Oracle Fusion Cloud Project Portfolio Management

How's resource mapping calculated?

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Author: Sumitha Vatsavai

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What's resource mapping?

Use resource mapping to match actual costs and revenue to planned resources within a project's resource breakdown structure. Resource mapping ensures that financial transactions like labor hours, materials, and costs are correctly associated with specific resources (such as Named Person, Job, or Expenditure Type) used for project planning and forecasting. This mapping allows project managers to accurately track, report, and analyze project performance by aligning real-world costs with planned resource allocations.

The Update Mapping process matches actual costs and revenue to the latest planning resources for project planning and forecasting. Summarized actual costs and revenue are recalculated for project performance reporting.

Considerations for Resource Mapping

Consider these points when using the Update Mapping process:

- Baseline project plan values aren't affected by the Update Mapping process.

- The Update Mapping process applies only if your planning resource breakdown structure doesn't allow changes at the project level.

    > **Tip:** If you allow resource changes at the project level, use the Update Actual Amounts action on the project plan to update the actual amounts for all tasks on the project plan. Use the process monitor to start the process to summarize project performance data for reporting.

- After running the Update Mapping process, regenerate forecast versions to reflect the new actual costs.

How Costs Map to Resources

You can track costs associated with every resource that's assigned to a task and use the resource breakdown structure to view the distribution of these costs. When costs are incurred, the application first checks for the best match in the resource breakdown structure. If not found, it tries to find the nearest match based on the rules of precedence.

The application attempts mapping from a lowest level resource format if the transaction associates to it. A three-level resource format (for example, Expenditure Type: Named Person: Job) is evaluated before evaluating a two-level resource format (for example, Expenditure Type: Named Person).

The application follows these rules to associate costs with resources:

- If there is only one level to which the transaction associates, then costs are mapped to that level.

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- If the transaction associates with different resource formats, the application sums the precedence numbers for all resource types in the branch and gives precedence to the resource element in the branch with the lowest sum.

  - If more than one branch has the lowest precedence number at the lower level, the application uses the precedence number of the next level up.
  - If the sum of precedence numbers is the same for more than one branch, precedence is given to the branch with the lowest number at the lowest level.
  - If one branch contains a user-defined resource type, precedence is given to the branch that doesn't contain a user-defined resource type.
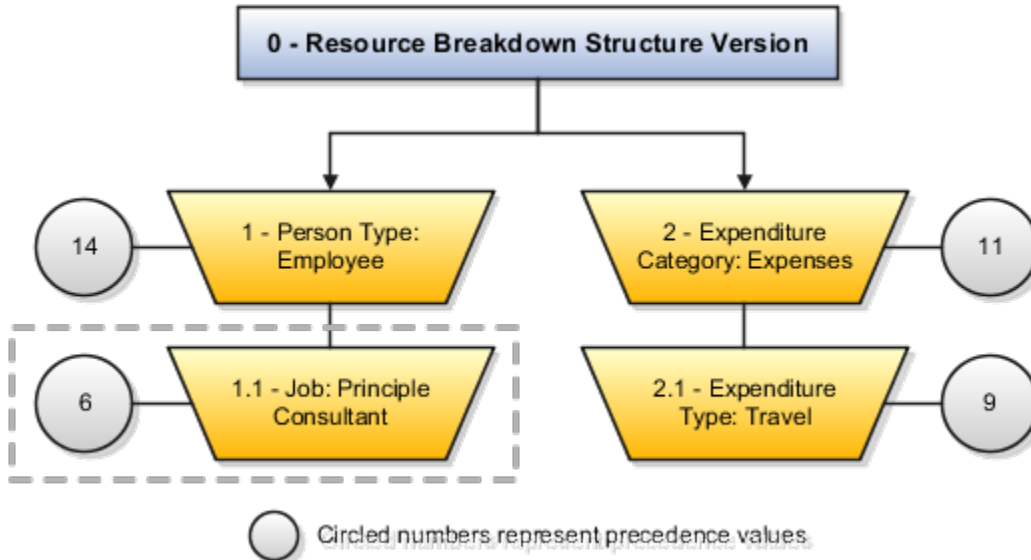
Projects give more precedence to a lower precedence number. For example, a resource element with a precedence number of *1* is given precedence over a resource element with a precedence number of *10*.

The following table lists the precedence numbers:

Resource Type	Precedence in Labor Resource Class	Precedence in Equipment Resource Class	Precedence in Material Items Resource Class	Precedence in Financial Resources Resource Class
Named Person	1	1	1	1
Project Nonlabor Resource	3	3	3	3
Inventory Item	5	5	5	5
Job	6	6	6	6
Item Category	8	8	8	8
Expenditure Type	9	9	9	9
Event Type	10	10	10	10
Expenditure Category	11	11	11	11
Revenue Category	12	12	12	12
Organization	13	13	15	15
System Person Type	14	14	14	14
Supplier	15	15	13	13
Resource Class	16	16	16	16

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Example of Resource Mapping Using Rules of Precedence

This example illustrates that precedence is given to the branch with the lowest number at the lowest level if the sum of precedence numbers is the same for more than one branch.

In this example, a time card transaction for a principle consultant who incurs travel expenses maps to two branches.

- The first branch consists of two levels (*1-Person Type: Employee* and *1.1-Job: Principle Consultant*). The highest level has a precedence number of *14*, and the lowest level has a precedence number of *6*, for a sum of *20* for the branch.

- The second branch also consists of two levels (*2-Expenditure Category: Expenses* and *2.1-Expenditure Type: Travel*). The highest level has a precedence number of *11*, and the lowest level has a precedence number of *9*, for a sum of *20* for the branch.

The transaction cost amount is mapped to the *Job: Principle Consultant* resource element because it has the lowest number (6) at the lowest level.

Example of How Costs Map to Resources

Say you create a planning resource breakdown structure named PRBS. While creating PRBS, you selected the Expenditure Type: Named Person: Job resource format. The application automatically selects Expenditure Type: Named Person and Expenditure Type resource formats. Now, the resource format hierarchy for PRBS is as follows:

- Expenditure Type

- Expenditure Type: Named Person

- Expenditure Type: Named Person: Job

The planning resources added to the resource combinations are as follows:

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Resource Combination	Planning Resources
Expenditure Type	Consulting
Expenditure Type	Carpenter
Expenditure Type: Named Person	Consulting: Emily
Expenditure Type: Named Person	Carpenter: Amy
Expenditure Type: Named Person: Job	Carpenter: Amy: Manager

Next, you processed two cost transactions with these values:

Transaction Number	Expenditure Type	Person Name	Job
1	Carpenter	Amy	Principal Consultant
2	Professional	Emily	Consultant

Now, let's see how costs are mapped to these planning resources:

- Let's say an assignment exists for Carpenter: Amy: Manager on one of the project tasks. When costs are incurred, although the planning is done for Carpenter: Amy: Manager, the application creates Carpenter: Amy as an unplanned resource and maps costs to it because:
  - While creating the transaction, Amy's job is set to Principal Consultant and this is different from what's available in PRBS.
  - The Carpenter: Amy resource format and the resource are available in PRBS.

- When costs are incurred for Emily, the application maps costs to Labor. Although the named person exists, costs aren't mapped to the Expenditure Type: Named Person resource combination that's available in PRBS.

  Note: Emily isn't available on PRBS as an independent entity. Also, while creating the transaction, Emily's Expenditure Type is set to Professional and Job is set to Consultant and these are different from what's available in PRBS. As the application didn't find any match, it mapped the costs to the Labor resource class.

Example of How Costs Map When Resources Aren't Planned on the Task

When a matching resource exists in the resource breakdown structure but not planned on the task, the application maps the costs to a generic resource instead of creating an unplanned cost.

Suppose that the resource breakdown structure has the following resource formats:

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Resource Formats	Example
• Resource class • Resource class: Expenditure Type • Resource class: Expenditure Type: Job • Resource class: Expenditure Type: Named Person	• Labor • Labor: Professional • Labor: Professional: Consultant • Labor: Professional: Amy

When a resource is defined at the job level and not at the named person level, the application determines that the actual cost matches the Labor: Professional: Consultant resource that's available in the resource breakdown structure. It then checks if the task has the exact resource planned. If so, it maps the cost to that planned resource, which in this case is Labor: Professional : Consultant.

When a resource is defined at the person level and a higher level resource isn't planned on the task, the application determines that the actual cost matches the Labor: Professional: Amy resource that's available in the resource breakdown structure. It then checks if the task has the exact resource planned. If there is no exact match, it further checks if a higher level resource (for example, Labor: Professional or Labor) is planned at the task. If it doesn't find a match, it creates the best matching resource from the resource breakdown structure as an unplanned resource and maps the cost to that unplanned resource, which in this case is Labor: Professional : Amy.

When a resource is defined at the person level and a higher level resource is planned on the task, the application determines that the actual cost matches the Labor: Professional: Amy resource that's available in the resource breakdown structure. It then checks if the task has the exact resource planned. If there is no exact match, it further checks if a higher level resource (for example, Labor: Professional or Labor) is planned at the task. It finds that a match exists for Labor and maps the cost to that planned resource, which in this case is Labor.

How Resources are Mapped When Update Financial Project Plan and Progress is Submitted

The Update Financial Project Plan and Progress action on the Manage Project Plan page transfers the project plan and progress information to the Manage Financial Project Plan page. Each time you submit this action, the application replaces all planning information in the financial project plan, including any planning done directly on the Manage Financial Project Plan page, with the latest plan from the Manage Project Plan page.

During this process, the application checks and maps the named person and expense resources to the best match in the planning resource breakdown structure. If not found, it tries to find the nearest match based on the rules of precedence.

> **Note:** The resources are mapped similarly when you enable a project for financial management or generate a project budget or forecast from project resources.

Precedence to the Format that Contains Named Person

If the project plan that's being transferred contains the named person and the planning resource breakdown structure has a resource format that contains the named person at any level, then the named person from the project plan is mapped to the Named Person resource. For example, if the planning resource breakdown structure contains the Named

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Person and Job: Organization resource formats, then precedence is given to the Named Person resource format. If there are multiple Named Person resource formats, then the precedence is given to the most granular level considering all the resource formats. For example, if the planning resource breakdown structure contains the Organization: Named Person and Organization: Named Person: Job resource formats, then mapping is done to the Organization: Named person: Job resource format.

Example of Precedence to the Format that Contains Named Person

Suppose that you created a planning resource breakdown structure with Named Person and Organization: Job resource formats.

The planning resources added to the resource combinations are as follows:

Resource Combination	Planning Resources
Named Person	David
Organization	Vision Operations
Organization: Job	Vision Operations: Principal Consultant

David is a Principal Consultant in Vision Operations and is assigned as a resource on a task in the project plan. Now, when the Update Financial Project Plan and Progress action is submitted, the resource is mapped to the Named Person David.

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