

Oracle Project Portfolio Management Cloud

Using Project Performance Reporting

22A



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1 Project Performance Reporting

Tolerance Percentage

Use tolerance percentages to compare the previous key performance indicator (KPI) value with the current value. The application calculates trend indicators based on the percentage increase or decrease in a KPI value and the tolerance percentage in the KPI definition.

Example of Tolerance Percentage

When you create a KPI, you must enter a tolerance percentage that's used to determine the trend indicator for a KPI. The percentage change in KPI value is calculated using the following formula:

$$\text{Percentage Change in KPI Value} = \frac{\text{absolute value of } ((\text{Current Value} - \text{Previous Value}) * 100)}{\text{Previous Value}}$$

This table describes how the application uses tolerance percentage to calculate the trend indicator.

KPI	Tolerance Percentage and Trend Indicator Setting	Current Period KPI Value and Status Indicator	Previous Period KPI Value and Status Indicator	Percentage Change	Trend Indicator Based on Previous Period
PTD Actual Invoice Amount	5 percent Up is Favorable	\$3500 Critical	\$4800 Warning	27 percent	Down, Unfavorable
PTD Actual Spent Labor Effort Percentage	5 Up is Favorable	75 On Track	71 On Track	5.6 percent	Up, Favorable
PTD Actual Margin Percentage	2 percent Up is Favorable	28.5 percent Warning	30.2 percent On Track	5.6 percent	Down, Unfavorable

Financial Plan Types Included in Summarization

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

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

- Primary Cost Forecast

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

Additional Financial Plan Types Included in Summarization

Apart from the financial plan types that are included in the summarization by default, you can manually include up to four financial plan types in summarization of project performance data.

Tip: You can include a financial plan type before it's used on a project for creating a version.

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

Performance Trend Indicators

Project performance trend indicators show whether project performance is favorable or unfavorable. You can view the following trends:

Trend	What Does It Indicate
Up, favorable	An increasing KPI value is favorable to the project.
Up, unfavorable	An increasing KPI value is unfavorable to the project.
Down, favorable	A decreasing KPI value is favorable to the project.
Down, unfavorable	A decreasing KPI value is unfavorable to the project.
Unchanged	No change to the KPI value.

In the Setup and Maintenance work area, use the **Manage Trend Indicators** task to change the default sort order of the trend indicators. Based on this sort order, the KPIs are listed in the KPI Watchlist region in the Project Performance Dashboard.

Example of KPI Thresholds with Different Currencies

You can set up different threshold ranges for each currency for currency-based KPIs to ensure that the thresholds apply for a particular currency amount.

Example of Threshold Levels with Different Currencies

The following example describes setting up of different threshold levels for each currency.

Vision Corporation sells and installs human resource software. A standard KPI used for installation projects is Period-to-Date (PTD) Invoice Amount. Projects are executed in different countries having different project and ledger currencies, such as United States dollars (USD), Japanese yen (JPY), and Indian rupees (INR).

The PTD invoice amount for projects with a ledger currency of USD is critical if the value is between 0 and 3,000 USD. The PTD invoice amount for projects with a ledger currency of INR is critical if the value is between 0 and 50,000 INR. The currency thresholds are independent of currency conversion.

FAQs for Project Performance Reporting

What budgets and forecasts are included in the summarization?

Certain financial plan types are included in summarization by default, while you must manually select others. Approved forecast and baseline budget versions of the following financial plan types are automatically included in summarization of project performance data:

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

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

Can I choose the regions to appear on Project Performance Reporting dashboard?

Yes. Select the **Edit Current Page** link in the **Personalization** menu to show or hide regions. You can also modify the arrangement of the region layouts using the **Change Layout** option.

Can I select the columns to appear in the Project Performance Reporting dashboard tables?

Yes. The View menu in the region gives you options to add or remove columns in a region.

2 Update Project Performance Data and Generate KPIs

Project Performance Data Summarization

Project managers, project application administrators, and project administrators can run the Update Project Performance Data process to summarize performance data for a project unit, business unit, a range of projects, or the projects managed by a project manager. This process:

- Summarizes data for different data sources, such as actual costs, commitments, contract revenue, invoice amounts, budgets, control budgets, allocations, forecasts, and awards.
 - Summarizes data in the project currency, project ledger currency, and transaction currency.
 - Summarizes data in the accounting and project accounting calendars.
 - Summarizes contracts.
- Generates KPI values and determines the overall project health status.
- Updates the financial project plan with summarized amounts from actual cost transactions.
- Updates Oracle Essbase cubes so that you can view the summarized data using Oracle Smart View for Office.

Summarized Data

Use the summarized data to analyze the health of projects and drill down to the causes of any deviation from set thresholds.

You can use summarized data to:

- Analyze project performance.
- Analyze KPI categories and KPIs.
- Track project health and progress across different periods.
- View summaries for revenues, invoices, actual costs, budgets, allocations, forecasts, and commitments.

Note: On the Review Project Performance page, the transfer order commitments are reported as part of Other Commitments. That is, the ITD Transfer Order Committed Cost is reported as part of ITD Other Committed Cost, the PTD Transfer Order Committed Cost is reported as part of PTD Other Committed Cost, and so on.

- Build dashboards and analyses to review project performance using the Projects - Performance Reporting Real Time subject area.
- Create reports using Oracle Smart View for Office.

When to Run the Update Project Performance Data Process

You can run the Update Project Performance Data process for different situations. For example, run it when:

- The summarized data is out of date and you want to update it. For example, if you don't see the latest summarized data in the Project Management infolets, in the Project Performance Dashboard regions, or in the My Projects page.
- Large volume of data isn't summarized yet, and you want to summarize the entire data in one run.

Note: If you have large volumes of data, run the Update Project Performance Data Without Producing Report process when the workload is low. For example, you can run the process on a nightly basis.

The following processes run as part of the Update Project Performance Data process and summarize data. So, don't run these processes if you're running the Update Project Performance Data process:

Process	Notes
Distribute Project Resource and Task Effort by Day	None.
Update Project Contract Performance Data or Update Project Contract Performance Data Without Producing Report	The Update Project Performance Data process or the Update Project Contract Performance Data process summarizes project and contract performance data. Submit or schedule either of these processes without specifying any parameters that determine the range of projects or contracts for the process. You must leave any such parameters (for example, project unit, business unit, and so on) blank so that the application can summarize the eligible projects and contracts.
Generate KPI Values or Generate KPI Values Without Producing Report	The Update Project Performance Data process doesn't spawn a subprocess for generating KPIs. KPIs are generated as part of the Update Project Performance Data process.
Update Award Project Performance Data Without Producing Report	None.
Update Project Plan Data or Update Project Plan Data Without Producing Report	If the Enable automatic pushing actual to project plan after every online cost summarization profile option is enabled, the Update Project Plan Data process runs as part of the Update Project Performance Data process. Otherwise, navigate to the Manage Financial Project Plan page, click Update Amounts > Update Actual Amounts from the Actions menu, and submit the Update Project Plan Data process.

Settings That Affect Performance Data Summarization

Tip: We recommended that you run the Update Project Performance Data process with the default parameter values.

Note: Data security checks are turned off when you run the Update Project Performance Data process with either the Project Manager parameter or with the From Project Number and To Project Number parameters. All projects for a project manager (if provided) or the projects between the From Project Number and To Project Number are summarized and the latest summarized data for these projects is displayed in the Project Management infolets, in the Project Performance Dashboard regions, and in the My Projects page.

Before you run the Update Project Performance Data process from the Scheduled Processes page, select one of the following summarization methods:

Summarization Method	Usage
Incremental	Summarizes new transactions that are yet to be summarized. Also, processes all the planning resource breakdown structure and reporting resource breakdown structure changes that are associated to summarized projects.
Delete and resummarize	Corrects summary data when the source system data changes outside the regular transaction flow. This option is disabled by default. But, if you want to delete and resummarize performance data, ask your application administrator to set the Enable Maintain Project Performance Data job profile option to Yes. The profile option is in the Setup and Maintenance work area.
Resource breakdown structure	Migrates all summary data from one resource breakdown structure version to the next. If you select this option, you must also specify the resource breakdown structure header. If you update a project-specific resource breakdown structure that allows resource changes at project level, then run the Update Project Performance Data process in the Resource breakdown structure mode for the changes to reflect in reporting. If you want the changes to apply to new projects that use this resource breakdown structure, then use the Manage Planning and Billing Resource Breakdown Structures task in the Setup and Maintenance work area to make the changes at the setup level. If you update a resource breakdown structure that doesn't allow resource changes at project level and you want these changes to reflect in the projects that are currently associated with this resource breakdown structure, then click Update Mapping or run the Update Project Performance Data process in the Resource breakdown structure or Incremental mode.

Each time you run the summarization process manually, specify the summarization parameters and whether to summarize the following transactions:

Transaction	Data Summarized
Budget and Forecast	Approved current and previous forecasts, and current and original budgets that have a baseline version. This includes approved budgets and primary forecasts.
Commitment	Commitments such as supplier invoices, purchase orders, and requisitions from other Oracle Cloud applications.
Actual Costs	The actual costs incurred for your projects.

How to Run the Update Project Performance Data Process

Project application administrators can schedule the Update Project Performance Data process to run periodically by clicking **Schedule New Process** on the Scheduled Processes page.

Project managers can submit these processes from the Project Performance Dashboard or the Project Management work area. Project administrators can submit these processes from the Project Performance Dashboard or the Project Financial Management work area.

After you run the Update Project Performance Data process, you can track its progress on the Scheduled Processes page.

Troubleshooting

After an environment refresh or a production-to-test refresh, the Update Project Performance Data or Update Project Contract Performance Data process ends in a warning if its sub process Maintain Project Performance Data: Maintain Oracle Essbase Cube ends in an error. To fix this error, run the Maintain Project Performance Data Without Producing Report process in the target environment with the Recreate Cube with Existing Summary Data parameter set to Yes and the rest of the parameters set to their default values.

Related Topics

- [How KPI Values Are Generated](#)
- [How can I view projects on the Project Performance Dashboard](#)

KPI Components

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

The key components of a KPI are:

- Performance Measure
- Performance Status Indicator
- Threshold Level
- Performance Trend Indicator
- Tolerance Percentage

Performance Measure

Performance measures are predefined criteria for performance or schedule that are used to determine if a project is on track. You can create your own performance measures based on existing custom performance measures to effectively determine the overall health of your projects. Use any of the available performance measure to create a KPI.

Performance measures are defined for budgets and forecasts, billing and revenue, costs, effort, margin, capitalization, and so on. Following are examples of predefined performance measures:

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

You can rename these performance measures to make the measure names more relevant for your business needs. For example, rename EAC Budget Cost to Budget at Completion.

A performance measure is associated with one of the following time dimensions:

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

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

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

Performance Status Indicator

Performance status indicators indicate the status of a project, such as critical, at risk, and on track. Each icon indicates the status and severity of performance.

During KPI definition, you first associate status indicators with performance statuses:

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

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

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

Threshold Level

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

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

Performance Trend Indicator

Performance trend indicators show the improving or worsening KPI value trends on the project. Each icon indicates whether an increasing performance trend has a positive or negative impact. For example, an increase in nonbillable costs is considered unfavorable to organizations that are able to bill costs to their clients. In this example, the performance trend indicator shows a negative impact.

Tolerance Percentage

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

Related Topics

How KPI Values Are Generated

Schedule or submit the **Update Project Performance Data** process to generate KPI values and analyze project performance. However, if you want to generate KPI values for a particular period, then submit the **Generate KPI Values** process with an appropriate KPI period determination date. You can assign a threshold level for the KPI values. The KPI values are generated and then a status indicator is assigned to the KPI based on the threshold you define.

Settings That Affect KPI Values

Before you submit the **Generate KPI Values** process from the Scheduled Processes page, you can set the following parameters:

Parameters	Description
KPI Period Determination Date	Date used to derive the project accounting calendar and accounting calendar periods for performance measure calculations when KPI values are generated.
Replace Current KPI Values	Replaces the existing KPI values with the values that you're generating now.
Delete Previous KPI Values	Deletes the KPI values that were generated by prior runs of the Generate KPI Values process.
Number of Days to Retain KPI Values	Retains the KPI values for the specified number of days starting from the current date. The KPI values generated prior to the specified number of days are deleted. This parameter is applicable only when the Delete Previous KPI Values parameter is set to Yes.

Suppose that you set the KPI Period Determination Date parameter value and generate the KPI values as mentioned in the following table:

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

KPI Period Determination Date	Generation Date

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

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

Note: Don't delete previous KPI values if you're generating KPI values for the first time in a period or if you want to see trending information for the KPIs over the life of the project.

How KPI Values are Generated

KPI values are calculated based on the value of the performance measure associated with the project. The **Update Project Performance Data** process generates KPI values using the current date as the KPI period determination date. If you submit the **Generate KPI Values** process to generate KPI values, the KPI period determination date is used to determine the period. KPI values are generated for the period based on the options in the KPI definition.

Only one set of KPIs are maintained for a KPI period determination date. If KPIs are generated for the same date more than once, then the existing KPI values are overwritten by the latest KPI values.

Suppose that the KPI values are generated with the KPI period determination date of August 24 at 8:15 a.m. for projects A and B. For project B, KPI values are also generated with a KPI period determination date of August 24 at 10:45 a.m.. The KPI values for project B that are generated at 8:15 a.m. are deleted, but the KPI values of project A are retained.

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

Generate KPI Notifications

To automatically notify project managers after you generate KPI values:

1. Go to **Projects > Project Financial Management**.
2. In the My Projects page, right-click the project and select **Manage Financial Project Settings**.
3. In the Manage Financial Project Settings page, click **Reporting**.
4. Select the **Notify project manager** check box in the KPI Notifications section.

Related Topics

How KPI Trends Are Calculated

Trend indicators show whether the trend of a key performance indicator (KPI) is favorable or unfavorable for a project. When you define KPIs you specify a value for tolerance percentage. The tolerance percentage is taken into account while calculating trend indicators for a KPI.

Note: KPI trends may not be useful if KPI values are generated often. The reason is, if the tolerance percentage is 10 percent and KPI values are generated every day, the values decrease by 1 percent each day. In this scenario, no change is observed in the trend as the decrease is well within the tolerance. However, if you generate KPI values at the start and end of the month, a significant change is observed in the trend.

Settings That Affect KPI Trends

The trend indicator that appears for a KPI is based on the default set in the performance trend indicator setup. The different trend indicators available are:

- Up, favorable: The project performance trend is increasing in value and is desirable.
- Up, unfavorable: The project performance trend is increasing in value and is undesirable.
- Down, favorable: The project performance trend is decreasing in value and is desirable.
- Down, unfavorable: The project performance trend is decreasing in value and is undesirable.
- Unchanged: The project performance trend is unchanged.

You can change the sort order of the trend indicators based on how you want to sequence KPIs in a table based on the performance of KPIs in a project.

How KPI Trends Are Calculated

Trend Indicators are calculated based on the percentage increase or decrease in a KPI value, while taking into consideration the tolerance percentage specified while creating the KPI. The following example illustrates how trend indicators are calculated for a KPI.

Consider a scenario where KPI values are generated for the first time on January 15, 2011, and again on February 15 and April 15. KPI trends are calculated when there are at least two values that exist for a KPI.

KPI Values Generated on January 15, 2011

This table displays the trend when KPI values are generated the first time on January 15, 2011. All values in the following tables are percentages unless specified otherwise.

KPI	Tolerance Percentage and Trend Indicator Setting	Current KPI Value and Status Indicator	Previous KPI Value and Status Indicator	Trend Indicator
PTD Actual Spent Labor Effort Percentage	5 Up is Favorable	70 On Track	NA	NA

KPI	Tolerance Percentage and Trend Indicator Setting	Current KPI Value and Status Indicator	Previous KPI Value and Status Indicator	Trend Indicator
PTD Actual Spent Equipment Effort Percentage	5 Up is Unfavorable	30 On Track	NA	NA
PTD Actual Invoice Amount	5 Up is Favorable	\$5000 Warning	NA	NA
Actual Billable Cost Percentage	2 Up is Favorable	90 On Track	NA	NA
PTD Actual Margin Percentage	2 Up is Favorable	30 On Track	NA	NA

After generating KPI values on January 15, 2011, the most critical KPI is PTD Actual Invoice Amount. The overall project health status is Warning, because the most critical KPI, PTD Actual Invoice Amount, has a status of Warning.

KPI Values Generated on February 15, 2011

This table displays the trend when KPI values are generated on February 15, 2011.

KPI	Tolerance Percentage and Trend Indicator Setting	Current Period KPI Value and Status Indicator	Previous Period KPI Value and Status Indicator	Trend Indicator based on Previous Period
PTD Actual Spent Labor Effort Percentage	5 Up is Favorable	71 On Track	70 On Track	Unchanged
PTD Actual Spent Equipment Effort Percentage	5 Up is Unfavorable	29 On Track	30 On Track	Unchanged
PTD Actual Invoice Amount	5 Up is Favorable	\$4800 Warning	\$5000 Warning	Unchanged
Actual Billable Cost Percentage	2 Up is Favorable	91 On Track	90 On Track	Unchanged
PTD Actual Margin Percentage	2 Up is Favorable	30.2 On Track	30 On Track	Unchanged

This table shows how the trend indicator is calculated based on the previous period. Although the KPI values for the current period are different from the previous period, the difference in the values isn't significant enough to change the trend indicator, based on the tolerance percentage defined for each KPI. For example, the PTD Actual Spent Labor Effort Percentage is 71 percent, compared to the previous period KPI value of 70 percent. If the current period KPI value is more than 73.5 percent, which is more than 5 percent higher than the previous period, then the trend indicator is Up, Favorable. If the current period KPI value is less than 66.5 percent, which is more than 5 percent lower than the previous period, then the trend indicator is Down, Unfavorable.

The overall project health status is Warning, based on the most critical of all KPI statuses. After generating KPI values on February 15, 2011, the most critical KPI is PTD Actual Invoice Amount.

KPI Values Generated on April 15, 2011

This table displays the trend when KPI values are generated the on April 15, 2011.

KPI	Tolerance Percentage and Trend Indicator Setting	Current Quarter KPI Value and Status Indicator	Previous Quarter KPI Value and Status Indicator	Trend Indicator Based on Previous Quarter
PTD Actual Spent Labor Effort Percentage	5 Up is Favorable	75 On Track	71 On Track	Up, Favorable
PTD Actual Spent Equipment Effort Percentage	5 Up is Unfavorable	25 On Track	29 On Track	Down, Favorable
PTD Actual Invoice Amount	5 Up is Favorable	\$3500 Critical	\$4800 Warning	Down, Unfavorable
Actual Billable Cost Percentage	2 Up is Favorable	91 On Track	91 On Track	Unchanged
PTD Actual Margin Percentage	2 Up is Favorable	28.5 Warning	30.2 On Track	Down, Unfavorable

This table shows how the trend indicator is calculated based on the previous quarter. The current KPI values are compared to the latest generation date of KPIs for the previous quarter.

It is possible that the previous period trend and the previous quarter trend are calculated based on KPI values from the same generation date. This occurs when the previous period generation date is the same as the latest generation date in the previous quarter.

The first three KPI values changed enough since the previous quarter to change the trend calculator. For example, the current quarter value of PTD Actual Invoice Amount is \$3,500, which exceeds the threshold tolerance of 5 percent from the previous quarter KPI value of \$4,800. Therefore the KPI is in a Critical status, and the trend indicator is Down, Unfavorable. If the current quarter value is greater than \$5,040, which is more than 5 percent higher than the previous quarter, then the trend indicator is Up, Favorable.

A project manager might review the KPI values, statuses, and trends shown in this table and determine that a transaction was not billed, because the KPIs that are based on revenue and invoice amounts have both dropped.

The overall project health is critical because of the status of the PTD Actual Invoice Amount.

Related Topics

- [Performance Trend Indicators](#)
- [Tolerance Percentage](#)

Examples of KPI Value Calculations

A key performance indicator (KPI), if enabled for use, can be defined against one of two calendars: accounting calendar or project accounting calendar.

To generate KPI values, you enter a KPI period determination date for the application to determine the accounting calendar period and project accounting calendar period. This example shows you how current period, prior period, and prior quarter KPI values are calculated.

Scenario

Vision Corporation designs and implements heavy engineering projects for government and private customers. The Finance department is interested in measuring revenue and margin on the accounting calendar, and budget to actual variance of labor effort on the project accounting calendar. The KPIs defined for this purpose are Period-to-Date (PTD) Revenue Variance Percentage on the accounting calendar and PTD Labor Effort Variance Percentage on the project accounting calendar.

The following table shows the accounting calendar used by InFusion Corporation.

Period Name	Period Start Date	Period End Date	Quarter Name	Quarter Start Date	Quarter End Date
Jun-09	1-Jun-09	30-Jun-09	Q2	1-Apr-09	30-Jun-09
Jul-09	1-Jul-09	31-Jul-09	Q3	1-Jul-09	30-Sep-09
Aug-09	1-Aug-09	31-Aug-09	Q3	1-Jul-09	30-Sep-09
Sep-09	1-Sep-09	30-Sep-09	Q3	1-Jul-09	30-Sep-09
Oct-09	1-Oct-09	31-Oct-09	Q4	1-Oct-09	31-Dec-09
Nov-09	1-Nov-09	30-Nov-09	Q4	1-Oct-09	31-Dec-09

The following table shows the project accounting calendar used by InFusion Corporation.

Period Name	Period Start Date	Period End Date	Quarter Name	Quarter Start Date	Quarter End Date
W1-Apr-09	4-Apr-09	10-Apr-09	Q2	4-April-09	3-Jul-09
W1-Sep-09	2-Sep-09	9-Sep-09	Q3	4-Jul-09	3-Oct-09
W2-Sep-09	10-Sep-09	17-Sep-09	Q3	4-Jul-09	3-Oct-09
W3-Sep-09	18-Sep-09	25-Sep-09	Q3	4-Jul-09	3-Oct-09
W4-Sep-09	26-Sep-09	3-Oct-09	Q3	4-Jul-09	3-Oct-09
W1-Oct-09	4-Oct-09	10-Oct-09	Q4	4-Oct-09	3-Jan-10
W2-Oct-09	11-Oct-09	18-Oct-09	Q4	4-Oct-09	3-Jan-10
W3-Oct-09	19-Oct-09	26-Oct-09	Q4	4-Oct-09	3-Jan-10
W4-Oct-09	27-Oct-09	3-Nov-09	Q4	4-Oct-09	3-Jan-10

Assume the KPI period determination date is *October 2, 2009*. In the calendar shown, *October 2, 2009*, occurs in the period OCT-09 on the accounting calendar, but in the W4-SEP-09 period on the project accounting calendar.

The following scenario describes how the current period, prior period, and prior quarter KPI values are calculated based on different KPI period determination dates.

KPI Values Generated on October 3, 2009

The first generation of KPI values occurs on October 3, 2009. On the KPI watchlist, the key performance indicator PTD Labor Effort Variance Percentage shows the current period as W4-Sep-09, prior period as W3-Sep-09, and prior quarter as Q2. The key performance indicator PTD Revenue Variance Percentage shows the current period as Oct-09, prior period as Sep-09, and prior quarter as Q2.

This table displays how the current period, prior period, and prior quarter KPI values are calculated for the date October 3, 2009 on the accounting and project accounting calendars.

KPI Period Determination Date	Generation Date	Period Name for Generation Date	KPI Name	Is KPI Value Current?	Current Period	Prior Period	Prior Quarter
3-Oct-09	October 3	W4-Sep-09	PTD Labor Effort Variance Percentage	Yes	W4-Sep-09	W3-Sep-09	Q2
3-Oct-09	October 3	Oct-09	PTD Revenue Variance Percentage	Yes	Oct-09	Sep-09	Q2

KPI Values Generated on October 4, 2009

KPI values are generated again on October 4, with a KPI period determination date of September 25, 2009. Even though the KPI period determination date is prior to the previous generation date, the KPI values generated on October 4 for September 25, 2009 are marked as current.

This table displays how the current period, prior period, and prior quarter KPI values are calculated for the date October 4, 2009 on the accounting and project accounting calendars.

KPI Period Determination Date	Generation Date	Period Name for Generation Date	KPI Name	Is KPI Value Current?	Current Period	Prior Period	Prior Quarter
3-Oct-09	October 3	W4-Sep-09	PTD Labor Effort Variance Percentage	No	W4-Sep-09	W3-Sep-09	Q2
3-Oct-09	October 3	Oct-09	PTD Revenue Variance Percentage	No	Oct-09	Sep-09	Q2
25-Sep-09	October 4	W3-Sep-09	PTD Labor Effort Variance Percentage	Yes	W3-Sep-09	W2-Sep-09	Q2
25-Sep-09	October 4	Sep-09	PTD Revenue Variance Percentage	Yes	Sep-09	Aug-09	Q2

KPI Values Generated on October 10, 2009

KPI values are again generated on October 10, 2009 with a KPI period determination date of October 10, 2009. These KPI values are now used for the current period, prior period, and prior quarter.

This table displays how the current period, prior period, and prior quarter KPI values are calculated for the period October 10, 2009 on the accounting and project accounting calendars.

KPI Period Determination Date	Generation Date	Period Name for Generation Date	KPI Name	Is KPI Value Current?	Current Period	Prior Period	Prior Quarter
3-Oct-09	October 3	W4-Sep-09	PTD Labor Effort Variance Percentage	No	W4-Sep-09	W3-Sep-09	Q2
3-Oct-09	October 3	Oct-09	PTD Revenue Variance Percentage	No	Oct-09	Sep-09	Q2

KPI Period Determination Date	Generation Date	Period Name for Generation Date	KPI Name	Is KPI Value Current?	Current Period	Prior Period	Prior Quarter
25-Sep-09	October 4	W3-Sep-09	PTD Labor Effort Variance Percentage	No	W3-Sep-09	W2-Sep-09	Q2
25-Sep-09	October 4	Sep-09	PTD Revenue Variance Percentage	No	Sep-09	Aug-09	Q2
10-Oct-09	October 10	W1-Oct-09	PTD Labor Effort Variance Percentage	Yes	W1-Oct-09	W4-Sep-09	Q3
10-Oct-09	October 10	Oct-09	PTD Revenue Variance Percentage	Yes	Oct-09	Sep-09	Q3

Import Project Key Performance Indicators

Import KPIs for project templates and projects that are enabled for financial management into Oracle Project Portfolio Management Cloud by using the Import Project Key Performance Indicators file-based data import feature.

You can also use the Excel template to update KPI assignments to project templates and projects that are enabled for financial management. For example, if you no longer want to see the values of certain KPIs for a project, then you can disable those KPIs for that project.

The Excel template is part of the External Data Integration Services for Oracle Cloud feature. To download the Project Key Performance Indicators Interface Excel workbook template, see the File-Based Data Import for Oracle Project Portfolio Management guide.

To attach or disable KPIs for project templates or projects:

1. Prepare your data in the Project Key Performance Indicators Interface macro-enabled Excel workbook template.
2. Click **Generate CSV File** in the template to create a comma-separated values file.
3. Navigate to the Scheduled Processes page.
4. Click **Schedule New Process**, select **Load Interface File for Import** from the **Name** drop-down list, select **Import Project Key Performance Indicators** from the **Import Process** drop-down list, upload the data file, and click **Submit**.

Output Report

After the **Import Project Key Performance Indicators** process is complete, the **Import Project Key Performance Indicators: Generate Report** process runs automatically and creates the Import Project Key Performance Indicators Report. This output report details:

- The number of KPIs and projects that were processed, attached successfully, and not attached. Also, lists the KPIs and projects that weren't attached.

- The errors due to which the records weren't processed. Correct these errors in the same output report and re-upload it.

Review the output report and repeat the following steps until all rows are imported successfully and the KPIs are attached to the project templates or projects:

1. Correct the errors in the Import Project Key Performance Indicators Report output report.
2. Generate CSV files.
3. Submit the **Load Interface File for Import** process.

FAQs for Update Project Performance Data and Generate KPIs

How can I view projects on the Project Performance Dashboard?

If you're a project manager, you can view your projects on the Project Performance Dashboard.

If you aren't a project manager, you can access the Project Performance Dashboard and view projects using a custom role that includes the functional security privilege Manage Project Performance (PJS_MANAGE_PROJECT_PERFORMANCE_PRIV). For example, if you're an administrator at the project, organization, or business unit level, you can access the Project Performance Dashboard to view the projects that you administer, or those that belong to the organizations or business units that you administer, or the ones to which you have access. You can also navigate to the Project Overview page in context of the Project Financial Management work area.

Additionally, if the following data security privileges are granted to custom roles, you can navigate to the Review Project Performance and Analyze KPI Categories pages from the Project Performance Dashboard:

- **PJS_REVIEW_PROJECT_PERFORMANCE_DATA** to access the Review Project Performance page
- **PJS_REVIEW_PROJECT_PERFORMANCE_HEALTH_DATA** to access the Analyze KPI Categories page

What's a key performance indicator?

The result of a business measure, for example product sales or operational costs, evaluated against a target for that measure. You use KPIs to assess the performance of the strategic objectives and initiatives that are part of your organizational strategy. When you define KPIs you should ensure they have these characteristics:

- Have measurable objectives that may vary over time.
- Can be evaluated using targets to determine performance status.
- Can be compared over time for trending purposes.

What actions trigger performance data summarization?

The following actions can trigger performance data summarization:

- Running the Update Project Performance Data process from the Project Performance Dashboard or the Project Financial Management work area.
- Running or scheduling the Update Project Performance Data process from the process scheduler.
- Creating revenue and invoice transactions.
- Creating actual cost transactions.
- Setting a baseline for an approved cost budget.

How can I update project performance data and generate KPI values?

Project managers and project administrators can submit the **Update Project Performance Data** process from the Project Performance Dashboard, My Projects page, or the Scheduled Processes page. Project application administrators can submit the **Update Project Performance Data** process from the Scheduled Processes page.

To update performance data for all projects in a project owning organization or business unit, project administrators must submit the **Update Project Performance Data** process from the Scheduled Processes page.

Project managers must ensure that they run the **Update Project Performance Data** process so that all the infolets on the Project Management dashboard are up-to-date.

You don't need to submit the **Generate KPI Values** process separately as KPIs are generated as part of the **Update Project Performance Data** process. However, if you want to generate KPI values for a particular period, then submit the **Generate KPI Values** process with an appropriate KPI period determination date.

Related Topics

- [Considerations When Analyzing Project Performance Using the Project Management Dashboard](#)

3 Project Performance Analysis

Considerations for Analyzing Project Performance Using the Project Management Dashboard

Project managers can use the Project Management dashboard to review the overall health, progress, and financial status of projects, and resolve issues. The dashboard consists of a group of infolets that displays critical information about your projects. Project managers can use this information for planning work and managing financial projects.

Project managers and project application administrators must run the **Update Project Performance Data** process from the Scheduled Processes page to refresh the data on the Project Management dashboard.

If you don't see updated information on certain or all infolets, it could be because:

- You haven't implemented either Project Execution Management or Project Financial Management.
- You don't have transactions yet.
- You haven't run the **Update Project Performance Data** process if you're using Project Financial Management.

Project Management Dashboard Infolets

Depending on whether you implemented Project Financial Management or Project Execution Management offering, the corresponding infolets display data on the Project Management dashboard. You can also implement both offerings simultaneously. You can hide the infolets that display no data. Use the Infolet Repository to enable or disable infolets on the Project Management dashboard.

The Project Management dashboard comprises of the following infolets that project managers can use to review project performance:

Infolet	Data Source	Data Displayed	Actions to Perform
My Projects	All the projects that you manage	Total count of the projects that you manage.	<ul style="list-style-type: none"> • Navigate to the My Projects page to analyze each project. • Analyze the overall progress of projects and take appropriate action.
Health	Project health based on KPI thresholds	<p>Project health in the order of severity. The project that's most severe appears first.</p> <p>Run the Update Project Performance Data process so that this infolet displays up-to-date information.</p>	<ul style="list-style-type: none"> • View the health of your projects that are enabled for financial management in the order of health status. For example, critical projects are listed topmost, at risk projects follow next, and on track projects follow thereafter. • Post messages on the project wall from the infolet to draw attention to the project health status.

Infolet	Data Source	Data Displayed	Actions to Perform
			<ul style="list-style-type: none"> Manage project costs and budgets and analyze KPIs that contribute to the current project health status.
Time Cards	Missing or partially reported time cards	Missing or partial time cards for the previous five weeks, including the current reporting period week.	<p>You can post messages:</p> <ul style="list-style-type: none"> On the project wall for time cards that aren't accurately submitted. To the project team members who haven't submitted accurate time cards.
Invoices	Invoices pending approval	Invoices; review to determine which invoices are pending approval.	Approve or reject the invoices if they're assigned to you for approval.
Uninvoiced Cost	Billable cost transactions that are uninvoiced or partially invoiced	Projects that have the highest number of uninvoiced costs.	Drill down to view the project cost transactions that contribute to the uninvoiced amount.
Cost Budget	Comparison of project cost to project budget	The cost budget for the project; displays only the current baseline approved cost budget.	<p>Create a budget or navigate to the Manage Project Budgets and Manage Project Costs pages to review budget and cost information.</p> <p>You can perform the following actions:</p> <ul style="list-style-type: none"> Determine the variance between the spent and the budget to date amounts for over budget projects as displayed in the donuts. Ensure that the spent amount includes both project costs and commitments from the start of the project to the current reporting period. Drill down to the Manage Project Costs page. The default view displays project costs incurred within the last 30 days. Change the filter to view data further in the past.
Team Allocation	Number of over or under allocated resources	Over and under allocated team members on projects. You can review resource allocations over weekly periods.	<p>Take appropriate action when:</p> <ul style="list-style-type: none"> Resources are over or under allocated to the project. Under allocated resources in one project can be used in another project.

Infolet	Data Source	Data Displayed	Actions to Perform
			<ul style="list-style-type: none"> Under allocated resources cause delays in projects.
Assignments	Assignments ending within two weeks and reserved assignments	Resource assignments for which the assignment end date is within two weeks.	<p>Navigate to the Manage Project Resources page to review resource details and take appropriate action by:</p> <ul style="list-style-type: none"> Viewing the assignment details. Adjusting the resource assignment. Confirming or canceling the assignment.
Milestones	Milestones past due, at risk, or due soon	Milestones past due, at risk, or due soon.	<p>Navigate to the expanded view for additional details of project milestones in a timeline view. From this detailed view, take appropriate action when project milestones are Past Due, Due Soon, or At Risk.</p>
Change Order	Change orders summarized by additional labor hours and cost impact	Change orders.	<p>From the expanded view, quickly navigate to the details for a change order and take appropriate action by:</p> <ul style="list-style-type: none"> Creating or accessing the impact of the change order. Approving or rejecting the change order.
Progress	Project progress with respect to planned dates	The target and actual percentage of work completed on projects.	<p>If exceptions exist, navigate to the Manage Task Exceptions page to resolve the exceptions. Take appropriate action by:</p> <ul style="list-style-type: none"> Analyzing the list of projects that aren't performing well and require immediate action. Performing the next steps to improve the progress of projects.

Related Topics

- Project Performance Data Summarization
- How can I update project performance data and generate KPI values

Draw Insight on Project Health and Progress

This video demonstrates how to use project management infolets to monitor the overall health, progress, and status of your project finances so you can take action to resolve issues.

Use the project management infolets to review your project statuses, identify areas that require attention, and take necessary actions to keep your projects on track.

Let's say you want to perform the following tasks using the Health and Progress infolets:

Task	Infolet
Analyze transactions for a critical project	Health
Review task exceptions	Progress

Analyze Transactions for a Critical Project

Use the Health infolet to review the project health based on the status of the KPIs. In this example, let's review a project that's in Critical status.

1. Navigate to the Project Management Dashboard area on the Home page.
2. Click the **Expand** icon on the Health infolet.
3. Click the **Actions** menu for a project that's in Critical status.
4. Click **View KPI Watchlist** to examine the KPI Watchlist for the critical project.

Note: Instead of using the **Actions** menu, you can click the name the project to open the KPI Watchlist.

5. On the KPI Watchlist dialog box, place your mouse over various points on the charts and graphs to view the values and generation dates.
6. Click the **Actions** menu for the ITD Actual Nonbillable Cost (%) KPI.
7. Click **View Costs** to study the cost transactions that are making this KPI critical.
8. On the Manage Project Costs page, locate an unbilled transaction.
9. Enable the check box for the transaction.
10. Click **Set to Billable** to make the transaction billable.
11. Click **Done**.

Review Task Exceptions

Use the Progress infolet to compare the target and actual percentage of work completed on your projects, and to identify task exceptions. In this example, let's analyze a task with exceptions.

1. On the Progress infolet, locate a project that's behind schedule and has at least one exception.

Tip: Projects that are behind schedule appear at the beginning of the infolet.

2. Click the **Exceptions** number for the project.
3. On the Manage Task Exceptions page, click **Preview Total Impact**.

4. On the Preview Total Impact page, review the impact of the exceptions on the project schedule and compare the current and proposed task values.
5. Click **Accept All** to update the project plan with the proposed values.

Note: If you don't want to accept the changes, then you can decline the changes or discuss them with the project team.

6. Click **Done**.

How Project Progress is Calculated

Project managers use the Progress infolet from the Project Management Dashboard to compare the target and actual percentage of work completed on the projects they own. Projects with maximum variance between actual and target percent complete appear topmost. Projects with same variance between actual and target percent complete are sorted in the reverse order of number of exceptions. If no effort is planned for a project, then the infolet displays zero percent complete. As soon as the team members start entering progress for tasks, the actual percent is calculated. From the Progress infolet, you can drill down to the Manage Project Plan and Manage Task Exceptions pages to view the details.

Settings That Affect Project Progress

Values in the Progress infolet are derived from the Manage Project Plan page. The project progress depends on the following values of a project:

- Current date
- Planned start date
- Planned finish date
- Planned effort in hours
- Current effort in hours
- Actual hours

Formulas to Calculate Project Progress

Here are the formulas to calculate the target and actual percent complete of a project:

- target percent complete = (expected hours / planned effort in hours) * 100
 - expected hours = (expected duration * planned effort in hours) / planned duration
 - expected duration = current date - planned start date + 1
 - planned duration = planned finish date - planned start date + 1
- actual percent complete = (actual hours / current effort in hours) * 100

Note: The actual percent complete is the rolled up percent complete of the project.

This table shows the values used to calculate target and actual percent complete for Project 1. Assume the current date is 2-Jun-2017, the calendar is 5 days a week with no holidays, and a workday contains 8 hours.

Name	Planned Effort in Days	Planned Start Date	Planned Finish Date	Planned Effort in Hours	Actual Hours	Remaining Hours	Current Effort in Hours	Expected Hours
Project 1	57	22-May-2017	30-Jun-2017	456	120	336	456	160
Task 1	10	22-May-2017	02-Jun-2017	80	40	40	80	$(10 * 80) / 10 = 80$
Task 2	7	01-Jun-2017	09-Jun-2017	56	16	40	56	$(2 * 56) / 7 = 16$
Task 3	20	05-Jun-2017	30-Jun-2017	160	0	160	160	0
Task 4	20	24-May-2017	20-Jun-2017	160	64	96	160	$(8 * 160) / 20 = 64$

This table shows the values used to calculate target and actual percent complete for Project 2. Assume the current date is 2-Jun-2017, the calendar is 5 days a week with no holidays, and a workday contains 8 hours.

Name	Planned Effort in Days	Planned Start Date	Planned Finish Date	Planned Effort in Hours	Actual Hours	Remaining Hours	Current Effort in Hours	Expected Hours
Project 2	16	29-May-2017	14-Jun-2017	128	48	72	128	48
Task 1	5	29-May-2017	02-Jun-2017	40	40	0	40	$(5 * 40) / 5 = 40$
Task 2	3	02-Jun-2017	06-Jun-2017	24	8	16	24	$(1 * 24) / 3 = 8$
Task 3	8	05-Jun-2017	14-Jun-2017	64	0	64	64	0

The project progress is determined as follows:

- If target percent complete is greater than actual percent complete then your project is behind schedule.
- If target percent complete is less than actual percent complete then your project is ahead of schedule.
- If target percent complete is equal to actual percent complete then your project is on schedule.

This table shows the calculation of target percent complete and actual percent complete for Project 1 and Project 2 and their progress results. For Project 1, the planned and current effort are same. For Project 2, the current effort is less than the planned effort.

Project	Expected Hours	Actual Hours	Target Percent Complete	Actual Percent Complete	Progress
Project 1	160	120	$(160 / 456) * 100 = 35$	$(120 / 456) * 100 = 26$	9 percent behind schedule
Project 2	48	48	$(48 / 128) * 100 = 37.5$	$(48 / 128) * 100 = 37.5$	On schedule

How Performance Status For Tasks And Resources Is Calculated

Performance status is individually calculated for all levels of the task and resource hierarchy. The performance status for individual tasks and resources is calculated only for percentage-based KPI values. These calculations are based on the threshold values that you set while creating percentage-based KPIs.

Settings That Affect Performance Status for Tasks and Resources

In the Manage Financial Project Settings page, if you enable the **Track KPI by Task** and **Track KPI by Resource** settings for a KPI, then a status indicator appears for the task and resource on project performance reports when the individual KPI value isn't on track. This helps identify troubled tasks and resources in a hierarchical task and resource structure in a project.

Examples of Performance Status for Tasks and Resources Calculations

Let's assume that for the KPI named **ITD Nonbillable Cost as a Percentage of Total Cost**, the threshold values are defined as listed in the following table. The status of the tasks and resources is calculated as listed in the Status Indicator column.

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

Suppose that the System Implementation main task contains six sub tasks: Planning, Definition, Build, Test, Release, and Support. The table shows the corresponding costs for each sub task and the ITD Nonbillable Cost as a percentage of the total cost. The sum of the cost of each sub task rolls up to the main task.

Task Hierarchy	Task	ITD Nonbillable Cost	ITD Billable Cost	ITD Total Cost	ITD Nonbillable Cost as a Percentage of Total Cost
1	System Implementation	21,000	105,000	126,000	16.66%
1.1	Planning	0	21,000	21,000	0%
1.2	Definition	6,000	51,000	57,000	10.53%
1.3	Build	15,000	33,000	48,000	31.25%
1.4	Test	0	0	0	0%
1.5	Release	0	0	0	0%
1.6	Support	0	0	0	0%

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

Lets take another example where the Consulting resource breakdown structure contains a Labor resource. Labor is a parent to the Project Manager resource, which is a parent to the Maxwell Martin, Robert Altima, and Fred Jones resources.

The **ITD Nonbillable Cost as a Percentage of Total Cost** KPI value for Labor is 12.97% and for Fred Jones is 0%. So, Labor has a status indicator of **Critical** and Fred Jones doesn't have a status indicator. This is because the KPI value for each row in the hierarchical structure is calculated separately.

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

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

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

FAQs for Project Performance Analysis

Why did the overall health indicator not appear for the project?

The overall health indicator is visible only after the overall health is calculated. The overall health is calculated for a project if KPIs are associated to the project and are enabled, and KPI values and summarized performance data are generated for the project.

Why is the overall health for the project at risk when the status of most of the KPIs is on track?

The KPI with the most severe status determines the overall health of the project. For example, if three out of four KPIs on a project are on track, and one is at risk, then the overall health of the project is at risk.

You can also configure the overall health calculation during implementation.

Can a time card be reported as missing and also be included as an unprocessed transaction?

No, both these situations can't coexist. Time cards that haven't been entered are considered missing. A time card is an unprocessed transaction after it's entered into the application and before it's included in the Update Project Performance Data process.

How can I evaluate project performance if KPIs aren't tracked?

Use the Review Project Performance page to perform detailed financial performance analysis for a project than what's possible on the Project Performance Dashboard. You can review amounts at the task or resource level, and drill down to individual expenditure items.

Why can't I view the KPI category analysis?

You can't view the KPI category analysis due to the following reasons:

- The project unit doesn't track KPIs.
- No KPIs are associated with the project.
- KPI values aren't generated.

FAQs for Project Comparison Graphs

Which currency is used on a project comparison graph?

The ledger currency is used if all projects in the project list are using the same ledger currency. However, if the projects in the project list are using different ledger currencies, then the user-preferred currency is used to bring all projects into the same currency.

Why can't I see all the KPIs for my project on the project comparison graph?

KPI values that are generated for the project appear on the KPI analysis project comparison graphs. The remaining KPIs are excluded.

When does a project appear in the Time Card Exceptions graph?

When a time card has an error, is pending, or is missing for a project.

What's the difference between time card exceptions that are missing, pending, or in error on the Time Card Exceptions graph?

Time transactions that are in error are received from the transaction source but failed the posting process.

Pending time transactions are received from the transaction source but haven't completed the posting process.

Time transactions are missing if the project cost for a team member doesn't exist for the transaction source, document, and the time period specified in the reporting options for the project unit.

How many periods can be viewed on the Percent Complete Analysis graph?

The Percent Complete Analysis graph displays data for the last 90 days with a maximum of 13 periods.

FAQs for KPI Watchlist

Why did a performance measure that compares the current and prior approved forecast show an unfavorable result when there is only one approved forecast?

If you generate KPI values when no previous approved forecast exists, a zero value is used to generate KPI values. So, the trend appears unfavorable because the difference between the current and prior forecast is the same as the current forecast. The results will be accurate once a new forecast is approved, project performance data is summarized, and KPI values are generated.

What happens if I use PTD amount-based measures for large projects?

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

Can I change the default sort order of KPIs listed in the KPI watchlist?

Yes. You can change the default sort order in the KPI watchlist by modifying the sort order of performance status indicators. By default, KPIs are sorted based on the current period status, with the least favorable status appearing at the top of the list and the most favorable status appearing at the bottom of the list. If there is no current period status, the KPIs are sorted by name.

Related Topics

- [Performance Trend Indicators](#)

Why are the KPIs visible on the Analyze KPI Categories page even after I disable them?

Inactive KPIs, disabled KPIs, or KPIs for which future references are deleted continue to appear until you regenerate KPI values. Determine if a KPI is enabled or active in the **Reporting** tab of the project definition.

Why can't I see my KPI in regions on the Analyze KPI Categories page?

Inactive KPIs, disabled KPIs, or KPIs for which future references are deleted continue to appear until you regenerate KPI values. Determine if a KPI is enabled or active in the **Reporting** tab of the project definition.

FAQs for KPI Historical Trending

What happens if a KPI value exceeds the threshold limits defined for the KPI?

An up or down arrow appears in the **Exceeds Threshold** column of the **KPI History** table, and the closest threshold is used to determine the KPI status. If KPI values fall outside the threshold ranges, consider extending the upper and lower threshold ranges.

Why did the trend indicator show a downward trend when KPI performance is improving?

While defining KPIs, you can determine if a positive increase between the current and previous KPI value is a favorable or unfavorable trend. Therefore, an upward trend may not necessarily indicate that KPI performance is improving.

For example, for a KPI based on a non-billable percentage of total costs, a low value for non-billable costs is preferred. Hence, a downward trend is favorable.

Why does the trend indicator differ from the KPI values on the Analyze KPI page?

The variance is likely due to a small difference between the KPI values that's ignored while calculating the trend on the Analyze KPI page for KPIs that are based on non-currency measures. The KPI values on the Analyze KPI page are based on the currency definition for currency-based measures and user preferences for non-currency-based measures.

However, the trend indicator is determined by taking into account only two places of decimal values for non-currency-based measures.

FAQs for Project Financial Performance

Why does the Financial Performance region show only the cost budget and forecast effort?

When the cost and revenue budgets are contained in different budget versions, the effort represented in project performance reporting is only for the cost budget. Similarly, when the cost and revenue forecasts are contained in different forecast versions, the effort represented in project performance reporting is only for the cost forecast.

Which budget and forecast are the numbers in the Financial Performance region based on?

The Financial Performance region displays summarized financial data. The summarization process always includes the original and current baseline budget, and current and previous forecasts for the financial plan types that are designated as approved cost or revenue budgets and forecasts.

Additionally, any other financial plan types enabled for use on the project on the Summarization tab, and KPIs based on custom measures, are included when the summarization process is run.

Why can't I see all the revenue for my project on the Financial Performance region?

The revenue amount in the Financial Performance region includes only external and interproject contracts. It doesn't include any intercompany revenue associated with the project.

FAQs for Task and Resource Level Analysis

What's the relationship between task structure and resource structure?

The task and resource structure regions share a master-detail relationship. The **Analyze KPI** page lets you select which structure appears in the master and detail regions. Depending on your selection, the detail structure region automatically displays the other structure. For example, if you select the task structure to appear in the master region,

the detail region displays the resource structure. Selecting a row in the **Task Structure** region displays the assigned resource for that task in the **Resource Structure** region.