SRCH_LOG records into the ETL Log.
2. The LoadData graph loads the Resource Management data and merges with the resumes.

Data is extracted from the PeopleSoft database and it is loaded into Endeca. Based on the last updated transaction date and time (stored in the RS_SRCH_LOG table) and the last ETL run date and time (stored in the EID_ETL_LASRUN table), only new or updated rows are loaded or updated in Endeca.

Note: When a full load is initiated, the Last ETL Run date and time is reset to 1900-01-01 in the EID_ETL_LASRUN table so that all the data rows are extracted.

3. The system executes these tasks:
 - a. Updates the last ETL run date with the ETL start date and time saved in step 1.

- b. Deletes the records in the ETL log.

Scheduling ETL Process

You can schedule the ETL Process in two ways:

- *Full Load*: Loads all rows from PeopleSoft to the Endeca data sources.
- *Incremental Load*: Loads new and updated rows in PeopleSoft since the last time the ETL process ran.

Some changes in PeopleSoft are not captured in the incremental load. For example, if the currency conversion rate changes and the Resources bill rates are impacted by the rate change, this is not captured with the incremental load. Also, some effective-dated control data, such as status changes or location changes, are not captured with the incremental load. Oracle recommends scheduling full loads once a week to update all the weekly availability, utilization data, and effective-dated control data. Schedule the incremental loads as often as needed to refresh the data.

Full Loads

Schedule a full load to load all data rows into Endeca. You must schedule full loads for the following scenarios:

Scenario	Frequency
Update weekly Availability and Utilization data	Once a week.
Changes in currency conversion rate	As often as needed to reflect significant rate fluctuations.
Change in currency code	Whenever there is a change in the reporting currency code.
Update Employee Data	Whenever PeopleSoft FSCM employee data is synchronized with PeopleSoft HCM data.

Incremental Loads

Schedule Incremental load to load new or updated rows, or refresh the data in Endeca.

For information on scheduling the ETL process, see *PeopleSoft Financials and Supply Chain Management 9.2 In-Memory Project Discovery Installation Scheduling ETL Processes*.

Setting Up the Integration with Resource Management

To set up integration between Project Discovery and PeopleSoft Resource Management, you must do the following:

- Install PeopleSoft Project Discovery. See *PeopleSoft Financials and Supply Chain Management 9.2 In-Memory Project Discovery Installation*, Installing PeopleSoft Project Discovery.

- Install Endeca Information Discovery. See *PeopleSoft Financials and Supply Chain Management 9.2 In-Memory Project Discovery Installation*, Installing Endeca Information Discovery.
- Implement Project Discovery Applications. See *PeopleSoft Financials and Supply Chain Management 9.2 In-Memory Project Discovery Installation*, Implementing Project Discovery Applications.
- Integrate Project Discovery with PeopleSoft Resource Management See *Pages used to Set Up Integration between Project Discovery and PeopleSoft Resource Management* section in this document

Pages used to Set Up Integration between Project Discovery and PeopleSoft Resource Management

This section discusses various pages in PeopleSoft that are necessary for setting up integration between Project Discovery and Resource Management.

Page Name	Definition Name	Navigation	Usage
Project Costing	INSTALLATION_PC	Set Up Financials / Supply Chain , Install , Installation Options , Project Costing	Set Up or Verify Weekly Calendar For additional information about setting permissions, see <i>PeopleSoft FSCM Application Fundamentals</i> , Setting Up a Weekly Calendar.
Calendar Periods	DETAIL_CALENDAR1	Set Up Financials/Supply Chain, Common Definitions, Calendar/Schedules, Detail Calendar, Calendar Periods	Verify if a weekly calendar is set up with 6 months in the past, and at least 24 months in the future. For additional information about setting permissions, see <i>PeopleSoft FSCM Application Fundamentals</i> , Setting Up a Weekly Calendar.
Resource Management	INSTALLATION_RS	Set Up Financials/Supply Chain, Install, Installation Options, Resource Management	Set up a currency code and Rate type.

Installation Options - Resource Management Page

Use the Installation Options - Resource Management page (INSTALLATION_RS) to set up a currency code. The currency code displayed in the Metrics bar of the Project Discovery Resources page is as per the currency code set up in the Resource Management page. Additionally, you must enter a Rate type.

Navigation

Set Up Financials/Supply Chain, Install, Installation Options, Resource Management

Image: Installation Options - Resource Management Page

This example illustrates the fields and controls on the Installation Options - Resource Management Page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Installation Options - Resource Management' page. It has tabs for 'Installation Options' and 'Resource Management'. The page is organized into sections:

- Service Order Options:** Service Order Priority (M)
- Organization Structure:** Organization Field Name (DEPTID), Organization Unit Record (DEPT_TBL), Organizational Structure Tree Name (CONSULTING), Employee - Organization Record (RS_ORGEMPLBR_V)
- Reporting Options:** Billing Rates section, which includes:
 - Billing Rate: 195.000
 - Currency Code: US Dollar (highlighted with a red box)
 - Rate Type: CRRNT (Current Rate)
 - Unit of Measure: Work Hour

Currency Code

Displays the currency code

Note: If you change the currency code in the Resource Management Installation Options page, a full ETL process must be run so that the new currency code is displayed in the Metrics bar of the Project Discovery Resources page.

Rate Type

Displays the Rate type that determines the default conversion rate for converting resource billing rates and currency codes

See *PeopleSoft FSCM Application Fundamentals* Setting Up Application-Specific Installation Options

Analyzing Resources Using Endeca

The Project Discovery Resources pages enable you to analyze PeopleSoft Resource Management data. The Project Discovery Resources pages display analytical data that includes metrics, charts, and maps that allows users to analyze resources and resource requests. Furthermore, by using Filter Options, users can iterate the data displayed on the Resources pages and render the metrics by various dimensions for analysis.

Analytic data displayed on the Resources pages is retrieved from the Endeca application. The Extract, Transform, Load (ETL) process extracts data from PeopleSoft, transforms the data, and loads it into Endeca. The data displayed on the Resources pages is only as fresh as the last time the ETL ran.

See [Setting Up the Integration with Resource Management](#).

Pages Used to Analyze Resource Management Data

Page Name	Definition Name	Navigation	Usage
Resources	RS_PROJ_DISCOVERY	Project Discovery , Resources	Analyze resources and data available in Resource Management.
Supply & Demand	RS_PROJ_DISCOVERY	Project Discovery , Resources. Select the Supply & Demand tab.	Compare the resource competencies (Supply) and resource request competencies (Demand).

Resources Page

Use the Resources page (RS_PROJ_DISCOVERY) to analyze resources and data available in Resource Management.

Navigation

Project Discovery , Resources

Image: Resources Page

This example illustrates the fields and controls on the Resources page. You can find definitions for the fields and controls later on this page.

The Resources page has multiple sections. Information about these sections can be found in the [Common Elements Used with Endeca](#) topic.

Section	Description
Search Box	Enables you to search for any text including resume attachments, accomplishments, and work experience. For more information, see <i>Search Box</i> section in Common Elements Used with Endeca
Breadcrumbs	Displays the current filter criteria in effect. For more information, see <i>Breadcrumbs</i> section in Common Elements Used with Endeca
Bookmarks	Allows you to save filter refinements that are frequently used. For more information, see <i>Bookmarks</i> section in Common Elements Used with Endeca
Guided Navigation	Enables you to apply filters and refine the scope of data being displayed on the Resources page and the Supply and Demand page. For more information, see <i>Guided Navigation</i> section in this document.
Tag Cloud	View up to 10 competency descriptions based on the current filter refinements. For more information, see <i>Tag Cloud</i> section in Common Elements Used with Endeca

The Resources page has the following components:

Metrics Bar

Image: Metrics Bar

This example illustrates the fields and controls on the Metrics Bar. You can find definitions for the fields and controls later on this page.



The Metrics Bar displays summarized data of the resources based on the filter options applied on the Resources page. The filter options are available under Guided Navigation on the Resources page. The following table lists the metrics displayed in the Metrics bar:

Metric	Description
Resources	Displays the count of employees being reviewed.

Metric	Description
Avg Standard Bill Rate	Displays the average Standard Bill rate for the resources being reviewed.
Avg Actual Bill Rate	Displays the average Actual Bill rate from transactions in Project Costing.
Cost Rate	Displays the average Cost rate from transactions in Project Costing.
Avg Margin %	<p>Displays the average difference between Actual Bill rate and Cost rate from Project Costing in percentage.</p> <p>The <i>green</i>, <i>red</i>, and <i>yellow</i> colors indicate alerts when the margin crosses a set range. Users can set the range for margins using the Customize Endeca Application link in the Endeca application</p>
USD	<p>Displays the currency code as set up in the Resource Management Installation Options page.</p> <hr/> <p>Note: If a user changes the currency code in the Resource Management Installation Options page, a full ETL process must be run so that the new currency code is displayed in the Metrics bar.</p> <hr/>
Avg Utilization %	<p>Displays the average utilization of the resources in percentage. Alerts are indicated by colors. Users can set the range using the Customize Endeca Application link in the Endeca application.</p> <p>To calculate Utilization %, see the <i>Utilization</i> section in this document.</p>

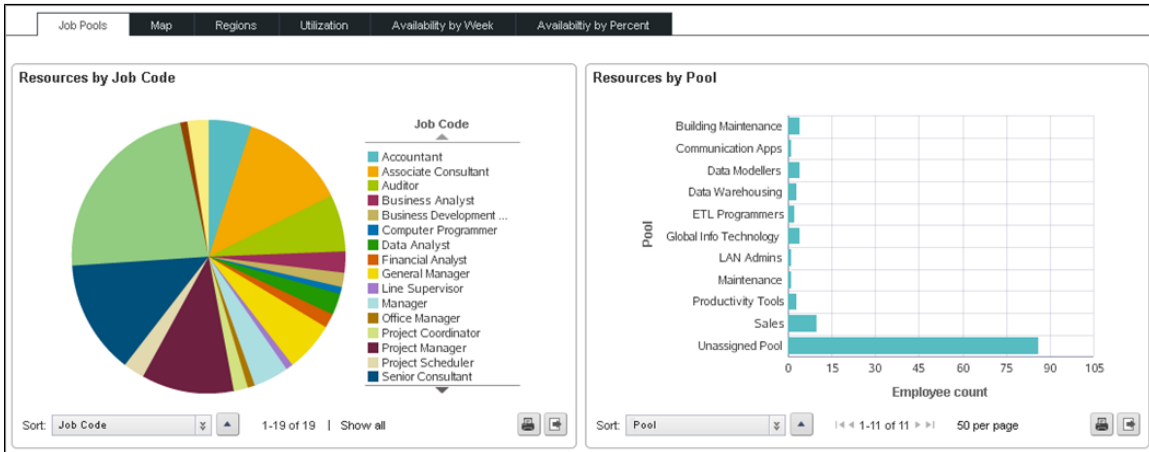
Job Pools

The Job Pools tab displays two different charts, Pie chart and a Bar chart, based on filter refinements. While the pie chart displays the count of resources by Job Code, the bar chart displays the count of resources by Resource Pool. The sort order, by default, is alphabetical by Job Code and Pool name

respectively in the ascending order. However, the Sort selector enables you to sort by the employee (resource) count.

Image: Job Code and Resource Pool

This example illustrates the fields and controls on the Job Code and Resource Pool.



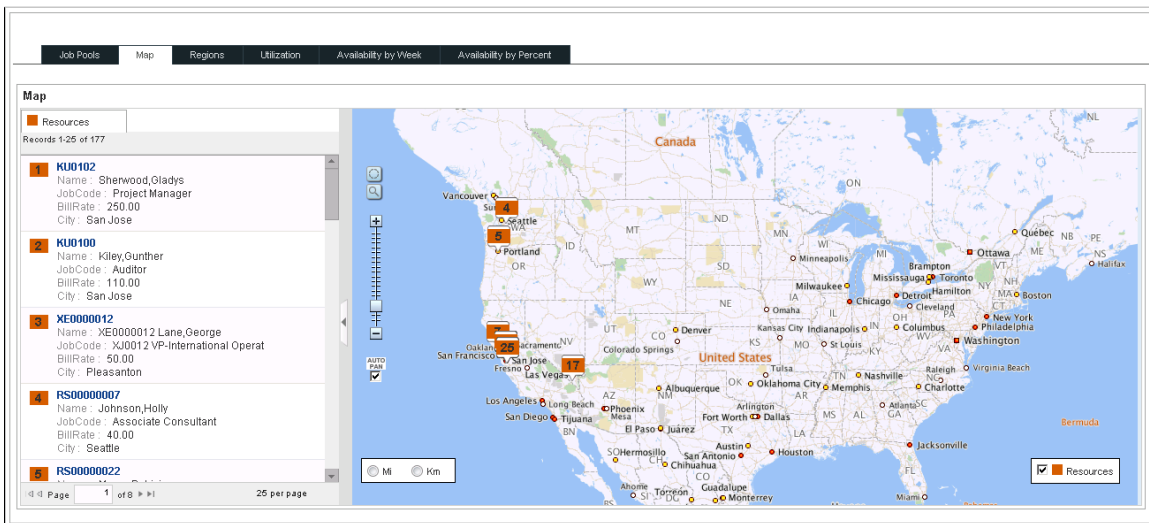
The Job Pools tab is selected by default and it displays the charts by Job Code and Resource Pool. If you select a job code in the Resources by Job Code pie chart, the Resources by Pool chart displays the associated resource pools for the selected Job Code. Likewise, if you select a bar in the Resources by Pool chart, the Resources by Job Code pie chart displays the associated job codes for the selected Resource Pool.

Map

Use the Map tab on the Resources page to view the locations of resources on a map. The locations of the resources are plotted on the map by orange markers. You can use the Resources check box on the map to turn on or turn off the display of resources. The left hand side of the map lists the number of resources, and this number is plotted on the map when the Resources check box is selected. The search option on the map enables you to locate a resource within the specified miles or kilometers in the search option.

Image: Map

This example illustrates the fields and controls on the Map.



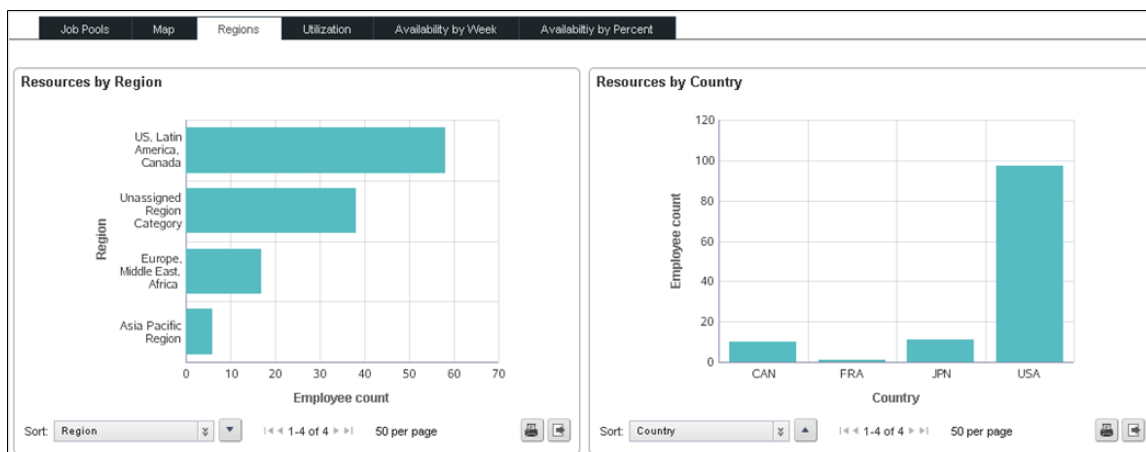
Resources by Region

Use the Region tab on the Resources page to view the resources chart by Region, Country, State, and City. While the Region chart displays the count of resources by Region name, the Country chart displays the count of resources by Country, State, and City. The Resources by Country chart enables you to drill down to country, state and city.

The sort order, by default, is alphabetical by Region and Country respectively in the ascending order. However, the Sort selector enables you to sort by the employee (resource) count.

Image: Region and Country Charts

This example illustrates the fields and controls on the Region and Country Charts.



Utilization

Use the Utilization tab on the Resources page to view the average percentage utilization of resources (by week) based on filter refinements. While Actual utilization is represented by blue bars, Scheduled utilization is represented in yellow. The green line is the optimized percentage, and this percentage is set to a fixed value of 85.

You enter past billing data and future assignments for various employee resources in PeopleSoft. The range of weeks, by default, is 6 months in the past and up to 12 months in the future from the current date. You can narrow the range using the Available Date Range slide bar in Guided Navigation.

The formulas to calculate Utilization % are:

- *Actual Utilization %* is RESOURCE_QUANTITY (actual worked hours from PC_SUMMARY_TBL table) divided by STD_HOURS (employee's standard hours or capacity from JOB table).

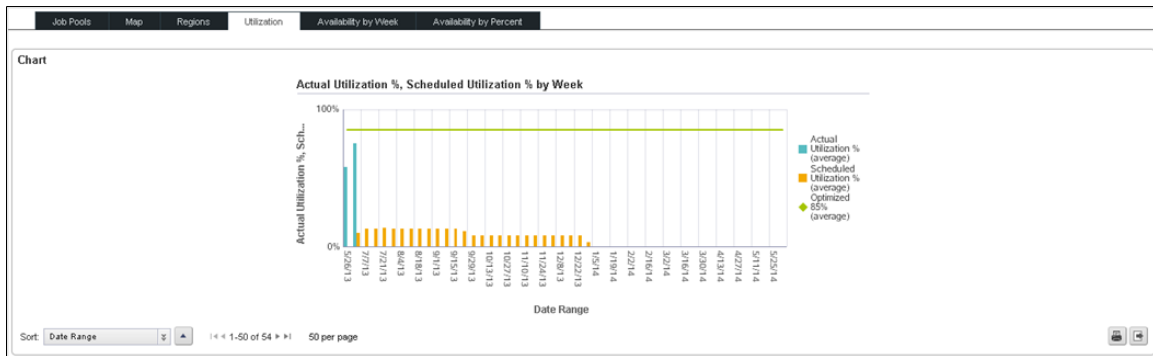
This is calculated using the past 6 months of data and summarized in monthly or weekly increments depending on the PC summarization period.

- *Scheduled Utilization %* is SCHEDULED_HRS (employee's assigned hours from RS_SCHED_TASK table) divided by STD_HOURS (employee's standard hours or capacity from JOB table).

This is calculated using the next 12 months of data and summarized in weekly increments.

Image: Utilization Chart

This example illustrates the fields and controls on the Utilization Chart.



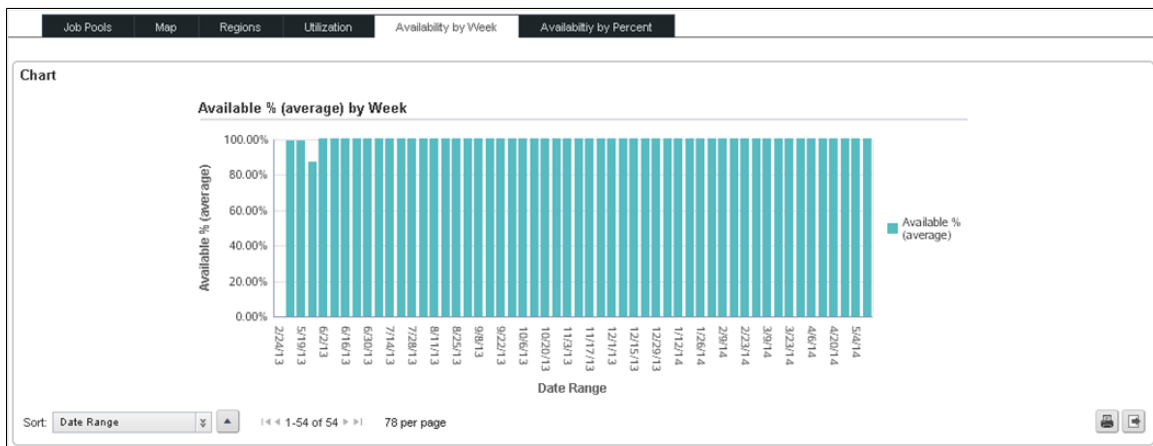
Availability by Week

Use the Availability by Week tab on the Resources page to view the Available percent by week.

Availability is always for a future date. However, the default start date will be in the past. To view Availability data, narrow the date range by selecting current date as the start date using the Available Date Range slide bar in Guided Navigation.

Image: Availability by Week Chart

This example illustrates the fields and controls on the Availability by Week Chart.



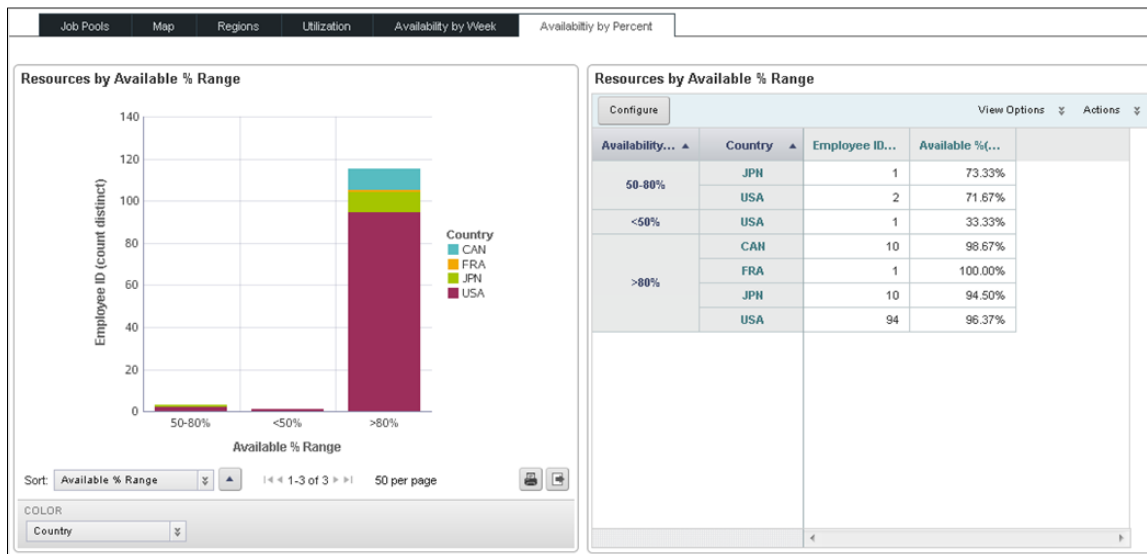
Availability by Percent

Use the Availability by Percent tab on the Resources page to view the availability by Available Percent Range buckets.

You cannot refine the data on the Available Percent Range buckets. However you can refine the data on country, state, and city. For example, if you select USA within a specific available bucket, resources in the USA are displayed. However, all Available Percent Range buckets are also displayed for USA.

Image: Availability by Percent Chart

This example illustrates the fields and controls on the Availability by Percent Chart.



Results Table by Employee

Use the Results Table by Employee to review transaction details at a finer level. The data displayed in the Results Table by Employee is based on filter refinements.

Image: Results Table by Employee

This example illustrates the fields and controls on the Results Table by Employee. You can find definitions for the fields and controls later on this page.

Results Table by Employee								
Overview								
Profile	Assign	Employee ID	Employee Name	Job Title	Project Business Unit	Project ID	Project Name	Pool
<input type="checkbox"/>	Profile	Assign	RS00000026	Chin,Robert	Associate Consultant			Unassigned Po
<input type="checkbox"/>	Profile	Assign	IXHEE102	Angelini,Gina	Senior VP			Unassigned Po
<input type="checkbox"/>	Profile	Assign	RS00000029	Reynolds-Smith,Debbie	Senior Consultant			Unassigned Po
<input type="checkbox"/>	Profile	Assign	RS00000054	Hart,Ryan	Business Analyst			Unassigned Po
<input type="checkbox"/>	Profile	Assign	RS00000017	Samsun,Mickey	Project Scheduler			Unassigned Po
<input type="checkbox"/>	Profile	Assign	RS00000015	Silno,Gina	Project Manager			Sales
<input type="checkbox"/>	Profile	Assign	KU0022	Turner,Cornelia	Senior Consultant			Unassigned Po
<input type="checkbox"/>	Profile	Assign	KU0059	Zinn,Vicki	Accountant			Unassigned Po
<input type="checkbox"/>	Profile	Assign	RS00000036	Lindsey,John	Data Analyst			Data Modellers
<input type="checkbox"/>	Profile	Assign	RS00000033	O'Brein,Brian	Project Coordinator			Unassigned Po

The Results Table by Employee table has the following options that helps you to refine data:

- By using Column Selector, you can view filtered data when you use filters options in the Column Selector. The filter options in the Column Selector are *Overview*, *Availability & Utilization*, *Rates*, and *Qualifications*.
- Click the Profile link to display the PeopleSoft Resource Profile page.

- Click the Assign link to create a new assignment for an employee on the PeopleSoft Resource Assign page or view the assignments already created for an employee.
- Click any value displayed in a field. The data and the charts will be refined based on the value you selected.
- Click the column headers to sort the columns in the Results Table by Employee table.

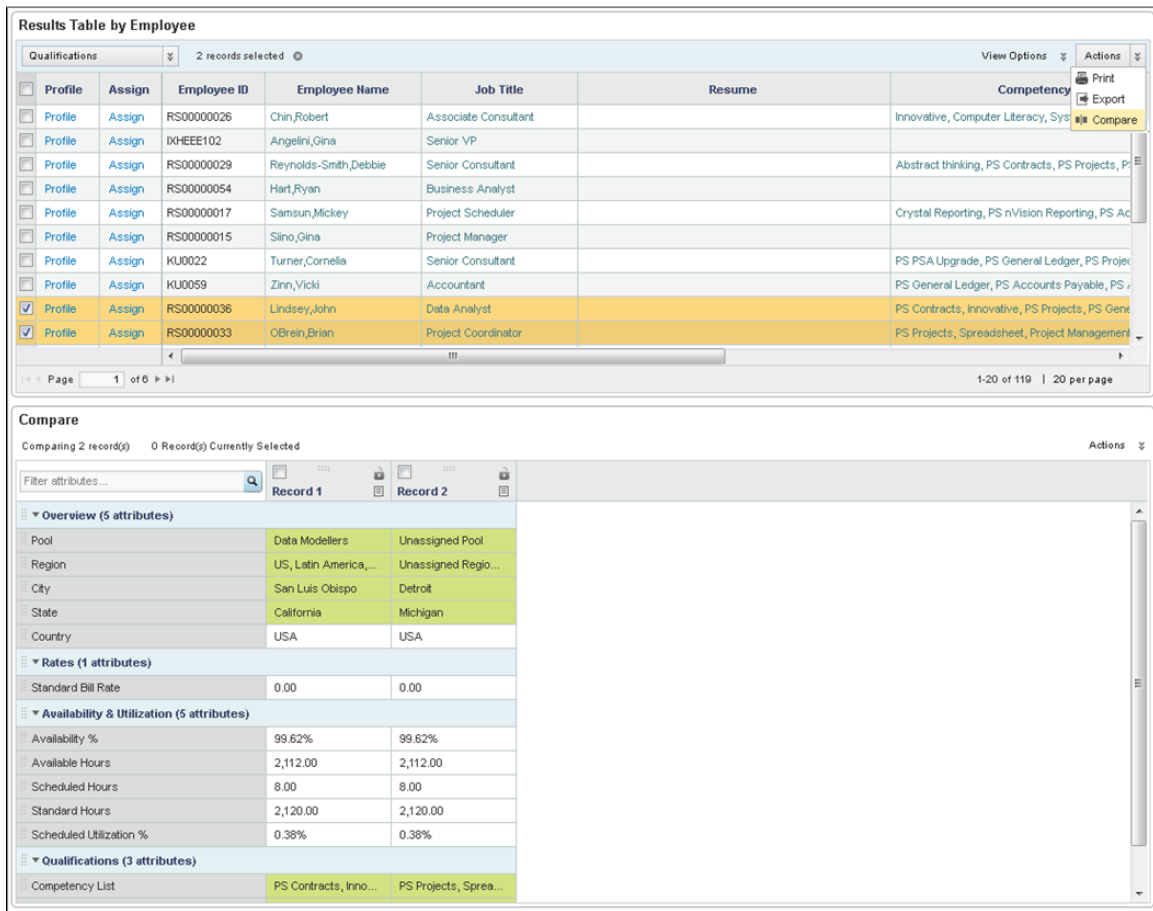
Compare Component

The Compare component allows you to compare multiple records selected in the Results Table.

Select the records you want to compare in the Results Table and then click *Compare* in the Action drop-down menu. Fields that are different are highlighted in *green*.

Image: Compare Component

This example illustrates the fields and controls on the Compare Component.



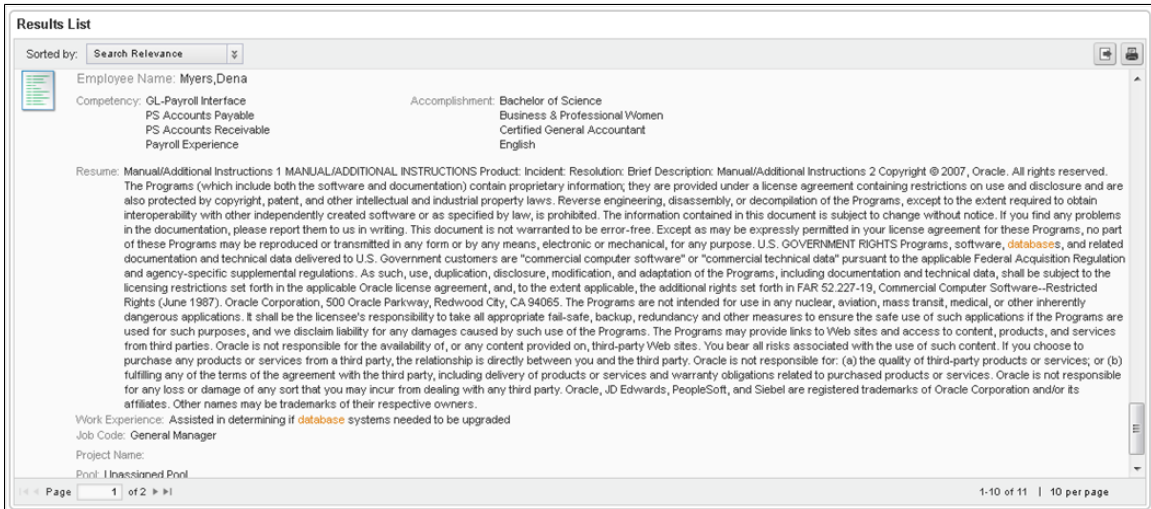
Result List Component

The Results List component enables you to view the record details of resources without having to open to the PeopleSoft Resource Profile page. You can scroll and view all the records that are displayed based on

the filter options that have been applied. Additionally, when a search is performed using the Search Box, the search text, if it is found, is highlighted in the Result List.

Image: Result List Component

This example illustrates the fields and controls on the Result List Component.



Guided Navigation

Use Guided Navigation to apply filters and refine the scope of data being displayed on the Resources page. To apply filters, select a filter value under Guided Navigation and then click Submit.

The Resources page has the following filters:

Resource Filters	Description
Employee ID	Displays the Employee IDs.
Employee Name	Displays the name of the Employees.
Job Code	Displays the job codes of the employees.
Competency	Displays job competencies.
Available Date Range	<p>Displays the range for dates. You can select the dates or use the slide bar to set a date range .</p> <hr/> <p>Note: The Available Date Range filter does not alter Actual Rate calculations. Actual Rates are always calculated from the entire set of Projects Summary data.</p> <hr/> <p>Note: If you pick a start date after the start day of a week, the current week is skipped and the following week is selected. To view availability for the current week, you must select the start date of the week according to the PC weekly calendar.</p> <hr/>

Resource Filters	Description
Actual Bill Rate	Displays the Actual Bill rate. You can select an Actual Bill rate or use the slide bar to set an actual bill rate.
Profile Last Updated	Displays a date range. You can select the dates or use the slide bar to set a date range to filter for last updated profiles.
Project Business Unit	Displays a list of Business Units
Project ID	Displays the Project IDs set up for the Projects.
Project Name	Displays the names of the Projects.
Pool	Displays a list of resource pools.
Region	Displays the region names.
City	Displays the name of the cities.
State	Displays the names of the states.
Country	Displays the names of the countries.

Supply & Demand Page

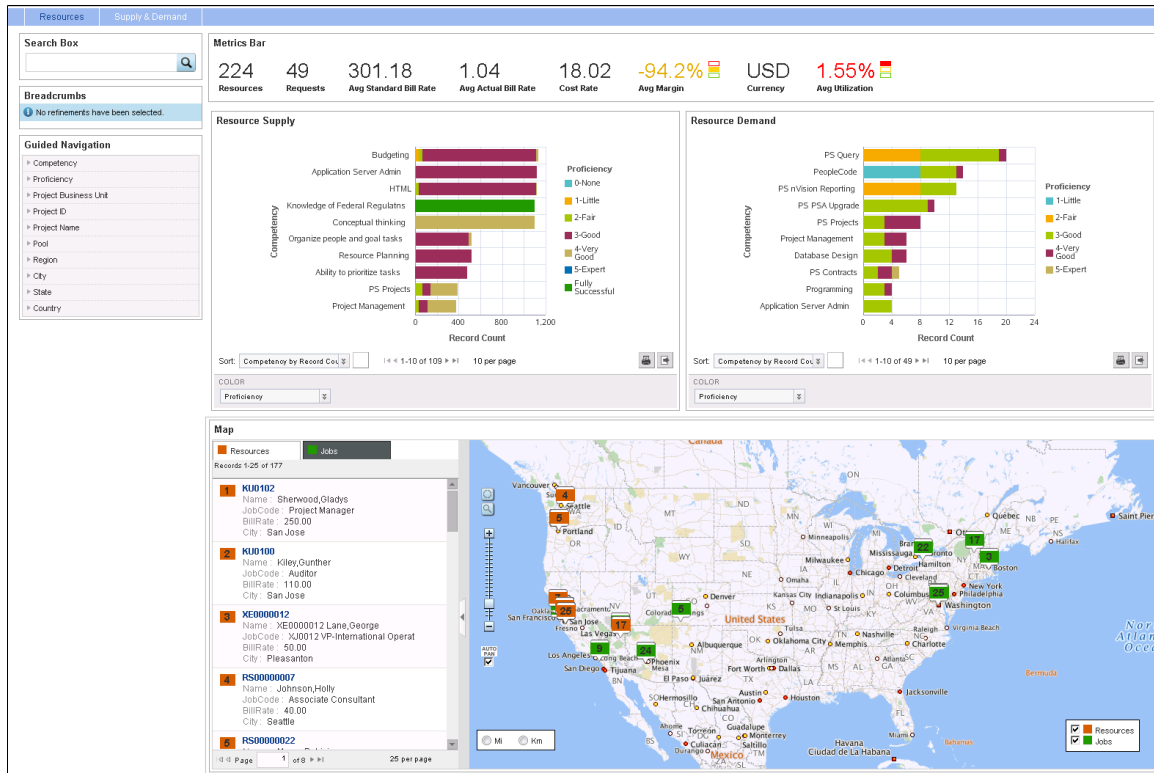
Use the Supply and Demand page (RS_PROJ_DISCOVERY) to compare the resource competencies (Supply) and resource request competencies (Demand).

Navigation

Project Discovery , Resources . Select the Supply & Demand tab.

Image: Supply & Demand Page

This example illustrates the fields and controls on the Supply & Demand page. You can find definitions for the fields and controls later on this page.



The Supply & Demand page has the following components:

Metrics Bar

The Metrics Bar displays summarized data for all resources and requests based on the filter refinements applied on the Supply & Demand page.

Image: Metrics Bar

This example illustrates the fields and controls on the Metrics Bar. You can find definitions for the fields and controls later on this page.



The following table displays the metrics in the Metrics Bar.

Metric	Description
Resources	Displays the count of employees being reviewed.

Metric	Description
Requests	Displays the count of resource requests being reviewed.
Avg Standard Bill Rate	Displays the average Standard Bill rate for the resources being reviewed.
Avg Actual Bill Rate	Displays the average Actual Bill rate from transactions in Project Costing.
Cost Rate	Displays the average Cost rate from transactions in Project Costing.
Avg Margin %	<p>Displays the average difference between Actual Bill rate and Cost rate from Project Costing. in percentage.</p> <p>The <i>green</i>, <i>red</i>, and <i>yellow</i> colors indicate alerts when the margin crosses a set range. Users can set the range for margins using the Customize Endeca Application link in the Endeca application</p>
USD	<p>Displays the currency code as set up in the Resource Management Installation Options page.</p> <hr/> <p>Note: If a user changes the currency code in the Resource Management Installation Options page, a full ETL process must be run so that the new currency code is displayed in the Metrics Bar.</p> <hr/>
Avg Utilization %	<p>Displays the average utilization of the resources in percentage. Alerts are indicated by colors. Users can set the range using the Customize Endeca Application link in the Endeca application.</p> <p>To calculate Utilization %, see the <i>Utilization</i> section in this document.</p>

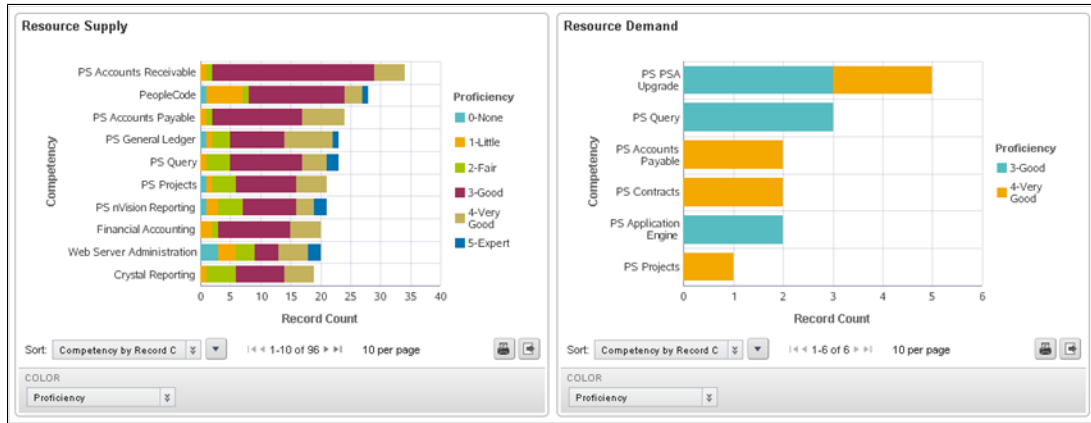
Supply and Demand Charts

The Supply & Demand charts display the resource competencies (Resource Supply) and resource request competencies (Resource Demand) side by side for comparison. Each competency is then sub divided into proficiency levels. These charts indicate what competencies are currently available (Resource Supply Chart) and what competencies are in demand (Resource Demand chart).

When you select a common competency in any one of the charts, both charts are re-drawn (or refreshed) with just one competency.

Image: Supply and Demand Charts

This example illustrates the fields and controls on the Supply and Demand Charts.

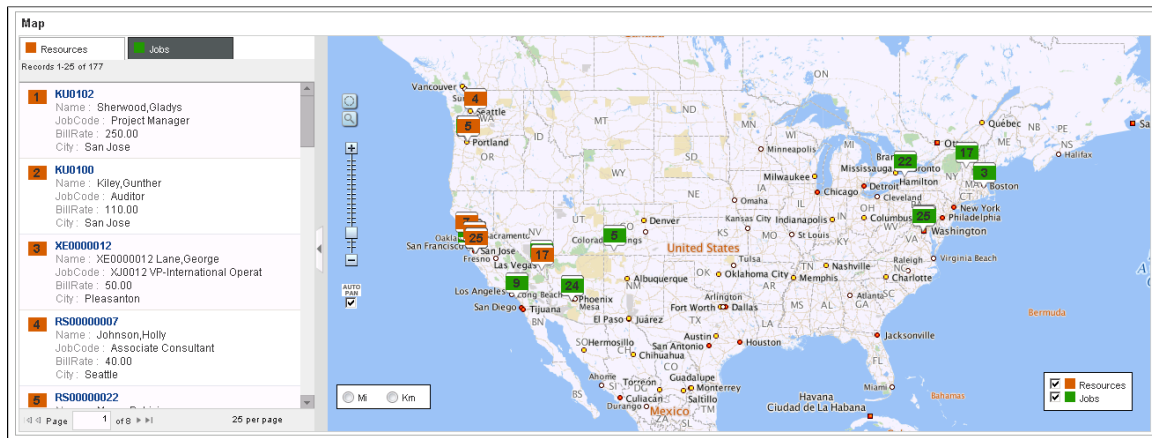


Supply & Demand Map

Image: Supply & Demand Map

Use the Supply and Demand map to view the resources and their job locations. The resource and their job locations are plotted on the map by *orange* and *green* markers respectively. You can use the Resources and Jobs check boxes on the map to turn on or turn off the display of resources, job locations, or both.

By using the search option, you can find resources within a set number of miles or kilometers of the customer job site or find jobs within a set number of miles, or kilometers, of the resource. The left hand side of the map displays two tabs, Resources and Jobs that lists the number of resources and jobs.; These numbers are plotted on the map when the Resources, Jobs, or both check boxes are selected.



Supply & Demand Results tables

The Supply & Demand Results tables enable you to review transaction details. The Supply & Demand Results tables consist of one row per competency.

Image: Supply & Demand Results tables

This example illustrates the fields and controls on the Supply & Demand Results tables.

The image shows two screenshots of Oracle HRMS tables. The top screenshot is titled 'Resource Supply' and shows a table with columns: Employee ID, Employee Name, Competency, Project Business Unit, Project ID, Project Name, and Pool. The bottom screenshot is titled 'Resource Demand' and shows a table with columns: Order ID, Order Line #, Order Line Description, Competency, Project Business Unit, Project ID, and Project Name.

Employee ID	Employee Name	Competency	Project Business Unit	Project ID	Project Name	Pool
EMP1	Jhones,Harris					Unassigned Pool
EMP1	Jhones,Harris	PeopleTools				Unassigned Pool
EMP1	Jhones,Harris	PS Accounts Receivable				Unassigned Pool
EMP1	Jhones,Harris	Java				Unassigned Pool
EMP10	Watson,Thomas					Unassigned Pool
EMP10	Watson,Thomas	PS Accounts Receivable				Unassigned Pool
EMP11	Jack,Mike					Unassigned Pool
EMP11	Jack,Mike	PS Accounts Receivable				Unassigned Pool
EMP12	Jhones,Rena					Unassigned Pool
EMP12	Jhones,Rena	Understands decision pro...				Unassigned Pool

Order ID	Order Line #	Order Line Description	Competency	Project Business Unit	Project ID	Project Name
000000002	1	PROJECT IMPLEMENTATION		CAN01	CAN IMPLEMENT	
000000002	1	PROJECT IMPLEMENTATION	PS Projects	CAN01	CAN IMPLEMENT	
000000002	1	PROJECT IMPLEMENTATION	PS PSA Upgrade	CAN01	CAN IMPLEMENT	
000000002	1	PROJECT IMPLEMENTATION	PS Query	CAN01	CAN IMPLEMENT	
000000002	2	CONTRACTS IMPLEMENT...		CAN01	CAN IMPLEMENT	
000000002	2	CONTRACTS IMPLEMENT...	PS Contracts	CAN01	CAN IMPLEMENT	
000000002	2	CONTRACTS IMPLEMENT...	PS Contracts	CAN01	CAN IMPLEMENT	
000000002	2	CONTRACTS IMPLEMENT...	PS PSA Upgrade	CAN01	CAN IMPLEMENT	
000000002	2	CONTRACTS IMPLEMENT...	PS PSA Upgrade	CAN01	CAN IMPLEMENT	
000000002	2	CONTRACTS IMPLEMENT...	PS Query	CAN01	CAN IMPLEMENT	

Guided Navigation

Guided Navigation allows you to apply filters to refine the scope of data being displayed on the Supply and Demand page. To apply filters, select a filter value under Guided Navigation and then click Submit.

The Supply & Demand page has the following filters:

Supply and Demand Filters	Description
Competency	Displays job competencies
Proficiency	Displays different Proficiency levels of a job competency.
Project Business Unit	Displays a list of Business Units
Project ID	Displays the Project IDs set up for the Projects.
Project Name	Displays the names of the Projects.

Supply and Demand Filters	Description
Pool	Displays a list of resource pools.
Region	Displays region names.
City	Displays the name of the cities.
State	Displays the names of the states.
Country	Displays the names of the countries.

Note: The Guided Navigation filters in common with the Resources page applies to the Supply & Demand page. For example, if you select a competency such as *Peoplecode* on the Resources page, the same filter is displayed in the Breadcrumbs on the Supply & Demand page.
